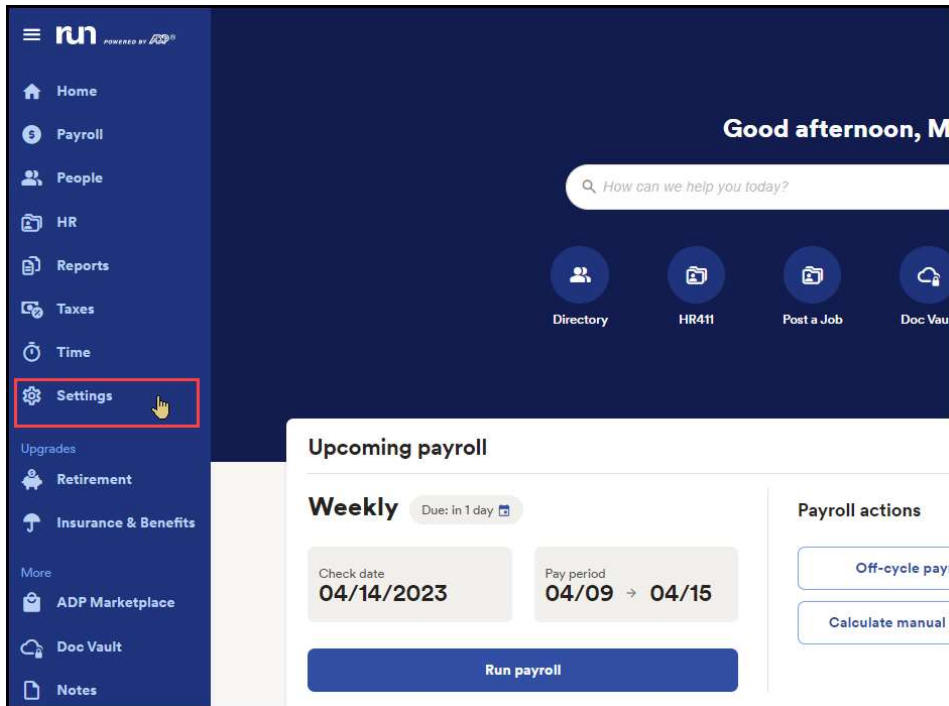
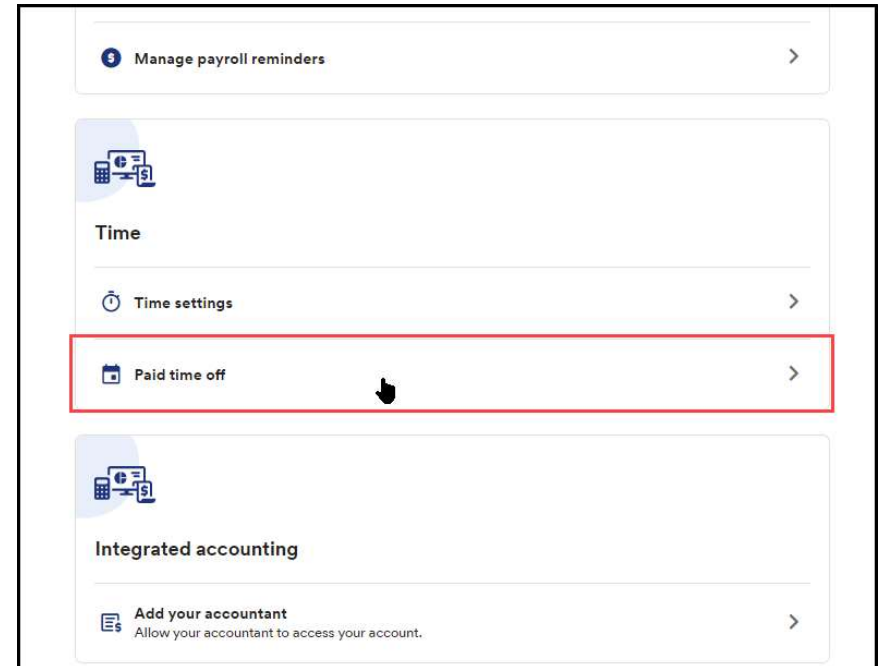


Assigning Employees to a PTO Plan

1 To get to the **Paid Time Off Plans**, click on **Settings**.



2 Then scroll down to the **Time** section and click **Paid Time Off**.



Assigning Employees to a PTO Plan

3 Here we can see all the **Paid Time Off** plans that you have created.

Paid time off
You can add or change your PTO plans.

Plan name	Method	PTO rate / amount	Assigned
Vacation	Annual Allowance	80 hours	4
Vacation (hourly full time)	Per Pay Period	1 hour	1

+ Add plan

Do you want to include PTO earnings on your employee pay stubs?
 No Yes

4 You can see very quickly how many employees are **assigned** to each plan **here**.

Paid time off
You can add or change your PTO plans.

Plan name	Method	PTO rate / amount	Assigned
Vacation	Annual Allowance	80 hours	4
Vacation (hourly full time)	Per Pay Period	1 hour	1

+ Add plan

Do you want to include PTO earnings on your employee pay stubs?
 No Yes

Assigning Employees to a PTO Plan

5 To see specifics or to add an employee who has not yet been assigned to the plan, click **the icon**.

Paid time off
You can add or change your PTO plans.

Plan name	Method	PTO rate / amount	Assigned
Vacation	Annual Allowance	80 hours	4
Vacation (hourly full time)	Per Pay Period	1 hour	1

[Add plan](#)

Do you want to include PTO earnings on your employee pay stubs?
 No Yes

6 If an employee is already added to the plan, they will have a **gray check mark** next to their name.

Who do you want to assign to this Vacation (hourly full time) plan?
Select the employees you want to assign to this plan.

<input type="checkbox"/>	Select all	Balance
<input checked="" type="checkbox"/>	Gutierrez, Lisa	80
<input type="checkbox"/>	Patterson, Desmond	
<input type="checkbox"/>	Reed, Jazmin	
<input type="checkbox"/>	Ward, Racheal	
<input type="checkbox"/>	Woods, Ben	

[Confirm & add](#)

Assigning Employees to a PTO Plan

- 7 If an employee is eligible to be added to a plan, you can select the **checkbox** next to their name. You can also add a **starting balance** at the same time if needed. When you're ready, click on **Confirm & Add**.

Who do you want to assign to this Vacation (hourly full time) plan?

Select the employees you want to assign to this plan.

<input type="checkbox"/>	Select all	Balance
<input checked="" type="checkbox"/>	Gutierrez, Lisa	<input type="text" value="80"/>
<input checked="" type="checkbox"/>	Patterson, Desmond <small>ⓘ Reassigning Desmond from Vacation plan to Vacation (hourly full time)</small>	<input type="text"/>
<input type="checkbox"/>	Reed, Jazmin	<input type="text"/>
<input type="checkbox"/>	Ward, Racheal	<input type="text"/>
<input type="checkbox"/>	Woods, Ben	<input type="text"/>

Assigning Employees to a PTO Plan

8 Now we can see that the number of employees has updated.

Paid time off
You can add or change your PTO plans.

Plan name	Method	PTO rate / amount	Assigned
Vacation	Annual Allowance	80 hours	3
Vacation (hourly full time)	Per Pay Period	1 hour	2

+ Add plan

Do you want to include PTO earnings on your employee pay stubs?
 No Yes

9 To make **Edits** to the **PTO Plan**, click on the **3 dots** to the right of the plan, then click **Edit**.

Paid time off
You can add or change your PTO plans.

Plan name	Method	PTO rate / amount	Assigned
Vacation	Annual Allowance	80 hours	3
Vacation (hourly full time)	Per Pay Period	2.3077 hours	2

+ Add plan

Do you want to include PTO earnings on your employee pay stubs?
 No Yes

Edit Plan
Delete Plan

Assigning Employees to a PTO Plan

10 This will bring up the **Review** screen from when you added the plan. To make an edit to a plan, click on the **Edit** icon to the right.

Edit your Vacation (hourly full time) plan

Edit your employees' PTO plan below.

Plan details		Edit
Plan name	Vacation (hourly full time)	
Method	Each pay period	

How many hours can your employees earn?		Edit
PTO rate	1 hour	
Maximum PTO accrual	Unlimited hours	

Work anniversary awards [Learn more](#)

You haven't created any work anniversaries awards yet.

[+ Add work anniversary award](#)

How does the plan behave?		Edit
Plan resets	Calendar year (Jan 1st)	
Unused hours	Carry over (20 hours)	

Additional options		Edit
Automatically add employees to this plan	Yes	
Earn while not being paid	No	

11 Click on the **Edit** option on the right-hand side for the section you want to change.

Edit your Vacation (hourly full time) plan

Edit your employees' PTO plan below.

Plan details		Edit
Plan name	Vacation (hourly full time)	
Method	Each pay period	

How many hours can your employees earn?		Edit
PTO rate	1 hour	
Maximum PTO accrual	Unlimited hours	

Work anniversary awards [Learn more](#)

You haven't created any work anniversaries awards yet.

[+ Add work anniversary award](#)

How does the plan behave?		Edit
Plan resets	Calendar year (Jan 1st)	
Unused hours	Carry over (20 hours)	

Assigning Employees to a PTO Plan

12 Here, we can modify the **amount of hours** that are accrued.

How much PTO can your employees earn for the hours they work?

*All fields marked with an * are required*

Use calculator Enter rate manually

Choose a pay frequency to calculate with * Weekly

Paid time off hours per year * 80.00

Amount of PTO earned per pay period worked 1.5385

Optional: What's the max number of hours an employee can accrue during the year?

Done

13 Put in the new total hours in the calculator and ADP will do the rest. Then click **Done**.

How much PTO can your employees earn for the hours they work?

*All fields marked with an * are required*

Use calculator Enter rate manually

Choose a pay frequency to calculate with * Weekly

Paid time off hours per year * 120.00

Amount of PTO earned per pay period worked 2.3077

Optional: What's the max number of hours an employee can accrue during the year?

Done

Assigning Employees to a PTO Plan

14 If there are no more changes to make, click **Save**.

The screenshot shows the configuration page for a PTO plan. It is divided into several sections, each with an 'Edit' link:

- Plan details:** Plan name: Vacation (hourly full time); Method: Each pay period.
- How many hours can your employees earn?:** PTO rate: 2.3077 hours; Maximum PTO accrual: Unlimited hours.
- Work anniversary awards:** You haven't created any work anniversaries awards yet. Includes an 'Add work anniversary award' button.
- How does the plan behave?:** Plan resets: Calendar year (Jan 1st); Unused hours: Carry over (20 hours).
- Additional options:** Automatically add employees to this plan: Yes; Earn while not being paid: No; Earn while on LOA: No.

A red box highlights the **Save** button at the bottom right of the page.

15 The **PTO Plan** is now updated and will be reflected on the next balance award.

The screenshot shows the 'Paid time off' management page. It includes a table of active PTO plans and a question about including PTO earnings on pay stubs.

Plan name	Method	PTO rate / amount	Assigned
Vacation	Annual Allowance	80 hours	3
Vacation (hourly full time)	Per Pay Period	2.3077 hours	2

Below the table is an 'Add plan' button. At the bottom, there is a question: 'Do you want to include PTO earnings on your employee pay stubs?' with radio buttons for 'No' and 'Yes' (selected).