Work Instruction: Managing Time Off in ADP

1. Audience
Human Resources and Payroll

2. Objective:
To manage negotiated time off and adjustments needed to correct time off errors.

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	12/29/2021	Original issue.	Glawe
001	10/21/2022	Converted to ADP.	Glawe
002	02/29/2024	Updated New HR Department #	Glawe

4. Scope
This process is an extension to onboarding when an employee negotiates time off and also applies to existing employees where time off corrections are needed for the time off bank.

5. Prerequisites
General understanding and access to ADP Workforce Now.

6. Records
None.

7. Associated Documents
- Offer letter (for negotiated time off)

8. Evaluative Factors
None

9. Responsibility
Human Resources is responsible for maintaining this work instruction.

10. Instructions
This instruction includes the steps required for:
- Entering Negotiated PTO
- Adjusting Time Off Balances

Entering Negotiated PTO
If an employee negotiates vacation, you follow these steps to allow the system to automatically process the higher rate accrual. PTO accrual is tied to the start date unless a seniority date has been entered for an employee. This is the field that we will update to process negotiated PTO.

Step 1
Before we begin, review the negotiated PTO rate and calculate the start date that would be needed to accrue at the negotiated rate.

For example, if an employee would accrue at the 4.64 hour rate, but they negotiated the next level up to 6.15, the service date needs to be five years earlier.

Years of Service at Anniversary Date	Hours Earned Biweekly	Maximum Accumulation
Beginning at Date of Hire	4.62 hours	120 hours
Beginning on the 5th year anniversary	6.15 hours	160 hours
Beginning on the 12th year anniversary	7.69 hours	200 hours

So, if the start date for this employee was 5/4/2023, the seniority date will be five years earlier on 5/4/2018.
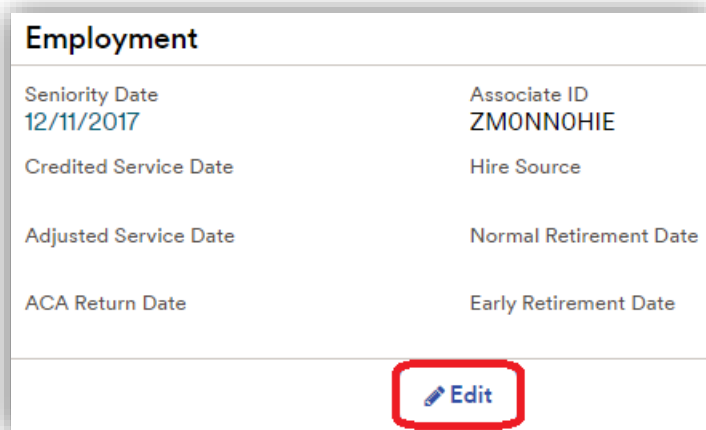
Step 2
Now we are ready to update the seniority date. From the mega-menu, click **People** and then **Employment Profile**.
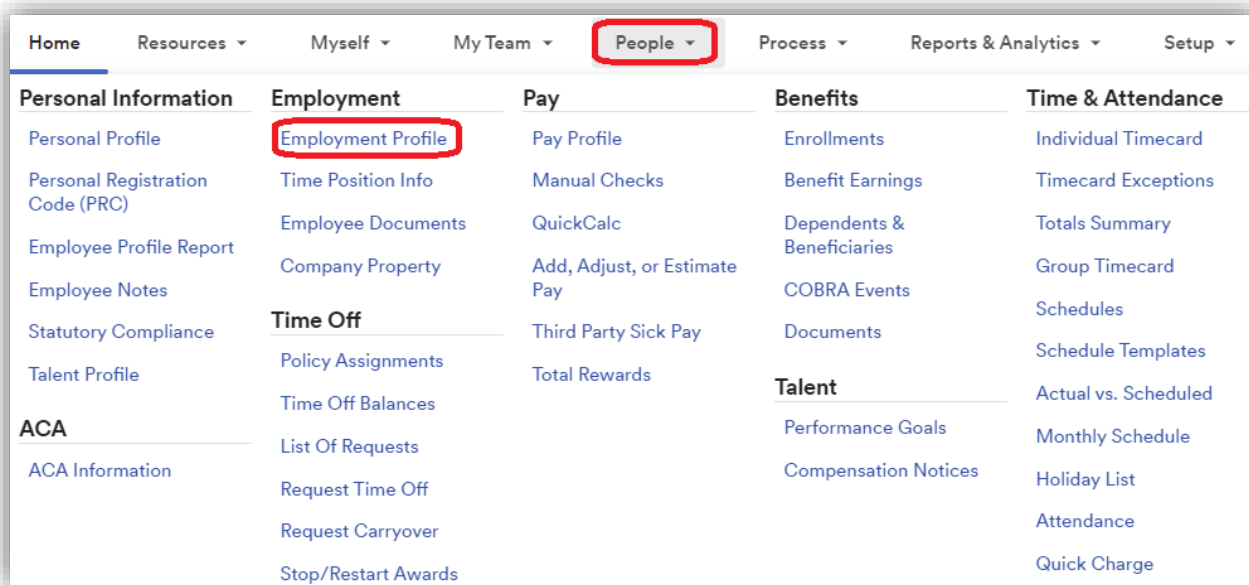
Step 3

Next, find the **Employment** tile on the window that opens and click on the **Edit** button.
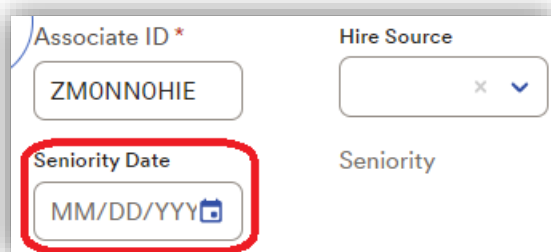

Step 4:

Enter the new seniority date (5/4/18 for our example) in the **Seniority Date** field and click **Save**.

Adjusting Time Off Balances:
If time off hasn't accrued at the proper rate, the time off balance must be adjusted. (This can happen if an employee negotiates PTO and the seniority date isn't added before the first payroll period.) Or the company may provide an award of PTO for winning an employee event. The balance must be adjusted in this situation, as well.

Step 1
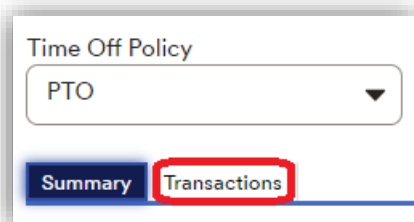From the mega-menu, select **People**, then click **Time Off Balances**
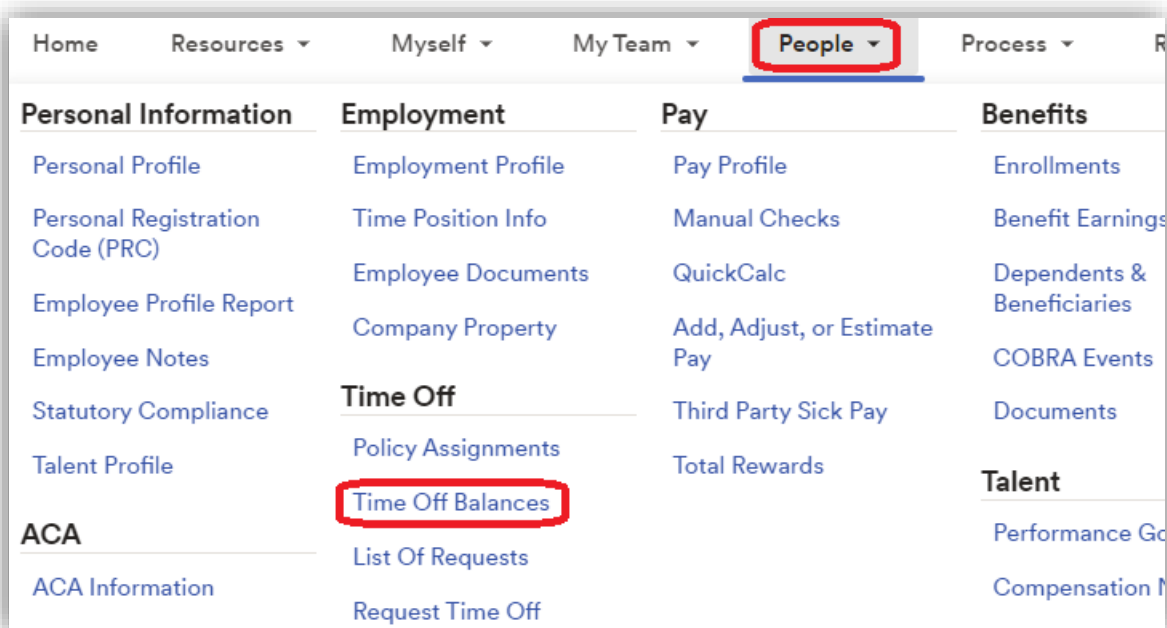
Step 2
Click on the "**PTO**" link in the first column.

Time Off Policy	Carryover	+ Earned/A...	+ Future Ear...	− Taken	− Scheduled	= Balance
PTO	-	18.48 hours	-	13.80 hours	-	4.68 hours

Step 3

The new window will default to the **Summary** tab. Click on **Transactions**.
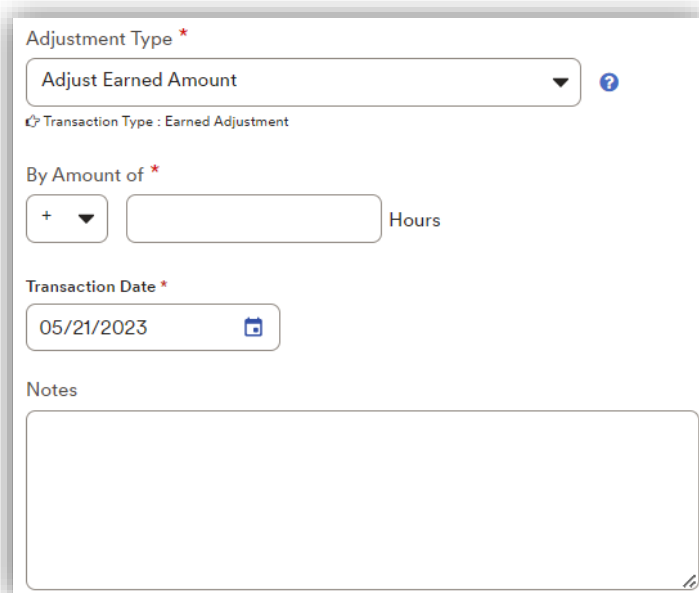
Step 4

In the upper right corner, click on the edit link.
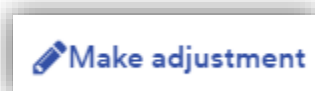
Step 5

A new window will open.

Step 5a

From the drop down, select which bucket needs to be updated. Generally, we will only use one of the first two options (Adjust Earned Amount or Adjust Taken Amount).

Adjustment Type *

Adjust Earned Amount	▼
Adjust Earned Amount	
Adjust Taken Amount	
Adjust Carryover Amount	
Recalculate Awards	

Then select either the plus (to add to the bucket) or the minus (to decrease from the bucket) and enter the total number of hours to adjust. The hours should be entered to two decimal places (i.e. 1.25)

By Amount of *

+ ▼		Hours
+		
-		

Step 5b
Enter the date the transaction is effective.

Transaction Date *

05/21/2023

Step 5c
In the Notes field, enter why the adjustment is being made. This is important as we might not remember why a change was made.

Notes

Step 5d
Then click **Save**.