
2024 Sick Pay Plan Setup: Changing From Lump Sum to Accrual

IMPORTANT! This setup must be done:

- (1) Before printing your first payroll checks that have a check date in January 2024 and
- (2) After printing your last payroll checks that have a check date in December 2023.

Some of the information from your old Sick Pay Plan must be copied to the new Sick Pay Plan to keep your company's current policies. To help you do this, begin by going to **Payroll > Sick Pay Setup/Maintenance > Sick Pay Plan Setup**.

1. In the *Plan ID* entry, enter your old Sick Pay Plan ID or use the lookup button to select it. Then write down or take a screenshot of the information you have entered in the highlighted entries below; this is what will be copied to the new Sick Pay Plan.

The screenshot shows the 'Sick Pay Plan Setup' window. A yellow callout bubble with the number '1' points to a yellow box that highlights the following fields: 'State', 'Accrue Sick Pay on Out of State Wages' checkbox, and 'State Starting Date'. Other visible fields include 'Plan ID', 'Description', and 'Method'.

2. Click on the *Plan Year Settings* tab. Write down or take a screen shot of the information you have entered in the highlighted entries below; this will be copied to the new Sick Pay Plan.

The screenshot shows the 'Plan Year Settings' tab of the 'Sick Pay Plan Setup' window. A yellow callout bubble with the number '2' points to a yellow box that highlights the following fields: 'Fixed Plan Year, Starting', 'Ending', 'Rollover On', and 'Check Date Day of Week'. Other visible fields include 'Next Plan ID'. At the bottom of the window are 'Save', 'Clear', and 'Delete' buttons.

- Click on the *Sick Pay Wages* tab. Write down or take a screenshot of the information you have entered in the highlighted entries below; this will also be copied to the new Sick Pay Plan.
- Click **Clear**.

- While still in the *Sick Pay Plan Setup* window, enter a **Plan ID** and a **Description** of your choice for the new Sick Pay Plan. Information for the following entries should be as follows:
 - State:** If all of your employees work in California, enter **CA**.
 - If you have multi-state employees, enter the information you used for your old Sick Pay Plan in both the **State** entry and *Accrue Sick Pay on Out of State Wages* option.
 - State Starting Date:** If you have multi-state employees, enter the date used in the old Sick Pay Plan. If this was left blank in the old Sick Pay Plan, leave it blank here too.
 - Method:** From the drop-down menu, select *Accrual*.

6. Under the *Accrual Settings* tab:

- **Accrual Rate:** If you are using the general rate of accrual (1 hour of sick pay for every 30 hours worked), enter **0.0333333**
- **Maximum Annual Accrual:** Enter **80.00**
- Leave the rest of the entries under this tab blank.

6

Accrual Settings | Lump Sum Settings | Plan Year Settings | Sick Pay Wages

Accrual Rate: 0.0333333

Salary Hours/Week:

Waiting Period to Accrue: Days

Maximum Annual Accrual: 80.00 Hours

Maximum Weekly Accrual: Hours

Maximum Lifetime Accrual: Hours

Maximum Carryover: Hours

7. Click on the *Plan Year Settings* tab and enter the information you used for your old Sick Pay Plan in the highlighted entries.

7

Settings | Lump Sum Settings | Plan Year Settings | Sick Pay Wages

Fixed Plan Year, Starting:

Ending:

Rollover On:

Check Date Day of Week:

Next Plan ID:

8. Click on the Sick Pay Wages tab.

- **Waiting Period to Pay:** Enter **90**
- **Max Allowed Sick Pay Per Year:** Enter **40.00**
- For all other entries under this tab, enter the information you used for your old Sick Pay Plan.

9. Click **Save**. Doing this will save the new Plan ID and then clear the window.

The screenshot shows the 'Sick Pay Wages' tab with the following fields and values:

- Waiting Period to Pay: 90 Days
- Sickpay Work Gap: [] Days
- Max Allowed Sick Pay Per Year: 40.00 Hours
- Discard Sick Pay Balance: [] Days after Termination
- Default Sick Pay Rate to Use: []
- Average Rate Lookback Period: [] Days
- Automatically Calculate Rate for Daily Payroll: []
- Print on Check Stub: []

The 'Save' button is highlighted with a yellow box and a callout bubble containing the number 9.

10. While still in the *Sick Pay Plan Setup* window, enter your old Sick Pay Plan ID in the **Plan ID** entry or use the lookup button to select it.

The screenshot shows the 'Sick Pay Plan Setup' window with the following fields and values:

- Plan ID: []
- Description: []
- State: [] Accrue Sick Pay on Out of State Wages
- State Starting Date: []
- Method: []

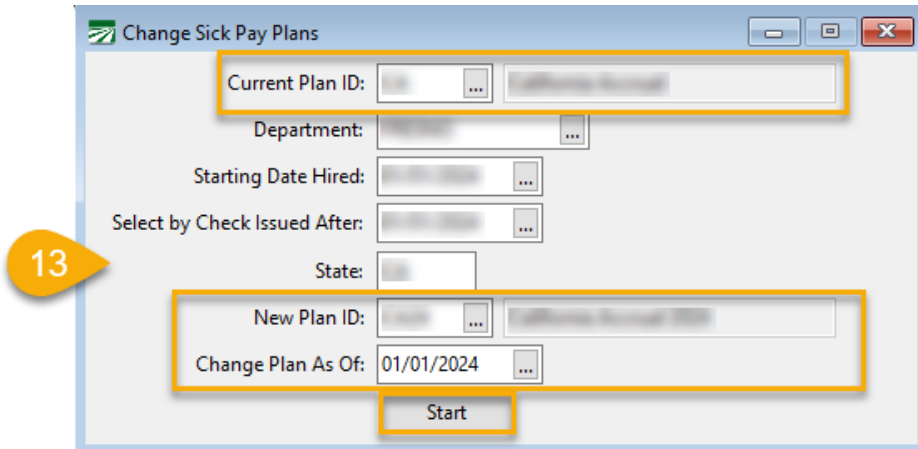
The 'Plan ID' field is highlighted with a yellow box and a callout bubble containing the number 10.

11. Click on the *Plan Year Settings* tab. In the Next Plan ID entry, enter the new Sick Pay Plan ID you created in steps 5-9.
12. Leave all other entries under this tab as they are. Then click **Save**.

The screenshot shows a software window with four tabs: 'Accrual Settings', 'Lump Sum Settings', 'Plan Year Settings', and 'Sick Pay Wages'. The 'Plan Year Settings' tab is active. It contains several input fields: 'Fixed Plan Year, Starting:' with a date picker, 'Ending:' with a date picker, 'Rollover On:' with a dropdown menu, and 'Check Date Day of Week:' with a dropdown menu. Below these is the 'Next Plan ID:' field, which is highlighted with a yellow box and a callout bubble containing the number 11. At the bottom of the window, there are three buttons: 'Save', 'Clear', and 'Delete'. The 'Save' button is highlighted with a yellow box and a callout bubble containing the number 12.

13. Go to **Payroll > Sick Pay Setup/Maintenance > Change Sick Pay Plans**.

- **Current Plan ID:** Enter your old Sick Pay Plan ID or click on the lookup button to select it.
- **New Plan ID:** Enter the new Sick Pay Plan ID that you set up in steps 5-9 or use the lookup button to select it.
- **Change Plan As Of:** Enter **01/01/2024**.
- Leave all other entries in this window blank. Then click **Start**.



14. Go to **Tools > Program Setup > Payroll > Benefits**. In the *Default Sick Pay Plan ID* entry, enter the new Sick Pay Plan ID or use the lookup button to select it.

15. Click **Ok**.

16. You will need to close and reopen the software for the new *Default Sick Pay Plan ID* setting to take effect.

