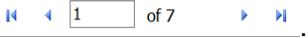


Leave Time

Menu items

-  Edit – This will allow you to make a change to an existing record. This is the default when you open a menu.
-  New – This is used to create a new record.
-  Delete – This is used to delete an existing record. If a record is tied to an employee it cannot be deleted.
-  Save – This is used to save a new record or a change after editing a record. The system will automatically save when you are in the edit mode.
-  Undo – This will undo a change made to a record if it has not been saved by pressing the Save icon. You cannot undo deleting a record.
-  Search – This will allow you to look at a list of all record and select the desired record.
-  Previous – If you select the previous menu item, you will be moved to the previous record every time you hit the Enter key on your keyboard.
-  Next – If you select the next menu item, you will be moved to the next record every time you hit the Enter key on your keyboard.
-  Copy – This will allow you to copy an existing record to create a new record.
-  Options – This allows you to lock the settings on specific fields so they cannot be changed.
-  Restricted Fields – This will allow you to open a locked field.
-  Application Help – Will take you to the online help guide.
-  What's this Help – When clicked, this will give you an explanation of any field you hover over.
- The search bar will allow you to enter a record number or title. You can also move between records with the arrows on the left side of the search bar  1 of 7.

Leave Rates

Leave Rates are used in Payroll to set up a schedule or process to add and track banks of time for employees. To access Leave Rates, you will open Payroll – Organization – Leave Rates.

Leave Rate: 100 VACATION

Leave Rate Levels Notes

Rate number:

Description:

Abbreviated description:

Type:

Adjust to carryover at:

Initial level date based on:

Modifier: %

Can exceed accumulation limit

Percentage

Max hours for calculation:

Pay code hours to include in calculation:

Fixed

Accrual frequency:

Monthly period numbers

1	2	3	4	5	...
A	A	A			

1. A new Leave Rate can be added to Payroll by clicking the new icon and typing a unique leave rate number. There is no special meaning or order to the leave rate numbers. Leave Rate numbers can be viewed on leave reports and in employee records.
2. A unique description is then entered to identify the leave rate. The Description field will allow 30 characters. Leave Rate descriptions are used on leave reports and employee records
3. A unique abbreviated description should be assigned; 3 characters are allowed in the abbreviated description field. Abbreviated descriptions can be viewed on leave reports.
4. A type must be assigned to the leave rate.
 - a. Fixed is used when a defined number of hours are to be added to the employee bank at specified time intervals.
 - b. Percentage is used when the number of hours to be added to the employee bank at the specified intervals is dependent on other factors.

5. Adjust to carryover defines the timeframe in which leave balances will be reduced to a defined number of hours.
 - a. Anniversary Date is used when employee leave balances are to be reduced as of an employee's anniversary date. This is common when vacation is given on an anniversary date and to be used by the next anniversary date.
 - b. Calendar year-end is used when employee leave balances are to be reduced as of December 31 of each year.
 - c. Fiscal year-end is used when employee leave balances are to be reduced as of the end of the municipal fiscal year (when it is not December 31).
 - d. None is used when leave balances are only reduced when time is used or paid out.
6. Initial level date based is used to control the date the system will move an employee from one level of a rate to another.
 - a. Anniversary date is used when an employee moves from one level to another on his/her anniversary date.
 - b. Calendar year date is used when an employee moves from one level to another on December 31 of the year, based on the year the leave rate is assigned to the employee.
 - c. Fiscal year date is used when an employee moves from one level to another on the last day of the municipal fiscal year (when it is not December 31), based on the year the leave rate is assigned to the employee.
 - d. Hire date is used when an employee moves from one level to another on his/her hire date.
 - e. None is used when an employee does not move from one level to another.
 - f. Start date is used when an employee moves from one level to another on his/her start date.
7. Modifier is used to control the impact of hours entered into Enter Leave Time Adjustments. If the Modifier is set at 100, the number of hours entered in enter leave time adjustments will be added or subtracted to the employee leave bank. If the Modifier is changed, the system will multiply the number of hours that are entered into enter leave time adjustments by the percentage and add or subtract the product of the entry to the employee leave bank.
8. **New** Annual Accrual Method determines whether the system should look at the check issue date range or the pay period date range to determine the time frame being used for annual accrual limits.
9. Checking the Can Exceed Accumulation Limit checkbox will allow employees to have more hours in the leave bank than the defined maximum but with a warning. If the checkbox is not checked, the system will not allow more hours than the defined maximum.
10. Percentage options are available if the Type is set to percentage.
 - a. Max hours for calculation is used when the number of hours being added to the bank is a percent of hours "worked". Usually a max of 80 hours (for biweekly payrolls) will be entered to represent a full time employee earning.
 - b. Pay Code Hours to Include in Calculation is populated by clicking the select button. Then the pay codes that the percent should be calculated, or those used in the definition of "hours worked" for the leave time purpose, should be selected.
11. Fixed options are available if the Type is set to fixed. Accrual frequency determines when the defined hours will be added to the employee bank.
 - a. Pay Periods allows the selection of the pay period for each month that the hours will be added to the employee bank. These pay period numbers are tied to the months by the pay period end date.

b. Anniversary date allows the hours to be added to the employee bank during the pay period that includes the employee anniversary date.

12. Leave levels control the number of hours that are added to the employee bank.

Leave Rate: 100 VACATION

Leave Rate Levels Notes

Level	Description
1	FIRST 12 MONTHS
2	YEARS 1- 5
3	YEARS 6-9
4	YEARS 10-19
5	YEARS 20+

Level

Level number:

Description:

Based on:

Length:

Rate/Amount:

Accumulation limit:

Carryover limit:

a. Click the new button to add a level.

b. Assign a level number. Start at 1 and count up. ***This is important, if you try to be creative in your level numbering and skip numbers you will receive a fatal error when trying to copy employees.***

c. Enter a description defining the level or step. The Description field will allow 30 characters. This often is used to describe the length of time an employee will be at this step or it will match the wording in the contract schedule.

d. Based on is normally set to length of service. This allows the entry of the length of time an employee will remain at each level. This can be changed to Hours Worked to only allow an employee to move from one level to another after they work X number of hours. If you base the level on hours worked you will need to add the pay codes that should be used in determining the hours worked at each level.

e. Length can be entered in months or years. This is the length of time an employee will remain at each level.

f. Rate/Amount is the number of hours that are added to an employee bank at the defined time.

i. If the Type of leave rate is set to Fixed this is the number (amount) of hours that will be added to the employee bank.

ii. If the Type of leave rate is set to Percentage then this is the percentage that the system will use to add time.

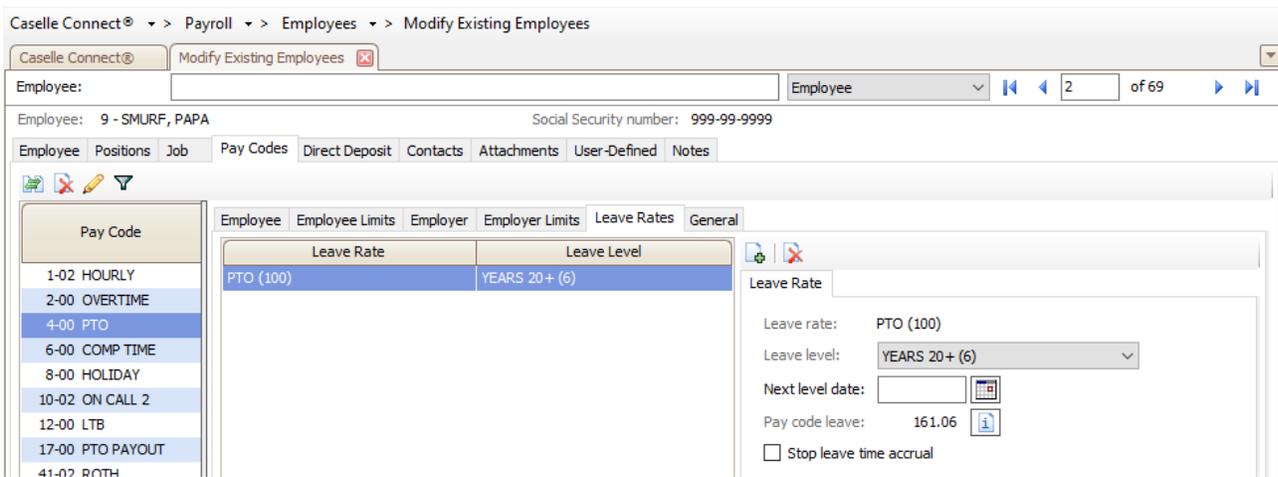
1. If a separate pay code is used to record comp time earned and comp time used (the bank of hours being tied to the comp time used pay code), the rate is often set at 150. This allows the system to multiply any hours entered in Enter Payroll Checks on the pay code earned pay code (selected in the pay codes used for calculation box on the leave rate tab) by 150% when adding to the bank.

2. If the time being added to the bank is a percentage of "hours worked", this should be the total hours given in the year at this level divided by 2080.

- g. Accumulation Limit is the maximum number of hours an employee may have in the bank at any given time.
- h. **New** Annual Accrual Limit allows you to set a maximum number of hours that an employee can accrue in a year. This will prevent an employee from earning hours, using hours and then earning more above this total earned threshold.
- i. Carryover limit is the number of hours an employee may keep in his/her bank from one year (defined on the leave rate tab) to another. The system will reduce the bank to the carryover limit when the Adjust Leave Balances process is run and the pay period includes the defined carry over adjustment time frame.

Assigning Leave to an Employee

Leave Rates are assigned to employees in Payroll – Employees – Modify Existing Employees. Select the employee and click on the Pay Codes tab. Double click on the leave time pay code and then click on the Leave Rates tab.



Caselle Connect® > Payroll > Employees > Modify Existing Employees

Employee: 9 - SMURF, PAPA Social Security number: 999-99-9999

Employee Limits Employer Employer Limits Leave Rates General

Leave Rate	Leave Level
PTO (100)	YEARS 20+ (6)

Leave Rate configuration details:

- Leave rate: PTO (100)
- Leave level: YEARS 20+ (6)
- Next level date: [Calendar icon]
- Pay code leave: 161.06 [Download icon]
- Stop leave time accrual

1. Verify the leave rate (schedule) the employee should be tied to. You can change the default leave rate assigned to the employee by using the delete and new buttons on the righthand side of the Leave Rate tab.
2. Verify the leave level (step) of the schedule the employee should be tied to. Note that not every employee will start at level one. If the employee negotiates to start at a higher level but will follow the schedule after that point you do NOT need to setup special leave rates for the employee.
3. Verify the Next Level Date. This is the date the employee will move to the next leave level. Once set, the system will maintain this when you run the Update Leave Levels; if you skip the update leave levels step you may need to adjust this manually. If an employee skips levels/steps you will need to set this date.

4.  Clicking the letter 'i' will show the balance, hours used and hours earned historically for the leave code.
5. Stop leave time accrual should be checked if an employee is still employed, can use the remaining hours in his/her leave bank but can no longer accrue hours.

Manual Adjustments

Leave balances can be manually adjusted for employees by going to Payroll – Employees – Enter Leave Time Adjustments.

Caselle Connect® > Payroll > Employees > Enter Leave Time Adjustments

Caselle Connect®
Enter Leave Time Adjustments ✕

Reference number:	<input style="width: 80%;" type="text" value="1"/>
Check issue date:	<input style="width: 80%;" type="text" value="07/20/2022"/> 
Employee:	<input style="width: 80%;" type="text"/> ▼
Pay code:	<input style="width: 80%;" type="text"/> ▼
Comments:	<input style="width: 80%; height: 20px;" type="text"/>
Hours:	<input style="width: 80%;" type="text" value=".00"/>

1. Verify the pay period you are recording the adjustment in. This is the pay period that the change in the balance will be reflected. Changing the check issue date here will not change the pay period that you are entering in.
2. Enter the employee name or number. If you cannot find the appropriate employee you can use the search button in the drop down next to the employee name field.
3. Enter the pay code tied to the leave rate. You can use the drop down at the end of the Pay Code field to search for the code if you are unsure of the pay code number. You can also use the drop down at the end of the Pay Code field to add the pay code/leave rate to the employee if it is not an option.
4. Comments can be used to store a description of why you are adjusting the balance of hours. Comments will only be seen in the payroll.
5. Hours entered as a positive number will be added to the bank. Hours entered as a negative number will reduce the balance of the bank. If the leave rate was setup with a modifier the system will multiply the number you enter by the modifier.

Leave Payout Check

To process a leave payout check you will need to a few items.

1. You will need to know whether this payout be subject to retirement or not? This will vary by state and by municipal policies.
 - a. If the payout is subject to retirement, you may be able to use the leave time pay code for the payout unless you need to report payouts to the state separate from wages for retirement purposes.
 - b. If the payout is not subject to retirement, you will need a payout pay code that is not subject to retirement.
2. You will need to determine whether you are including this on the final or a regular payroll check/direct deposit or whether you will be issuing a separate check/direct deposit for this.
 - a. If including on a regular payroll check/direct deposit, you will need to verify the total hours paid as the payout may impact the standard hours depending on which code(s) you use.
 - b. If on a separate check/direct deposit you will want to pay attention to the pay period number being used to monitor the deductions and benefits that are calculated with the payment.