

Workforce Link Benefit Accruals Onboarding Form

Basic Company and Contact Info:

Company Name (Legal Name): _____

Company Name (DBA): _____

Primary Contact Name: _____

Primary Contact Title: _____

Primary Contact Phone Number: _____

Primary Contact Email: _____

Time Off Configuration

Please complete the following questions for each time off policy offered

Time Off Type: ☐ Vacation ☐ Personal Time ☐ PTO ☐ Sick Leave ☐ Other

Please enter the description to use for this policy (ex. VAC – vacation): _____

Which employees are eligible for this policy? (ex. All full time employees): _____

Are balances accrued or allocated at a specific time (i.e. 24 hours allocated on January 1st)?

☐ **Allocated at a specific time (annual dump)**

On what date are balances allocated to the employee? (Ex. January 1st, Hire Date, etc.)

What amount is allocated to each employee at that time? If there are multiple tiers, please describe them here. _____

Do you have a waiting period associated with this policy? ☐ Yes ☐ No

If yes, how long? _____

Once the waiting period has been satisfied, what amount does the employee receive?

☐ The employee receives the full amount

☐ The employee receives a prorated amount

How is the prorated amount calculated? _____

☐ Other: _____

Does your company utilize carry over for this policy? ☐ Yes ☐ No

If yes, how many hours are carried over? _____

Do carried over hours have to be used by a certain date? _____

Are carried over hours moved to another time off category? _____

☐ **Accrued**

Accruals are based on:

☐ Tenure, based on hire date / start date / other

Please provide the date which your accrual schedule is based on (Anchor Date):

When tenure changes occur, time off should accrue at the new rate:

☐ At the beginning of the next accrual period

☐ On the exact date of the change

☐ At the beginning of the current accrual period

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☐ At the beginning of the current accrual year

☐ At the beginning of the new accrual year

☐ Hours Worked

☐ Other: _____

Upon hire, time off should accrue:

☐ At the beginning of the accrual period

☐ On the hire date

☐ At the beginning of the next accrual period

☐ At the beginning of the current accrual year

☐ At the beginning of the new accrual year

How often do employees accrue time off? ☐ Daily ☐ Monthly ☐ Quarterly ☐ Semi-Annually

☐ Weekly ☐ Per Pay Period ☐ Annually

☐ Other: _____

Are hours credited to the employee at the beginning or end of the accrual period? (Ex. If the accrual period is monthly, should the accrual occur on the 1st or the last of the month?)

☐ Beginning ☐ End

Do you have a waiting period for this policy? ☐ Yes ☐ No

If yes, how long? _____

How does the employee accrue time off during the waiting period?

☐ They do not accrue at all

☐ They accrue during the waiting period, and can see the balance

☐ They accrue during the waiting period, but cannot see the balance

Please describe the schedule at which an employee accrues time off. If there are multiple tiers, please describe each tier's schedule.

Tier	Tenure Required (Ex. Upon Hire, 1 year, 5 years, etc.)	Accrual Rate (Ex. 40 hours per year, 3.34 hours per pay period, etc.)	Maximum Running Balance (if applicable)	Maximum Annual Accrual (if applicable)
Tier 1				
Tier 2				
Tier 3				
Tier 4				
Tier 5				
Tier 6				
Tier 7				

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Is there a maximum amount of time off the employees can accrue? ☐ Yes ☐ No

If yes, and if the employee uses some of their hours, are they able to accrue again to reach that maximum amount? ☐ Yes ☐ No

Do future scheduled hours reduce the employee's balance and allow the employee to accrue again? ☐ Yes ☐ No

Do balances carry over or are they paid out at the end of the accrual year?

☐ Balances are carried over

Is there a maximum amount that can be carried over? ☐ Yes ☐ No

If yes, what is the maximum carry over amount? _____

☐ Balances are paid out at the end of the accrual year

What should happen to a negative accrual balance?

☐ Balances should be carried over

☐ Balances should be zeroed out

☐ Balances should be moved to a different category

Please provide a copy of your policy to transition@payrolllink.com

Additional Comments

Are there any exceptions to the above rules? (Ex. Executive employees accrue at the 5 year rate immediately, etc.)

If yes, please explain:

Is there anything else we should know regarding this time off policy?
