

ReadyPay Online Release Notes

Our ReadyPay Today solution has proven to be one of the top on-demand pay solutions on the market. We continuously work to make the necessary improvements in order to provide the best solution available to our clients. In this report, you can view our new features and fixes to ReadyPay Today that will help our clients this coming year.

For update requests of this guide, please email client.training@proliant.com.

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Overview

This guide highlights important new features as well as problem resolutions to ReadyTime which are included in the July 2022 release.

ReadyTime » Enhancements

The following enhancements have been made to ReadyTime:

Accrual Policies

- ReadyTime has been enhanced to support the overnight automatic transfer of accrual policies for existing employees who switch from one employee group to another, as part of an employment status or department change.
- Assigning and removing an accrual policy assignment may now be accomplished using Employee Groups.
- ReadyTime has been enhanced to track the user who made the last accrual policy update and whether the update was the assignment or the removal of an accrual policy assignment.

Auto Policy Transfers

- ReadyTime has been enhanced to allow administrators to setup the transferred-to time off policies, as well as associated actions for existing accrual hours, granted (available) hours, and future time off requests.

Automatic Accrual Policy Transfer Nightly Process

- ReadyTime's nightly process was enhanced to support an automatic accrual policy transfer. Because an employee may be assigned to multiple employee groups, ReadyTime uses the priority settings from the **PTO | Auto Assignment** page to determine which accrual policy to assign to the employee. Using configuration settings on the Auto Policy Transfer page, accrued hours, granted hours, as well as future dated time off requests of the From Policy are transferred as well.



Expert Tip

ReadyTime's data sync runs nightly at 10pm EST. If RPO's Employee Groups' evaluation time is after 10pm EST (defined at **Employee Grouping | Confirmation** page), the automatic accrual policy transfer would take an additional day.

ReadyTime » Problem Resolutions

The following issues have been resolved:

Accrual Policy Effective Date

- The effective date of an employee's accrual policy was set to the date that the employee was assigned to their employee group instead of the employee's hire date. This issue has been resolved.

Balance and Accrual History Pages

- Column headers were updated from **Balance** to **Avail Hrs** to match the column headers in ReadyPay Online on the **Employee | Balance and Employee | Accrual History** pages.

Pending Requests

- The Accrual Engine rejected requests for an employee with sufficient hours available on the Pending Requests page.
- It was not possible to save a new accrual policy if the employee was previously assigned future dated policy. This issue has been resolved.

ReadyTime » Documentation Enhancements

The following documentation enhancements have been added to ReadyTime:

ReadyTime Accrual Policy Transfer for Existing Employees

In ReadyTime, the auto assignment of accrual policies for new hires runs as part of a nightly process.

For the nightly process to automatically assign accrual policies, ensure that the following prerequisites are completed:

- Set up Employee Groups on the **Company Setup | Resources | Employee Grouping** page.
- Set up the Auto Assignment order on the **Company Setup | PTO | Auto Assignment** page.



Expert Tip

Typically, the Employee Grouping evaluation is set to run daily at midnight, and it is strongly recommended to keep the system default setting.

If you modify the daily evaluation schedule, you must ensure that the evaluation completes prior to the nightly process starting at 2 AM EST to avoid a one-day delay for the auto assignment of the accrual policy for any new hire.

Example: Transfer an Accrued Monthly and Annual Grant (Available Hours) Policy

This example demonstrates an accrual policy transfer using the Employee Group for an accrual policy where hours are periodically accrued but may not be available for employees to immediately use. For example, a monthly accrual with an annual grant:

- Access the **Company Setup | Resources | Employee Grouping | Group Member** page.

The screenshot shows a web interface for editing a group. At the top, it says "Editing Group: JJ-Accrued-NoGrant". Below that is a "Members" section with a search bar and an "Add" button. There is also a "Search Existing Members..." field with a "Search" button and a "Clear" button. Below the search area is a table with columns: Status, Employee Name (Id), Member Since, Override Date, and Delete. The table contains one row for a member named LUCIANO ALEJO (10) who is included and has a member since date of 07/27/2022 and an override date of 07/27/2022.

Status	Employee Name (Id)	Member Since	Override Date	Delete
Included	LUCIANO ALEJO (10)	07/27/2022	07/27/2022	

2. Access the **PTO | Balance** page and notice that there are 7 Accrued hours and 0 Granted hours as of the current date.

Employee	Policy	Type	Last Post Date	Accrued	Granted	Used	Future	Adj.	Balance
ALEJO, LUCIANO (10)	JJ-Annua...	VAC-M	Jan 01, 2022	7.00	0.00	0.00	0.00	23.08	23.08

3. Access the **PTO | Accrual History** page and notice the accruals on the 26th of each month, with a balance transfer on 1/1 from another policy in the Adjustment column.

Date	Balance Forward	Accrued	Granted	Adjustment	Used	Balance	Info
Jul 26, 2022	23.08	1.00	0.00	0.00	0.00	23.08	- Accrued
Jun 26, 2022	23.08	1.00	0.00	0.00	0.00	23.08	- Accrued
May 26, 2022	23.08	1.00	0.00	0.00	0.00	23.08	- Accrued
Apr 26, 2022	23.08	1.00	0.00	0.00	0.00	23.08	- Accrued
Mar 26, 2022	23.08	1.00	0.00	0.00	0.00	23.08	- Accrued
Feb 26, 2022	23.08	1.00	0.00	0.00	0.00	23.08	- Accrued
Jan 26, 2022	23.08	1.00	0.00	0.00	0.00	23.08	- Accrued
Jan 01, 2022	0.00	0.00	0.00	23.08	0.00	23.08	- Balance transferred from policy [Fr...

4. Access **Company Setup | PTO | Accrual Policies** page and select  for the accrual policy to which you would like to assign your employees.

Policy Name	Policy Type	Count	Actions
JJ-Vacation-TimePassed	SIC-TP, VAC-TP	3	  

5. On the Accrual Assignment window, select the accrual policy Effective Date and select **Next**.

Accrual Assignment

This wizard is used to Assign or Unassign one or more employee groups to or from an Accrual Policy. You will be guided through the process over the next few pages.

Assign employee groups to JJ-Vacation-TimePassed
 Unassign employee groups from JJ-Vacation-TimePas

Effective Date

7/1/2022 

Next **Cancel**



6. Select  to move all applicable Employee Groups for this accrual policy assignment to the Selected Items section and select **Next**.

Home Employee Payroll Reports/Analytics HR Talent Acquisition Talent Mgmt System

Assign Employee Groups to JJ-Vacation-TimePassed

Search by Employee Group

All Items	Selected Items
Add All	Remove All
Full Time Hourly →	JJ-Accrued-NoGrant ×
JJ-Dept-CC1 →	
JJ-Maint Job-CC2 →	
JJ-Salary-TP →	
JJ-Vacation-TP →	
Manager →	
Part Time Hourly →	

Next **Cancel**

7. Select **Next**.

1 Employee	No of Employees
JJ-Accrued-NoGrant	1

8. The Employee Assignment page will list all applicable accrual policies that are currently assigned to the employees in the selected Employee Group(s). In this example, we want to move accrued hours to the new policy's accrual totals and available hours under the Adjustment column to the new policy's available totals. The current policy's accrued type **VAC-M** will be transferred to the new policy's **VAC-TP**.

- From the **Accrued Hours Move To** drop-down list, select **Accrued**.
- From the **Granted Hours & Future Request** drop-down list, select **Convert To** to move the from-policy's granted hours, if any, to the new policy's Adjustment totals and make the hours available for employees to use immediately. This will also move all future time off requests against the current policy to the new accrual policy.

Employee Assignment

This page allows you to transfer an employee's Time Off Policy and associated hours. Start by selecting the To Policy and transfer actions for: (1) Accrued Hours Move To ("Adjustment" means the hours available for the employee to use immediately). (2) Granted Hours and Future Requests ("Convert To" moves the hours to the new policy's "Adjustment" bucket and are available immediately)

Number of unique employees to assign: 1

From Policy: JJ-AnnualGrant (1 Employee) To Policy: JJ-Vacation-TimePassed

Action	From Time Off Type	Accrued Hours Move To	Granted Hours & Future Request	Destination Time Off Type	Hours
	VAC-M	Accrued	Convert To	VAC-TP	

From Policy: No Policy (0 Employee) To Policy: JJ-Vacation-TimePassed

These changes will be effective on Jul 01, 2022.

9. Select **Submit**.

Expected Results

After completing the accrual policy transfer, the following changes should be visible on the **PTO | Accrual History** page. You may view the balance transfer transactions that were logged in the Info column.

- The new **VAC-TP** policy's accrued column should have 6 hours because the new policy's Effective Date is 7/1/2022.

- The new **VAC-TP** policy's granted column should be zero.
- The new **VAC-TP** policy's adjustment column should be 23.08 which was transferred over from the **VAC-M** policy.

Policy Name	Policy Type	Start Date	End Date	Status
JJ-Vacation-TimePassed	SIC-TP	07/01/2022	12/31/2100	Active
JJ-Vacation-TimePassed	VAC-TP	07/01/2022	12/31/2100	Active

Date	Balance Forward	Accrued	Granted	Adjustment	Used	Balance	Info
Jul 01, 2022	0.00	6.00	0.00	23.08	0.00	23.08	- Balance transferred from policy [J... - 1.000000 hours accrued, not grant... - 1.000000 hours accrued, not grant...

- On the **PTO | Balance** page, you can view the accrual summary information for this employee. Note that the new policy does offer a SIC-TP accrual, so this employee now has two accrual types.

Employee	Policy	Type	Last Post Date	Accrued	Granted	Used	Future	Adj	Balance
ALEJO...	JJ-Vacati...	SIC-TP	Jul 01, 2022	2.00	2.00	0.00	0.00	0.00	2.00
	VAC-TP		Jul 01, 2022	6.00	0.00	0.00	0.00	23.08	23.08

Example: Transfer Accrual Policies Using an Employee Group Containing New Hires who are Already Assigned to Another Accrual Policy

This example demonstrates an accrual policy transfer using an Employee Group with a new hire already assigned to the new accrual policy.

1. Access the **Company Setup | Resources | Employee Grouping | Group Member** page.

Status	Employee Name (ID)	Member Since	Override Date	Delete
Included	JS JOSEPH L SHORES (46)	07/26/2022	07/26/2022	
Included	NS NATALIE D SMITH (9)	07/26/2022	07/26/2022	

2. Access the **PTO | Balance** page.

Time Off Pending Requests **Balance** Accrual History Projected Balance Recalculate Employee Balance

JS SHORES, JOSEPH (46) Filter

Employee	Policy	Type	Last Post Date	Accrued	Granted	Used	Future	Adj.	Balance
JS SHOR...	JJ-Vacati...	SIC-TP	Jun 30, 2022	14.00	14.00	0.00	0.00	0.00	14.00
		VAC-TP	Jun 30, 2022	40.00	40.00	0.00	0.00	0.00	40.00

Time Off Pending Requests **Balance** Accrual History Projected Balance Recalculate Employee Balance

NS SMITH, NATALIE (9) Filter

Employee	Policy	Type	Last Post Date	Accrued	Granted	Used	Future	Adj.	Balance
NS SMITH...	JJ-Vacati...	SIC-TP		2.00	2.00	0.00	0.00	0.00	2.00
		VAC-TP		0.00	0.00	0.00	0.00	0.00	0.00

3. Access the **PTO | Accrual History** for Joseph Shores.

Time Off Pending Requests Balance **Accrual History** Projected Balance Recalculate Employee Balance

+ Recalculate JS SHORES, JOSEPH (46) Filter

Show Active Only Policy: JJ-Vacation-TimePassed (SIC914) ACTIVE

Policy Name	Policy Type	Start Date	End Date	Status
JJ-Vacation-TimePassed	SIC-TP	01/01/2022	12/31/2100	Active
JJ-Vacation-TimePassed	VAC-TP	01/01/2022	12/31/2100	Active

Date	Balance Forward	Accrued	Granted	Adjustment	Used	Balance	Info
Jul 25, 2022	12.00	2.00	2.00	0.00	0.00	14.00	- Accrued
Jun 25, 2022	10.00	2.00	2.00	0.00	0.00	12.00	- Accrued

Policy Name	Policy Type	Start Date	End Date	Status
JJ-Vacation-TimePassed	VAC-TP	01/01/2022	12/31/2100	Active

Date	Balance Forward	Accrued	Granted	Adjustment	Used	Balance	Info
Jun 30, 2022	33.33	6.67	6.67	0.00	0.00	40.00	- Accrued

4. Access the **PTO | Accrual History** for Natalie Smith who is a new hire with an accrual policy start date of 7/25. Notice that she has no vacation hours accrued (VAC-TP), but does have 2 hours of SIC-TP.

Time Off Pending Requests Balance **Accrual History** Projected Balance Recalculate Employee Balance

+ Recalculate < > NS SMITH, NATALIE (9) Filter

Show Active Only Policy: JJ-Vacation-TimePassed (SIC914) ACTIVE

Policy Name	Policy Type	Start Date	End Date	Status
JJ-Vacation-TimePassed	SIC-TP	07/25/2022	12/31/2100	Active
JJ-Vacation-TimePassed	VAC-TP	07/25/2022	12/31/2100	Active

Date	Balance Forward	Accrued	Granted	Adjustment	Used	Balance	Info
Jul 25, 2022	0.00	2.00	2.00	0.00	0.00	2.00	- Accrued

< > 1 > > 20 Rows 1 - 1 of 1 items | 1 pages

Policy Name	Policy Type	Start Date	End Date	Status
JJ-Vacation-TimePassed	VAC-TP	07/25/2022	12/31/2100	Active

Date	Balance Forward	Accrued	Granted	Adjustment	Used	Balance	Info
No records available.							

5. Access **Company Setup | PTO | Accrual Policies** page and select  for the accrual policy that you would like to assign your employees to.

TP - Salary	grant, PTO, Sick	7	   
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6. On the **Accrual Assignment** window, select the accrual policy **Effective Date** and select **Next**.

Accrual Assignment

This wizard is used to Assign or Unassign one or more employee groups to or from an Accrual Policy. You will be guided through the process over the next few pages.

Assign employee groups to TP - Salary
 Unassign employee groups from TP - Salary

Effective Date

7/1/2022 

Next **Cancel**

7. Select  to move all applicable Employee Groups for this accrual policy assignment to the **Selected Items** section and select **Next**.

Assign Employee Groups to TP - Salary

All Items	Selected Items 1 Selected
Add All	Remove All
Full Time Hourly →	JJ-Vacation-TP ✕
JJ-Accrued-NoGrant →	
JJ-Dept-CC1 →	
JJ-Maint Job-CC2 →	
JJ-Salary-TP →	
Manager →	
Part Time Hourly →	

Next
Cancel

8. Select **Next**.

Assign Employee Groups to TP - Salary

2 Employees	No of Employees
JJ-Vacation-TP	2

Next
Back

9. The **Employee Assignment** page will list all applicable accrual policies that are assigned to the employees in the selected Employee Groups. In this example, both employees are currently assigned to JJ-Vacation-TP.

Employee Assignment

This page allows you to transfer an employee's Time Off Policy and associated hours. Start by selecting the To Policy and transfer actions for: (1) Accrued Hours Move To ("Adjustment" means the hours available for the employee to use immediately). (2) Granted Hours and Future Requests ("Convert To" moves the hours to the new policy's "Adjustment" bucket and are available immediately).

Number of unique employees to assign: 2

From Policy: JJ-Vacation-TimePassed (1 Employee)		To Policy: TP - Salary	
Action	From Time Off Type	Accrued Hours Move To	Granted Hours & Future Request
SIC-TP	Adjustments (Available)	Convert To	Sick
VAC-TP	Accrued	Convert To	PTO
+			

From Policy: No Policy (1 Employee)

To Policy: TP - Salary

These changes will be effective on Jul 01, 2022.

Submit
Back

- a. Joseph Shores will be moved from the JJ-Vacation-TP policy to the TP – Salary accrual policy.
- b. Since Natalie Smith’s hire date (7/25/22) is after the new accrual policy’s Effective Date (7/1/22), the employee’s headcount is under the **From Policy: No Policy** section. In this example, we want to move accrued hours to the new policy’s accrual totals and available hours under the **Adjustment** column to the new policy’s available totals.

In this example, the current policy’s accrued type VAC-TP will be transferred to the new policy’s PTO.

- From the **Accrued Hours Move To** drop-down list, select **Accrued**.
- From the **Granted Hours & Future Request** drop-down list, select **Convert To** to move the from-policy’s granted hours, if any, to the new policy’s Adjustment totals and make the hours available for employees to use immediately. This will also move all future time off requests against the current policy to the new accrual policy.

In this example, the current policy’s accrued type SIC-TP will be transferred to the new policy’s VAC-TP.

- From the **Accrued Hours Move To** drop-down list, select **Adjustments (Available)**. This option will transfer all accrued hours that are not available to be available immediately in the new VAC-TP’s Adjustment column.
- From the **Granted Hours & Future Request** drop-down list, select **Convert To** to move the from-policy’s granted hours, if any, to the new policy’s Adjustment totals and make the hours available for employees to use immediately. This will also move all future time off requests against the current policy to the new accrual policy.

10. Select **Submit**.

Expected Results

After completing the accrual policy transfer, the following changes should be visible on the **PTO | Accrual History** page. You may view the balance transfer transactions that were logged in the Info column.

- The new **VAC-TP** policy’s accrued column should have 6 hours because the new policy’s Effective Date is 7/1/2022.
- The new **VAC-TP** policy’s granted column should be zero.
- The new **VAC-TP** policy’s adjustment column should be 23.08 which was transferred over from the **VAC-M** policy.

Policy Name	Policy Type	Start Date	End Date	Status
JJ-Vacation-TimePassed	SIC-TP	07/01/2022	12/31/2100	Active
JJ-Vacation-TimePassed	VAC-TP	07/01/2022	12/31/2100	Active

Date	Balance Forward	Accrued	Granted	Adjustment	Used	Balance	Info
Jul 01, 2022	0.00	6.00	0.00	23.08	0.00	23.08	<ul style="list-style-type: none"> - Balance transferred from policy [J... - 1.000000 hours accrued, not grant...

- On the **PTO | Balance** page, you can view the accrual summary information for this employee. Note that the new policy does offer a SIC-TP accrual, so this employee now has two accrual types.

The screenshot shows the 'Time Off' page for employee ALEJO, LUCIANO (10). The page includes a navigation menu at the top with options like Home, Employee, Payroll, Reports/Analytics, HR, Talent Acquisition, Talent Mgmt, and System. Below the navigation, there are tabs for Pending Requests, Balance (selected), Accrual History, Projected Balance, and Recalculate Employee Balance. The main content area displays a table with the following data:

Employee	Policy	Type	Last Post Date	Accrued	Granted	Used	Future	Adj.	Balance
ALEJO...	JJ-Vacati...	SIC-TP	Jul 01, 2022	2.00	2.00	0.00	0.00	0.00	2.00
		VAC-TP	Jul 01, 2022	6.00	0.00	0.00	0.00	23.08	23.08

At the bottom of the table, there is a pagination control showing '1 - 1 of 1 items | 1 pages' and a 'Rows' dropdown set to 10.