

VUE allows for the accruing and tracking of paid leave. Once company-wide defaults are set, employee payroll records may be individualized.

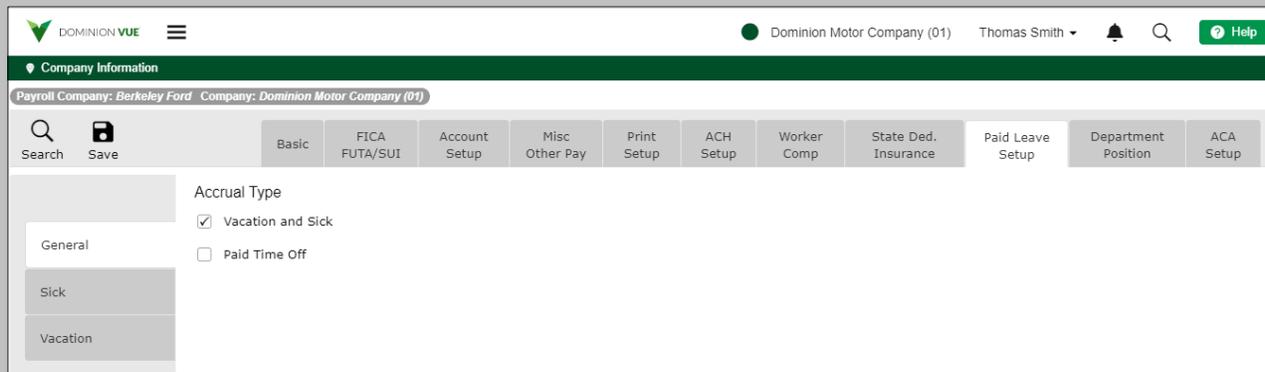
PAID LEAVE 1.1

PAYROLL

Paid Leave Setup tabs have been added to both the Company Information and Employee Information screens. Previously, all settings were defined on the employee record.

Payroll > Maintenance > Company Information > Paid Leave Setup tab > General tab

Select an Accrual Type by choosing *Vacation and Sick* or *Paid Time Off*. When *Paid Time Off* is selected, the Sick tab and the Vacation tab are no longer available and are replaced with a Paid Time Off tab.

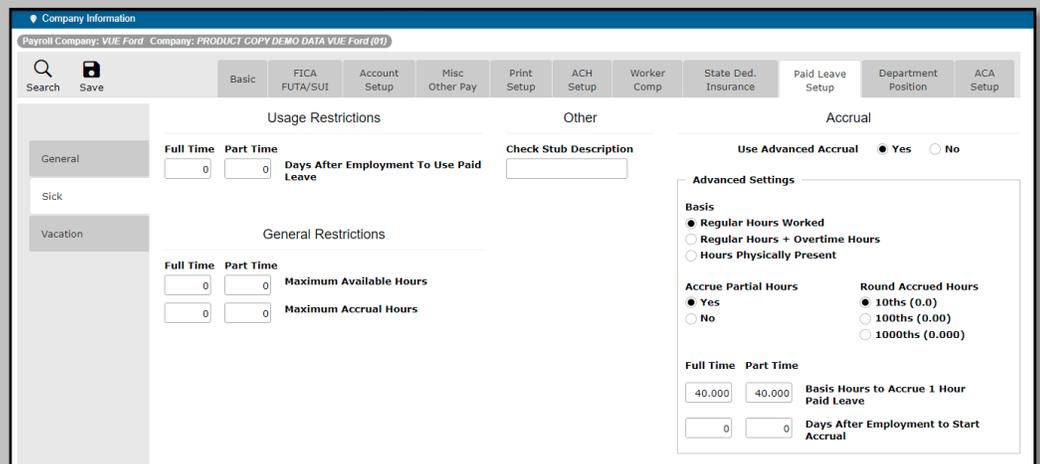


Payroll > Maintenance > Company Information > Paid Leave Setup tab > Sick, Vacation or PTO tab (Shown here with *Use Advanced Accrual* set to **Yes**)

Usage Restrictions section

Input the number of days an employee must complete before they can use their paid leave (Vacation, Sick, or PTO).

- *Note: The employee's Start Date or Last Hire Date (whichever is greater) is used to determine if the wait-time has passed.*
- *Note: You can still enter hours for an employee in a payroll run regardless of the employee's available paid leave. A warning message alerts you if the employee does not have available paid leave.*



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1.800.227.8187 or email dmssupport@dominiondms.com

Payroll > Maintenance > Company Information > Paid Leave Setup tab > Sick, Vacation or PTO tab

Accrual section

Use Advanced Accrual - Select *Yes* or *No*. When set to *No* at the company level, Advanced Settings are disabled and will not be available at the employee level. Accrual options are available in the employee record on a per-pay-period basis.

When Advanced Accrual is set to *Yes* at the company level, Advanced Accrual is available to all at the employee level. Advanced Accrual does not have to apply to all employees.

- The company level accruals are considered the default accrual settings. Some settings can be customized at the employee level.
- When checks are printed, the calculated accruals update the employee record with the accrued hours, used hours, etc.

Basis - Select the type of hours on which to base the accrual calculations.

- *Regular Hours Worked* - Hours calculate from the hours entered in the *Regular Hours* field in **Enter/Edit Payroll Entries**.
- *Regular Hours + Overtime Hours* - Hours to be accrued calculate from the combination of hours entered in the *Regular Hours* and the *Overtime Hours* fields in **Enter/Edit Payroll Entries**.
- *Hours Physically Present (HPP)* - Hours to be accrued calculate from the hours entered in the *Hours Present* field in **Enter/Edit Payroll Entries**.

Accrue Partial Hours - Select *Yes* or *No*.

- By selecting *Yes*, partial hours are accrued.
- By selecting *No*, only whole hours are accrued.
 - When whole hours are accrued, the carryover hours (regular, overtime, or HPP depending on the settings) that are not enough to complete a full hour of sick time are applied to the employee record as *Carryover/Hours Applied to Next Payroll*. These hours are used in the next payroll in the sick time accrual calculation.

Round Accrued Hours - (Available when Accrue Partial Hours is set to *Yes*) Make a selection to round hours to tenths, hundredths, or thousandths.

Full Time / Part Time Parameters - Input the number of days for Full Time and Part Time employees.

- The number of *Basis Hours* needed to accrue one hour of paid leave.
- The number of days after employment to start accrual (Start Date or Last Hire date, whichever is greater).

Accrual

Use Advanced Accrual **Yes** **No**

Advanced Settings

Basis

Regular Hours Worked

Regular Hours + Overtime Hours

Hours Physically Present

Accrue Partial Hours **Round Accrued Hours**

Yes **10ths (0.0)**

No **100ths (0.00)**

1000ths (0.000)

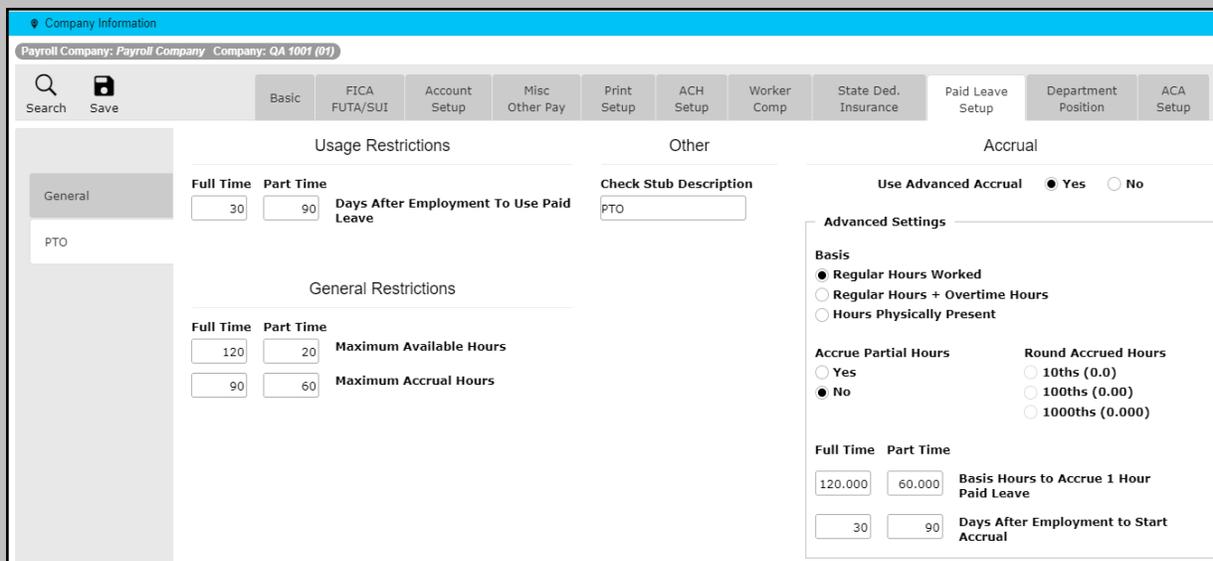
Full Time **Part Time**

 Basis Hours to Accrue 1 Hour Paid Leave

 Days After Employment to Start Accrual

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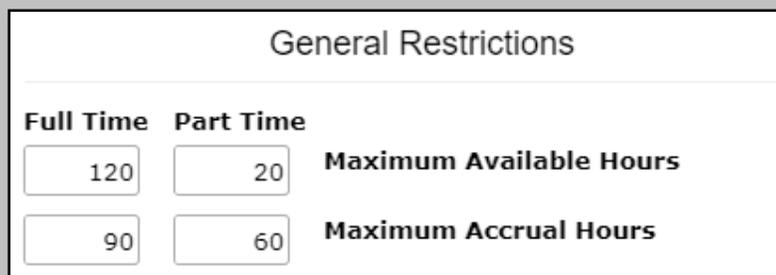
Payroll > Maintenance > Company Information > Paid Leave Setup tab > Sick tab or Vacation tab

General Restrictions section

Maximum Available Hours

This is the limit of paid leave hours an employee can have at any given time. If the employee has reached the Maximum Available Hours, no additional paid leave will be accrued.

- Frontload and Rollover Hours cannot be added to increase the Available Hours.
- If the *Maximum Available Hours* is defined and/or adjusted and an employee's existing Rollover/Frontloaded Hours cause their available balance to exceed the *Maximum Available Hours*, a popup appears prompting you to resolve the conflict.



NOTE: Payroll Run Considerations

- *Maximum Available Hours* will decrease as *Hours Used YTD* increases.
- If an employee has the maximum available paid leave hours, no additional hours can be accrued until some of the paid leave is used. Once the employee uses paid leave hours, accrual resumes on the next payroll run (up to the *Maximum Available Hours* or *Maximum Accrual Hours*).

Maximum Accrual Hours

This represents the total number of paid leave hours an employee can earn in a year. Hours no longer accrue for the employee once their *Hours Accrued YTD* reaches this value. *Hours Accrued YTD* does not decrease as hours are used.

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Payroll > Maintenance > Company Information > Paid Leave Setup tab > Sick tab or Vacation tab

General Restrictions section (continued)

Conflict Resolution of Maximum Available Hours

When *Maximum Accrued Hours* are adjusted and an employee has accrued hours beyond the maximum allowed, the employee retains the accrued hours. Because those hours were accrued in a previous payroll, they cannot be adjusted or removed. The employee's frontloaded or rollover hours can be adjusted. If hours were improperly accrued on a payroll check, that check must be voided.

When changing the *Full Time / Part Time Max Available Hours* fields, VUE searches for employees with available hours above that range. If any conflicts are found, the *Max Available Hours Conflict Resolution* window opens.

When there is a conflict between *Maximum Available Hours* and *Available Hours*, the employee's *Hours Available* are displayed in **red**. When there is no conflict, *Hours Available* are displayed in **black**. Adjust the *Frontloaded* or *Rolled Over* fields; or mark the *Override Max* checkbox, and input *Max Hours* for each conflict line. As edits are made, *Hours Available* are recalculated and turn from **red** to **black**.

When all conflicts are resolved, click the **[Update]** button.

General Restrictions

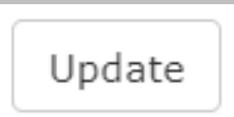
Full Time	Part Time	
<input type="text" value="90"/>	<input type="text" value="90"/>	Maximum Available Hours
<input type="text" value="81"/>	<input type="text" value="81"/>	Maximum Accrual Hours

Max Available Hours Conflict Resolution

Maximum Available Hours set to 90.

The following employees exceed this amount. To resolve the conflict, adjust the Frontloaded and/or Rolled Over hours or enable employee override.

Emp Number	First Name	Last Name	Frontloaded	Rolled Over	Accrued YTD	Used YTD	Hours Available	Override Max	Max Hours
98456	Erika	Madison	0.000	120.000	0.000	0.000	120.000	<input checked="" type="checkbox"/>	120.000
100456	Cynthia	Calvert	0.000	100.000	0.000	0.000	100.000	<input type="checkbox"/>	
DMSJDG001	Jeffrey	Smith	0.000	125.000	0.000	0.000	125.000	<input type="checkbox"/>	
000928	Colby	Stockwell	0.000	120.000	0.000	0.000	120.000	<input type="checkbox"/>	



NOTE: Clicking the **[Update]** button updates employee records. The *Max Available Hours Conflict Resolution* window saves changes to the employee record(s) but does not save changes made to Company Information.

Clicking **[Cancel]** closes the *Conflict Resolution* window and undoes any edits made to the *Maximum Available Hours* field on the **Paid Leave Setup** screen.

Click **[Save]** in the Action Ribbon to save changes made to the Company Information screen.

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Payroll > Maintenance > Employee Information > Paid Leave tab > Holiday tab

Input *Frontloaded Hours*. (Holiday Hours have no accrual abilities)

- *Hours Used YTD* and *Hours Available* track information as hours are used and are non-editable.
- *Hours Available* = (Frontloaded Hours - Hours Used YTD)

Balance	
Holiday	
Frontloaded Hours	0.000
Hours Used YTD	0.000
Hours Available	0.000

Payroll > Maintenance > Employee Information > Paid Leave tab > Sick tab or Vacation tab
Accrual section

- If *Use Advanced Accrual* is enabled at the company level, *Advanced Accrual* will default to **Yes** (On) in each employee record, and the *Accrual Rate* will default to the company level settings. Each employee record may be individually configured to deviate from the company default.
- When *Use Advanced Accrual* is set to **No** on the employee record, period-based accrual fields are displayed instead of *Advanced Accrual* fields. Input the hours per period.
- For no accrual, set the *Hour(s) Accrued* to 0.00 with no period defined for this employee.
- When *Accrual Rate* is defined on the employee record, *Advanced Settings* are available and apply to the type of hours selected on the employee record. These settings function the same as the company level settings. However, they override the company level settings.
- Select the hourly basis to accrue for this employee.

Use Advanced Accrual Yes No

0.000 Hour(s) Accrued Weekly

Accrual

Use Advanced Accrual Yes No

Accrual Rate Employee

Advanced Settings

Basis

Regular Hours Worked

Regular Hours + Overtime Hours

Hours Physically Present

40.000 Basis Hours to Accrue 1 Hour Paid Leave

Balance section

- Hours may be added to an employee record in the *Frontloaded Hours* field if they have chosen not to accrue hours or if the employee should receive hours in addition to their accrual.
- Hours defined in the *Balance* field on the **Insurance/Retirement/Vacation/Sick** Tab will be displayed in the *Hours Rolled Over* field and may be adjusted.
- *Hours Accrued YTD*, *Used YTD* and *Hours Available* are non-editable and track as hours are used. (Frontloaded Hours + Hours Rolled Over + Hours Accrued YTD - Hours Used YTD = Hours Available.) *Hours Available* can be negative.

Balance	
Frontloaded Hours	0.000
Hours Rolled Over	0.000
Hours Accrued YTD	0.000
Hours Used YTD	0.000
Hours Available	0.000

Company Overrides section

The *Maximum Accrued Hours* and *Maximum Available Hours* fields are on the employee record to override to the company level defaults.

- Select **Yes** to override, and input the employee's individual maximum.
- Click the [**Save**] button in the Action Ribbon.

Company Overrides

Override Maximum Available Hours Yes No

Employee Maximum Available 0

Override Maximum Accrued Hours Yes No

Employee Maximum Accrued 0

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Permissions - Update Frontload or Rollover

Accounting > Maintenance Employees

Permissions tab > Payroll > Maintenance > Paid Leave

Paid Leave (Jeff Jenkins)
 Create ✗ Read ✓ Update ✓ Delete ✗

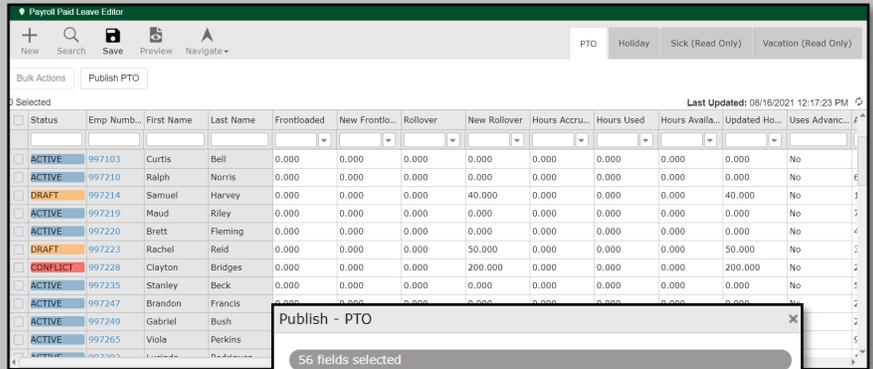
- Access to this screen and its functions are restricted by the use of permissions. Ask your administrator to provide Read and Update permissions.

Update Frontload or Rollover Process

Payroll > Maintenance > Paid Leave

When PTO is enabled at the company level, the Sick and Vacation Tabs are Read Only. When Sick and Vacation are enabled at the company level, the PTO tab is Read only.

- Each of the four tabs include editable *New Frontloaded* and *New Rollover* columns. The *Updated Hours* column adjusts as the New Frontloaded and New Rollover hours are changed. The Sick and Vacation tabs are also available for easy reference as read-only fields.
- Filtering the grid by either Part Time or Full Time employees applies changes to only those employees.
- Inputting a New Frontload or New Rollover changes the Status to DRAFT and highlights the record in orange.
- The **[Save]** button in the Action Ribbon allows you to save your Draft before applying the changes to the employee records. If you need to stop work on this task and plan to come back to it later, click **[Save]**. Your work and the changes you have made are recalled the next time you open the screen.
- You may refresh the screen at any time. We recommend doing this when records may have been edited by others.
- Sorting by the *Status* column brings all the DRAFT records together for review before publishing.
- Conflict records exceed their Maximum Available hours. Conflict records are not published. Click the employee hyperlink to make needed adjustments.
- Select individual records, or you can make changes to many records at once.
 - Filter the grid to locate all the records that should be changed.
 - Mark the checkbox at the top of the grid to select all. You may deselect any records you wish.
 - To update multiple records with the same action, click **[Bulk Actions]** to open the Publish PTO window. Mark Frontloaded and/or Rollover. Input the number of hours. Clicking the **[Apply]** button puts each changed record into Draft status.
- Changes are only applied to employee records when you click **[Publish PTO]**. You may mark the checkbox of the records you want to publish. You will be prompted to publish All Employees or just the selected employees.
- When you click **[Publish]**, the employee records are updated. The Status of the record is changed to Published and is highlighted in green. The Frontloaded Hours match the New Frontloaded once published.



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