# PTO Viewing Balances and Applying PTO

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## 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.



Manager Approval of employee request

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

NOTE: Select schedule and rates for proper payroll mapping

# Workflow with **Manager** initiating the entry of PTO for an employee

Reports > **PTO / Other Earnings**



Filter on intended payroll group, and press**Show Report**
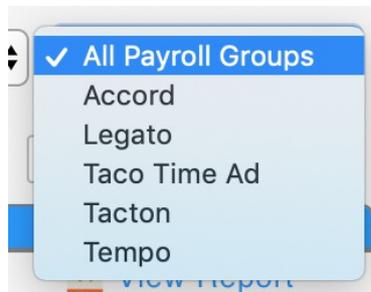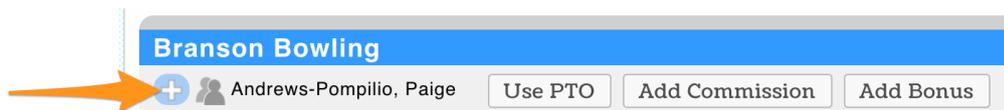


Initiate activity from an employee's Primary or intended department for PTO use.

Expand employee history with "+"



Observe accumulation and balances of PTO and Other Earnings

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**.

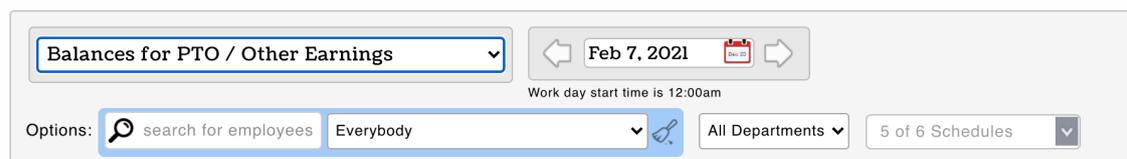NOTE: The action will be blocked if insufficient PTO is available for use.



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



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.