



# **Unicorn HRO**

## **Earned Sick Time Setup**

## OVERVIEW

iCON allows you the ability to set up a paid time off policy for earned sick time, also known as paid sick leave. A specific program is needed in order to calculate the special requirements for this type of plan. Follow the steps in this document to set up the policy.

## COMMON OBJECT DICTIONARY

To set up a paid time off policy for Earned Sick Time, access **Common Object Dictionary** and select the Paid Time Off Formula. Add a Paid Time Off Formula with Process Name ent\_est.p This Process Name is the program which calculates the accruals.

### Add Common Object Dictionary for Paid Time Off Formula

\* Paid Time Off Formula:

\* Short Description:

Long Description:

Process Name:

In Paid Time Off Codes, add a record for Earned Sick, as shown in this example. You may use any Code and Description.

### Update Common Object Dictionary for Paid Time Off Codes

\* Paid Time Off Code:

\* Short Description:

Long Description:

Eligible For Time Off?:  Yes  No

In Paid Time Off Buckets, add a bucket for Earned Sick as shown in this example. You may use any Code or Description.

### Update Common Object Dictionary for Paid Time Off Buckets

\* Paid Time Off Bucket Code: EST

\* Short Description: Earn Sick Time

Long Description: Earn Sick Time

## ***PAID TIME OFF POLICIES***

In the **Paid Time Off Policies** function, depending on your policy, select to add either an Anniversary or Calendar plan.

### Update Paid Time Off Policy

\* = Required

**Paid Time Off Policy:**

Paid Time Off Group:	Value PST Group	<input checked="" type="checkbox"/> Carry Over Option
Paid Time Off Type:	Calendar	<input type="checkbox"/> Recalculate Total
Paid Time Off:	PST-30-40Mx-NoC	<input type="checkbox"/> First Year Rules Exist
Plan Date:	04/13/2016	<input type="checkbox"/> Prorate First Year
Accrual Requirement:	Hours Worked	<input checked="" type="checkbox"/> Payroll Paid Time Off
Accrual Period:	Every Hour on Paycheck	<input type="checkbox"/> Take Year After Accrual Period
Paid Time Off Formula:	Earned Sick	<input type="checkbox"/> Add Carry Over to Last Year Accrual Balance
Days Empl. Req. For Elig.:	0	<input type="checkbox"/> Accrue After Required Hours
Date Option:	*no value	<input type="checkbox"/> Store/Include Remaining Hours
		<input checked="" type="checkbox"/> Print On Check

Enter the Plan date and select the applicable Accrual Requirement. For Earned Sick policies the “hours worked” accrual is most common.

Select the Paid Time Off Formula. Note this enables the drop down list for the Accrual Period.

The Accrual Period allows provides three options –

- 1) Beginning of Year: This accrual period will grant a certain number of hours to an employee on their first paycheck of the calendar year.
- 2) Every Hour on Paycheck: This accrual period will accrue a certain number of hours per paycheck if a minimum hours rule is defined. For example, if Puerto Rico law required employees to accrue 8 hours provided the employee worked at least 115 hours in a month.
- 3) Every Paycheck: This accrual period would be used to accrue a certain number of hours for every hour worked on the paycheck. For example, if an employee should accrue 1.33 hours for every 40 hours worked.

Select the Accrue After Required option if you want the system to accruing hours after the employee has worked a certain number of hours. The system will add hours worked per month and hours this period and check if the monthly maximum has been reached.

The Store/Include Remaining Hours field is enabled when the Accrual Period is Every Paycheck. If this field is checked and the minimum number of hours worked has not been met, the system will store the hours worked as remaining hours and will include them in the next payroll processing accrual.

### Update Paid Time Off Policy

\* = Required

Paid Time Off Policy:		
Paid Time Off Group:	Value PST Group	<input checked="" type="checkbox"/> Carry Over Option
Paid Time Off Type:	Calendar	<input type="checkbox"/> Recalculate Total
Paid Time Off:	PST-30-40Mx-40C	<input type="checkbox"/> First Year Rules Exist
Plan Date:	01/01/2014	<input type="checkbox"/> Prorate First Year
Accrual Requirement:	Hours Worked	<input checked="" type="checkbox"/> Payroll Paid Time Off
Accrual Period:	Every Paycheck	<input type="checkbox"/> Take Year After Accrual Period
Paid Time Off Formula:	Earned Sick	<input type="checkbox"/> Add Carry Over to Last Year Accrual Balance
Days Empl. Req. For Elig.:	0	<input type="checkbox"/> Accrue After Required Hours
Date Option:	*no value	<input checked="" type="checkbox"/> Store/Include Remaining Hours
		<input checked="" type="checkbox"/> Print On Check

Once you have saved the Paid Time Off record, click on the Accrual Rules button and add the required rule(s).

**Update Paid Time Off Accrual Rule**

**Paid Time Off Policy:**  
Paid Time Off Group: Value PST Group      Paid Time Off: PST-30-40Mx-40C  
Paid Time Off Type: Calendar      Plan Date: 01/01/2014

If the employee's length of service is from  years and  months through  years and  months and the employee is scheduled for  hours per pay period the following will occur:

The employee will accrue  hours for every  Hours Worked not to exceed  hours within a given year.

Maximum carry over policy for this Paid Time Off is  hours per year.

Required to work at least  hours during the month in which the accrual takes place.

After the accrual rules have been defined, click on the buckets button to add a sequence number, Paid Time Off Bucket Code and a maximum accrual balance. The Accrual Balance must include the maximum number of hours that may be accrued per year, plus any carryover balance that is allowed.

**Update Paid Time Off Bucket**

**Paid Time Off Policy:**  
Paid Time Off Group: Value PST Group      Paid Time Off: PST-30-40Mx-40C  
Paid Time Off Type: Calendar      Plan Date: 01/01/2014

\* = Required

Sequence:

Paid Time Off Bucket Code:

Credit Account Accrued:

Debit Account Accrued:

Credit Account Available:

Debit Account Available:

Maximum Balance:

According to our research, the Puerto Rico paid sick leave requires that an employee must work 115 hours before accruing 1 day for the month. Here is an example of that set-up. Please verify the rules for your organization before setting up the paid time off policy.

The Paid Time Off Formula must be set to the Paid Time Off Formulas common object value containing the ent\_est.p program. In this example, the Earned Sick formula contains this program. Select the Accrual Period of Every Paycheck. Select the checkbox for Accrue After Required Hours, which will tell the system to only accrue after the employee has worked the required number of hours in the month. Unselect the checkbox for Carry Over Option, since no carry over is allowed. Enter the Days Employment Required for Eligibility, which defines any waiting period for new hires.

### Update Paid Time Off Policy

\* = Required

<b>Paid Time Off Policy:</b>		
Paid Time Off Group:	Value PST Group	<input type="checkbox"/> Carry Over Option
Paid Time Off Type:	Calendar	<input type="checkbox"/> Recalculate Total
Paid Time Off:	PST-Puerto Rico	<input type="checkbox"/> First Year Rules Exist
Plan Date:	01/01/2014	<input type="checkbox"/> Prorate First Year
Accrual Requirement:	Hours Worked	<input checked="" type="checkbox"/> Payroll Paid Time Off
Accrual Period:	Every Paycheck	<input type="checkbox"/> Take Year After Accrual Period
Paid Time Off Formula:	Earned Sick	<input type="checkbox"/> Add Carry Over to Last Year Accrual Balance
Days Empl. Req. For Elig.:	90	<input checked="" type="checkbox"/> Accrue After Required Hours
Date Option:	*no value	<input type="checkbox"/> Store/Include Remaining Hours
		<input checked="" type="checkbox"/> Print On Check

For the accrual rule, you must enter 173.333 in the monthly hours worked field. The program for Puerto Rico is hard-coded to look for this amount, even though it may not apply to each employee. Enter 115 in the Required to Work field; when the employee has worked this number of eligible hours, he or she will accrue the hours that you specify.

### Update Paid Time Off Accrual Rule

**Paid Time Off Policy:**  
Paid Time Off Group: Value PST Group      Paid Time Off: PST-Puerto Rico  
Paid Time Off Type: Calendar      Plan Date: 01/01/2014

If the employee's length of service is from  years and  months through  years and  months and the employee is scheduled for  hours per pay period the following will occur:

The employee will accrue  hours for every  Hours Worked not to exceed  hours within a given year.

Maximum carry over policy for this Paid Time Off is  hours per year.

Required to work at least  hours during the month in which the accrual takes place.

Set up a bucket for this plan, with the maximum balance that can exist.

### Update Paid Time Off Bucket

**Paid Time Off Policy:**  
Paid Time Off Group: Value PST Group      Paid Time Off: PST-Puerto Rico  
Paid Time Off Type: Calendar      Plan Date: 01/01/2014

\* = Required

Sequence:

Paid Time Off Bucket Code:

Credit Account Accrued:

Debit Account Accrued:

Credit Account Available:

Debit Account Available:

Maximum Balance:

## ***PAID TIME OFF PAY CODE OVERRIDE***

Use this function to indicate if any pay codes should be excluded from the paid time off accrual program.

### Paid Time Off Pay Code Override

\* = Required

\*Paid Time Off Group: Value PST Group

\*Paid Time Off Plan: PST-30-40Mx-40C refresh

To update, click on information in the left column.

Pay Type	Override?	Action
Sabbatical	yes	view delete

+ add

## ***PAID TIME OFF PAY CODE ASSIGNMENT***

If you will be using a pay code to track the sick hours that employees take, use this function to link that pay code to the paid time off policy.

### Paid Time Off Pay Code Assignment

\* = Required

\*Paid Time Off Group: Value PST Group

\*Type Of Pay: PST-30-40Mx-40C refresh

To update, click on information in the left column.

Sequence	Paid Time Off	Paid Time Off Bucket Code	Action
1	PST-30-40Mx-40C	Paid Sick S42	view delete

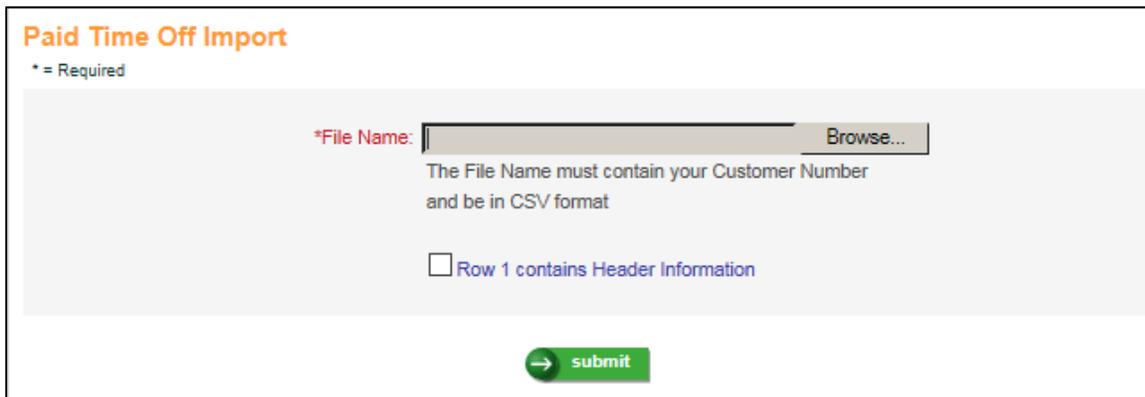
+ add

If you will be using an absence code to track employees' sick time, use the **Paid Time Off Absence Code Assignment** function instead.

## ***PAID TIME OFF IMPORT***

If you have been storing paid time off balances outside of iCON, you may use this function to import employee **Paid Time Off** records from a .csv file. When this function is used, you will be prompted to choose the file that you wish to import. The file must be in CSV format and must contain your customer number in the file name. This file must contain each of the fields in the paid time off table with the fields in the proper order.

The Paid Time Off Import functionality can only be used when starting a plan for one or more employees. This import will not update existing paid time off records.



The screenshot shows a web form titled "Paid Time Off Import". At the top left, there is a legend: "\* = Required". The main form area has a label "\*File Name:" followed by a text input field and a "Browse..." button. Below the input field, there is a message: "The File Name must contain your Customer Number and be in CSV format". Below this message is a checkbox labeled "Row 1 contains Header Information". At the bottom center of the form is a green "submit" button with a right-pointing arrow.

Click on the Browse button to select the file you wish to import. The file name must contain your Customer Number and it must be in the .csv format. The system will display the selected file. If the file contains a header row, click on the checkbox next to Row 1 contains Header information.

Click on Submit to begin the process. The job will be sent to the job server.

When the job completes, check the Paid Time Off Import Errors report in **Report Master Listing**. If no errors were found, the Paid Time Off Import report will print Import successful – no errors in the file, and the number of records imported.

If any errors were found, the report will tell you which employees were affected and the reasons for the errors. No records will be imported if there are any errors. Correct the data and import the file.

The mandatory fields are as follows: Employee#, Plan Date, Paid Time Off Group and Paid Time Off Plan. Add the Units Accrued and the Units Carry-Over to populate the Units Balance field.

The field names in the header record must be exactly as shown:

- Employee#
- Plan Date
- Paid Time Off Group
- Paid Time Off Plan
- Paid Time Off Bucket
- Units Accrued
- Units Carry-Over
- Units Balance
- Units Used
- Rate Accrual
- Hire Date
- Service Hours
- Hours Worked in the Month
- Hours Worked in the Year
- Stored Hours Worked
- Source

If the header row contains optional fields but no data is to be imported into those fields, a comma must be included as a placeholder for that field.

## PAID TIME OFF

For plans defined as paid sick leave, additional fields will appear in **Paid Time Off**: Hours Worked This Period, Hours Worked This Month, Hours Worked This Year and Remaining Earned Hours. For paid sick leave for a Puerto Rico plan, only the first three fields will be shown; the Remaining Earned Hours does not apply and therefore will not appear for Puerto Rico plans.

Summary	Demographics	Work Profile	Absences	Disciplinary Actions	Education	Certifications	Emergency Contacts	Job Review																																																								
<b>Denise DeLorenzo</b> Accounting Manager Cons. Group / Olympics / US Corporate / Alpine Ski	<h3>Update Paid Time Off</h3> <p>* = Required</p> <table border="0"> <tr> <td>Paid Time Off Group:</td> <td>Value PST Group</td> <td>Plan Date:</td> <td>01/01/2016</td> </tr> <tr> <td>Paid Time Off:</td> <td>PST-30-40Mx-40C</td> <td>Paid Time Off Bucket:</td> <td>Paid Sick S42</td> </tr> <tr> <td>Length of Service:</td> <td>3 Yr. 2 Mo.</td> <td></td> <td></td> </tr> </table> <table border="0"> <tr> <td><b>Hours Accrued</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Plan year-to-date:</td> <td>0.000</td> <td>Hours Worked This Period:</td> <td>40.000</td> </tr> <tr> <td>Carried Over:</td> <td>7.000</td> <td>Hours Worked This Month:</td> <td>40.000</td> </tr> <tr> <td>Pending:</td> <td>1.000</td> <td>Hours Worked This Year:</td> <td>50.000</td> </tr> <tr> <td><b>Hours Used</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Plan year-to-date:</td> <td>0.000</td> <td>Remaining Earned Hours:</td> <td>20.000</td> </tr> <tr> <td>Pending:</td> <td>0.000</td> <td></td> <td></td> </tr> <tr> <td><b>Adjustment</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Adjusted Hours:</td> <td><input type="text" value="0.000"/></td> <td></td> <td></td> </tr> <tr> <td><b>Balance</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Available Hours:</td> <td>8.000</td> <td></td> <td></td> </tr> </table> <p>Comments:</p>								Paid Time Off Group:	Value PST Group	Plan Date:	01/01/2016	Paid Time Off:	PST-30-40Mx-40C	Paid Time Off Bucket:	Paid Sick S42	Length of Service:	3 Yr. 2 Mo.			<b>Hours Accrued</b>				Plan year-to-date:	0.000	Hours Worked This Period:	40.000	Carried Over:	7.000	Hours Worked This Month:	40.000	Pending:	1.000	Hours Worked This Year:	50.000	<b>Hours Used</b>				Plan year-to-date:	0.000	Remaining Earned Hours:	20.000	Pending:	0.000			<b>Adjustment</b>				Adjusted Hours:	<input type="text" value="0.000"/>			<b>Balance</b>				Available Hours:	8.000		
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<b>Direct Reports: 0</b>																																																																