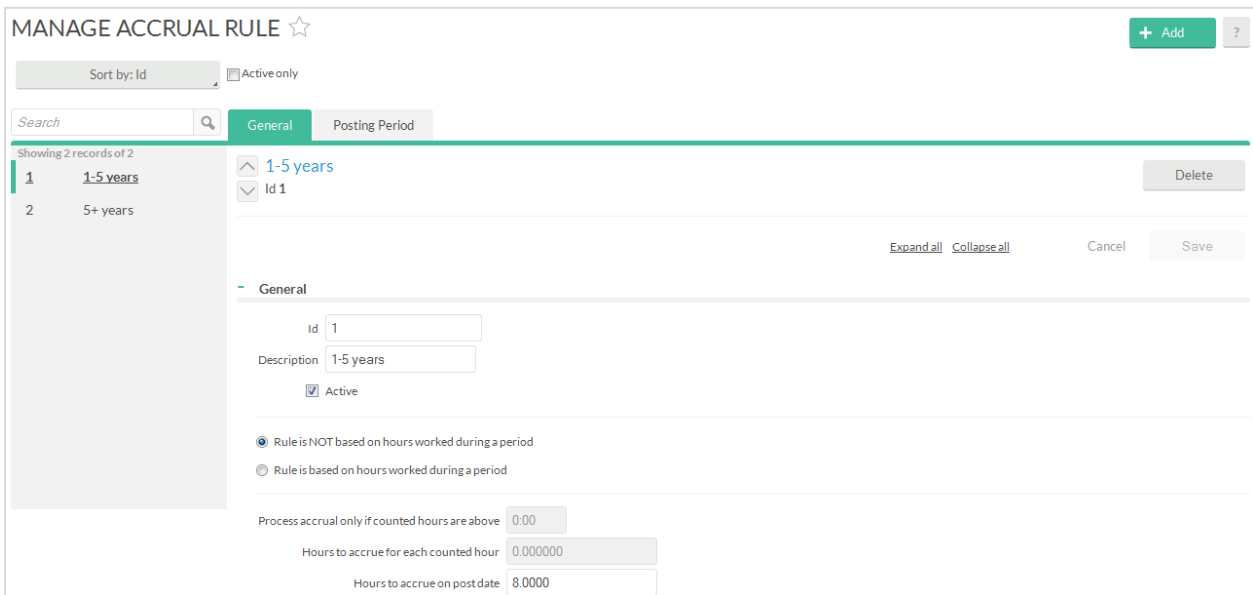


Accruals Essentials

Accruals are used within **TimeClock Plus** to maintain a balance of time that an employee earns, typically for any type of leave (e.g. vacation, sick, or comp time). Accruals are handled in a two part system: with **Accrual Banks** storing the accrued time, and **Accrual Rules** automatically generating the accruals according to a rule that the user sets up.

Manage Accrual Rule



MANAGE ACCRUAL RULE ☆ + Add ?

Sort by: Id Active only

Search General Posting Period

Showing 2 records of 2

1	1-5 years	<input type="button" value="Delete"/>
2	5+ years	

[Expand all](#) [Collapse all](#)

General

Id

Description

Active

Rule is NOT based on hours worked during a period
 Rule is based on hours worked during a period

Process accrual only if counted hours are above

Hours to accrue for each counted hour

Hours to accrue on post date

If you will need **TimeClock Plus** to actively add accrual time to a bank, then you can create what is called an **Accrual Rule**, which sets how the accrual is processed.

Creating an Accrual Rule Not Based on Hours Worked

If the amount your employees work does not affect how they accrue time (ex: They receive a balance of accrued time on a specified date, such as their hire date) then you will need to create an accrual rule not based on hours worked using the following steps:

1. Browse to **Manage Accrual Rule (Configuration > Accruals > Accrual Banks)** and click **Add**.
2. The **Add Accrual Rule** wizard will appear. In the section marked **General Information**, you can fill in an **ID** number and **Description** for the bank, as well as set an **Active** status for the rule.



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3. Select **Rule is NOT based on hours worked during a period**. Below that, you can specify how many hours are accrued on the date the accrual posts.
4. Click **Next**. This will take you to the **Period Options** section, where you can choose how often and when the accrual posts. You can also configure when the accrual begins posting, and when it ceases posting, based on how many days since the individual's hire date (which is helpful for creating a tiered system of accruals).
5. Click **Next**. This will take you to the **Rule Summary** section. If the rule's summary matches what you need, click **Finish**.

Creating an Accrual Rule Based on Hours Worked

If your employees will be accruing hours according to how many hours they have worked (e.g., For every hour of work, the employee accrues 0.078 hours of vacation time) then you will need to create an accrual rule based on hours worked using the following steps:

1. Browse to **Accrual Rules (Configuration > Accruals > Accrual Rules)** and click **Add**.
2. The **Add Accrual Rule** wizard will appear. In the section marked **General Information**, you can fill in an **ID** number and **Description** for the bank, as well as set an **Active** status for the rule.
3. Select **Rule is based on hours worked during a period**.
4. Below that, you can specify whether the accrual processes if the counted hours are above a certain threshold, how many hours are accrued for each counted hour, and/or what flat amount of hours are accrued on the date the accrual posts.
5. Click **Next**. This will take you to the **Counted Hours – Job Codes** section, where you can specify which job codes' hours count toward the accrual. This can apply to **All job codes**, **All clockable job codes**, and **Only selected job codes**.
6. Click **Next**. This will take you to the **Counted Hours – Options** section. Here, you can choose whether Regular, Overtime 1, and Overtime 2 hours count toward the accrual. You can also choose which hours within a time frame get counted for the purposes of the accrual.
7. Click **Next**. In the **Period Options** section, you can choose how often and when the accrual posts. You can also configure when the accrual begins posting, and when it ceases posting, based on how many days since the individual's hire date (which is helpful for creating a tiered system of accruals).
8. Click **Next**. This will take you to the **Rule Summary** section. If the rule's summary matches what you need, click **Finish**.

General Tab

The **General** tab is where you can manage the accrual bank's **ID** number, **Description**, and **Active/Inactive** status. You can also manage whether or not the rule is based on hours worked in a period, how much to accrue for each counted hour, and how many hours to accrue on the post date.



TimeClock Plus

If your accrual rule is based on hours worked in a period, you should also see the **Counted Hours – Job Codes** section, which allows you to specify which job codes count toward this code; and the **Counted Hours – Options section**, which allows you to specify whether Regular, Overtime 1, and/or Overtime 2 hours count toward the accrual, as well as which hours within a certain time frame.

Posting Period Tab

The Posting Period tab allows you to manage how often and when the accrual posts. You can also specify when the accrual begins posting, and when it ceases posting, based on how many days since the individual's hire date (which is helpful for creating a tiered system of accruals).

Manage Accrual Bank

MANAGE ACCRUAL BANK ☆

Sort by: Id Active only

Search

Showing 2 records of 0

1	Vacation bank	Id 1	Delete
2	Sick bank		

Expand all Collapse all Cancel Save

General

Id

Description

Active

+ Accrual Rules

+ Accrual Usage Job Codes

+ Caps

+ Resets

The first thing you will need to do is create an **Accrual Bank**. This will be a way to maintain a balance of hours in the desired job codes, with the option to have time deducted when used.

Creating an Accrual Bank

1. Browse to **Accrual Banks (Configuration > Accruals > Accrual Banks)** and click **Add**.
2. The **Add Accrual Bank** wizard will appear. In the section marked **General Information**, you can fill in an **ID** number and **Description** for the bank, as well as set an **Active** status for the bank.
3. Click **Next**. This will take you to the **Assign Accrual Rules** section. Here, you can assign any **Accrual Rules** you may have set up in the system, by using the **Assign** button.

Accruals Essentials

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TimeClock Plus

4. Click **Next**, and you will be taken to the **Assign Accrual Usage Job Codes** window. This allows you to select which job code(s) will apply towards deducting a total from this bank.
5. Clicking **Next** again will take you to the **Accrual Cap** window. This gives you the option to set up an amount to cap the accrual with, if applicable.
6. Click **Next**. This will take you to the **Accrual Reset** window, which allows you to choose if/when the accrual resets, and what amount it resets to if applicable.
7. Click **Finish**.

General

The **General** section is where you can manage the accrual bank's **ID** number, **Description**, and **Active/Inactive** status.

Accrual Rules

The **Accrual Rules** section is where you can add any additional accrual rules to the bank should the need arise.

Accrual Usage Job Codes

If any additional job codes need to be added to an accrual bank, then it is possible to do so via the **Accrual Usage Job Codes** section.

Caps

The **Caps** section is where you can add in an amount for the accrual to max out at.

Resets

The **Resets** section allows you to manage when an accrual resets, and what amount it resets to.



Assigning Accruals

Once your accrual banks have been completed you can assign them to your employees to begin tracking accrual balances.

1. Browse to **Employee > Employee Profiles**.
2. Select an employee and browse to **Leave > Accrual Banks**.
3. Click **Assign** to add an Accrual Bank to the employee, then **Save**.

You can also assign accrual banks to your employees en masse:

1. Browse to **Employee > Global Modification**.
2. Select the employees you want to assign your bank to and click **Next**.
3. Select **Leave > Accrual Banks > Assign Accrual Banks** and click **Next**.
4. Select the bank(s) that you wish to assign and click **Next**.
5. Review the summary and click **Process**.

**For assistance please call Customer Support at: (325) 223-9300
Or visit us at: Support.TimeClockPlus.com**

Accruals Essentials

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