

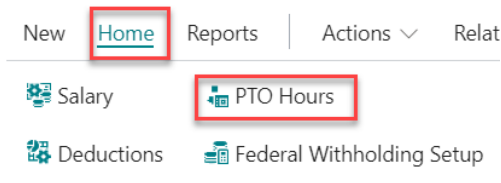
Add Employee PTO Hours

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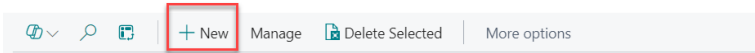
To ADD EMPLOYEE PTO HOURS

Step 1. From 'Payroll Employee Card' select 'Home' and then select 'PTO Hours'



Step 2. The Payroll Employee PTO list will open. Click "New"

Payroll Employee PTO List



Step 3. The 'Employee PTO Card' will open

Step 4. For the 'Earnings Code' field, select an earnings code from the available options in the drop down menu.

Step 5. Enter a 'Starting Date' for the PTO Hours to begin accruing by entering a date or selecting one from the drop down menu

EMPLOYEE PTO CARD

EMP10002

Show Attached

General

Earnings Code VACATION PAY

Starting Date 5/17/2018

Hours Remaining 0.00

Hours Limit

Lump Sum Setup

Use Lump Sum Hours Today Done

Lump Sum Hours

Accrual per Pay Period Setup

Allow Negative Hours

Year Carryover

Carryover Hours Limit

Anniversary Date

Restricted Until Date

It allows the user to restrict the use of the employee PTO till a 'Restricted Until Date' that is after the PTO 'Starting Date'. For example, a company may only allow 8 hours of PTO to be used during the first 6 months of employment. This feature allows the system to track the period for which PTO is restricted.

EMPLOYEE PTO CARD

EMP10007 · PERSONAL DAY · 1/7/2019

General

Earnings Code PERSONAL DAY

Starting Date 1/7/2019

Hours Remaining 0.00

Year Carryover ☐

Restricted Until Date 7/7/2020

At this point the field is for information tracking purposes. We currently do not have any rules built into this field yet since they could vary widely for each customer. However, this field gives the system the ability to track a Restricted Until Date and then the implementer can always add rules / an extension to the field based on customer requirements.

Step 6. Enter an 'Hours Limit'. This is the maximum amount of hours that can accrue each year

EMPLOYEE PTO CARD

EMP10002

Show Attached

General

Earnings Code VACATION PAY

Starting Date 5/17/2018

Hours Remaining 0.00

Hours Limit 80

Allow Negative Hours ☐

Year Carryover ☐

Carryover Hours Limit

Lump Sum Setup

Use Lump Sum Hours ☐

Lump Sum Hours

Anniversary Date

Accrual per Pay Period Setup

Step 7. If you wish to allow negative hours or allow unused PTO Hours to carry over each year amount, set the appropriate sliders to True. If you set the 'Year Carryover' to True you can enter a 'Carryover Hours Limit'. The 'Carryover Hours Limit' is the amount of accrued hours they can carryover from the previous year.

NOTE: 'ALLOW NEGATIVE HOURS' means that an employee can use hours that they have not yet accrued. This is most commonly utilized with Vacation Time for new employees.

EMPLOYEE PTO CARD
EMP10002

Show Attached

General

Earnings Code: VACATION PAY
Starting Date: 5/17/2018
Hours Remaining: 0.00
Hours Limit: 80.00

Allow Negative Hours: ☒
Year Carryover: ☒
Carryover Hours Limit: 80.00

Lump Sum Setup

Use Lump Sum Hours: ☐
Lump Sum Hours:
Anniversary Date:
Accrual per Pay Period Setup

NOTE: In most cases, companies will either utilize 'LUMP SUM SETUP' or the 'ACCRUAL PER PAY PERIOD SETUP'.

LUMP SUM SETUP PROCEDURE

Step 1. If you wish to utilize the 'LUMP SUM SETUP', set the 'Use Lump Sum Hours' to True. At which point the 'Lump Sum Hours' and 'Anniversary Field' will become editable.

EMPLOYEE PTO CARD
EMP10002

Show Attached

General

Earnings Code: VACATION PAY
Starting Date: 5/17/2018
Hours Remaining: 0.00
Hours Limit: 80.00

Allow Negative Hours: ☒
Year Carryover: ☒
Carryover Hours Limit: 80.00

Lump Sum Setup

Use Lump Sum Hours: ☒
Lump Sum Hours:
Anniversary Date:
Accrual per Pay Period Setup

Step 2. Enter the lump sum hours and the anniversary date for the hours in the corresponding fields then click the Back button to exit.

EMPLOYEE PTO CARD
EMP10002

Show Attached

General

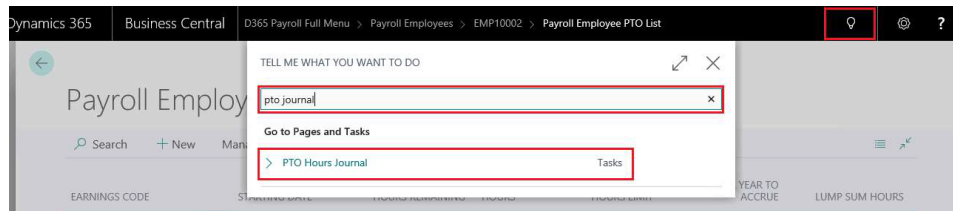
Earnings Code: VACATION PAY
Starting Date: 5/17/2018
Hours Remaining: 0.00
Hours Limit: 80.00

Allow Negative Hours: ☒
Year Carryover: ☒
Carryover Hours Limit: 80.00

Lump Sum Setup

Use Lump Sum Hours: ☒
Lump Sum Hours: 80.00
Anniversary Date: 1/1/2019
Accrual per Pay Period Setup

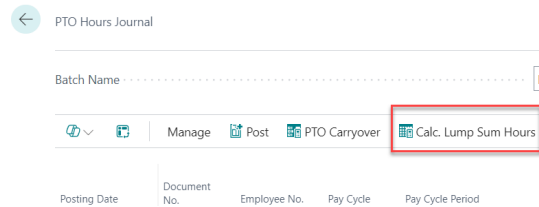
Step 3. Now OPEN the PTO Journal. Enter 'PTO Journal' in the SEARCH BAR and select 'PTO Hours Journal'



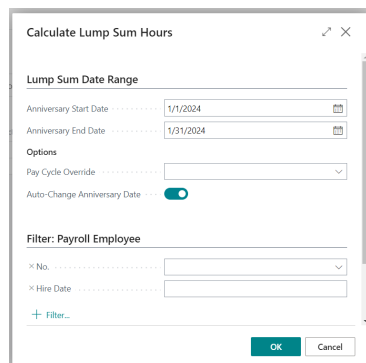
Step 4. The 'PTO HOURS JOURNAL' will appear.



Step 5. Select Calc. Lump Sum Hours'



Step 6. Enter an 'Anniversary Start Date' and 'Anniversary End Date' range that includes the lump sum anniversary date you entered in the 'LUMP SUM SETUP' the click 'OK'.



ACCRUAL PER PAY PERIOD SETUP PROCEDURE

Step 1. If you elect to utilize the 'ACCRUAL PER PAY PERIOD SETUP', enter the 'Hours per Year to Accrue' then click the 'Back' button.

EMPLOYEE PTO CARD

EMP10002

Show Attached

Starting Date: 1/1/2018

Hours Remaining: 0.00

Hours Limit: 80.00

Year Carryover: ☒

Carryover Hours Limit: 80.00

Lump Sum Setup

Use Lump Sum Hours: ☐

Lump Sum Hours:

Anniversary Date:

Accrual per Pay Period Setup

Hours per Year to Accrue: 80.00 x

Step 2. Review the newly added PTO hours in the 'Payroll Employee PTO List' then click the 'Back' button.

Payroll Employee PTO List

EARNINGS CODE	STARTING DATE	HOURS REMAINING	ALLOW NEGATIVE HOURS	HOURS LIMIT	HOURS PER YEAR TO ACCRUE	LUMP SUM HOURS
PERSONAL DAY	1/2/2018	3.69	☒	120.00	40.00	0.00
SICK PAY		0.00	☐	0.00	0.00	0.00
VACATION PAY	1/1/2018	-2.00	☒	80.00	80.00	0.00