

## Leave Plan Window

Payroll or Human Resources > Leave Plans > Leave Plan Maintenance

Use this window to maintain information about each leave plan. As each plan is defined, choose the accrual method and frequency for each plan. Accruals take place when selecting the Accrue Leave step in the Process Payroll window.

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At least 1 Leave Type needs to be defined before beginning to define leave plans.

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Follow the steps below to add a leave plan:

1. Right-click in the grid and select **Add**. The Add Leave Plan window displays.
2. In the **Description** field, enter a name for this plan. The name entered here is the name that appears on selection lists when assigning the leave to an employee and on employee pay stubs. This is a required field.
3. From the **Leave Type** dropdown, select the leave plan type. Define Leave Plan Types in [Payroll or Human Resources > Leave Plans > Leave Plan Types](#).
4. Add the appropriate data on each tab.

## Accrual Information

Use this tab to define Accrual information for this leave plan.

Follow the steps below to define the accrual information for this leave plan:

1. Double-click on a leave plan to edit. The Edit Leave Plan window displays.
2. In the **Description** field, verify the leave plan to edit.
3. From the **Leave Type** dropdown, verify the type according to the Description.
4. Select the **Accrual Information** tab to enter information. The information for that tab displays.
5. Enter the appropriate information. See the Field Descriptions table below for more information.
6. Click **OK** when finished adding information. The Leave Plan Maintenance grid displays.

### Field Descriptions

Field	Description	Notes
Time Units	Select either Days or Hours to maintain the leave transactions and accruals.	<p>If this pertains to the District - Enter the hours per day for a normal full day if the Leave Plan is in HOURS. For example, if an employee works 7 hours for a normal full day, enter "7".</p> <p>If this pertains to the District - Enter the hours per day if the Leave Plan is in HOURS. To not include this leave plan in the Staff Report, mark the Exclude from Staff Report checkbox.</p> <p>Oklahoma Clients Only - Enter the hours per day if the Leave Plan is in</p>

		HOURS and the Leave Plan has OK Sick Leave marked. This field is for TRS Retirement Reporting.
Accrual Date	This is the date type to use for accruing this leave.	This date relates to the Leave Accrual Dates recorded in the Dates tab in Employee Maintenance.
Vested Accrual Date	This is the vested accrual date.	The default is the Hire Date. Use the dropdown to select a different date to change the default. This is a required field.
Time Card Leave Code	This is the leave code for the time card.	Use this dropdown if using a time card interface system.
Sub System Leave Code	This is the applicable leave code used by the sub calling system if using a substitute calling system (such as CRS or eSchool).	If not using a sub calling system, leave this field blank.
Vested Months	This is the vested months that need to elapse before considering an employee vested for this plan, if needed.	The system uses the months specified in this field to calculate an employee's vesting date (in the Employee Leave Plan grid, Vested Date field).

<p>Exclude from Staff Report</p>	<p>This excludes this leave plan from the Staff Report.</p>	<p>Massachusetts and New Mexico Clients Only - Marking this checkbox excludes the leave plan from the MA - EPIMS Staff Report or the NM - STARS Staff Report.</p> <p>Oklahoma Clients Only - Marking this checkbox reports this leave plan as OK Sick Leave for OK - TRS Reporting purposes. When marked, the Hours / Day field becomes available for entry.</p>
<p>Accrue based on Time Worked Units</p>	<p>When marking this checkbox, the leave plan accrues based on actual time worked.</p>	<p>Make sure to also enter the rate of accrual in the Units to Accrue field. The system uses the time card units to determine the accrual.</p> <p>For example, if defining a leave plan with this checkbox marked and an employee gets 80 hours on a pay check, the employee accrues 80 times the amount entered in the Units to Accrue field. Therefore, to accrue 4 hours per pay for 80 hours worked, enter .05 in the Units to Accrue field.</p> <p>The Include Regular Pay, Include Overtime Pay, Calc Using Leave Factor = 1, Advantage District, and Reduce by Dock Units checkboxes become available. Mark as needed.</p>

If marking the Include Regular Pay checkbox only, the system only includes regular pay. If marking the Include Overtime Pay checkbox, IVEE only includes overtime pay. If marking both, the system includes both.

If marking the Advantage District checkbox, accruals base on the employee's total FTE or hours worked, whichever is the lesser.

If marking the Reduce by Dock Units checkbox, the accrual amounts reduce based on the number of units the employee is docked during Payroll Processing. The Calculate Leave Docking step must be done before Accruing Leave. ([See Payroll Default Settings - Advanced tab](#) for more information.) For example: An employee has 80 hours for the pay period and has 5 units docked. The system accrues based on 75 hours.

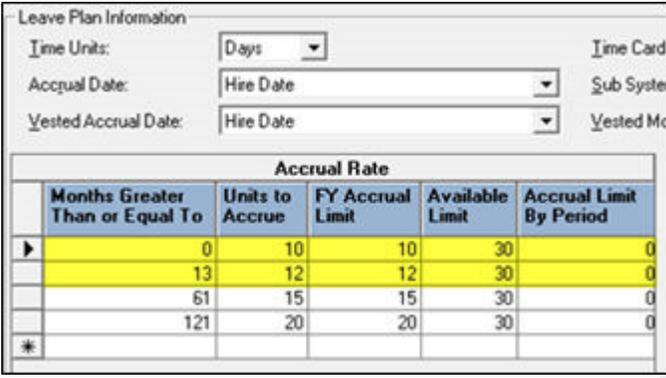
For leave plans with the Calc Using Leave Factor = 1 checkbox marked, the accrual amount calculates as: Position Pay Journal hours x Accrual Rate x 1.00. For example: An employee, Bill Board, has a single position with a Leave Factor of .50. He has a leave plan called 'Sick Leave - Hourly Employees' which is set to accrue

		<p>.033333 hours of leave for each 1.0 hour worked. For Biweekly Pay Period 9, there are 40.0 pay journal hours on Bill's position. When Bill's leave accrual computes during payroll processing, the resulting accrual amount is .6667 units: <math>40.0 \text{ hours} \times .033333 \times .50 = .6667</math>. The desired accrual amount, which disregards the Position Leave Factor, is 1.3333 Units: <math>40.0 \text{ hours} \times .033333 \times 1.0 = 1.3333</math>.</p>
<p>Accrue Based on Sub Time Worked Units</p>	<p>For Sub Interface Systems only - this accrues leave based on Sub Time Worked Units.</p>	<p>Edit Supplemental Templates used for the Substitute Interface system to have a leave factor of "1".</p> <p><a href="#">SI - Accrual Leave for Positions Checklist</a></p>
<p>Include in Docking Calculation</p>	<p>This includes this leave plan in the automatic docking calculations.</p>	<p>For the automatic docking calculation (during Payroll Processing) to occur, 2 other factors must be in sync.</p> <ul style="list-style-type: none"> <li>The leave factor must be greater than zero (0.0000) on the employee's position and, if applicable, the employee's</li> </ul>

		<p>supplemental pays.</p> <ul style="list-style-type: none"> <li>The leave plan must also be marked in the Deduction/Leave Control tab for the employee's positions and, if applicable, the employee's supplemental pays.</li> </ul>
<p>Include on Check</p>	<p>This determines whether activity for this plan is to display on checks and direct deposit stubs.</p>	<p>If marking, leave information displays on the check stubs and direct deposit stubs. If cleared, no transactions or balances for this plan display on any check stubs. The initial default is to mark the checkbox.</p>
<p>Earned Paid Sick Time</p>		<p>Arizona Clients Only - Marking this checkbox includes earned paid sick leave for this leave plan. This checkbox is only available if marking the Include on Check checkbox.</p> <p>If the effective date is in the future, a warning message displays with the effective date for earned paid sick</p>

		<p>time. Change the effective date by clicking on the warning message. The Change Effective Date window displays. Enter the new effective date in MM/DD/YYYY format and then click OK. Depending on the date entered, the warning message either changes or no longer displays.</p>
<p>Include on Accrual Liability Report</p>	<p>This includes this deduction in the Accrual Liability Report.</p>	<p>Type the liability rate in the Liability Rate field. The default is 1.0000. This field is only available if marking the Include on Accrual Liability Report checkbox.</p>
<p>Leave Accrual Rounding</p>	<p>This indicates how many decimal places to round leave accruals to.</p>	<p>Enter a value between 0 and 8. The default is 4.</p>
<p>iVisions Publish Type</p>	<p>This selects the leave plan that displays in iVisions.</p>	<p>If using the iVisions Web Portal, select from the iVisions Publish Type dropdown to choose the leave plan that displays in iVisions Web Portal &gt; My Workflow &gt; Attendance. Choose the level of access , if needed. Use the dropdown to select Full Access, Read Only, or Don't Show.</p> <p>In addition, in order to have a leave plan display in iVisions ESS &gt; Self Service &gt; Time Off for employees,</p>

		<p>mark the Include on Check checkbox for the leave plan, and the leave plan must be active on the actual employee's leave plans (Employee Leave Plans).</p>
<p>Leave Legend Color</p>	<p>This is the legend color for this leave plan when it displays in the Employee Leave Calendar in Employee Leave Plans.</p>	<p>The system displays the Select a Color window. Click in the color selection grid to select the color to use.</p>
<p>Months Greater Than or Equal To</p>	<p>Use the Accrual Rate grid to specify the accrual rate for the leave plan.</p>	<p>In the next empty row, type the number of Months Greater Than or Equal To.</p>
<p>Units to Accrue</p>	<p>This is the units to accrue for this leave plan.</p>	<p>Enter more than 1 line to accrue different rates based on the months elapsed since the Accrual Rate type selected. Define at least 1 accrual rate for the leave plan.</p> <p>See the Accrual Rate table below for information on how the rate calculates.</p> <p>Enter the number of Units to Accrue in the next field.</p>
<p>FY Accrual Limit</p>	<p>Enter the FY Accrual Limit if there is an annual limit for accruing this leave.</p>	<p>If there is no limit, type "99999". For Calendar Year users, the CY Accrual</p>

		Limit column displays in place of the FY Accrual Limit column.
Available Limit	Enter the Available Limit if there is a lifetime limit for this leave plan.	If there is no limit, type "99999".
Accrual Limit by Period	Enter the Accrual Limit by Period if there is an accrual limit per pay period.	This limit works in conjunction with the FY Accrual Limit and Available Limit. The field is only used if the leave accrues based on time worked.
Accrual Rate	<p>Leave Accrual Calculation</p>  <p>Imagine this vacation Leave Plan definition at the right. From 0 to 12 months of service, 10 days accrue; with 13 months of service, 12 days accrue.</p>	<p>Leave accrual calculates as follows:</p> <p>A year has either 365 or 366 (leap year) days and leap years occur every 4 years. Over the course of 4 years, the average number of days in a month is 30.4375.</p> $(3 * 365) + 366 = 1461 \text{ days in 4 years}$ $1461 / 48 \text{ months} = 30.4375 \text{ average number of days per month.}$ <p>If using the Hire Date as the Accrual Date, the system calculates the number of days between the Hire Date and the Pay Date and then divides it by the average number of days in a</p>

month (30.4375) to arrive at the Units

to Accrue.

Scenario 1:

Natalie Attired is hired on 10/9/12 and

the Pay Date processed is 10/25/13.

The number of days between those 2

dates is 381.

- $381 / 30.4375 = 12.5174537$
- 12.5174537 rounds up to 13 months of service; therefore, the system accrues 12 days.

Scenario 2:

Crystal Ball is hired on 10/10/12. The

Pay Date processed is 10/25/13. The

number of days between those 2 dates

is 380.

- $380 / 30.4375 = 12.4845995$
- 12.4845995 rounds down to 12 months of service;

		therefore, the system accrues 10 days.
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7. Click **OK**. The leave plan saves in the Leave Plans grid.