



Please copy this form and complete it for each new vacation plan. Please fax the completed form to (937) 485-4039.

Our dealership is requesting a new Vacation or Time-Off plan. Our client number is _____.

We also want this plan set up in the following client branches (if applicable): _____,
_____, _____, _____, _____.

-----THE BASICS OF THE PLAN-----

1. Most employees are first allowed to take vacation (circle one):
 - A. Their first hire anniversary.
 - B. Other. Explanation: _____

2. The following amount of vacation time is distributed to the employee on that date (circle one):
 - A. 1 week.
 - B. 2 weeks.
 - C. Other. Explanation: _____

3. How is the distribution increased as the employee gains experience? (circle one)
 - A. 1 week on first anniversary and 2 weeks from second anniversary on.
 - B. _____ week(s) / _____ years; _____ weeks / _____ years; _____ week(s) / _____ years.
 - C. Other. Explanation: _____

4. When are most employees first eligible to take paid sick time? (circle one):
 - A. After their introductory period of _____ days/months.
 - B. Immediately.
 - C. Other. Explanation: _____

5. How much paid sick time is available with that initial distribution?
_____ days/hours

6. When is the second distribution of paid sick time? (circle one)
 - A. The next month.
 - B. Bimonthly (on even months).
 - C. Quarterly (in March, June, September, and December).
 - D. Their next hire anniversary.
 - E. The next January 1st.
 - F. The next anniversary of their introductory period.
 - G. Other. Explanation: _____

7. How much paid sick time is made available with this second distribution?
_____ days/hours

-----TECHNICAL CLARIFICATIONS-----

8. When the second distribution of vacation time occurs and the employee has not taken all the vacation time from the previous distribution, how is it handled?
 - A. Carry over all of it to the next year.
 - B. Do not carry any of it over to the next plan year. The unused time is lost.
 - C. Pay it off when _____.
 - D. Hold it until employee is terminated, then pay it off.
 - E. Other. Explanation: _____

9. How is the carryover of paid sick time handled? (circle one)

- A. Carry over all of it to the next year.
- B. Do not carry any of it over to the next plan year. The unused time is lost.
- C. Pay it off when _____.
- D. Hold it until employee is terminated, then pay it off.
- E. Other. Explanation: _____

10. Are salespeople given paid vacation or paid vacation time? (circle one)

- A. Yes. PROCEED TO QUESTION 11.
- B. No. ANSWER QUESTION 10B.

10B) How is their vacation eligibility date determined if they become a sales manager? (circle one)

- C. From their hire date.
- D. From the date they became a manager.
- E. Do not know; or, on a case-by-case basis.

11. Is it common for vacation to be paid off at the time that it is accrued, and then to take the time at a later date? (circle one)

- A. Yes, for salespeople and other classes of employees. ANSWER QUESTION 11B.
- B. Yes, but only usually for salespeople. ANSWER QUESTION 11B.
- C. No, vacation is paid when time-off is taken. PROCEED TO QUESTION 12.

11B) Is it useful for the system to track when time is taken? (circle one)

- D. Yes.
- E. No.

12. When part-time employees become full-time employees, from what date do they generally receive vacation? (circle one)

- A. Hire date.
- B. Date becoming full-time.
- C. Don't know; or, on a case-by-case basis.

13. If an employee is terminated before reaching the date they receive their vacation, is there any compensation? (circle one)

- A. No.
- B. Yes. They get a prorated share of the vacation that would have been distributed on their eligibility date.
Description of calculation: _____

14. With your current payroll procedures, is vacation time input in the paychecks for salaried employees? (circle one)

- A. No. We pay them salary only.
- B. Yes. Vacation pay is "split out" for all employees.

15. Is it common for vacation or paid sick time to be taken by the employee prior to their eligibility or distribution date? (circle one)

- A. Yes. A negative balance should be reflected on the check stub.
- B. No. Available balance should never be negative on the check stub.
- C. Other. Explanation: _____

16. Are there any other time-off issues that would have some kind of distribution? (circle one)

- A. Emergency leave - limited to certain number of days a year.
- B. Unpaid sick time - limit?
- C. Maternity.
- D. Training.

Signature _____ Date _____

Name (Please Print) _____ Title _____

Dealership Name _____

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