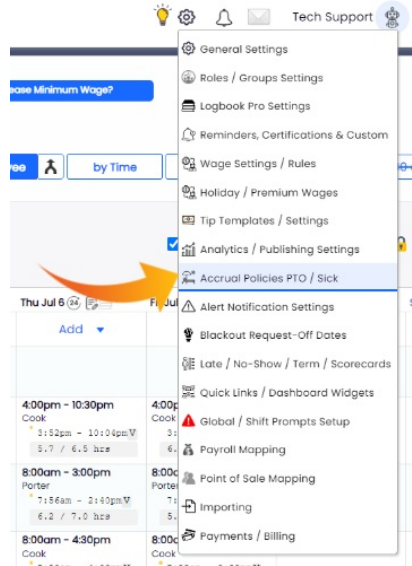


PTO Overview

Last Modified on 07/14/2023 7:33 am MDT

Creating PTO Policies

Gearwheel Menu > Accrual Policies PTO / Sick



Create policies and fill in policy data.

PTO Accrual Policies

[Create a new PTO Accrual Policy](#) No PTO Employee Default

PTO Employee Default

TEST

Visible to Employees

Starting Minimum Allowed Request of hours per day
Maximum Allowed Request of hours per day
Force increments of hours

Use Original Employee Hire Dates, if less than months from latest hired date.

Anniversary

Use Hire Date
 Use Calendar Year (January 1)
 Use Policy Start Date

Enable Accrual

Start Accrual Days after Hired Date. Start Eligibility Days after Hired Date.
Allow Negative Balance of hours.

Other Earnings types that apply towards Accrual:

Accrue on Full-Time only
 Apply start hours year one, even though partial year
 Accrue All Employees on 40 hr / week

Type	Year 1	Year 2	Year 3	Year 4	Year 5 and after
Hours Accrued per Employee Worked Hour	0.384	0.384	0.384	0.384	0.384
Max Accrued Hours Allowed In Year	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Percent of Accrued Hours Allowed to Carry over	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Max Hours Allowed to Carry over	<input type="text" value="80"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Max Hours Allowed to Withdraw	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Start Each Year (On or Following the Policy Start Date) with	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Activate Select Locations / Departments for PTO

or Other Earnings Use

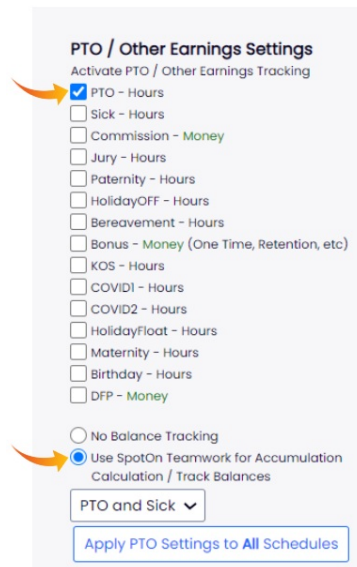
Gearwheel Menu > **General Settings** > Scroll to **Locations**

For each location that you want to implement PTO tracking

Use the "+" sign to reveal location options



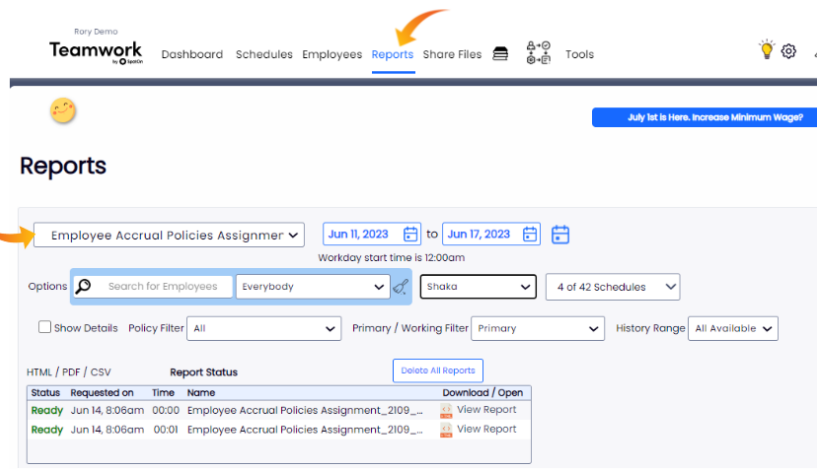
1. Check **Activate PTO Tracking**. The ability to manually add and request use of PTO is now engaged.
2. If you are using Teamwork to track accumulate hours, select **Use SpotOn Teamwork for Accumulation Calculation / Track Balances**, and select PTO from the dropdown menu.



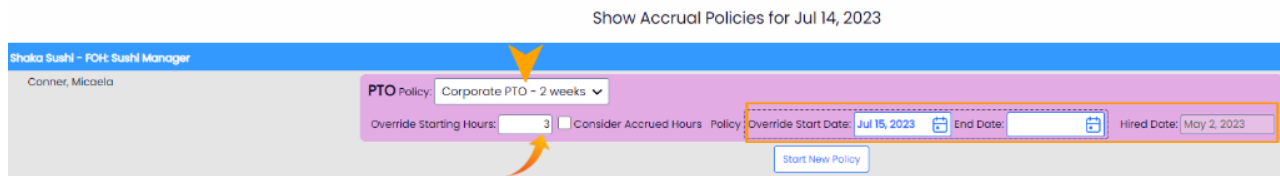
Assign employees policies, hire date, and policy start date.

NOTE: Teamwork is provide initial import. Please provide an excel roster of employee balances.

Reports > **Employee Accrual Policies Assignment**

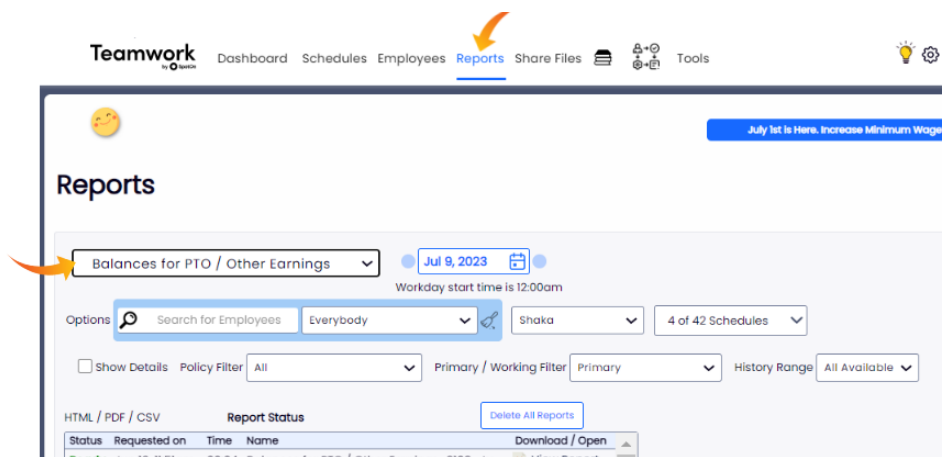


Assign Policy, Start Hours, and Policy Start Date. (Hire date will populate from Payroll import if applicable)

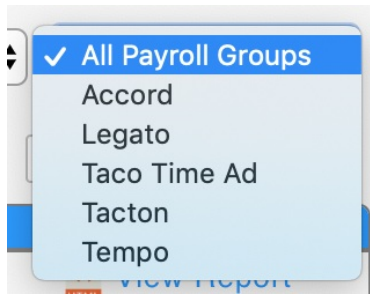


Viewing Balances and Applying PTO

Reports > Balances for PTO / Other Earnings

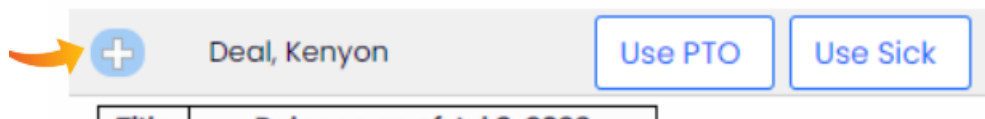


Filter on intended payroll group, and press Show Report



Initiate activity from an employee's Primary or intended department for PTO use.

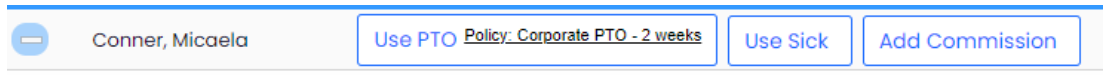
Expand employee history with "+"



Observe accumulation and balances of PTO and Other Earnings

Sushi Manager					
Conner, Micaela		Use PTO Policy: Corporate PTO - 2 weeks		Use Sick	Add Commission
Policy: Corporate PTO - 2 weeks (Jun 16, 2023)		PTO Hours			Hired: May 2, 2023 12:00am
Week Start Date	Accrued	Used	Can't Approve	Adjusted	Balance Hours (Accrued Hours / Year)
7 Sun - Jun 11 to Jun 18 2023	3.00			0.00	* Policy: Corporate PTO - 2 weeks - Preload(A) 3 hrs * 3.00 (3.00)

Use the **USE** or **ADD** buttons to produce PTO / Other Earnings for a given date



Enter Hours PTO, Applicable Date, and Role (for assigning the applicable wage used for PTO), and **Submit**.

NOTE: The action will be blocked if insufficient PTO is available for use.

Add Earnings to Micaela Conner @Sushi Manager

Starting Sunday Jul 2, 2023 12:00am

PTO

Use hours on Reason:

Role:

PTO will flow into the payroll output.

Workflow with **EMPLOYEE** initiating PTO use

From their Dashboard, employee can view balance and make request.

NOTE: Employee request will be blocked if it exceeds available balance.

The screenshot shows an employee's dashboard with the following elements:

- Header: Teamwork logo, navigation tabs (Dashboard, Schedules, Employees, Tools), user profile (Micoela Conner).
- Section: "No Shared Libraries Setup"
- Section: "Employee Requests" with a "Show" button.
- Section: "PTO Hours I've Requested Statuses" with a "Show" button.
- Table: "PTO Hours I've Requested" with columns for Week Start Date, Accrued, Used, Can't Approve, Adjusted, and Balance Hours (Accrued Hours / Year).

Week Start Date	Accrued	Used	Can't Approve	Adjusted	Balance Hours (Accrued Hours / Year)
Sun - Jun 11 to Jun 18 2023	3.00			0.00	*Policy: Corporate PTO - 2 weeks - Priced(AT) 3 hrs * 3.00 (3.00)
- Form: "Starting Sunday Jul 2, 2023 12:00am". Fields include "Request to use" (PTO (Current Policy: Corporate PTO - 2 weeks)), "hours, starting" (with a calendar icon), "Reason", and "Schedule" (Sushi Manager). A "Submit Request" button is at the bottom.

Manager Approval of employee request

From **Dashboard**, manager can view and approve PTO requests

NOTE: Select schedule and rates for proper payroll mapping

The screenshot shows a manager's dashboard with the following elements:

- Header: Teamwork logo, navigation tabs (Dashboard, Schedules, Employees, Reports, Share Files, Tools), user profile (Tech Support).
- Section: "Employee Requests"
- Text: "No Shift Trades Waiting Approval", "No Shift Swaps Waiting Approval"
- Section: "PTO/Sick Requests Waiting for Mgr Approval" (highlighted with an orange box). It contains two request entries:
 - Schedule: Sushi Manager, Role: Micoela Conner requests PTO time on Sunday, Jul 23rd for 3 hrs, Reason: sister's wedding, Requested Jul 14, 2023
 - Schedule: Sushi Manager, Role: Micoela Conner requests PTO time on Sunday, Jul 16th for 2 hrs, Reason: Vacation, Requested Jul 14, 2023
- Section: "Availability Requests Waiting for Mgr Approval"
- Text: "Shades Bar & Grill", "View | Teresa Carreto has Requested Availability Preferences for the week starting May 23, 2023 | requested May 23, 2023"