



PTO Set-up Form

Fax to 781.851.8491

PayrollManager Express™

Powered By PMTWorks

Questions? Call 877.907.2976

Employer Information

Date: _____ Company Name: _____

PTO Data

What do you want to track? Vacation Sick Paid Time Off

Does your plan(s) have multiple tiers? No Yes (please specify below)

EXAMPLE -

From 0 to 12 months employees accrue at .025 rate per hour worked to a max of 52

From 12 to 24 months employees accrue at .05 per hour worked to a max 104

VACATION

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

SICK

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

PTO

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

From _____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

Additional Required Information - Please respond for each plan

When should we re-set your plan? On January 1st each year On a specific date

Employee Hire or Anniversary Date Do not re-set

Do your employees accrue or are they given a lump sum each year? Accrue Lump sum

Is there a wait time before employees can BEGIN their accrual? Yes No How long? _____

Is there a wait time before employees can USE their accrual? Yes No How long? _____

Do you allow your employees to Carry-Over PTO time? Yes No If yes, How much per tier? _____

Is there an overall maximum amount of time your employees can have on the books at any time? Yes No If yes, How much per tier? _____

Please supply the following information for each employee

Hire date: _____

Total Accrued to date: _____

Total Used to date: _____

Total Carry-Over: _____