



Accrual Policy Questionnaire

- Please include a separate copy of this worksheet for every type of PTO (ex: Sick, Vacation, etc.) Fill it out as completely as possible. Also include a copy of your policy when sending this questionnaire back.
- The available balances will not show up on the check stub for the first payroll(s). After you are confident that the accruals are working properly, please contact us at Paylocity and we will start printing the balances on the check stubs.
- Setting up a PTO policy generally takes about two weeks to one month from our receipt of your information.
- If accruing per hour, every time that a new earning code is added that should be accrued on, you must inform us of that when the new earning code is set up. In addition, if a new earning code is set up that should reduce an employee's balance; you must inform us of this when the new code is set up.
- **The system will not prevent an employee from taking more PTO than they have accrued.** While entering the payroll, you must verify that an employee has enough time available to use, unless your policy allows employees to "borrow" hours.



Accrual Policy Questions

Company Name(s) and Number(s): _____

Person(s) to contact about the set up: _____

Email address: _____

This policy is for: Vacation Sick Floating Holiday PTO Other: _____

➤ How many hours are in a standard work day? _____

➤ Can employees who are not active (ex: leave of absence employees) accrue time off? **Y** **N**

➤ Do you want to calculate dollars based on accrued hours? **Y** **N**

➤ Circle what you want to show on the check stub
Available hours used hours both nothing

➤ How often should employees accrue? Please circle one.

Per hour worked Quarterly
Every pay period Annually by calendar year
Monthly Annually by anniversary Other frequency: _____

➤ If employees should accrue per hour, which earning codes will they accrue on (Ex: Reg, OT, Vacation, Holiday, etc)?



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- **You must attach a copy of your company's time off policy for proper setup.**