

## 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.

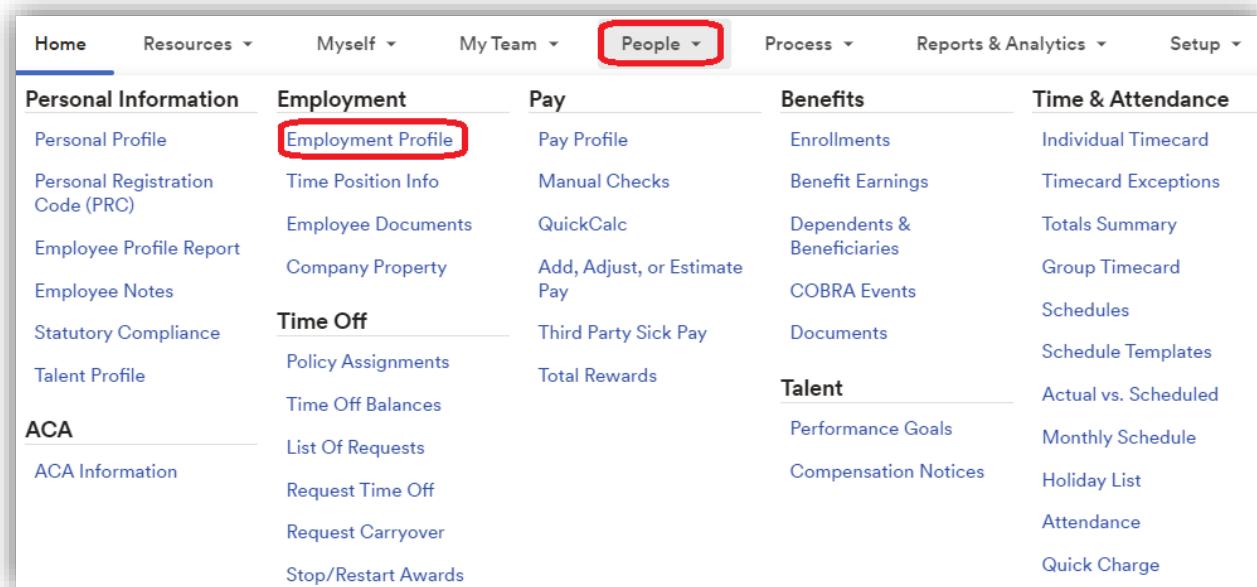
For example, if an employee would accrue at the 4.64 hour rate, but they negotiated the next level up to 6.15, the service date needs to be five years earlier.

Years of Service at Anniversary Date	Hours Earned Biweekly	Maximum Accumulation
Beginning at Date of Hire	4.62 hours	120 hours
Beginning on the 5 <sup>th</sup> year anniversary	6.15 hours	160 hours
Beginning on the 12 <sup>th</sup> 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**.



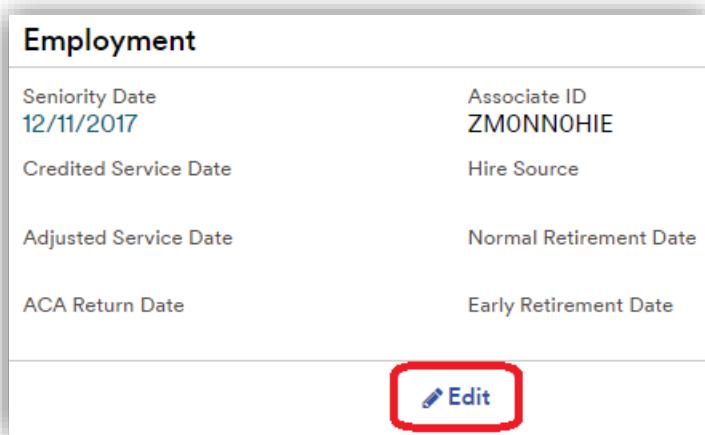
### Step 3

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

**Employment**

Seniority Date 12/11/2017	Associate ID ZM0NNOHIE
Credited Service Date	Hire Source
Adjusted Service Date	Normal Retirement Date
ACA Return Date	Early Retirement Date

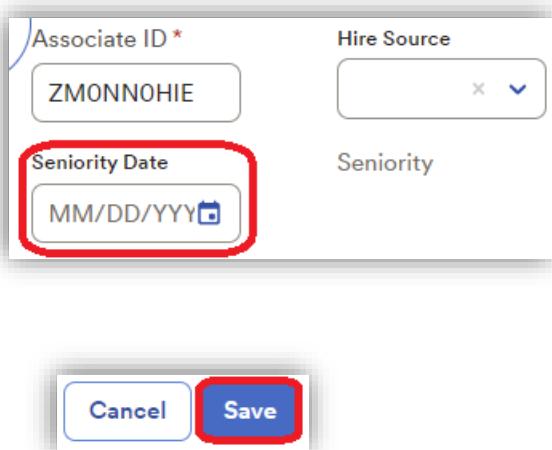
**Edit**



### Step 4:

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

Associate ID *	Hire Source
ZM0NNOHIE	<input style="border: 1px solid black; padding: 2px 5px;" type="button" value="X"/> <input style="border: 1px solid black; padding: 2px 5px;" type="button" value="▼"/>
Seniority Date	Seniority
<input style="border: 1px solid black; padding: 2px; width: 150px; height: 25px; border-radius: 5px;" type="text" value="MM/DD/YYYY"/> <input style="border: 1px solid black; padding: 2px 5px; border-radius: 5px;" type="button" value="▼"/>	
<input style="border: 1px solid black; padding: 5px 15px; border-radius: 5px; background-color: #e0e0e0; color: black; font-weight: bold; font-size: 10pt; margin-right: 10px;" type="button" value="Cancel"/>	<input style="border: 1px solid black; padding: 5px 15px; border-radius: 5px; background-color: #0070C0; color: white; font-weight: bold; font-size: 10pt;" type="button" value="Save"/>

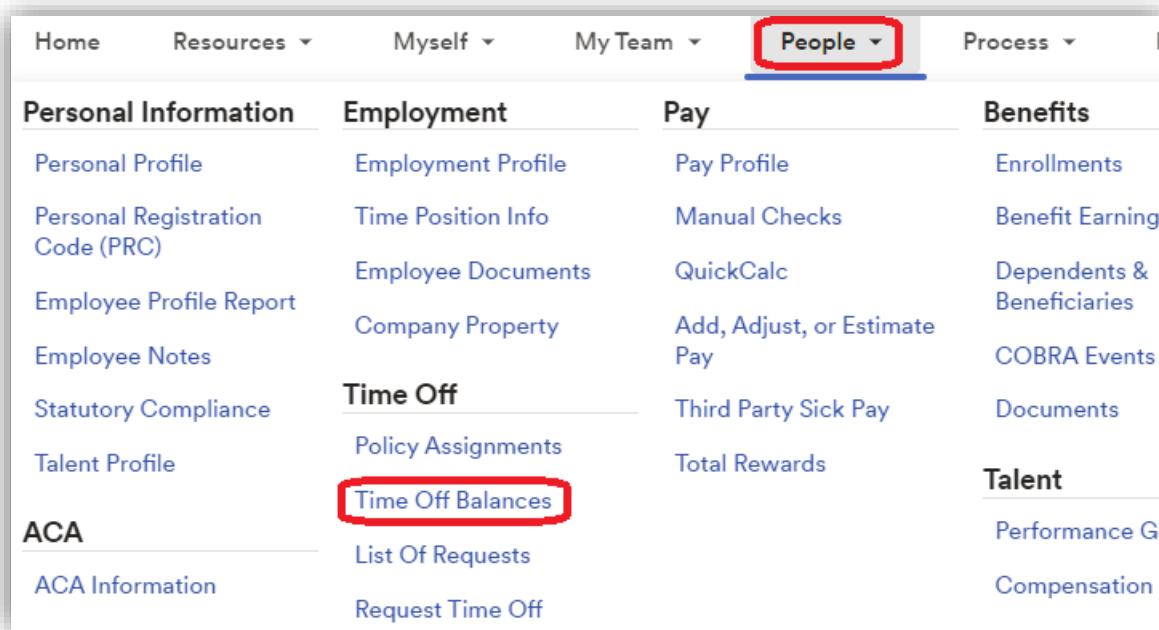


### Adjusting Time Off Balances:

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**

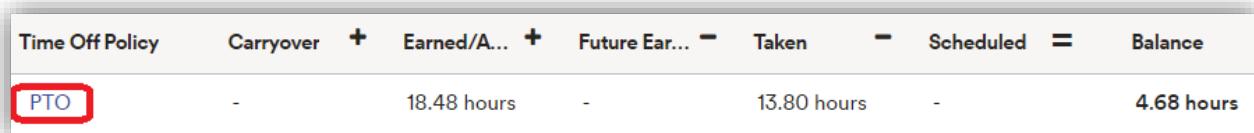


The screenshot shows the ADP mega-menu with the following structure:

Personal Information	Employment	Pay	Benefits
Personal Profile	Employment Profile	Pay Profile	Enrollments
Personal Registration Code (PRC)	Time Position Info	Manual Checks	Benefit Earnings
Employee Profile Report	Employee Documents	QuickCalc	Dependents & Beneficiaries
Employee Notes	Company Property	Add, Adjust, or Estimate Pay	COBRA Events
Statutory Compliance	<b>Time Off</b>	Third Party Sick Pay	Documents
Talent Profile	Policy Assignments	Total Rewards	<b>Talent</b>
<b>ACA</b>	<b>Time Off Balances</b>		Performance Go
ACA Information	List Of Requests		Compensation N
	Request Time Off		

#### Step 2

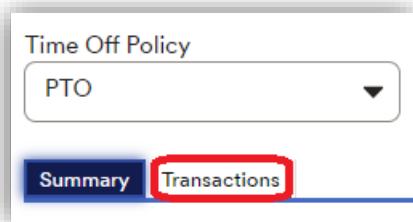
Click on the "PTO" link in the first column.



Time Off Policy	Carryover	+	Earned/A...	+	Future Ear...	-	Taken	-	Scheduled	=	Balance
<b>PTO</b>	-		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.

A screenshot of a form window titled 'Adjustment Type \*'. The dropdown menu shows 'Adjust Earned Amount' as the selected option. Below the dropdown, a note says 'Transaction Type : Earned Adjustment'. The next section is 'By Amount of \*', with a dropdown menu showing '+', a text input field, and the word 'Hours'. The next section is 'Transaction Date \*', with a date input field showing '05/21/2023'. The final section is 'Notes', which is a large empty text area.

### 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 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**.

