# ADP Time and Attendance Accrual and Time Off Request Questionnaire

Date: _____

Company Code: _____

Company Name: _____

Contact Info: _____

**Are balances required to appear on employee check stubs?**

**If Yes: DO NOT USE THIS QUESTIONNAIRE**. Tell your representative so we can correctly assist in setting up your accruals in the proper system.

**NOTE**: If you have current balances for employees, please use balance sheet located here

Please provide a list of **Employee Balances** as of the last day of the prior pay period.

Employee Balances

**Do you have more than one accrual policy? If yes, please fill out a separate questionnaire for each policy/pay class.**

## Questions:

**1)** What type of hours do you accrue/award?

____Vacation ____Sick ____Float ____PTO ____Personal

____Other – Please specify name: _____

**2)** Which pay class(es) do these awards apply to? (Example: Full Time, Part Time, Salary, etc.)

_____

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Accrual Type: _____ Pay Class: _____

**(Please fill out separate pages per each award type)**

(**NOTE**: Accruals **cannot** be configured to award on the last day or a pay period of month, only the first.)

___January 1st

___1st of every payroll

___1st of the month

___Annually on employee's anniversary date

___Annually on a specific recurring date

___Once a week: please specify the day: _____

___Per Hours Worked (if PHW, please specify amounts per hour, per tenured year in the chart below)

**please note that for **Per Hours Worked**, the system does **not** automatically move the employee to the next tier. There will be a different pay class for each amount and the admin must manage moving employees to the next level when the time comes**

**Please list your accrual factors for each type, award amount, and pay classes in the chart below.**

| BENEFIT TYPE | EMPLOYEE TYPE | LENGTH OF SERVICE PARAMETER | AWARD AMOUNT IN HOURS | AWARD FACTOR |
|---|---|---|---|---|
| Example: Vacation | Example: Full Time | Example: 0-5 years | Example: 3.08hrs | Example: Per Pay Period |
| Ex: Per Hours Worked | Example: 1st year | Example: 0-1 | Example: 0.0333 | Example: Per Hour |
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****PROBATION PERIOD IS NOT APPLICABLE FOR PER HOURS WORKED AWARD****

**If probation is requested for Per Hours Worked, a separate pay class with no accrual will be configured. The admin must manually move employees to accrual pay class after probation.**

**3)** Do new hire employees have a probation period before they are given benefit hours?

_____Yes _____No If yes, how long? _____

***CARRYOVER IS ONLY APPLICABLE TO JANUARY 1ST AND EMPLOYEE ANNIVERSARY AWARDS***

**The system can NOT carryover amounts for any other award type. If carryover is still desired, the admin must manage carryover via a manual adjustment each year.**

**4)** Can employee's carryover balances from year to year?

____Yes ____No If yes, how much? _____

***MAX BALANCE IS ONLY APPLICABLE TO JANUARY 1ST AND ANNIVERSARY AWARDS***

For **ALL OTHER ACCRUAL TYPES**: Once the employee falls below the max balance, the system will award again.

**5)** Is there a maximum balance of hours that employees can have at one time? ____Yes ____No

If yes, how much? _____

**6)** Do the employee's hours get purged to 0? ____Yes_____No

If yes: _____Anniversary Date _____Purged Before Next Award is Given

_____ Specific Date: _____

**TIME OFF REQUESTS:**

**7)** Can employees request time off? _____Yes _____No

**8)** Can employees request all the above specified codes off, or just select ones? _____Yes, all

Select codes: _____

**9)** Are Supervisors approving Time Off Requests? _____Yes _____No

**10)** Please name ONE admin to be used as backup for Supervisor should they not get to request in time:

Admin's Name: _____

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