

## Attendance – Accrue – Time Off By Custom Dates

### Summary:

Accrue Time-Off on Custom Dates

### Problem / Goal:

Accrue Time-Off on Custom Dates such as every two weeks or 15<sup>th</sup> and last day of the month or quarterly, etc.

### Solution:

Click **Settings**, **Time-Off Plan Maintenance** and then do one of the following:

#### OPTION ONE

##### Editing an existing plan that had previously been set up with Custom Dates:

Select the plan from the **Browse** screen and click **Detail**. You will notice that the **Edit Custom Dates** button at the lower left is grayed out. To gain access, change the frequency to **Yearly – Once per year** and then, change it back to **Custom Dates**. You may now click **Edit Custom Dates** to edits as you wish. When done, click **Save > Exit > Save. Close**

#### OPTION TWO

##### Setting up a new plan from scratch:

##### Earn Time-Off on Custom Dates:

You may accrue on...

- Specific dates **Weekly** or **Every two weeks** or **15th and last day of each month** or **Last day of each month** or...
- Specific dates entered directly into the **Custom Accrue Date** window.

1. By now, you will have already clicked **Settings > Time-Off Plan Maintenance**, entered a plan name, and selected a Benefit Year. Save the plan before continuing even though the plan is not yet finished.

2. Now, under **Select How Often to Accrue** click **Custom** and you may now **Edit Custom Dates**.

3. Select the appropriate **Frequency** and enter a **Start Date** or enter dates manually into the **Custom Accrue Date** field.

4. Under **Number of dates to add** enter the number of dates that will take you to your license expiration date. Be sure to include the **Start with Date**. In the example at right, the first accrual date is 1/11/2013. At a rate of every two weeks, we need another 25 dates but we must enter 26 to include the **Start with Date**.

5. Click **Run Auto Fill** (except for manually entered dates) then, click **Save** and then, click **Exit**. Click **Save** again.

**Note:** You may also accrue on specific dates that you specify in the vertical **Custom Accrue Date** window.

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