

How to Associate Time Off with Employee Earning

1. Open an employee record from **Employees**.
2. Click **Time Off** tab under **Employee** tab.
3. Click **Add** grid icon.

The screenshot shows the 'Entity - Aaron P Ritter' window with the 'Employee' tab selected. The 'Time Off' sub-tab is active, displaying a table with columns 'Time Off ID', 'Description', and 'Hours Left'. A green box highlights the '+ Add' button in the top left corner of the table. To the right, the 'Time Off Information' section contains various input fields: 'Time Off ID' (None Selected), 'Description' (empty), 'Eligible Date' (empty), 'Rate (Hours)' (0.00), 'Per' (0.00), 'Rate Factor' (1.000000), 'Award On' (empty), 'Max Earned' (0.00), and 'Max Carryover' (0.00). Below this, the 'Time Off Hours' section shows 'Last Award Date' (empty), 'Hours Accrued' (0.00), 'Hours Earned' (0.00), 'Hours Used' (0.00), and 'Balance' (0.00).

4. Select time off type to associate.
5. Click **OK** toolbar button.

The 'Add Time Off Types' dialog box is shown with the 'Details' tab selected. It features a 'Layout' button and a 'Filter Records {F3}' search field. A table lists several time off types with checkboxes: 'Time Off ID' (unchecked), 'PER {Year}' (checked), 'SICK' (unchecked), 'Personal' (unchecked), 'VAC {Year}' (unchecked), and 'VAC {Hour}' (unchecked). The 'PER {Year}' row is highlighted, and its description is 'Personal Time Off {Year}'. The 'OK' button is highlighted with a green box.

6. Set the value of the following fields:
 - a. Eligible Date
 - b. Rate Factor

The screenshot shows the 'Entity - Aaron P Ritter' window with the 'Employee' tab selected. The 'Time Off' sub-tab is active. The table now contains one entry: 'PER {Year}' with description 'Personal Time Off {Year}' and 'Hours Left' of 0. The 'Time Off Information' section on the right has the following values: 'Time Off ID' (PER {Year}), 'Description' (Personal Time Off {Year}), 'Eligible Date' (7/4/2016), 'Rate (Hours)' (40.00), 'Per' (1.00/Week), 'Rate Factor' (1.000000), 'Award On' (Anniversary Date), 'Max Earned' (100.00), and 'Max Carryover' (100.00). The 'Time Off Hours' section shows 'Last Award Date' (empty), 'Hours Accrued' (0.00), 'Hours Earned' (0.00), 'Hours Used' (0.00), and 'Balance' (0.00). The 'OK' button from the previous dialog is still visible in the top left corner of the table area.



The rest of the fields must be disabled as the values for these will be from other fields.

- Click **Earnings** tab.
- Set the time off type in the **Accrue Time Off** dropdown on the earning where it will accrue.
- Set the time off type in the **Deduct Time Off** dropdown on the earning where it will deduct.

- Click **Save** button to save changes made.

- Check the hours in **Time Off** tab.

- Open an employee record from **Employees**.
- Click **Time Off** tab under **Employee** tab.

3. Click **Add** grid icon.

The screenshot shows the 'Entity - Aaron P Ritter' window with the 'Time Off' tab selected. The grid has columns for 'Time Off ID', 'Description', and 'Hours Left'. The '+ Add' button in the grid is highlighted with a green box. The right-hand side of the window contains 'Time Off Information' and 'Time Off Hours' sections with various input fields.

4. Select time off type to associate.

5. Click **OK** toolbar button.

The screenshot shows the 'Add Time Off Types' dialog box. The 'OK' button is highlighted with a green box. The 'Details' tab is selected, and the 'PER (Year)' option is checked in the list of time off types. The list includes 'PER (Year)', 'SICK', 'Personal', 'VAC (Year)', and 'VAC (Hour)'.

6. Set the value of the following fields:

- Eligible Date
- Rate Factor

The screenshot shows the 'Entity - Aaron P Ritter' window with the 'Time Off' tab selected. The 'Time Off' grid now contains one entry: 'PER (Year)' with a description of 'Personal Time Off (Year)' and 'Hours Left' of 0. The 'Eligible Date' and 'Rate Factor' fields in the 'Time Off Information' section are highlighted with green boxes. The 'Eligible Date' is set to 7/4/2016, and the 'Rate Factor' is set to 1.000000.



The rest of the fields must be disabled as the values for these will be from other fields.

7. Click **Earnings** tab.

8. Set the time off type in the **Accrue Time Off** dropdown on the earning where it will accrue.

- Set the time off type in the **Deduct Time Off** dropdown on the earning where it will deduct.

Entity - Aaron P Ritter

Menu: New, Save, Search, Refresh, Delete, Undo, Additional, Template, Archived Reports, API Key, 2-Step Verification, Close

Tabs: Entity, General, **Earnings**, User, Locations, Contacts, Comments (0), History, Attachments (0), Messages, Custom, Audit Log (26)

Sub-tabs: Detail, Taxes, Earnings, Deductions, Time Off, Time Entry, Direct Deposit, Timesheet, Paychecks

Buttons: + Add, X Remove

Earning ID	Description	Amount	Default	Pay Group
DTV	Overtime Pay	16.50	<input checked="" type="checkbox"/>	Weekly
REG	Regular	11.00	<input checked="" type="checkbox"/>	Weekly
VAC	Vacation Pay	11.00	<input type="checkbox"/>	Weekly

Earning Information

Earning ID: REG

Description: Regular

Calculation Type: Fixed Amount

Linked Earning: REG

Amount: 11.00

Default Hours: 40.00

Accrue Time Off: PER (Year)

Deduct Time Off: PER (Year)

- Click **Save** button to save changes made.

Entity - Aaron P Ritter

Menu: New, **Save**, Search, Refresh, Delete, Undo, Additional, Template, Archived Reports, API Key, 2-Step Verification, Close

Tabs: Entity, General, **Earnings**, User, Locations, Contacts, Comments (0), History, Attachments (0), Messages, Custom, Audit Log (26)

Sub-tabs: Detail, Taxes, Earnings, Deductions, Time Off, Time Entry, Direct Deposit, Timesheet, Paychecks

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Earning ID	Description	Amount	Default	Pay Group
DTV	Overtime Pay	16.50	<input checked="" type="checkbox"/>	Weekly
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VAC	Vacation Pay	11.00	<input type="checkbox"/>	Weekly

Earning Information

Earning ID: DTV

Description: Overtime Pay

Calculation Type: Overtime

Linked Earning: REG

Rate Factor: 1.50

Default Hours: 0.00

Accrue Time Off: PER (Year)

Deduct Time Off: PER (Year)

Earning Taxes

+ Add X Remove

Tax ID	Description	Type	Paid By
FT	Federal Income Tax	USA Federal Tax	Employee
FICA SS Employee	FICA Social Security Employee	USA Social Security	Employee
FICA SS Company	FICA Social Security Company	USA Social Security	Company
FICA MED Employee	FICA Medicare Employee	USA Medicare	Employee

Earning GL Distribution

+ Add X Remove

Expense Account	Percent
54100-0000-001	100.00 %

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- Check the hours in **Time Off** tab.

- From Payroll module, single click the **Employee** and select an existing Employee record from the list.
- Under Employee > **Time Off** tab, click the **Quick Add** grid button. **Add Time Off Types** screen will be opened.

Employee - JDBarry

Menu: New, Save, Search, Delete, Undo, Duplicate, Template, Timesheet, History, Close

Tabs: Details, Notes, Taxes, Earnings, Deductions, **Time Off**, Attachments, Time Entry

Buttons: Quick Add, Remove, Move Up, Move Down

Time Off ID: (None Selected)

Hours Left: 0

Per: 0

Balance: 0

Add Time Off Types

Layout Filter Records (F3)

Time Off ID	Description
Personal	Personal Time Off
VAC	Vacation Time Off

Ready

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3. Select the Time Off ID from the grid then click the OK button to populate in the Employee Time Off tab.

The screenshot shows the 'Employee - JDBarry' application window. The 'Time Off' tab is selected in the top navigation bar. On the left, a table lists Time Off IDs. The first row, 'Personal', is highlighted with a red border. To the right of the table is a 'Time Off Information' panel with various input fields. Below that is a 'Time Off Hours' panel with summary statistics.

Time Off ID	Description	Hours Left
Personal	Personal Time Off	0

Time Off Information

Time Off ID: Personal
Description: Personal Time Off
Eligible Date: 06/02/2014
Rate (Hours): 160 Per: 1 Month
Award On: Anniversary Date
Max Earned: 14
Max Carryover: 0

Time Off Hours

Last Award Date: 06/02/2015
Hours Accrued: 14
Hours Earned: 14
Hours Used: 0
Balance: 14

4. Fill in the **Time Off Hours** Panel.
5. Click the **Save** toolbar button.
6. Under Employee > **Earnings** tab, select the Earning ID that was selected in **Time Off ID**.
7. Select the **Time Off ID** from Associated Time Off panel.
8. Click the **Save** toolbar button to save the changes made.
9. Click the **Close** toolbar button to close the Employee screen.