

PTO Viewing Balances and Applying PTO

Last Modified on 02/12/2021 4:56 pm MST

Workflow with **EMPLOYEE** initiating PTO Request

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

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

PTO Hours I've Requested and Commission / Bonus Statuses

PTO Hours I've Requested and Commission / Bonus

Paid Time Off Hours						Hired: Nov 24, 2018
Week Start Date	Accrued	Used	Denied	Adjusted	Balance	
	0.00	0	0	0.00	3.00	
Sat - Jun 22, 2019	0.40	0	0	0.00	3.40	
Sat - Jun 29, 2019	0.71	0	0	0.00	4.11	

Commission

Week Start Date	Amount
Sat - Jun 22, 2019	\$100.00

Week Details Below

For Date	Request Made On	Amount	Schedule	Role	Notes	Action by	Mgr Note
Fri Jun 28, 2019 6:00am	Thu Jul 4, 2019 4:08pm	\$100.00	Branson Bowling	Guest Attendant	testing	Tech Support	Mgr Submitted

\$100.00 Amount in current anniversary year

Bonus

Week Start Date	Amount
	\$0.00 Amount in current anniversary year

Request to use hours starting Reason:

Schedule:

Manager Approval of employee request

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

NOTE: Select schedule and rates for proper payroll mapping

Employee Requests

Shift Trades Waiting for Mgr Approval

- Spencer Beeman (TOT Sch: 20.0 hrs, w/trade: 26.0 hrs, 0 shifts day of) wants Adam Wilson's (TOT Sch: 26.0 hrs, w/trade: 20.0 hrs, 1 shift day of) on Wednesday Jul 10th 5:00pm-11:00pm @Denton Restaurant town. requested Jul 4, 2019 11:44pm
- Jacob Sutterfield (TOT Sch: 22.0 hrs, w/trade: 30.5 hrs, 0 shifts day of) wants Sabin Banks's (TOT Sch: 23.0 hrs, w/trade: 14.5 hrs, 1 shift day of) on Friday Jul 5th 5:00pm-1:30am @Tulsa Bowling Mechanic, Reason: visiting family from 7/3/19 to 7/6/19. requested Jul 4, 2019 3:58pm
- Mark Freeman (TOT Sch: 37.5 hrs, w/trade: 44.5 hrs, 0 shifts day of) wants Raymond Brass's (TOT Sch: 21.5 hrs, w/trade: 14.5 hrs, 1 shift day of) on Friday Jul 5th 12:00pm-7:00pm @Tulsa Restaurant Line cook. requested Jul 4, 2019 10:57pm

PTO/Sick Requests Waiting for Mgr Approval

- Schedule: Role: Wage: Paige Andrews-Pompilio requests PTO time on Wednesday, Jul 3rd for 1 hr, Reason: tech testing Requested Jul 4, 2019

Workflow with Manager initiating the entry of PTO for an employee

Reports > PTO / Other Earnings

Reports

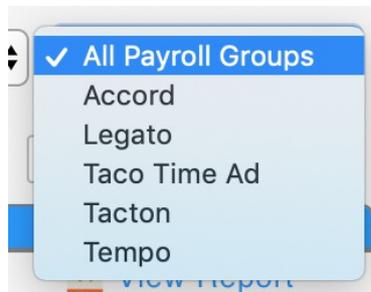
Use Our Quick

PTO / Other Earnings Jun 22, 2019 to Jul 5, 2019

Work day start time is 6:00am

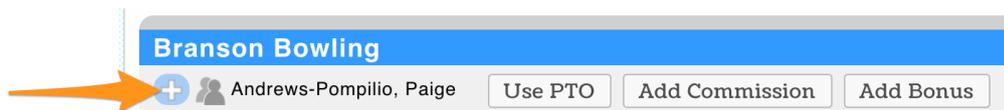
Options:

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

Paid Time Off Hours						
Week Start Date	Accrued	Used	Denied	Adjusted	Balance	
	0.00	0	0	0.00	3.00	
Sat - Jun 22, 2019	0.40	0	0	0.00	3.40	
Sat - Jun 29, 2019	0.71	0	0	0.00	4.11	

Commission	
Week Start Date	Amount
Sat - Jun 22, 2019	\$100.00

Week Details Below

For Date	Request Made On	Amount	Schedule	Role	Notes	Action by	Mgr Note
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\$100.00 Amount in current anniversary year

Bonus	
Week Start Date	Amount
\$0.00 Amount in current anniversary year	

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.



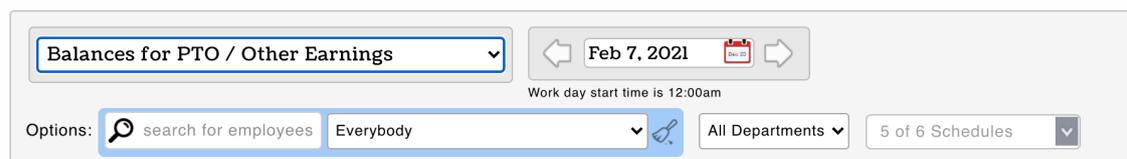
PTO will flow into the payroll output.

Workflow for Checking or Exporting Balances

Reports > Balances for PTO / Other Earnings

- Enter the Date for the "as-of" date
- Filter as desired
- Run Screen Report or Export as CSV

Reports



NOTE: PTO detail or assignment of hours used use can be initiated from this report, just as it can from the PTO report shown above.