



ACCRUAL PLANS IMPLEMENTATION SURVEY

COMPANY LEGAL NAME: _____

POLICY DESCRIPTION

- How many accrual policies do you have (PTO, Vacation, Sick, Bereavement, Jury Duty, Maternity, etc.)?
- Would you like accrual balances to appear on your employees' checks?

POLICY NAME:

- How are hours accrued: per hour worked, per schedule, no accrual?

▪ PER HOURS WORKED

- Which earnings count toward the accrual (such as OT)?
- Is there a minimum number of hours that must be worked in order to trigger the accrual?
- Is there a maximum cap on the number of hours that count towards the accrual?

▪ PER SCHEDULE

- When are hours accrued (per pay period, monthly, quarterly, annually)?
- Do hours reset on the Calendar Year or Anniversary Year?
- Which employees are eligible for this policy?
- Is there a probationary period that employees must wait before receiving PTO hours?
 - » If yes, how long?
 - » If yes, are they not allowed to accrue hours, or can they accrue hours but not use them?

ACCRUAL PLAN RATES

LENGTH OF SERVICE	ACCRUAL FACTOR PER SCHEDULE	BALANCE LIMIT	CARRYOVER OPTION	CO EXPIRATION DAYS	YTD ACCRUAL LIMIT	YTD TAKEN LIMIT

- Do you want your employees to be able to make PTO requests through their iSolved Self Service account?
- If yes, will they be allowed to have a negative balance at any time?
- If yes, do you want an employee's negative balance to carryover at year end?