

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 plan. Our client number is \_\_\_\_\_.

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

### Part 1: Vacation Plan Basics

1. How should this vacation plan be 'named' (up to 4 characters, e.g. 'VAC' or 'VAC2')? \_\_\_\_\_

2. Describe in general terms how the vacation plan works.

When does the employee receive their first distribution of vacation time? (i.e.: on their hire date (1<sup>st</sup> day of work), 1<sup>st</sup> anniversary on hire date, January 1<sup>st</sup>, etc.)

How often is vacation time distributed?

How much vacation time is distributed at different length of employment thresholds? (i.e.: 2 weeks for 1-4 years, 3 weeks for 5-9 years, etc.)

Any other details about the vacation plan:

3. Do you want the available vacation time to print on the employee's check stub? \_\_\_\_\_ If so, what format should be used? (please circle one)

Whole days (e.g. 8 days)

Partial day, in tenths (e.g. 8.5 days)

Whole hours (e.g. 44 hours)

Partial hours, in tenths (e.g. 22.5 hours)

4. An employee has 16 hours of vacation available. He takes 24 hours of vacation on March 2, 3 and 4, and his eligibility date is March 4 (when his next vacation hours are distributed). Is it OK for the system to show the 8 hours as a 'negative' balance? \_\_\_\_\_

5. Are salespeople given vacation pay at the time it is accrued or at the time it is taken? \_\_\_\_\_

6. For salaried employees, is vacation pay 'split out' on the paycheck? Or are they paid salary only, and the vacation is a 'memo earning'? \_\_\_\_\_

7. If an employee is terminated before reaching the date they receive vacation, is there compensation? If so, please describe: \_\_\_\_\_

**Part 2: Example Employees**

When setting up a new vacation plan, we need to have several examples. For each example, please list the vacation accruals for the next 10 years (or longer, if your plan provides a new distribution level after 10 or more years of service) in a spreadsheet.

**Example 1:** Employee is hired today who takes all vacation during each year.

**Example 2:** Employee doesn't take any accrued vacation for the first 4 years of employment, and then takes all available vacation. Once the vacation time is used, the employee doesn't take vacation again for 6 years. (Note this does seem to be an odd example, but it demonstrates how vacation 'carries over' year after year.)

**Example 3:** Employee is hired on July 15 of last year (as a part time employee), and is moving to full time status today.

**Additional Examples:** If your vacation plan is based on a calendar date (like January 1) instead of an anniversary date, examples need to be included for someone with a hire date of 1 week before the calendar date, on the calendar date, and one week after the calendar date. For example, if you plan is based on January 1, we need example employees hired on December 27, January 01, and January 04.

The columns for the example employees should be similar to this:

Date	Event	Hours Accrued	Hours taken/paid	Hours Remaining/ Carried over	Note
01/01/2011	Hire	0.00	0.00	0.00	Hire Date
01/01/2012	Eligibility Date/ Distribution Event 1	40.00	0.00	40.00	First accrual after one year of service
01/01/2013	Distribution Event 2	40.00	0.00	40.00	Second accrual, no carry over
05/18/2013	Vacation Used		40.00	0.00	Took one week vacation
01/01/2014	Distribution Event 3	80.00	0.00	80.00	reached 2 week milestone (3 year anniversary)

**Part 3: Copy of the Vacation Policy from the dealership Employee Handbook**

Please scan/fax the vacation policy pages from the dealership Employee Handbook and include them for our reference.

**Part 4: Special notations regarding this Vacation Policy**

As you complete the information above (especially the example employees), you may have some special notations to make about your vacation plan. Please include those notes here.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (Please Print) \_\_\_\_\_ Title \_\_\_\_\_

Dealership Name \_\_\_\_\_