

Families First Coronavirus Response Act TLM Configuration Guide

For Full Time Employees



Families First Coronavirus Response Act TLM Configuration Guide for Full Time Employees

© 2001- 2020 All rights reserved. Under copyright laws, this document may not be copied, photocopied, reproduced, or translated without prior consent.

CONTENTS

| | |
|--|----|
| Overview of Families First Coronavirus Response Act | 5 |
| Paid Sick Time | 5 |
| Extended Paid Leave | 5 |
| TLM & Accruals Configuration – Full Time Employees | 6 |
| Pre-Requisites..... | 6 |
| Step 1: Counters (PC2) & Pay Categories (PC1) | 6 |
| Counters – Pay Calculations 2.0 | 6 |
| 12 Week Emergency Leave – 2/3 Rate of Pay Counter | 6 |
| 10 Day Emergency Paid Medical Leave – Full Rate of Pay Counter..... | 7 |
| 10 Day Emergency Paid Medical Leave – 2/3 Rate of Pay Counter | 7 |
| Summary of Counters Page | 7 |
| Pay Categories – Pay Calculations 1.0 | 8 |
| 12 Week Emergency Leave – 2/3 Rate Pay Category..... | 8 |
| 10 Day Emergency Paid Medical Leave – Full Rate Pay Category..... | 8 |
| 10 Day Emergency Paid Medical Leave – 2/3 Rate Pay Category..... | 8 |
| Summary of Pay Categories Page | 9 |
| Step 2: Time Offs | 9 |
| Parent Time Off – Emergency Paid Sick Leave | 9 |
| Child Time Off – Emergency Paid Sick Leave at Regular Rate | 10 |
| Child Time Off – Emergency Paid Sick Leave at Two-Thirds Regular Rate | 10 |
| Emergency Family and Medical Leave Category | 11 |
| Step 3: Timesheet Profiles & Time Off Request Profiles | 11 |
| Customized Time Off Lists in Time Off Request Profiles | 11 |
| Preventing Negative Balances | 12 |
| Timesheet Profile Rule – Time Off Exceeded | 12 |
| Timesheet Off Request Profile Setting – Use Timesheet Rules for Validation | 13 |
| Step 4: Accruals Rule Policy Creation | 14 |
| Accruals Profile with Emergency Paid Sick Leave Act Rule | 14 |
| Edit or Create the Rule | 14 |
| Accruals Profile - Carry Over Settings..... | 15 |
| Accruals Profile - Extra Settings | 15 |
| Accruals Profile - Schedule..... | 16 |
| Generating Accrual Time for Employees..... | 17 |
| Leave Module Configuration | 18 |
| Pre-Requisites..... | 18 |
| Step 1: Leave of Absence Categories | 18 |
| Step 2: Leave of Absence Reasons..... | 18 |
| Step 3: Leave of Absence Profiles..... | 19 |
| Step 4: Leave of Absence Profile Rules | 19 |
| Waiting Period Rule (Entitlement Category Rule) | 19 |
| Entitlement Time Rule (Entitlement Category Rule)..... | 20 |
| Expire Leave Time Taken (Balance Category Rule) | 20 |
| Use Available Time Off (Time Category Rule) | 20 |

- Use Available Time Off – Full Rate of Pay20
- Use Available Time Off – Two-Thirds Rate of Pay.....20
- Create Time Entry (Time Category Rule)21
- Leave Rules Summary22
- Employee Information.....23
- Employee Timesheet.....24
 - Calc. Detail Tab24
 - Calc. Summary Tab.....24
 - Counters Tab.....24
 - Summary By Day Tab25

Overview of Families First Coronavirus Response Act

Paid Sick Time

Requires employers with fewer than 500 employees and government employers to provide employees two weeks of paid sick leave, paid at the employee's regular rate, to quarantine or seek a diagnosis or preventive care for coronavirus; or paid at two-thirds the employee's regular rate to care for a family member for such purposes or to care for a child whose school has closed, or child care provider is unavailable, due to the coronavirus.

- Full-time employees are entitled to 2 weeks (80 hours) of paid sick leave.
- Part-time employees are entitled to the typical number of hours that they work in a typical two-week period.
- The Act, and the requirements under the Act, expire on December 31, 2020.

Extended Paid Leave

Employees of employers with fewer than 500 employees and government employers, who have been on the job for at least 30 days, have the right take up to 12 weeks of job-protected leave under the Family and Medical Leave Act to be used for any of the following reasons:

- To adhere to a requirement or recommendation to quarantine due to exposure to or symptoms of coronavirus
- To care for an at-risk family member who is adhering to a requirement or recommendation to quarantine due to exposure to or symptoms of coronavirus
- To care for a child of an employee if the child's school or place of care has been closed, or the child-care provider is unavailable, due to a coronavirus
- After the two weeks of paid leave, employees will receive a benefit from their employers that will be no less than two-thirds of the employee's usual pay.
- The Act, and the requirements under the Act, expire on December 31, 2020.

IMPORTANT NOTE!

This overview is a summary only to facilitate the configuration guide and instructions provided. It should not be viewed as definitive or legal guidance on employers' obligations.

TLM & Accruals Configuration – Full Time Employees

The new legislation provides a 10-day mandate for full-time employees to receive full pay or two-thirds their regular rate of pay, depending on the reason for taking time off. It also provides a 12-week expansion of FMLA where employers pay full-time employees 2/3 their rate of pay. This is in effect until December 31, 2020 when the requirements will reset, pending another governmental announcement of emergency requirement, for the subsequent year.

Pre-Requisites

The configuration shown requires the following to be enabled in your company:

- TLM module enabled
- Accruals functionality enabled
- Rates functionality enabled and in use (if not using rates in our application, manual calculations may be required)

Step 1: Counters (PC2) & Pay Categories (PC1)

This allows the proper Counter/Pay Category to be used to track the time taken in the timesheet and also flow to payroll properly. This also allows the proper rate multiplier to be defined for each type of Leave. Full Rate of Pay (1.0) or 2/3 rate of pay (0.67). We recommend something similar to the following:

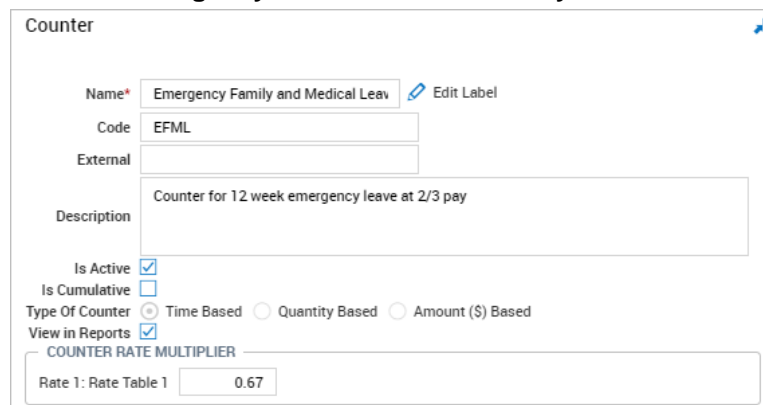
- Emergency Family and Medical Leave
- Emergency Paid Sick Leave at Full Employee Regular Rate
- Emergency Paid Sick Leave Two-Thirds Regular Rate

Counters – Pay Calculations 2.0

Company Settings > Time & Labor Setup > TLM List Definitions > Counters

If using rates, counters can be set with a rate multiplier to pay hours at 2/3 pay rate and full pay rate.

12 Week Emergency Leave – 2/3 Rate of Pay Counter



The screenshot shows a configuration form for a counter. The fields are as follows:

- Name***: Emergency Family and Medical Leave (with an 'Edit Label' link)
- Code**: EFML
- External**: (empty field)
- Description**: Counter for 12 week emergency leave at 2/3 pay
- Is Active**:
- Is Cumulative**:
- Type Of Counter**: Time Based, Quantity Based, Amount (\$) Based
- View in Reports**:
- COUNTER RATE MULTIPLIER**: (header for a table)
- Table**:

| | |
|----------------------|------|
| Rate 1: Rate Table 1 | 0.67 |
|----------------------|------|

10 Day Emergency Paid Medical Leave – Full Rate of Pay Counter

Counter

Name* [Edit Label](#)

Code

External

Description

Is Active

Is Cumulative

Type Of Counter Time Based Quantity Based Amount (\$) Based

View in Reports

COUNTER RATE MULTIPLIER

Rate 1: Rate Table 1

10 Day Emergency Paid Medical Leave – 2/3 Rate of Pay Counter

Counter

Name* [Edit Label](#)

Code

External

Description

Is Active

Is Cumulative

Type Of Counter Time Based Quantity Based Amount (\$) Based

View in Reports

COUNTER RATE MULTIPLIER

Rate 1: Rate Table 1

Summary of Counters Page

← Counters

Rows On Page 3 Rows [Refresh Data](#)

Click here to expand grouped columns

| <input type="checkbox"/> All | <input type="checkbox"/> Page | Name | Time Based | Rate Table 1 Multiplier | Code |
|------------------------------|-------------------------------|--|----------------------------------|-------------------------------------|--|
| | | <input type="text" value="starts with"/> <input type="text" value="emerg"/> | <input type="text" value="All"/> | <input "="" type="text" value="="/> | <input type="text" value="starts with"/> |
| Type: Time Based UNGROUP | | | | | |
| <input type="checkbox"/> | ✕ | Emergency Family and Medical Leave | Yes | 0.6700 | EFML |
| <input type="checkbox"/> | ✕ | Emergency Paid Sick Leave Full Pay | Yes | 1.0000 | EPSL.Full Pay |
| <input type="checkbox"/> | ✕ | Emergency Paid Sick Leave Two-Thirds Pay | Yes | 0.6700 | EPSL_Two Thirds Pay |

Pay Categories – Pay Calculations 1.0

Company Settings > Time & Labor Setup > TLM List Definitions > Pay Categories

If using rates, pay categories can be set with a rate multiplier to pay hours at 2/3 pay rate and full pay rate.

12 Week Emergency Leave – 2/3 Rate Pay Category

| | |
|---|---|
| Name* | Emergency Family and Medi |
| Abbreviation | EFML |
| Description | Pay Category for 12 Week Leave at 2/3 pay |
| Code | EFML |
| Type | |
| Sort Order Index | 0 |
| Visible | <input checked="" type="checkbox"/> |
| TIME ENTRY RATE MULTIPLIER | |
| Rate 1: Rate Table 1 | 0.67 |
| USED AS: | |
| Time Category (Example: Regular, Double Time) | <input checked="" type="checkbox"/> |
| Extra Pay Category (Example: Bonus) | <input type="checkbox"/> |

10 Day Emergency Paid Medical Leave – Full Rate Pay Category

| | |
|---|---|
| Name* | Emergency Paid Sick Leave |
| Abbreviation | EPSL1.0 |
| Description | Pay Category for 10 day paid sick leave at full pay |
| Code | EPSL1.0 |
| Type | |
| Sort Order Index | 0 |
| Visible | <input checked="" type="checkbox"/> |
| TIME ENTRY RATE MULTIPLIER | |
| Rate 1: Rate Table 1 | 1.0 |
| USED AS: | |
| Time Category (Example: Regular, Double Time) | <input checked="" type="checkbox"/> |
| Extra Pay Category (Example: Bonus) | <input type="checkbox"/> |

10 Day Emergency Paid Medical Leave – 2/3 Rate Pay Category

| | |
|---|--|
| Name* | Emergency Paid Sick Leave |
| Abbreviation | EPSL.67 |
| Description | Pay Category for 10 day paid sick leave at 2/3 pay |
| Code | EPSL.67 |
| Type | |
| Sort Order Index | 0 |
| Visible | <input checked="" type="checkbox"/> |
| TIME ENTRY RATE MULTIPLIER | |
| Rate 1: Rate Table 1 | 67 |
| USED AS: | |
| Time Category (Example: Regular, Double Time) | <input checked="" type="checkbox"/> |
| Extra Pay Category (Example: Bonus) | <input type="checkbox"/> |

Summary of Pay Categories Page

← Company Pay Categories

Rows On Page 3 Rows [Refresh Data](#)

| | Name | Used As Time Category | Rate Table 1 Multiplier | Description | Code |
|-------------------|------------------------------------|-----------------------|-------------------------|---|-------------|
| | starts with emerg | All | = | = | starts with |
| ✕ | Emergency Family and Medical Leave | Y | 0.6700 | Pay Category for 12 Week Leave at 2/3 pay | EFML |
| ✕ | Emergency Paid Sick Leave .67 | Y | 67.0000 | Pay Category for 10 day paid sick leave at 2/3 pay | EPSL.67 |
| ✕ | Emergency Paid Sick Leave 1.0 | Y | 1.0000 | Pay Category for 10 day paid sick leave at full pay | EPSL1.0 |

Step 2: Time Offs

Company Settings > Global Setup > Time Offs

This allows the time off categories to be requested and time off time to be tracked properly in the timesheet and against accrual balances. We recommend something similar to the following:

- **Emergency Paid Sick Leave** – (parent time off) paid time off for 10 days at full pay or two-thirds rate of pay, including child time offs to further define the type and pay.
- EPSL Regular Rate (time off to be selected when employees should be paid at regular rate of pay)
- EPSL Two-Thirds Regular Rate (time off to be selected when employees should be paid two-thirds regular rate of pay)
- **Emergency Family and Medical Leave** – 12 weeks job protection and 2/3 rate of pay for employees

Parent Time Off – Emergency Paid Sick Leave

Set the *Default Hours In a Day*, ensure *Visible* is checked. If using counters, add the *Default Counter*.

Time Off Selector VIEW AS LIST

Show Hidden

Time Off (TO)

- Bereavement
- Comp Time
- Emergency Family and Medical Leave
- Emergency Paid Sick Leave
 - EPSL Regular Rate
 - EPSL Two-Thirds Regular Rate
- Holiday
- Jury Duty
- Leave of Absence (LOA)
- Paid Time Off (PTO)
- Sick
- Unpaid Time Off (UTO)
- Vacation

Time Off Properties

Main

Path **Emergency Paid Sick Leave**

Name* [Edit Label](#)

Abbreviation

Description

External Id

Payroll Code

Default Counter

Visible

SETTINGS

Allow Time Allocation Towards This Time Off

Time Off Can Be Requested By Employee

Include Time Off in Scheduled Hours

Default Hours In a Day

Populate Scheduled Days Off

Time Off Priority

Child Time Off – Emergency Paid Sick Leave at Regular Rate

Set up a time off to track the time that should be paid at employees full rate of regular pay. Set the *Default Hours In a Day*, ensure *Visible* is checked, check *Allow Time Allocation Toward This Time Off*. If using counters, add the *Default Counter*. If employees are allowed to request time using this time off category, check *Time Off Can Be Requested By Employee*.

The screenshot shows the 'Time Off Properties' configuration page for 'EPSSL Regular Rate'. The left sidebar shows a tree view of time off categories, with 'Emergency Paid Sick Leave' expanded to show 'EPSSL Regular Rate'. The main form includes the following fields and settings:

- Path:** Emergency Paid Sick Leave > EPSSL Regular Rate
- Name:** EPSSL Regular Rate (with an 'Edit Label' link)
- Abbreviation:** (empty field)
- Leave Reasons:** (empty field)
- Description:** 1. is subject to a Federal, State, or local quarantine or isolation order related to COVID-19
2. has been advised by a health care provider to self-quarantine related to COVID-19
3. is experiencing COVID-19 symptoms and is seeking a medical diagnosis
- External Id:** (empty field)
- Payroll Code:** (empty field)
- Default Counter:** Emergency Paid Sick Leave (dropdown)
- Visible:**
- SETTINGS:**
 - Allow Time Allocation Towards This Time Off:
 - Time Off Can Be Requested By Employee:
 - Include Time Off in Scheduled Hours:
 - Default Hours In a Day: 8.00 (input field)
 - Populate Scheduled Days Off:
 - Time Off Priority: 50 (dropdown)

Child Time Off – Emergency Paid Sick Leave at Two-Thirds Regular Rate

Set up a time off to track the time that should be paid at 2/3 rate of regular pay for employees. Set the *Default Hours In a Day*, ensure *Visible* is checked, check *Allow Time Allocation Toward This Time Off*. If using counters, add the *Default Counter*. If employees are allowed to request time using this time off category, check *Time Off Can Be Requested By Employee*.

The screenshot shows the 'Time Off Properties' configuration page for 'EPSSL Two-Thirds Regular Rate'. The left sidebar shows a tree view of time off categories, with 'Emergency Paid Sick Leave' expanded to show 'EPSSL Two-Thirds Regular Rate'. The main form includes the following fields and settings:

- Path:** Emergency Paid Sick Leave > EPSSL Two-Thirds Regular Rate
- Name:** EPSSL Two-Thirds Regular Rate (with an 'Edit Label' link)
- Abbreviation:** (empty field)
- Leave Reasons:** (empty field)
- Description:** 4. is caring for an individual subject to an order described in (1) or self-quarantine as described in (2)
6. is experiencing any other substantially-similar condition specified by the Secretary of Health and Human Services, in consultation with the Secretaries of Labor and Treasury
- External Id:** (empty field)
- Payroll Code:** (empty field)
- Default Counter:** Emergency Paid Sick Leave Two-Thirds Regular Rate (dropdown)
- Visible:**
- SETTINGS:**
 - Allow Time Allocation Towards This Time Off:
 - Time Off Can Be Requested By Employee:
 - Include Time Off in Scheduled Hours:
 - Default Hours In a Day: 8.00 (input field)
 - Populate Scheduled Days Off:
 - Time Off Priority: 50 (dropdown)

Emergency Family and Medical Leave Category

Set up a time off to track the 12 weeks of job protection at 2/3 rate of pay for employees.

Set the *Default Hours In a Day*, ensure *Visible* is checked, check *Allow Time Allocation Toward This Time Off*. If using counters, add the *Default Counter*.

NOTE: This time off is used to pay employees already out on a Leave case, so the *Time Off Can Be Requested By Employee* setting should be unchecked.

The screenshot shows the 'Time Off Selector' on the left with a tree view containing categories like Bereavement, Comp Time, Emergency Family and Medical Leave, Emergency Paid Sick Leave, EPSL Regular Rate, EPSL Two-Thirds Regular Rate, Holiday, Jury Duty, Leave of Absence (LOA), Paid Time Off (PTO), Sick, Unpaid Time Off (UTO), and Vacation. The 'Emergency Family and Medical Leave' category is selected. On the right, the 'Time Off Properties' form is shown for 'Emergency Family and Medical Leave'. The 'Main' section includes fields for Name, Abbreviation, Description (5. is caring for a child whose school or place of care is closed (or child care provider is unavailable) for reasons related to COVID-19), External Id, and Payroll Code. The 'Default Counter' is set to 'Emergency Family and Medical Leave' and 'Visible' is checked. The 'SETTINGS' section includes: 'Allow Time Allocation Towards This Time Off' (checked), 'Time Off Can Be Requested By Employee' (unchecked), 'Include Time Off in Scheduled Hours' (unchecked), 'Default Hours in a Day' (8.00), 'Populate Scheduled Days Off' (unchecked), and 'Time Off Priority' (50).

Step 3: Timesheet Profiles & Time Off Request Profiles

For Timesheet Profiles: *Company Settings > Profiles/Policies > Timesheets*

For Time Off Request Profiles: *Company Settings > Profiles/Policies > Timesheets* then select *Time Off Request Profile* in the *Time Off Settings* widget.

Customized Time Off Lists in Time Off Request Profiles

If you wish to limit the types of time offs employees can request, you can set this in the Time Off Request Profile associated with their Timesheet Profile. In the *Available Time Off* section, select *Custom List* and add a list of time offs employees can use to request time off.

For any time off added to the list, ensure each time off configuration is set with the *Time Off Can Be Requested By Employee* setting checked.

The screenshot shows the 'Time Off Request Profile' configuration on the left and the 'Time Off Lists' table on the right. The profile is named 'Default' and is active. The 'Available Time Off' section has 'Custom List' selected. The 'Time Off Lists' table shows the following data:

| | Name | # Items |
|--|-------------------------------|---------|
| | Counts Toward Straight Time | 9 |
| | Emergency Paid Sick Leave Act | 3 |
| | Sick | 1 |

Edit List: Emergency Paid Sick Leave Act ✕

List Items

Rows On Page: 50 | 3 Rows

| <input type="checkbox"/> | Name | System Id |
|--------------------------|--|-----------|
| | starts with | |
| <input type="checkbox"/> | Emergency Paid Sick Leave | 39622286 |
| <input type="checkbox"/> | Emergency Paid Sick Leave/EPSL Regular Rate | 39622532 |
| <input type="checkbox"/> | Emergency Paid Sick Leave/EPSL Two-Thirds Regular Rate | 39622533 |

[Remove](#)

Items Not In A List

Rows On Page: 50 | No Rows

| <input type="checkbox"/> | Name |
|--------------------------|------|
| | = |
| No Results Returned | |

[Add](#)

[Change Name](#) [Done](#)

Preventing Negative Balances

To prevent Emergency Paid Sick Leave time from going negative, the following rules and settings are suggested.

Timesheet Profile Rule – Time Off Exceeded

This rule will prevent managers from manually adding time that would result in a negative balance. It is available in categories for *On Approval*, *On Save*, and *On Submit*. You can have the rule in all three categories but to simply your configuration, we recommend adding it to the *On Save* category, as that catches most user practices of saving timesheets.

The rule for all categories has the option to generate a notification when the rule is triggered. Notifications can be set up under *Company Settings > Global Setup > Notifications*.

On Save

Set the *On Save* rule to generate an error if entered time exceeds the balance by 0 hours. We recommend adding the rule to only include only the *Emergency Paid Sick Leave Act* time off (or the name you gave this time off.) If desired, you can add an additional rule for your other time offs.

- Set the manager levels enabled in your company (1-5, plus Payroll Admin). Also ensure you enable *Check Unapproved Requests* to catch all time offs.
- This rule has an *Applies To Employees* setting that you should enable if employees are allowed to enter their own time.

The error will generate when a manager or employee enters hours that will cause the balance to go negative when saving the timesheet.

The screenshot shows the configuration for the 'Time Off Exceeded' rule. It includes a 'Display' dropdown set to 'Error', a condition 'If Entered Time Off Exceeds Current Balance By' with a value of '0' and a unit of 'Hours'. There are two radio buttons: 'Apply To All Accrued Time Off Categories' (unselected) and 'Apply Only To Following Time Off Categories' (selected), with a search box containing 'Emergency Paid Sick Leave Act'. A 'MESSAGE TO DISPLAY' box contains the text: 'Remaining accrued balance for {TimeOffName} would be negative: {AmountExceededBy}.'. Below this are several checkboxes: 'Generate Notification When This Rule Is Triggered' (unchecked), 'CHECK ESTIMATED BALANCES' (unchecked), 'Check Unapproved Requests' (checked), 'Check Future Approved Time Off' (unchecked), and 'Applies To Employees' (checked). At the bottom, 'Applies To Managers On Level:' is set with checkboxes for 'None', '1', '2', '3', '4', '5', and 'Payroll Admin', all of which are checked.

Timesheet Off Request Profile Setting – Use Timesheet Rules for Validation

In the Time Off Request Profile, the *Use Timesheet Rules For Validation* setting will ensure that the system validates your rules based on those set up in Timesheet Profiles and not in the Time Off Request Profile.

We recommend if you are using the *Time Off Exceeded* rule in Timesheet Profiles, you also check these settings in any associated Time Off Profile.

This setting is available in two places in the Time Off Request Profile: *Submit Settings* widget and *Approval Settings* widget.

The screenshot shows two settings widgets. The 'Submit Settings' widget has a checkbox for 'Use Timesheet Rules For Validation' which is checked and highlighted with a red box. The 'Approval Settings' widget also has a checkbox for 'Use Timesheet Rules For Validation' which is checked and highlighted with a red box. Below this is another unchecked checkbox 'Use Calculated Time For Validation'. Underneath is a section titled 'CHECKS' with a list of 11 checkboxes, all of which are checked: 'Employee Default Cost Centers Not Configured', 'Requested Day Is Company Holiday', 'Request Exceeds Employee Regular Day Hours', 'Hours (Any) Already On Timesheet', 'Hours (Time Off) Already On Timesheet', 'Request Will Result In Negative Accrual Balance', 'Accrual Profile Has 'Use First Balance' Configured', 'Requested Day Is For The Next Accrual Year', 'Requested Day Is For The Previous Accrual Year', 'Requested Day Is One+ Year(s) From Now', and 'Requested Day Is Blocked Out'.

Step 4: Accruals Rule Policy Creation

Company Settings > Profiles/Policies > Benefit Accruals

Creating a new Accruals policy in existing Accrual Profiles (or new Accrual Profiles) helps you grant paid sick leave and track the time taken.

- Add an *Emergency Paid Sick Leave* policy in existing profiles (or create new profiles and add policy rules)
- Accrual Policy Type: *System Maintained > Tenure Based*
- Time Off: *Emergency Paid Sick Leave*

Accruals Profile with Emergency Paid Sick Leave Act Rule

[←](#) Benefit Accruals Profile

Description

Name*

Description

Active

Display Values

Rules

| | | | | | | |
|---|--|------------|----|-------|----|--------------|
| <input checked="" type="checkbox"/> Visible To Employee | <input checked="" type="checkbox"/> Auto Run | [Redacted] | | | | |
| Time Off | Emergency Paid Sick Leave | Initially: | 80 | Hours | 80 | Hours/Yearly |
| Type | System (Tenure) | | | | | |
| Accrued | Yearly | | | | | |

Edit or Create the Rule

Time Off System Id: 51901890

Anchor Date Day(s) From

Use

Adjusted To

Date To Use As a Start Date

Use

Waiting Period

Use For Calculating Waiting Period

Time Before Employee Can Use Time Off Day(s)

Use Schedule Based Definition No Yes

Include Time Earned During Waiting Period

Adjust End Of Waiting Period To

Accruals Profile - Carry Over Settings

Carry Over Settings

Carry Over Would Be Applied On: Start Of New Accrual Year
Employee Would Carry Over: Maximum Of 0 Hour(s)
Amount Over Maximum Would Be: Zeroed Out
Carried Over Amount Can Be Used: Whole Year
Negative Balance Would Be: Zeroed Out

Edit Carry Over Settings

Enabled Yes No

Date To Apply On: Start Of New Accrual Year

MAXIMUM CARRY OVER AMOUNT

- No Limit
- Hours
- % Of Annual Total
- Schedule Based
- % Of Remaining Balance
- % Of Remaining Balance (Schedule Based)

MOVE CARRY OVER AMOUNT TO DIFFERENT TIME OFF

Time Off

AMOUNT OVER MAXIMUM

- Zeroed Out
- Move To:

USE OPTIONS

- No Limit
- By Date(mm/dd):
- In Days:

NEGATIVE BALANCE OPTIONS

- Carried Over
- Zeroed Out
- Move To:

Accruals Profile - Extra Settings

Extra Settings

Tenure Changes On Exact Date (Note: Breaks Accrual Period)
 'Entitled To' Time Will Be Accrued On The FIRST Day Of The New 'Accrue Period'
Accruals Will Be Calculated From Current Accrue Period Start.

Edit Extra Settings

Tenure Changes Break Point on Exact Date (Note: Breaks Accrual Period)

Rounding Round To Increment, Round (Excl.)

MAXIMUM ACCRUED AMOUNT (PER ACCRUAL YEAR)

Not Enabled
 Extended (Includes: Imported, Carry Over, Manual Changes, etc.)

MAXIMUM RUNNING BALANCE

Not Enabled
 Subtract Scheduled Hours
 Over Maximum Zero Out Move To

BALANCE MOVE

After Balance Reaches (HH:MM)
 Move (HH:MM) Whole Hours Over Balance Above
 To Time Off

UTILIZATION SETTINGS

Balance Should Be Used First When Time Off Request Is Approved
 Balance Should Be Used Next If Balance Is Exceeded

RESTRICTION SETTINGS


Restrict From Approve Time Off Request If Balance Will Be Negative

'Entitled To' Time Will Be Accrued On The Day Of The New 'Accrue Period'

Accruals Will Be Calculated Up To For Terminated Employees

For New Hires, Accruals Will Be Calculated From

Accruals Profile - Schedule

Schedule 

Accrue Rate Daily

Allow Personal Schedule

'Entitled To' Time Is Value Per Year Accrue Period

| | | ENTITLED TO | | RATE |
|--------------------------------|---|------------------------------------|--|-------------------|
| Initially: | <input type="text" value="80.0"/> | <input type="text" value="Hours"/> | | 80 Hours / Yearly |
| <input type="text" value="1"/> | <input type="button" value="ADD ROWS"/> | | | |


Generating Accrual Time for Employees


Once employees have the new policies assigned, the accrual amounts need to be generated for employees. This can be done from the Accrual Balances report.


In the report, filter for the *Emergency Paid Sick Leave Time Off*. Select all rows in the report and set the *Updated to Date* to 1/1/2020. This will ensure all employees get the full 80 hours for the rest of the year.


Information


Please enter new 'Updated To Date'.


Calendar Date 


Employee Start Date 

Employee Hired Date 

Employee Seniority Date 

Employee Birthday 

Employee Birthday Test Date 

Employee Date 2 Date 

COMMENT

Select all rows in the report and execute accruals to 1/1/2021 so the time is granted for the rest of the year.


Settings

UP TO DATE


Today

1st Of This Month

1st Of Next Month

Calendar Date: 

Apply Carry Over

Next  Anniversary

Do Not Adjust Execution End Date

Leave Module Configuration

The new legislation provides a 10-day mandate for full time employees to receive full pay and a 12-week expansion of FMLA where employers pay full time employees 2/3 their rate of pay. This is in effect until December 31, 2020 when the requirements will reset, pending another governmental announcement of emergency requirement, for the subsequent year.

The configuration steps outlined below allow you to track employee emergency leave time through the Leave module.

Pre-Requisites

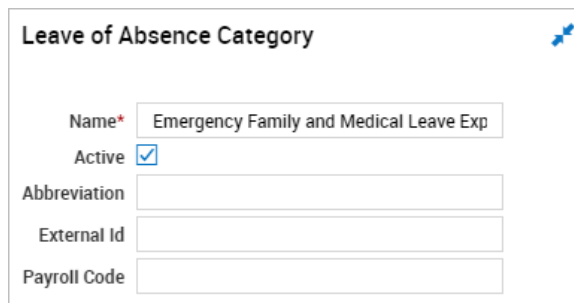
The configuration shown requires the following to be enabled in your company:

- Leave module enabled. This is done in the *Available Functionality* widget when editing your company under *Maintenance > All System Companies > Edit Company* icon for your company.
- Enabling the Leave module may incur additional fees.
- The Leave module is optional and not required for the new legislation.

Step 1: Leave of Absence Categories

Company Settings > Profiles/Policies > Leave of Absence > Categories

Create a *Leave of Absence Category* for *Emergency Family and Medical Leave Expansion Act* (or your name of choice).



The screenshot shows a form titled "Leave of Absence Category" with a blue edit icon in the top right corner. The form contains the following fields:

- Name*: Emergency Family and Medical Leave Exp
- Active:
- Abbreviation:
- External Id:
- Payroll Code:

Step 2: Leave of Absence Reasons

Company Settings > Profiles/Policies > Leave of Absence > Reasons

Create a *Leave of Absence Reason* for *Emergency Leave Regular Rate* and *Emergency Leave Two-Thirds Regular Rate* (or your name of choice). The reasons will be used to indicate the type of pay employees should receive for the first two weeks of the leave period.



The screenshot shows a table titled "Reasons" with a back arrow in the top left corner. The table has a search filter set to "starts with Emergency" and shows two rows. The first two rows are highlighted with a red box:

| ← Reasons | |
|--|---|
| Rows On Page: 20 2 Rows Refresh Data | |
| Name | |
| starts with: Emergency | |
| | Emergency Leave Regular Rate |
| | Emergency Leave Two-Thirds Regular Rate |

Step 3: Leave of Absence Profiles

Company Settings > Profiles/Policies > Leave of Absence > Profiles

Create or edit a *Leave of Absence Profile* for *Emergency Family and Medical Leave Expansion Act* category (or your name of choice). In the *Categories* section of the profile, ensure the category you created is checked.

Leave of Absence Profile

Name*

Description

Active

Auto Run Balance Rules

Schedule Type

Approval Workflow

Qualifier Questionnaire

CATEGORIES

- Family Medical Leave of Absence Act (FMLA)
- CA Volunteer Firefighting, Reserve Peace Officer, and Emergency Rescue Personnel Leave
- California Family Rights Act (CFRA)
- CA Bone Marrow Leave
- CA Organ Donor Leave
- CA Pregnancy Disability Leave
- CA Domestic Abuse/Sexual Assault/Stalking Leave
- CA Crime Victims Leave
- CA Military Spouse Leave
- CA School Activities Leave
- Emergency Family and Medical Leave Expansion Act

Step 4: Leave of Absence Profile Rules

Company Settings > Profiles/Policies > Leave of Absence > Profiles > View/Edit Rules

Add rules to the *Leave of Absence Profile* for *Emergency Family and Medical Leave Expansion Act* category (or your name of choice).

Waiting Period Rule (Entitlement Category Rule)

Set the *Waiting Period* rule for 30 days using the *Emergency Family and Medical Leave Expansion Act* category (or name of your choice). Use the *Date Hired* for calculating the waiting period.

Settings

Entitlement Time rule is required to follow this rule.

Leave of Absence Category

Use For Calculating Waiting Period

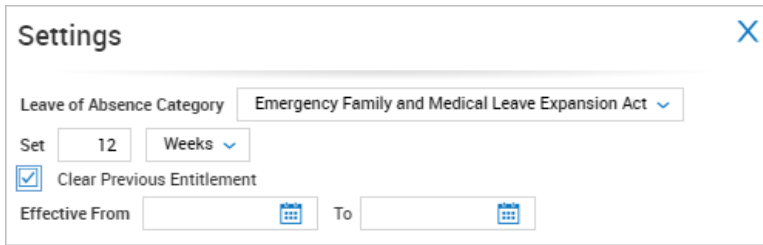
Include Active Service Periods Only

Time Before Employee Can Use Category

Effective From To

Entitlement Time Rule (Entitlement Category Rule)

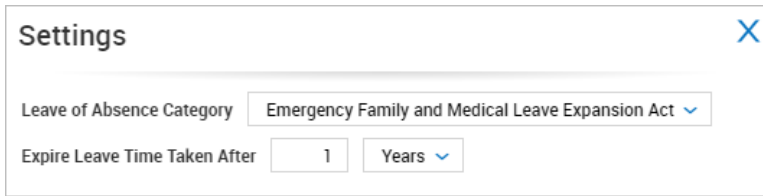
The *Entitlement Time* rule is required to follow the *Waiting Period* rule. Set this rule to 12 weeks.



The screenshot shows a 'Settings' dialog box for an Entitlement Time Rule. The 'Leave of Absence Category' is set to 'Emergency Family and Medical Leave Expansion Act'. The 'Set' field is '12' with a 'Weeks' dropdown. There is a checked checkbox for 'Clear Previous Entitlement'. The 'Effective From' and 'To' fields are empty with calendar icons.

Expire Leave Time Taken (Balance Category Rule)

Set this rule to expire in 1 year for the *Emergency Family and Medical Leave Expansion Act* category (or name of your choice).



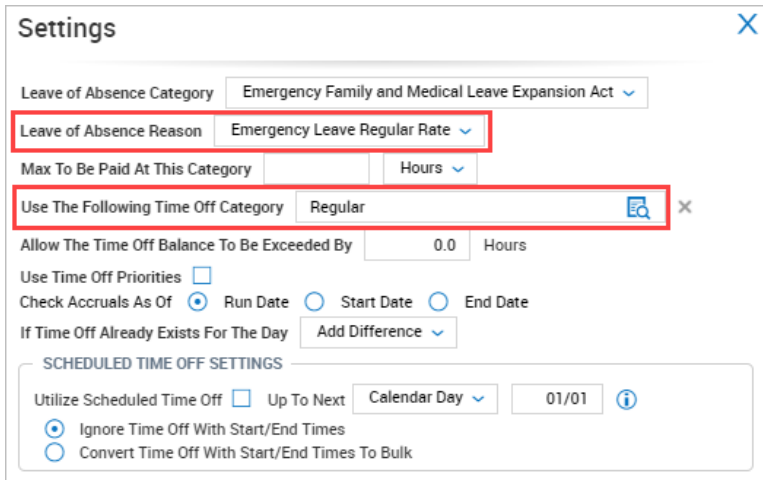
The screenshot shows a 'Settings' dialog box for an Expire Leave Time Taken rule. The 'Leave of Absence Category' is 'Emergency Family and Medical Leave Expansion Act'. The 'Expire Leave Time Taken After' field is '1' with a 'Years' dropdown.

Use Available Time Off (Time Category Rule)

Two *Use Available Time Off* rules need to be configured to indicate the type of pay (regular rate or two-thirds rate) employees should receive prior to using *Emergency Family and Medical Leave* time.

In the first rule, the *Leave of Absence Reason* should be set to *Emergency Leave Regular Rate*. The *Use The Following Time Off Category* setting should be set to use *Emergency Paid Sick Leave/Regular* (or name of your choice) at Regular Rate prior to using Leave time (12 week - 2/3 pay).

Use Available Time Off – Full Rate of Pay



The screenshot shows a 'Settings' dialog box for a 'Use Available Time Off – Full Rate of Pay' rule. The 'Leave of Absence Category' is 'Emergency Family and Medical Leave Expansion Act'. The 'Leave of Absence Reason' is 'Emergency Leave Regular Rate'. The 'Max To Be Paid At This Category' is empty with an 'Hours' dropdown. The 'Use The Following Time Off Category' is 'Regular'. The 'Allow The Time Off Balance To Be Exceeded By' is '0.0' with an 'Hours' dropdown. There are checkboxes for 'Use Time Off Priorities' and 'Check Accruals As Of' (set to 'Run Date'). There are radio buttons for 'Start Date' and 'End Date'. There is a dropdown for 'If Time Off Already Exists For The Day' set to 'Add Difference'. A section titled 'SCHEDULED TIME OFF SETTINGS' contains a checkbox for 'Utilize Scheduled Time Off' (unchecked), a dropdown for 'Up To Next' set to 'Calendar Day', and a date field '01/01'. There are two radio buttons: 'Ignore Time Off With Start/End Times' (selected) and 'Convert Time Off With Start/End Times To Bulk'.

Use Available Time Off – Two-Thirds Rate of Pay

In the second rule, the *Leave of Absence Reason* should be set to *Emergency Leave Two-Thirds Regular Rate*. The *Use The Following Time Off Category* setting should be set to use *Emergency Paid Sick Leave/Two-Thirds Regular Rate* (or name of your choice) at Two-Thirds Regular Rate prior to using additional Leave time (12 week - 2/3 pay).

Settings X

Leave of Absence Category Emergency Family and Medical Leave Expansion Act ▾

Leave of Absence Reason Emergency Leave Two-Thirds Regular Rate ▾

Max To Be Paid At This Category Hours ▾

Use The Following Time Off Category Two-Thirds Regular Rate 🔍 X

Allow The Time Off Balance To Be Exceeded By 0.0 Hours

Use Time Off Priorities

Check Accruals As Of Run Date Start Date End Date

If Time Off Already Exists For The Day Add Difference ▾

SCHEDULED TIME OFF SETTINGS

Utilize Scheduled Time Off Up To Next Calendar Day ▾ 01/01 ⓘ

Ignore Time Off With Start/End Times

Convert Time Off With Start/End Times To Bulk

NOTE: If you or your employees want to use any other paid time off, such as Vacation, you can add another *Use Available Time Off* rule to use that time prior to using *Emergency Family and Medical Leave*.

Create Time Entry (Time Category Rule)

To generate Leave time entries in timesheets for *Emergency Family and Medical Leave*, add this rule. If time already exists for a day, you will want the difference added. Be sure to set the *If Time Off Already Exists For The Day* setting to *Add Difference*.

Settings X

Leave of Absence Category Emergency Family and Medical Leave Expansion Act ▾

Leave of Absence Reason ▾

Max To Be Paid At This Category Hours ▾

Use The Following Time Off Category Emergency Family and Medical Leave 🔍 X

Use Time Off Priorities

If Time Off Already Exists For The Day Add Difference ▾

Leave Rules Summary

Entitlement

Waiting Period ↑ ↓ ×

Leave of Absence Category: **Emergency Family and Medical Leave Expansion Act**

30 Days From Date Hired

Waiting Period, System Id: 21004290

Entitlement Time ↑ ↓ ×

Leave of Absence Category: **Emergency Family and Medical Leave Expansion Act**

Set 12 Weeks

Clear Previous Entitlement

Entitlement Time, System Id: 21004546

Balance

Expire Leave Time Taken ↑ ↓ ×

Leave of Absence Category: **Emergency Family and Medical Leave Expansion Act**

Expire Leave Time Taken After **1** Year

Expire Leave Time Taken, System Id: 21004802

Time

Use Available Time Off ↑ ↓ ×

Leave of Absence Category: **Emergency Family and Medical Leave Expansion Act**

Leave of Absence Reason: **Emergency Leave Regular Rate**

Time Off Category: **Emerg Leave Regular Rate**

Allow The Time Off Balance To Be Exceeded By: **0.0 Hours**

If Time Off Already Exists For The Day: **Add Difference**

Override Fields

Use Available Time Off, System Id: 1868544

Use Available Time Off ↑ ↓ ×

Leave of Absence Category: **Emergency Family and Medical Leave Expansion Act**

Leave of Absence Reason: **Emergency Leave Two-Thirds Regular Rate**

Time Off Category: **Emerg Leave Two-Thirds Rate**

Allow The Time Off Balance To Be Exceeded By: **0.0 Hours**

If Time Off Already Exists For The Day: **Add Difference**

Override Fields

Use Available Time Off, System Id: 1868800

Create Time Entry ↑ ↓ ×

Leave of Absence Category: **Emergency Family and Medical Leave Expansion Act**

Leave of Absence Reason: **Emergency Family and Medical Leave**

Time Off Category: **Emergency Family and Medical Leave**

If Time Off Already Exists For The Day: **Skip Day**

Override Fields

Create Time Entry, System Id: 1869056

Employee Information

In employee accounts in Employee Information, you can view/edit accrual balances and view/edit leave cases. Be sure to add the *Accruals* and *Leave of Absence* widgets to employee accounts.

Accruals

[Edit Accrual Balances](#)

| | | | TIME OFF | ACCRUED TO | Hrs: | CURRENT ACCRUED | TAKEN | CURRENT BALANCE | SCH | PENDING APPROVAL | ACCRUE RATE |
|-------------------------|--|--|---------------------------|------------|------|-----------------|-------|-----------------|-------|------------------|-------------|
| | | | Emergency Paid Sick Leave | 01/01/2021 | | 80:00 | 8:00 | 0:00 | 72:00 | 0:00 | 80/Yearly |
| 01/01/2020 - 01/01/2021 | | | | | | | | | | | |
| | | | Vacation | 01/01/2021 | | 40:00 | 0:00 | 0:00 | 40:00 | 0:00 | 40/Yearly |
| 01/01/2020 - 01/01/2021 | | | | | | | | | | | |

Leave of Absence

[Edit Leave Of Absence Balances](#) [View Leave of Absence Cases](#)

| CATEGORY | ENTITLEMENT | TAKEN | TAKEN AS OF | BALANCE |
|--|-------------|-----------|-------------|-------------|
| Emergency Family and Medical Leave Expansion Act | 12.0 Weeks | 5.0 Weeks | 04/24/2020 | 7.0 Weeks |
| Family Medical Leave of Absence Act (FMLA) | 480.0 Hours | 0.0 Hours | 04/24/2020 | 480.0 Hours |

RUN ENTITLEMENT RULES

RUN BALANCE RULES

Employee Timesheet

When leave cases are populated to the timesheet, you can view the information from multiple tabs.

| Date | Cost Centers | Activities | Time Off | In Date | From | To | Raw Total | Calc. Total | Picework | Schedule | |
|--------|--------------|------------|--------------|---------|------|----|-------------------------|--------------|--------------|----------|--|
| SUN 5 | X | | | Sun 5 | | | 0:00 | 0:00 | | N/A | |
| | | | | | | | Day Total | 0:00 | | | |
| MON 6 | X | | Regular Rate | Mon 6 | | | 8:00 | 8:00 | | 8 Hour | |
| | | | | | | | Day Total | 8:00 | | | |
| TUE 7 | X | | Regular Rate | Tue 7 | | | 8:00 | 8:00 | | 8 Hour | |
| | | | | | | | Day Total | 8:00 | | | |
| WED 8 | X | | Regular Rate | Wed 8 | | | 8:00 | 8:00 | | 8 Hour | |
| | | | | | | | Day Total | 8:00 | | | |
| THU 9 | X | | Regular Rate | Thu 9 | | | 8:00 | 8:00 | | 8 Hour | |
| | | | | | | | Day Total | 8:00 | | | |
| FRI 10 | X | | Regular Rate | Fri 10 | | | 8:00 | 8:00 | | 8 Hour | |
| | | | | | | | Day Total | 8:00 | | | |
| SAT 11 | X | | | Sat 11 | | | 0:00 | 0:00 | | N/A | |
| | | | | | | | Day Total | 0:00 | | | |
| | | | | | | | Timesheet Total: | 40:00 | 40:00 | | |

Calc. Detail Tab

| Date | Raw From | Raw To | Raw Total | Schedule | Calc. Total | Weekly | Pay Period | Time Off | Rate Table 1 Rate | Emergency Paid Sick Leave |
|----------------|----------|--------|-----------|----------|-------------|--------|------------|--------------|-------------------|---------------------------|
| Sun 04/05/2020 | | | | | | | | | | |
| Mon 04/06/2020 | * | | 8:00 | 8 Hour | 8:00 | 8:00 | 8:00 | Regular Rate | 24.03846 | 8:00 |
| Tue 04/07/2020 | * | | 8:00 | 8 Hour | 8:00 | 16:00 | 16:00 | Regular Rate | 24.03846 | 8:00 |
| Wed 04/08/2020 | * | | 8:00 | 8 Hour | 8:00 | 24:00 | 24:00 | Regular Rate | 24.03846 | 8:00 |
| Thu 04/09/2020 | * | | 8:00 | 8 Hour | 8:00 | 32:00 | 32:00 | Regular Rate | 24.03846 | 8:00 |
| Fri 04/10/2020 | * | | 8:00 | 8 Hour | 8:00 | 40:00 | 40:00 | Regular Rate | 24.03846 | 8:00 |
| Sat 04/11/2020 | | | | | | | | | | |

Calc. Summary Tab

| Counter | Total | Total Rate Table 1 Amount |
|---------------------------|-------|---------------------------|
| Emergency Paid Sick Leave | 40:00 | 961.5384 |

Counters Tab

| Date | Record Date | Source Date | Counter | Cost Center 2 | Total Time | Rate Table 1 Rate | Total Rate Table 1 Amount |
|------------|-------------|-------------|---------------------------|---------------|------------|-------------------|---------------------------|
| 03/23/2020 | 03/23/2020 | 03/23/2020 | Emergency Paid Sick Leave | | 8:00 | 24.0385 | 192.3077 |
| 03/24/2020 | 03/24/2020 | 03/24/2020 | Emergency Paid Sick Leave | | 8:00 | 24.0385 | 192.3077 |
| 03/25/2020 | 03/25/2020 | 03/25/2020 | Emergency Paid Sick Leave | | 8:00 | 24.0385 | 192.3077 |
| 03/26/2020 | 03/26/2020 | 03/26/2020 | Emergency Paid Sick Leave | | 8:00 | 24.0385 | 192.3077 |
| 03/27/2020 | 03/27/2020 | 03/27/2020 | Emergency Paid Sick Leave | | 8:00 | 24.0385 | 192.3077 |

Summary By Day Tab

| Extra Pay & Counter Adjustment Timesheet Exceptions Calc. Detail Calc. Summary Counters Summary By Day | | | |
|--|---------------------|---------------------------|----------|
| Date | Calc. Total | Emergency Paid Sick Leave | Counters |
| Sun 03/22/2020 | | | |
| Mon 03/23/2020 | 8:00 | 8:00 | |
| Tue 03/24/2020 | 8:00 | 8:00 | |
| Wed 03/25/2020 | 8:00 | 8:00 | |
| Thu 03/26/2020 | 8:00 | 8:00 | |
| Fri 03/27/2020 | 8:00 | 8:00 | |
| Sat 03/28/2020 | | | |
| | Total: 40:00 | 40:00 | |