

Accrual Policy Set-up Form

Company Code & Name	Contact Name	Contact E-Mail/Phone

Please attach the following documents

- Copy of written accrual policies from company handbook OR fill out Page 2 of this document
- Current available balance listing for each employee

Accrual Setup Pricing **starts at \$150.00+ per plan setup**

Fee's include: Accrual Plan Setup and Employee Balances updated year to date

Total Accrual Setup Fee \$_____ Notes: _____

Benefit Accrual Service:

Southland will need all policies and relevant employee data to begin the conversion and set-up of the benefit accrual service. Accrual setups and major revisions typically take two weeks to implement. Upon setup a report with all data obtained from your company will be sent for your review and approval. With the signed approval, Southland will automatically track your employee's benefit status based on your policy. Any changes made after the approved copy has been forwarded to Southland may be subject to additional administrative fees. Southland will not report any accrual information until an approved copy of the data is received from your company. This process may take up to two payroll periods before the accurate accrual information is printed on the check stubs.

By signing below, you understand that you must provide Southland with the benefit accrual policies and up-to-date employee data in order to initiate the benefit accrual process. We commit to provide the data using Southland's report form for your review and approval. If there are any discrepancies on Southland's data entry that need correction, Southland will make the necessary changes at no charge. Once there is an approved copy and changes are requested after the approval, the client may be subject to administrative fees. The initial process may take up to two payroll periods before the approved up-to-date information is included with your payroll check stubs.

The information provided by our company is correct and current as of the date below:

Client Signature

Date



CA Sick Leave Set-up Form

Please let us know which method you would like for the accrual setup:

Accrual (by hours worked) Method

- Employees will accrue one hour of paid sick leave for every 30 hours worked. Exempt employees will be presumed to work 40 hours per week unless they are regularly scheduled to work fewer hours, in which case accrual will be based on their usual schedule. Accrual will begin immediately upon employment. Employers may cap accrual at 48 hours. Unused time will carry over up to the accrual limit. Employers may choose to cap the use of leave to 24 hours per year.

Lump Sum (up front) Method

- Employers may choose to use a lump sum method of providing sick leave by granting each employee 24 hours or three days of paid leave (whichever is greater) at the beginning of each benefit year. A benefit year may be any regular consecutive 12-month period. If a lump sum method is used, unused time may be forfeited at the end of a benefit year rather than carried over.

PLEASE NOTE: The information above is the standard Paid Sick Leave minimum requirements for the state of California. The amount accrued, capped, or provided up front may vary depending on if your location is in one of the following municipalities: Berkeley, Oakland, Emeryville, Los Angeles, San Francisco, San Diego, or Santa Monica. Please let us know if your company is located in any of these localities.

Answering the following:

When does this accrual need to clear? (ex. start of calendar year, employee anniversary, or a specific check date):

Is there a usage limit on how many hours an employee can use in a year? (Can not be less than minimum requirement of 24 hours):

How many days of employment before an employee can use their hours? (Employers may prevent employees from using any time accrued until their 90th day of employment):

Any additional info (Please note here if you would like to offer another amount of hours above minimum requirement):

COMPLIANCE: A written accounting of each employee's available sick leave must be distributed to the employee every pay day. Once the implementation of this accrual set up is complete, you can request that we show available balances on check stubs. You must also give notice of paid sick leave at the time of hire and display a poster with similar information in a common area accessed by employees. If you have any questions about this, please reach out to our HR department for more information.