# Time Off Request (TOR) Setup Prework

1. What you would like to be used for your Standard and Custom Entitlements. Some examples are:
*Standard Entitlements*: Vacation, Additional vacation accumulator; *Custom Entitlements*: Bereavement, Lieu Day.

|  |  |  |  |
| --- | --- | --- | --- |
| Entitlement Name | Paid Time OR Tracking Purposes Only (no impact to employee pay)? | If paid, is there already a pay code set up on your payroll? Yes/No | If yes, existing Pay Code name |
|  | Choose an item. | Choose an item. |  |
|  | Choose an item. | Choose an item. |  |
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|  | Choose an item. | Choose an item. |  |

1. Custom Entitlement set up. Please answer the following for each entitlement:

|  |  |  |  |
| --- | --- | --- | --- |
| Entitlement Name | Can employees have unlimited time off for this entitlement? Yes/No | Do you allow employees to take more time than they have available in their balance? | Do you allow employees to carry balances from year to year? If no, balances reset on grant date. |
|  | Choose an item. | Choose an item. | Choose an item. |
|  | Choose an item. | Choose an item. | Choose an item. |
|  | Choose an item. | Choose an item. | Choose an item. |
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|  | Choose an item. | Choose an item. | Choose an item. |
|  | Choose an item. | Choose an item. | Choose an item. |

1. How much time do you grant to employees for each Custom Entitlement? Please answer the following for each entitlement:

|  |  |  |  |
| --- | --- | --- | --- |
| Entitlement Name | When should this entitlement be granted each year? Provide Date | Is everyone granted the same time amount of time (in hours)?**\*** | How much time (in hours) is granted to employees on grant date? |
|  | Click or tap to enter a date. | Choose an item. |  |
|  | Click or tap to enter a date. | Choose an item. |  |
|  | Click or tap to enter a date. | Choose an item. |  |
|  | Click or tap to enter a date. | Choose an item. |  |
|  | Click or tap to enter a date. | Choose an item. |  |
|  | Click or tap to enter a date. | Choose an item. |  |
|  | Click or tap to enter a date. | Choose an item. |  |

**\***Amounts can be entered manually on employee level.

1. Balances for each Custom Entitlement will need to be entered manually on each employee for this first year of use. If you would like us to enter this for you, please complete the attached [spreadsheet](https://www.powerpay.ca/en/docs/forms/Custom%20Entitlements%20Starting%20Balance.docx) with the employee’s name, employee number, pay element, and balance to be keyed. If the spreadsheet is not returned to us, we will assume you will enter these amounts manually.
2. Tell us about your company’s normal working days and hours. Working Days are the days of the week that your employees typically work. Normal daily hours are the number of hours per day employees usually work on a working day. These values will be the default applied to all employees, you will be able to specify an individual employee’s working days and normal working hours on the employee profile.

|  |  |
| --- | --- |
| Day of the Week | Working Day (Yes/No) |
| Sunday | Choose an item. |
| Monday | Choose an item. |
| Tuesday | Choose an item. |
| Wednesday | Choose an item. |
| Thursday | Choose an item. |
| Friday | Choose an item. |
| Saturday | Choose an item. |

Normal Hours worked per day \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Does your company observe any holidays other than the legislated Statutory Holidays that you would like to add to your calendar? E.g.: Company Wellness Day

|  |  |
| --- | --- |
| Name of Holiday | Date of Holiday |
|  | Click or tap to enter a date. |
|  | Click or tap to enter a date. |
|  | Click or tap to enter a date. |

1. Statutory Days may fall on a weekend or other day that is already taken off by your company. In this event, you may wish to observe the statutory holiday on a different date. Do you wish to move any observed dates?

Note: The observed date is used in the calculation of the duration for time off requests. It is important to have the correct dates before employee’s request time off to ensure accurate entitlement calculations.

|  |  |
| --- | --- |
| Name of Holiday | Date your company observes the Holiday |
|  | Click or tap to enter a date. |
|  | Click or tap to enter a date. |
|  | Click or tap to enter a date. |

1. Who will approve time off requests submitted by your employees? Please check the approver.

[ ]  The contact listed as Primary on the User and Contact Management Screen if Role Based Security is not setup.

*or*

[ ]  The contact assigned the role of Payroll Admin if Role Based Security is setup (can be multiple recipients in this case)

or

[ ]  A specific employee other than Payroll Admin as selected in the “Reports to” Field on the Employee Profile screen. The requests are approved within Powerpay Self Service, and not Powerpay in this instance. I.e. An employee’s manager may approve TOR but not process payroll thus will not have a Powerpay User Id

1. Which payment date do you want to go live with this functionality? Note: We will start the steps to complete the activation as soon as your previous payment date has occurred. You also have activation steps to complete, and we want to provide you with adequate time prior to your processing date. Note: Dayforce has created the [Time Off Requests – Employee Guide](https://www.powerpay.ca/en/docs/PPSSDocs62.pdf) for you to provide to your employees prior to go live

Payment Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Payroll number: \_\_\_\_\_\_\_\_\_\_\_\_\_

Email the completed form to Powerpay.Service@ceridian.com. After submitting the form, wait for a confirmation email from Dayforce before proceeding with your Time Off Request set up.