



AVIONTÉ

Growth ♦ Retention ♦ Integrity ♦ Technology

Sick Leave Accruals

1. You are in listen-only mode.
2. This session is designed to provide 40 minutes of content and 20 minutes of Q&A.
3. Please submit questions via the questions panel. We'll respond to as many as possible during and at the end of the session.

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Agenda

- Sick leave and employer responsibilities
- Understand Avionté's capabilities
- Best Practices
- Tools to manage your Accrual Plans



Paid Sick Leave Updates

July 1, 2017

COMING
SOON

- Arizona
- Chicago, IL
- Cook County, IL
- Minneapolis, MN
- St. Paul, MN



Fair Wages and Healthy Families Act

- Passed by voters in Nov 2016; 6th state to pass paid sick leave
- Accrue starting day 1; rate of 1 hour of sick time for every 30 hours worked.
- Accrue and use and carry over up to 40 hours/year (for a business with more than 15 employees).
- Max balance of 80 hours (for a business with more than 15 employees).

For more information: <https://www.azica.gov/frequently-asked-questions-about-wage-and-earned-paid-sick-time-laws>



Chicago Minimum Wage and Paid Sick Leave Ordinance

- Employers that maintain a business facility in the city limits or subject to certain city licensing requirements.
- Accrue starting day 1; 1 hour of sick time for every 40 hours worked.
- Accrue and use up to 40 hours per 12-month period (from accrual start date) and can carry over up to 20 hours into next year & 40 *additional* hours for FMLA (if applicable).



Ordinance No. 16-4229

- Employee performs 2 hours of work in 2 week period in Cook County.
- If employer has place of business in Cook County
- 1 hour of sick time for every 40 hours worked.
- Accrue and use up to 40 hours/year (for business with more than 15 employees).
- Certain cities in the county (over 30 of them!) have opted out.

For more information: [read the full text](#), and an [overview](#)



Minneapolis Sick and Safe Time

- See FAQ link below regarding applicable employers and the pending lawsuit.
- Accrue starting day 1; 1 hour of sick time for every 30 hours worked.
- Accrue up to 48 hours per year, carried over from year to year, until 80 hour maximum accrual cap is reached.

For more information: access [Employer Resources](#), including the [FAQ](#)



St. Paul Earned Sick and Safe Time Ordinance

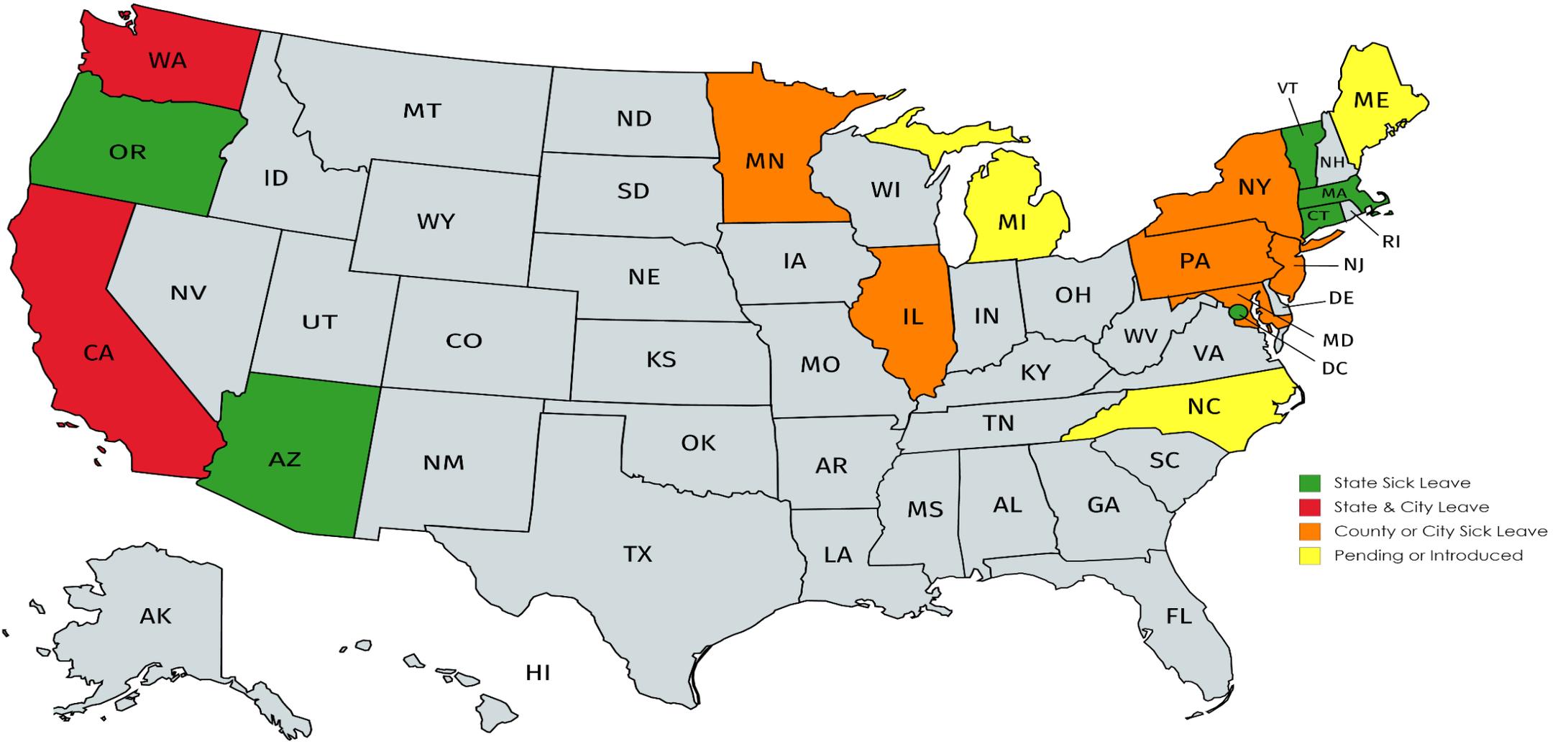
- Employers that have physical location within St. Paul.
- “Temporary workers supplied by a staffing agency located *outside* the City and working for a contracting employer within the City are not subject to ESST.”
- Accrue starting day 1; 1 hour of sick time for every 30 hours worked.
- Accrue up to 48 hours per year, carried over from year to year, until 80 hour maximum accrual cap is reached.

What else to look for



- ✓ Required posters
- ✓ Required employee notification
- ✓ Pay stub requirements
- ✓ Termination & payout rules
- ✓ Recordkeeping requirements
- ✓ Frontloading
- ✓ Usage by employee & what employers can ask for
- ✓ Handbooks

Accruals Map



What's Next?

Michigan Democrats Continue to Push for Paid Leave

- Michigan Democrats introduced a bill to provide workers in the state with one hour of paid sick leave for every 30 hours worked. Similar legislation failed during the previous session, but the bill's sponsors believe that more people now view this as a nonpartisan issue. ([ABC 12](#))

Maine Sick Leave Bill Is in the Works

- Maine state Sen. Rebecca Millett, introduced a paid-sick-leave bill that would apply to businesses with 50 or more employees, allowing them to earn 1 hour of sick time for every 30 hours worked. The bill would also require smaller businesses to give workers unpaid leave. ([The Press Herald](#))

Pennsylvania Lawmakers Seek to Quash City Laws

- A bill making its way through the Pennsylvania state senate would also prohibit municipalities in the state from enacting workplace leave laws that go beyond what is required by federal or state laws. In its current iteration, the Republican-backed bill would apply retroactively, meaning that Philadelphia's existing ordinance and Pittsburgh's pending paid-sick-leave law would be deemed null and void. "The measure's supporters say labor policy should be established at the state and federal level to provide uniformity for businesses," the [Pittsburgh Post-Gazette](#) reports.

North Carolina

- Democrats in North Carolina have offered a bill the, "Economic Security Act of 2017" that would not only provide paid sick leave, but raise the minimum wage, compel equal pay for equal work and "ban the box" on job applications for government agencies.

Maryland Paid Sick Leave Vetoed

- Both chambers of the state legislature passed its offering of paid sick leave — the state House with just enough votes — 88. Republican governor Larry Hogan vetoed Democrats' efforts to provide paid sick leave to employees of businesses that have 15 or more employees while urging them to work with him to get a bill passed next year ([US News & World Report](#)).

Need additional legal guidance?

my|HR|counsel

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Accruals: What's In It For Me?

Why use
Avionté?

Eliminate
spreadsheet
tracking

Review
accrual
history

Reporting &
Pay Stubs

Automate
earnings &
depletion of
accrual
hours

Sick Leave Setup in Avionté

Step 1: Setting up Transaction Types

Step 1: Setting up Transaction Types

Creating Accrual Plan Transaction Types

- Best practice: Setup a new transaction type for each sick leave accrual plan!
- Admin Tools > System > Transaction Type
- Use that transaction type to deplete the sick leave accrual plan in Time Entry
- Example: AZ Sick Leave
- Type = Paycode to show in Time Entry
- Select Branches that have access & Click Save

<https://support.avionte.com/hc/en-us/articles/209618948-Admin-Tools-Transaction-Type>

Action Item!

ConfigTransactionTypeID	Name	Description	Deduction Category
152	AZ Sick Leave	AZ Sick Leave	
155	AZ Sick Leave	AZ Sick Leave	
16	Background	Background Check Fee	Expense
90	BillBackGroundCheck	BillBackGroundCheck	

Transaction Type Details

Name	AZ Sick Leave
Description	AZ Sick Leave
System Name	AZSickLeave
Type	Paycode

Shared By

Site	Staffing Supplier	
Minneapolis (T)	ABC	<input checked="" type="checkbox"/>
New York (T)	ABC	<input checked="" type="checkbox"/>
Eagan Training	ABC	<input checked="" type="checkbox"/>
Los Angeles (T)	ABC	<input checked="" type="checkbox"/>
Madison (T)	ABC	<input checked="" type="checkbox"/>
Eagan Sales	Sales	<input checked="" type="checkbox"/>
Atlanta Sales	Sales	<input checked="" type="checkbox"/>
Kalispell Sales	Sales	<input checked="" type="checkbox"/>
Minneapolis sales	Sales	<input checked="" type="checkbox"/>
Ontario	Tim Hortons Canada	<input checked="" type="checkbox"/>
Manitoba	Tim Hortons Canada	<input checked="" type="checkbox"/>
Default Branch	TCI - Customer	<input checked="" type="checkbox"/>

Step 2: Activating Accrual Plans

Step 2: Setting up Accrual Plans

State Sick Leave

- Admin Tools > Employer > Accrual Plan
- Accrual Plans will be set up for you as Inactive
- Day Gap: # of days for a gap of employment
- *Processing Method needs to be requested from Tech Services

Supplier Administration : ABC Staffing Inc.

Detail	Branch	User	Wc Code	Bank	Tax	Locality/Country	Accrual Plan	Config Year	Email	
Accrual Plan										
Accrual Plan	Rate	Rate Type	Description	Pay Period Limit	Yearly Limit	Balance	Active	Max Accrual Balance	Initial Balance	Allowed Carryover
<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> Sick Leave_CT	0.025	Per Hour	Sick Leave_CT_01012012_40	0.00	40.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	40
<input checked="" type="checkbox"/> Sick Leave_MA	0.0334	Per Hour	Sick Leave_MA_07012015_30	0.00	40.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	40
<input checked="" type="checkbox"/> Sick Leave_OR	0.0334	Per Hour	Sick Leave_OR_01012016_30	0.00	40.00	0.00	<input checked="" type="checkbox"/>	80.00	0.00	40
<input checked="" type="checkbox"/> Sick Leave_DC	0.0271	Per Hour	Sick Leave_DC_11132008_37	0.00	56.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	Unlimited
<input checked="" type="checkbox"/> Sick Leave_VT	0.0193	Per Hour	Sick Leave_VT_07012017_52	0.00	24.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	Unlimited
<input checked="" type="checkbox"/> Sick Leave_AZ	0.0334	Per Hour	Sick Leave_AZ_07012017_30...	0.00	40.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	Unlimited
<input checked="" type="checkbox"/> Sick Leave_WA	0.025	Per Hour	Sick Leave_WA_01012018_40	0.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	40

Accrual Plan | Accrual Plan Accrue | Accrual Plan Deplete

Add New | Cancel

Benefit Plan

Accrual Plan	Sick Leave_AZ	Max Accrual Balance	0.0000
Description	Sick Leave_AZ_07012017_30_270	Processing Method	...
Rate Type	Per Hour	Active	<input type="checkbox"/>
Rate	0.0334	Remember to make Active!	
Unlimited Carryover	<input checked="" type="checkbox"/>	Action Item!	
Carryover Limit	0.0000		
Pay Period Limit	0.0000		
Yearly Limit	40.0000		
Yearly Date Type	Anniversary Date		
Initial Balance	0.0000		

Save

Step 2: Setting up Accrual Plans

Accrual Plan Accrue

- How/When is the Employee accruing hours?
- Set up for you
- Transaction Types: Reg, OT & DT
- Mapping transaction types in Time Entry to the Accrual Plan
- Example: When the Transaction Type of Reg has hours entered in Time Entry, the employee will accrue their sick leave hours

Supplier Administration : ABC Staffing Inc.

Detail Branch User Wc Code Bank Tax Locality/Country **Accrual Plan** Config Year Email

Accrual Plan

Accrual Plan	Rate	Rate Type	Description	Pay Period Limit	Yearly Limit	Balance	Active	Max Accrual Balance	Initial Balance	Allowed Carryover
<input checked="" type="checkbox"/> s							<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> Non-accrue...	0	Per Hour	Non-accrue Vacation Plan t...	0.00	40.00	0.00	<input checked="" type="checkbox"/>	40.00	40.00	0
<input checked="" type="checkbox"/> Sick Leave	0	Per Pay P...	Sick plan external employees	24.00	24.00	0.00	<input checked="" type="checkbox"/>	24.00	24.00	8
<input checked="" type="checkbox"/> FED Sick Plan	0.0333	Per Hour	Federal Sick Pay	0.00	0.00	0.00	<input checked="" type="checkbox"/>	56.00	0.00	Unlimited
<input checked="" type="checkbox"/> Sick Leave_M...	0.0334	Per Hour	Sick Leave_MN_Minneapolis	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	80
<input checked="" type="checkbox"/> Sick Leave C...	0.0334	Per Hour	Sick Leave Cook IL_14031	0.00	40.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	0
<input checked="" type="checkbox"/> Sick Leave_AZ	0.033	Per Hour	Sick Leave_AZ	0.00	40.00	0.00	<input checked="" type="checkbox"/>	80.00	0.00	40
<input checked="" type="checkbox"/> Sick Time	0.025	Per Hour	Joess Tacos Sick time	2.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	Unlimited

Accrual Plan **Accrual Plan Accrue** Accrual Plan Deplete

Accrual Plan	Transaction Type
<input checked="" type="checkbox"/> Sick Leave_AZ	<input checked="" type="checkbox"/> Reg
<input checked="" type="checkbox"/> Sick Leave_AZ	<input checked="" type="checkbox"/> OT
<input checked="" type="checkbox"/> Sick Leave_AZ	<input checked="" type="checkbox"/> DT
<input checked="" type="checkbox"/> Sick Leave_AZ	

Save

Step 2: Setting up Accrual Plans

Accrual Plan Deplete

- How/When is the Employee using hours?
- Map transaction types in Time Entry to the Accrual Plan
- Example: When the transaction type of AZ Sick Leave has hours in Time Entry, the Employee's hours will be decreased
 - This is the Transaction Type we set up in step 1!
- Click Save

Action Item!

Accrual Plan	Rate	Rate Type	Description	Pay Period Limit	Yearly Limit	Balance	Active	Max Accrual Balance	Initial Balance	Allowed Carryover
Non-accrue...	0	Per Hour	Non-accrue Vacation Plan t...	0.00	40.00	0.00	<input checked="" type="checkbox"/>	40.00	40.00	0
Sick Leave	0	Per Pay P...	Sick plan external employees	24.00	24.00	0.00	<input checked="" type="checkbox"/>	24.00	24.00	8
FED Sick Plan	0.0333	Per Hour	Federal Sick Pay	0.00	0.00	0.00	<input checked="" type="checkbox"/>	56.00	0.00	Unlimited
Sick Leave_M...	0.0334	Per Hour	Sick Leave_MN_Minneapolis	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	80
Sick Leave C...	0.0334	Per Hour	Sick Leave Cook IL_14031	0.00	40.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	0
Sick Leave_AZ	0.033	Per Hour	Sick Leave_AZ	0.00	40.00	0.00	<input checked="" type="checkbox"/>	80.00	0.00	40
Sick Time	0.025	Per Hour	Joes Tacos Sick time	2.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	Unlimited

Accrual Plan | Accrual Plan Accrue | **Accrual Plan Deplete**

Accrual Plan: Sick Leave_AZ | Transaction Type: **AZ Sick Leave**

Save

Step 2: Setting up Accrual Plans

City Sick Leave

- Admin Tools > Employer > Accrual Plan
- Accrual Plans will be set up for you as Inactive
- Day Gap: # of days for a gap of employment
 - Only need the gap if the plan tracks this
 - Extremely important to update the Employee accrual plan start date and yearly date if tracked
- *Processing Method needs to be requested from Tech Services
- Click Save!
- Specify Accrual Plan Deplete

Supplier Administration : ABC Staffing Inc.

Detail	Branch	User	Wc Code	Bank	Tax	Locality/Country	Accrual Plan	Config Year	Email	
Accrual Plan										
Accrual Plan	Rate	Rate Type	Description	Pay Period Limi	Yearly Limit	Balance	Active	Max Accrual Balan	Initial Balanc	Allowed Carryov
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>								
<input checked="" type="checkbox"/> Sick Leave_WA_Spokane	0.0334	Per Hour	Sick Leave_WA_Spokane...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	24
<input checked="" type="checkbox"/> Sick Leave_PA_Philadelphia	0.025	Per Hour	Sick Leave_PA_Philadelp...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	40
<input checked="" type="checkbox"/> Sick Leave_PA_Pittsburgh	0.0286	Per Hour	Sick Leave_PA_Pittsburg...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	40
<input checked="" type="checkbox"/> Sick Leave_MN_Minneapolis	0.0334	Per Hour	Sick Leave_MN_Minneap...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	80.00	0.00	80
<input checked="" type="checkbox"/> Sick Leave_MN_StPaul	0.0334	Per Hour	Sick Leave_MN_StPaul_0...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	80.00	0.00	80
<input checked="" type="checkbox"/> Sick Leave Montgomery MD	0.0334	Per Hour	Sick Leave_21031_10012...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	56
<input checked="" type="checkbox"/> Sick Leave Cook/Chicago IL	0.025	Per Hour	Sick Leave_14031_04012...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	40

Accrual Plan | Accrual Plan Accrue | Accrual Plan Deplete

Add New | Cancel

Benefit Plan

Accrual Plan	Sick Leave_MN_Minneapolis	Max Accrual Balance	80.0000
Description	Sick Leave_MN_Minneapolis_0701201	Processing Method	
Rate Type	Per Hour	Active	<input checked="" type="checkbox"/>
Rate	0.0334		
Unlimited Carryover	<input type="checkbox"/>		
Carryover Limit	80.0000		
Pay Period Limit	0.0000		
Yearly Limit	48.0000		
Yearly Date Type	Anniversary Date		
Initial Balance	0.0000		

Remember to make Active!

Action Item!

Save

Step 2: Setting up Accrual Plans

County Sick Leave

- Admin Tools > Employer > Accrual Plan
- Accrual Plans will be set up for you as Inactive
- Day Gap: # of days for a gap of employment
- Looks at the **worksite Geocode** to determine the State and City
- *Request Processing Method from Tech Services
- Specify Accrual Plan Deplete

Supplier Administration : ABC Staffing Inc.

Detail Branch User Wc Code Bank Tax Locality/Country **Accrual Plan** Config Year Email

Accrual Plan	Rate	Rate Type	Description	Pay Period Limit	Yearly Limit	Balance	Active	Max Accrual Balanc	Initial Balance	Allowed Carryove
<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Sick Leave_MN_StPaul	0.0334	Per Hour	Sick Leave_MN_StPaul_07...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	80.00	0.00	80
<input type="checkbox"/> Sick Leave Montgomery...	0.0334	Per Hour	Sick Leave_21031_100120...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	56
<input checked="" type="checkbox"/> Sick Leave Cook/Chicago IL	0.025	Per Hour	Sick Leave_14031_040120...	0.00	48.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	40
<input type="checkbox"/> Sick Leave Chicago IL	0.025	Per Hour	Sick Leave_IL_Chicago_07...	0.00	48.00	0.00	<input type="checkbox"/>	0.00	0.00	40
<input type="checkbox"/> Sick Time	0.025	Per Hour	Joes Tacos Sick time	2.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	Unlimited
<input type="checkbox"/> test	0	Per Hour	test	0.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	0

Accrual Plan Accrual Plan Accrue Accrual Plan Deplete

Add New Cancel

Benefit Plan

Accrual Plan Sick Leave Cook/Chicago IL Max Accrual Balance 0.0000

Description Sick Leave_14031_04012017_40 Processing Method

Rate Type Per Hour

Rate 0.0250 Active

Unlimited Carryover Remember to Activate!

Carryover Limit 40.0000

Pay Period Limit 0.0000

Yearly Limit 48.0000

Yearly Date Type Anniversary Date

Initial Balance 0.0000

Save

Action Item!

Step 2: Setting up Accrual Plans

Exempt Cities in a County

- If there are any cities in the county that shouldn't get the sick leave accrual plan to accrue for, a Supplier Property will be created
- Example Property: Cook IL County Excluded Cities_14031
- Value column = comma separated list of all the cities in that county to exclude from the accruing
- Verify excluded cities are correct



Supplier Administration : ABC Staffing Inc.

Details

Short Name: ABC Full Name: ABC Staffing Inc.

Supplier Info

Short Name: ABC Full Name: ABC Staffing Inc. Parent Supplier: FEIN: 505505505 Next Invoice Number: 6725 Copy Information From:

Logo Invoice Logo Paymer

Value

Arlington Heights, Barrington, Bartlett, Bedford Park, Burr Ridge, Chicago, Des Plaines, Elk Grove Village, Elmwood Park, Evergreen Park, Glenview, Hanover Park, Hickory Hill, Hoffman Estates, Lynwood, Mount Prospect, Norridge, Oak Forest, Oak Lawn, Orland Park, Palatine, Palos Heights, Palos Park, River Forest, Riverside, Rolling Meadows, Rosemont, Schaumburg, South Barrington, Streamwood, Tinley Park, Western Springs, Wheeling

Use user dictionary Check Spelling Add/Remove Word Cancel OK

Contact Method

Type	Value	Is Primary	DoNotT
Phone	(651) 555-5555	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cook IL County Excluded Cities_14031 Springs, Wheeling Edit 06/23/2017

Step 3: Activating DRM's

Step 3: Setting up DRM's

DRM Setup for Days

- Admin Tools > System > Data Requirement Message
- Filter by "Sick" in Message column
- Needs to be Activated
- Looks at the number of days before the Employee can use the accrued sick leave hours
 - Supplier Property
- *Message SP Name must be requested from Tech Services

Example: Minneapolis, MN
Employees can't use their accrued hours for 90 days.

Type	Error Type	Stored Procedure	Message	IsActive
	Warning		Sick Leave	<input type="checkbox"/>
	Warning		Sick Leave	<input checked="" type="checkbox"/>
	Warning		Sick Leave	<input checked="" type="checkbox"/>
	Warning		Sick Leave	<input checked="" type="checkbox"/>
	Warning		Sick Leave	<input checked="" type="checkbox"/>

SiteName	SiteDesc	Staffing Supplier	
Minneapolis	Minneapolis (T)	ABC	<input checked="" type="checkbox"/>
New York	New York (T)	ABC	<input checked="" type="checkbox"/>
Eagan	Eagan Training	ABC	<input checked="" type="checkbox"/>
Los Angeles	Los Angeles (T)	ABC	<input checked="" type="checkbox"/>
Madison	Madison (T)	ABC	<input checked="" type="checkbox"/>
Atlanta Sales	Eagan Sales	Sales	<input checked="" type="checkbox"/>
Kalispell Sales	Atlanta Sales	Sales	<input checked="" type="checkbox"/>
Minneapolis sales	Kalispell Sales	Sales	<input checked="" type="checkbox"/>
Ontario	Tim Hortons Canada		<input checked="" type="checkbox"/>

Step 3: Setting up DRM's

DRM Setup for Hours

- Admin Tools > System > Data Requirement Message
- Filter by "Sick" in Message column
- Needs to be Activated
- Looks at the number of accrued hours the Employee can use in a year
 - Supplier Property
- *Message SP Name must be requested from Tech Services

Example: Minneapolis, MN
Employees can't use more than 48
hours in a year

Type	Error Type	Stored Procedure	Message	IsActive
<input checked="" type="checkbox"/>	Warning	sp_GetAccruedHoursByEmployee	Sick Leave	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Warning	sp_GetAccruedHoursByEmployee	Sick Leave	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Warning	sp_GetAccruedHoursByEmployee	Sick Leave	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Warning	sp_GetAccruedHoursByEmployee	Sick Leave	<input checked="" type="checkbox"/>

SiteName	SiteDesc	Staffing_Supplier	IsActive
<input checked="" type="checkbox"/>	Minneapolis	ABC	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	New York	ABC	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Eagan	ABC	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Los Angeles	ABC	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Madison	ABC	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Atlanta Sales	Sales	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Kalispell Sales	Sales	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Minneapolis sales	Sales	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ontario	Tim Hortons Canada	<input checked="" type="checkbox"/>

Action Item!

Step 3: Setting up DRM's

DRM Properties

- Admin Tools > Employer > Detail
- Provided by Tech Services
- Relates directly to DRM functionality
- Value column determines what the DRM will check against
 - Days or Hours needed before Sick Leave can be used

Supplier Administration : ABC Staffing Inc.

Detail Branch User Wc Code Bank Tax Locality/Country Accrual Plan Config Year Email

Details

Short Name	Full Name	FEIN	Parent Supplier	Next Invoice Number
ABC	ABC Staffing Inc.	505505505		6725

Supplier Info

Short Name: ABC
Full Name: ABC Staffing Inc.
Parent Supplier: [Dropdown]
FEIN: 505505505
Next Invoice Number: 6725
Copy Information From: [Dropdown]

Logo Invoice Logo Payment Logo

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Address

Country: United States
Street 1: 123 Main Street
Street 2:
City: Eagan
State: MN Zip Code: 55122-

Supplier Properties

Property	Value	Date Entered
sick		
tbv_SickLeaveDaysWorked_NJ_Plainfield	100	06/20/2017
tbv_SickLeaveDaysWorked_NY_NewYork	120	06/20/2017
tbv_SickLeaveDaysWorked_14031	180	06/20/2017
tbv_SickLeaveDaysWorked_WA_Seattle	180	06/20/2017
tbv_SickLeaveDaysWorked_WA_Tacoma	180	06/20/2017
tbv_SickLeaveHoursUsed_CA	24	06/20/2017
tbv_SickLeaveHoursUsed_VT	24	06/20/2017
tbv_SickLeaveDaysWorked_VT	365	06/20/2017
tbv_SickLeaveHoursUsed_14031	40	06/20/2017
tbv_SickLeaveHoursUsed_AZ	40	06/20/2017

Contact Method

Type	Value	Is Primary	DoNotT
Phone	(651) 555-5555	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*		<input type="checkbox"/>	<input type="checkbox"/>

Save



Step 4: Adding Employee Accrual Plans

Sick Leave Eligibility

New Sick Leave Aqs

- Determines which sick leave plan an Employee qualifies for
- Identifies Employees who have gaps in employment

Recommend running Aqs on a regular basis

Request Reports from Tech Services

Step 4: Viewing Employee Accrual Plans

Employee Accruals

- Employee > Payroll > Accrual
- New Accrual & Select from dropdown
- Start Date: When the Accrual plan starts
- Yearly Date
 - Anniversary: Employee Specific & user-managed
 - Calendar: Jan 1st (calendar year)
- Click Save

Action Item!

AVIONTE SOFTWARE

Employee

Resource Type: Set All | Search Type: Set Name | Current Employee: Marta Greene : xxx-xx-1464

Main Menu: Front Office (Employee, Customer, Call-Em-All, Order, DH Order, Contact, Assignment, Agency, Resume Parser, Email), Dates, Extra, Payroll (Accrual, Tax, Deduction, Contribution, Direct Deposit, ACA Eligibility), History, Roster, Assignment, Favorite, Evaluation

Start Page | Search | Summary | **Accrual** | Actions | New Employee

Plan Name	Rate	Balance	Active	Add
Sick Leave_MN_Minneapolis	0.0334	0.00	<input checked="" type="checkbox"/>	

Accrual Plan: Sick Leave_MN_Minneapo | Max Accrual Balance: 80.0000

Plan Name: Sick Leave_MN_Minneapolis | Active:

Rate Type: Per Hour | Balance: 0.0000

Rate: 0.0334

Pay Period Limit: 0.0000

Unlimited Carryover:

Carry Over Limit: 80.0000

Yearly Limit: 48.0000

Initial Balance: 0.0000

Customer Name:

Start Date: 06/23/2017

Yearly Date Type: Anniversary Date

Yearly Date: 06/23/2017

Message

ActionType	Subject	Message	Date	UserName	Customer	Contact
------------	---------	---------	------	----------	----------	---------

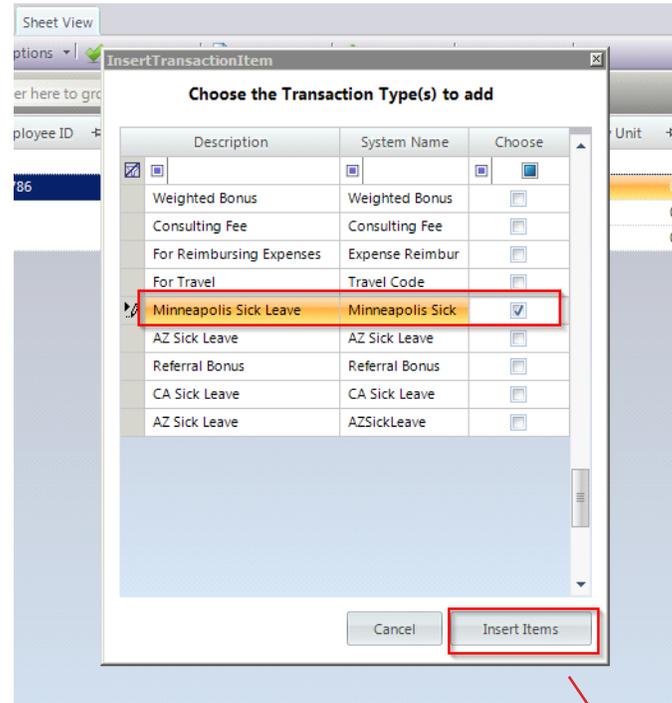
Handling Sick Leave Accruals in Avionté

Recording Sick Leave in Time Entry

Tracking Sick Leave in Time Entry

Tracking Sick Leave in Time Entry

- Sheet View > Right click Employee > Insert Transaction Type
- Enter the hours or days the Employee used of their Sick Leave accrual
- Finish Time Entry as normal



The screenshot shows the "Time Entry" interface. At the top, there is a "Search Type" dropdown set to "Employee Name" and a "Search Criteria" input field. Below this is a navigation bar with "Start Page", "Home", and "Sheet View" tabs. A toolbar contains buttons for "1835", "Options", "Verify Batch", "Batch Report", "Close Batch", and "Instant Pay". A message says "Drag a column header here to group by that column." Below this is a table with columns: Batch ID, Employee ID, Employee, SSN, Type, Pay Unit, Bill Unit, Pay Rate, and Bill Rate. The "Minneapolis Sick Leave" row is highlighted in orange and has a red box around it. A red arrow points from the "Minneapolis Sick Leave" row in the dialog box above to this row in the table.

Batch ID	Employee ID	Employee	SSN	Type	Pay Unit	Bill Unit	Pay Rate	Bill Rate
1835	21786	Greene, Marta	xxx-xx-1464	Reg	20	20	\$15.00	\$22.50
				OT	0	0	\$22.50	\$31.50
				DT	0	0	\$30.00	\$42.00
				Minneapolis Sick Leave	8	0	\$0.00	\$0.00

Processing Payroll

Processing Payroll



Payroll

Search Type: Set | User Name: ▼ | Search Criteria: ▭ | Current Payroll: Payment Batch ID:1771

Main Menu

- Agency
- Resume Parser
- Email
- Roster
- Favorites
- Back Office
- Time Entry
- Payroll**
- Billing
- Invoice
- Dashboard

Start Page | Home | **Checks** | New Batch

Supplier: Supplier^

Name	Check Number	Gross Pay	Taxes	Deductions	Net Amount	Date Cleared	Direct Deposit	W2	Branch	Check Delivery	Emp
Supplier : ABC (1 item) Gross Pay \$300.00, Net Amount \$233.97, Taxes \$66.03, Deductions \$0.00, Employer Cont \$0.00											
▶ Greene, Marta		\$300.00	\$66.03	\$0.00	\$233.97		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Eagan	Email	
Summaries for ABC		\$300.00	\$66.03	\$0.00	\$233.97						\$0.00
Grand Summaries		\$300.00	\$66.03	\$0.00	\$233.97						\$0.00

Tax Info | Transaction

TaxCategory : Employee Portion (4 items) Amount \$66.03

Tax Name	Taxable Gross	Amount
Federal Income Tax	\$300.00	\$29.40
FICA EE	\$300.00	\$18.60
MED EE	\$300.00	\$4.35
MN WH	\$300.00	\$13.68

Summaries for Employee Portion

Deductions | Banks | **Accruals** | Contributions

PlanName	Type	Accrued Unit
Sick Leave_MN_Minne	Accrue	0.67
Sick Leave_MN_Minne	Deplete	-8.00
Grand Summaries		Sum = -7.33

Processing Payroll

Viewing Paystub

- Example: Entered 8 hours of Minneapolis Sick Leave in Time Entry
- Started with a balance of 0 hours
- During this pay period 0.67 hours were accrued
- Balance = -7.33 hours

Name: Marta Greene		Email		EARNINGS STATEMENT			
SSN: ###-##-1464	Check Date: 06/23/17	ABC Staffing Inc.	Check #:70000199	IMPORTANT - KEEP FOR YOUR RECORDS			
Week Worked	Customer-Department	Type	Hours	Pay Rate	Total Pay	YTD Hrs.	YTD Pay
4/17/2017-4/23/2017	Medtronic -Corporate	Reg	20.00	\$15.00	\$300.00	20.00	\$300.00

Tax Name	Taxable Grs.	Tax Amt.	YTD Tax
Federal Income Tax	\$300.00	\$29.40	\$29.40
FICA EE	\$300.00	\$18.60	\$18.60
MED EE	\$300.00	\$4.35	\$4.35
MN WH	\$300.00	\$13.68	\$13.68

Plan	Accrual Hrs.	Balance
Sick Leave_MN_Minnes	0.67	-7.33

YTD Gross	\$300.00
Gross Amt.	\$300.00
Net Amt.	\$233.97



Reporting

Accrual Balance As of Today AQ

- This report is an easy way to pull up accrual balance information for employees from today's date.
- Report Parameters:
 - Branch (Employee)
 - Accrual Plan
 - On Assignment
 - Show Balance > Than

EmployeeID	SSN	FirstName	MiddleName	LastName	Branch	OnAssignment	IsW2	AccrualPlan	Rate	RateBasedOn	Balance Unit	AccrualDateE
20851	xxx-xx-5768	John		Abbott	Default Branch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	43.0000	04/02/2014
20555	xxx-xx-1651	Leota		Alfaro	Eagan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sick	0.0000	Per Pay Period	39.0000	09/22/2015
20418	xxx-xx-5161	Brennen		Brother	Eagan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sick Leave	0.0000	Per Pay Period	40.0000	03/11/2014
21633	xxx-xx-8445	Barry		Burton	Eagan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	30.0000	04/08/2015
21573	xxx-xx-6453	Emily		Fields	Eagan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PST	0.0333	Per Hour	5.0000	02/19/2015
21540	xxx-xx-5555	Justin		McGrain	Eagan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PST	2.0000	Per Pay Period	30.0000	02/04/2015
21774	xxx-xx-6312	Harry		Potter	Eagan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	16.0000	12/02/2015
21565	xxx-xx-8765	Hans		Solo	Eagan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PTO	0.5000	Per Pay Period	60.0000	07/29/2015
21145	xxx-xx-7458	Lauren		Fenmore	Madison	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	6.0000	04/29/2015
21168	xxx-xx-9749	Elaine		Goodell	Madison	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PST	0.0333	Per Hour	40.0000	02/03/2015
20438	xxx-xx-2586	Richard		Bender	Minneapolis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation	0.5000	Per Pay Period	0.5000	01/20/2014
20826	xxx-xx-4545	Dustin		Agnew	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	10.0000	03/10/2014
20732	xxx-xx-9879	Billie Joe		Armstrong	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	3.0000	06/10/2014
21602	xxx-xx-5861	Mark		Arnold	Minneapolis Bran	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PST	0.0333	Per Hour	17.7326	03/26/2015
21550	xxx-xx-8742	John		Dawson	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PTO	0.5000	Per Pay Period	9.0000	06/10/2015
21727	xxx-xx-5884	Robert		Johnson	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	26.0000	05/14/2015
21592	xxx-xx-4173	Clark		Kent	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	18.0000	03/12/2015
21538	xxx-xx-5752	Eddie		Money	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	2.5000	Per Pay Period	15.0000	02/04/2015
20993	xxx-xx-5464	Spencer	Marie	Rohlinger	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	3.0000	03/04/2014
21726	xxx-xx-4754	Roger		Smith	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	17.0000	06/11/2015
21612	xxx-xx-6341	Nancy		Wilson	Minneapolis Bran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vacation Plan	3.0000	Per Pay Period	2.0000	04/08/2015

Accrual History AQ

- This report is useful to see an employee's accrual information over time from each pay period
- Report Parameters:
 - Date Type (Check Date or Accounting Period Date)
 - Start Date & End Date
 - Branch (Check)
 - Accrual Plan
 - Show Details

Report View

Accrual History

Accrual History

Start Date: 01/01/2015
End Date: 06/23/2016
Accrual Plan: CA Sick Leave
Show Details: Yes

Run Query

Drag a column header here to group by that column. Select All

EmployeeID	SSN	FirstName	MiddleName	LastName	CheckNumber	CheckDate	GrossAmount	NetAmount	AccrualPlan	PreviousBalance	AccruedUn
20322	xxx-xx-0943	Arlene	B	Arkansas	11125946	01/01/2016	\$400.00	\$191.97	CA Sick Leave	0.0000	0.0000
20325	xxx-xx-9854	Calvin		California	90102295	05/22/2015	\$522.50	\$423.27	CA Sick Leave	0.0000	0.0000
20325	xxx-xx-9854	Calvin		California	90102300	05/29/2015	\$522.50	\$423.27	CA Sick Leave	0.0000	0.0000
21093		zzandy		zzandy	11125954	01/11/2016	\$100.00	\$82.74	CA Sick Leave	0.0000	0.0000
21855	xxx-xx-1111	zzBobo		zzBear	90102436	08/14/2015	\$100.00	\$82.89	CA Sick Leave	0.0000	0.0000
21855	xxx-xx-1111	zzBobo		zzBear	90102437	08/21/2015	\$1,200.00	\$794.06	CA Sick Leave	0.0000	0.0000
21855	xxx-xx-1111	zzBobo		zzBear	ri1-90102437	08/25/2015	\$0.00	-\$794.06	CA Sick Leave	0.0000	0.0000
21855	xxx-xx-1111	zzBobo		zzBear	90102440	08/25/2015	\$0.00	\$769.06	CA Sick Leave	0.0000	0.0000
21855	xxx-xx-1111	zzBobo		zzBear		12/31/2015	\$1,200.00	\$612.04	CA Sick Leave	0.0000	0.0000
21506	xxx-xx-2233	Honey		zzBooBoo	90102394	07/24/2015	\$1,025.00	\$740.03	CA Sick Leave	0.0000	1.5030

Grand Summaries

Sum = 5070.00 Sum = 3325...

Managing Accrual Plans & Balances

Managing Accrual Plans

Accrual History

- Employee > Payroll > Accrual
- Employee Accrual History allows you to see earnings & usage of Accrued Hours
- Updated information available upon closing of Accounting Period
- Example: Dave earned 0.67 hours and a total of 8 hours were tracked in Time Entry
 - $0.67 - 8.00 = -7.33$

Plan Name	Rate	Balance	Active	Add
Sick Leave_MN_Minneapolis	0.0334	-7.33	<input checked="" type="checkbox"/>	

Date	CheckNumber	AccruedUnit
Period : 04-10-2017 To 04-09-2018 (CURRENT) (2 items) AccruedUnit -7.33		
04/23/2017	70000170	0.67
04/23/2017	70000170	-8.00
Summaries for 04-10-2017 To 04-09-2018 (CURRENT)		-7.33
Grand Summaries		-7.33

Managing Accrual Plans

Accrual Notes

- Employee > Payroll > Accrual > Note
- Free-text field
- Activity tracked in Employee Log

The screenshot displays the 'Employee' interface for Marta Greene (ID: xxx-xx-1464). The 'Accrual' tab is active, showing a table with one entry: 'Sick Leave_MN_Minneapolis' with a rate of 0.0334 and a balance of -7.33. Below the table, a text box contains the note: 'Added 6/23/2017 by marissa.eubank'. The right sidebar includes tabs for 'Accrual Info', 'Accrual History', and 'Note', with 'Note' currently selected.

Plan Name	Rate	Balance	Active	Add
Sick Leave_MN_Minneapolis	0.0334	-7.33	<input checked="" type="checkbox"/>	

Managing Accrual Balance

Manual Add/Deplete

- Employee > Payroll > Accrual
- Click Add to manually adjust the Employee's accrued hours
- Add or Deplete
- Especially useful for frontloading
- Accessible under Accrual History
- The updated hours will be reflected once the Accounting Period has closed

The screenshot displays the Avionté HR system interface. The main window is titled "Employee" and shows search filters for "Resource Type" (Set All) and "Search Type" (Set Name). The "Current Employee" is identified as "Marta Greene : xxx-xx-1464". A modal dialog box titled "Add accrual units" is open, showing the "Accrual hours entry" form. The "Accrual Plan" is set to "Sick Leave_MN_Minneapolis". The "Unit" field is empty and highlighted with a red box. The "Date" is set to "06/23/2017". The "Note" field is empty. At the bottom of the dialog, the "Finish" button is highlighted with a red box. In the background, the "Actions" menu on the right side of the page has an "Add" button highlighted with a red box.

Managing Accrual Plans

Pay History

- Employee > History > Pay History
- On the Accruals tab you can view accrual information relating to the specific paycheck
- Amount accrued and amount used

Employee Resource Type Search Type Search Criteria Current Employee

Set All Set Name Marta Greene : xxx-xx-1464

Start Page Search Summary Accrual Tax Pay History Actions New Employee

Check

Supplier Year ID

Check Number	Gross Pay	Taxes	Deductions	Check Date	Net Amount	Date Cleared	YTD Gross	Direct Deposit	Status	W2	Branch	Check Del
70000199	\$300.00	\$66.03	\$0.00	06/23/2017	\$233.97		\$300.00	<input type="checkbox"/>	Regular	<input checked="" type="checkbox"/>	Eagan	Email
Summaries for 2017												
	\$300.00	\$66.03	\$0.00		\$233.97							
Summaries for ABC												
	\$300.00	\$66.03	\$0.00		\$233.97							
Grand Summaries												
	\$300.00	\$66.03	\$0.00		\$233.97							

Tax Info Transaction

Tax

TaxCategory : Employee Portion (4 items) Amount \$66.03

Tax Name	Taxable Gross	Amount
Federal Income Tax	\$300.00	\$29.40
FICA EE	\$300.00	\$18.60
MED EE	\$300.00	\$4.35
MN WH	\$300.00	\$13.68

Summaries for Employee Portion

Deductions Banks Accruals Contributions

PlanName	Type	Accrued Unit
Sick Leave_MN_Minnea	Accrue	0.67
Sick Leave_MN_Minnea	Deplete	-8.00
Grand Summaries		Sum = -7.33

Next Steps

What's Next?



- ✓ Set up Transaction Types
- ✓ Activate Accrual Plans
- ✓ Activate DRMs
- ✓ If Self-Hosted, request sick leave procedures and DRM processing method from Tech Services
- ✓ Verify paystub, are you using custom?
 - If so, request the necessary changes to your custom pay stub
- ✓ Specify user permissions relating to accruals
- ✓ Make sure you are compliant outside of Avionté!

Questions?