

Managing Accruals

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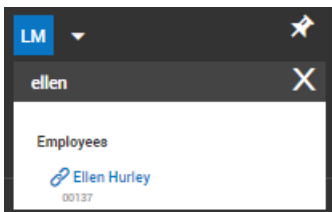
As a manager or system administrator, you will need to periodically edit, execute, and oversee employee accrual balances if your company has enabled this module. For example, you may need to manually edit an employee's time off balances to adjust for overtime or a holiday worked.. This topic explains how to process and edit accruals.

START HERE

Accruals can be managed in multiple areas of the system. Review Accruals On an Individual Employee Record

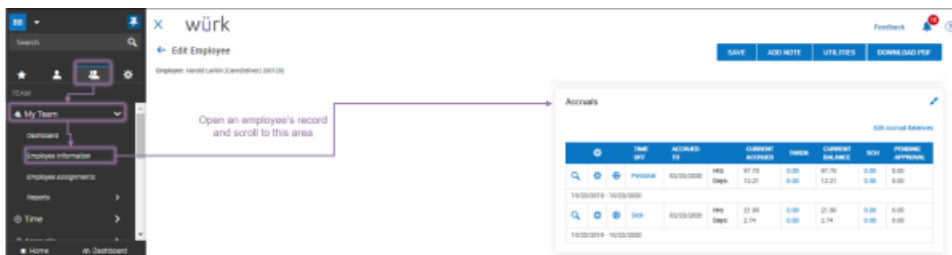
1. Search for an employee:

To quickly navigate to an employee record, you can search for them by name in the Search field at the top of the main menu.



(or navigate to **Team>My Team>Employee Information** and select an employee).

2. In the employee's information record, scroll to the Accruals section.

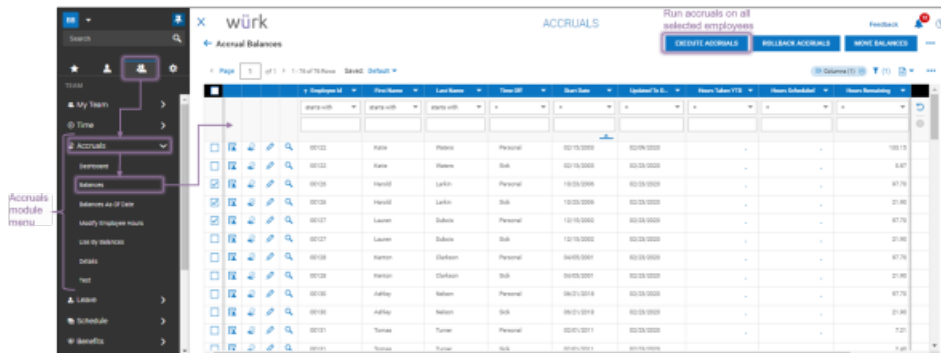


Review Accruals on

Multiple Employees: **Team>Accruals**

If your company has enabled the Accruals module, the Accruals section of the Team menu provides a wealth of information about your teams' accruals.

To see your team's accrual balances and make manual edits to employees' accrual hours, go to **Team>Accruals** from the main menu.



If you select one or more employees from the Balances report shown above and click **EXECUTE ACCRUALS**, this brings in the latest accruals from their timesheets.

Accruals Menu Option	Description
Balances	See all your employee's accrual balances.
Balances As Of Date	See Balances As Of Date; here you can filter the report for specific employees, or view them all.
Modify Employee Hours	Edit employee accrual balances.
Use By Balances	See employees whose accruals must be used by a certain date and unused hours can then be subtracted from the balance.
Test	(Administrator only) Here you can run and adjust Benefit Accruals calculations and Profiles, and test-run them against employee data before applying them. This is also where you can create new Accrual Profiles.

What are Profiles? A Profile in Wurk is a set of rules that can be applied to many employees and situations. For example, within each job description defined for your company, you can assign various *profiles*, such as for whether the employee is eligible for benefits or holiday pay, or the type of work schedule they follow (like for a grow site with 24-hour days versus an office with 9am-5pm hours). These profiles are essentially shortcuts for defining what the employee can see and do in Wurk, and for what their managers and HR and

payroll specialists can do for them in Work. Another way to think of Profiles is "defaults": each profile can preset aspects of the employee's Work information and be reused again and again for each new hire. Once you pull in defaults from a profile to an employee record, you can then edit those settings to customize them for that employee.

Profiles can be set at the EIN level, the Cost Center level, or the Job level. That means that if a Holiday profile has been applied, for example, to a Cost Center, those holidays will apply to everyone in that Cost Center. To make an exception, you would have to edit the specific employee's job description. As a Manager, What Am I Supposed to Do With Accruals?

Periodically edit, execute, and oversee employee accrual balances (using menu options above)

Run Accruals either **manually outside of payroll** to update balances, or as part of **payroll processing**.
