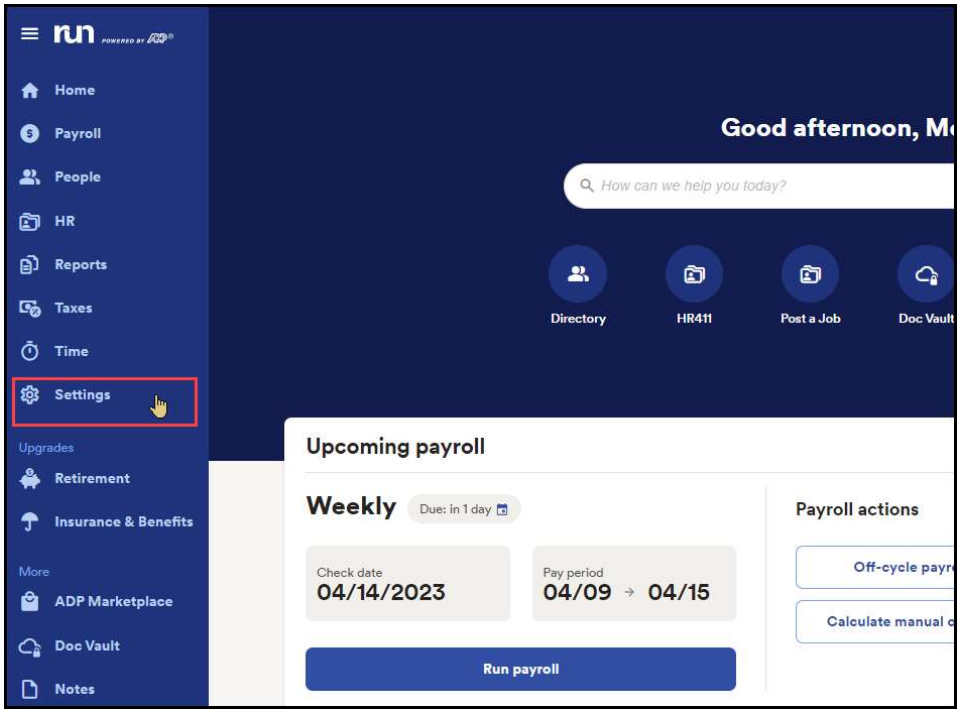
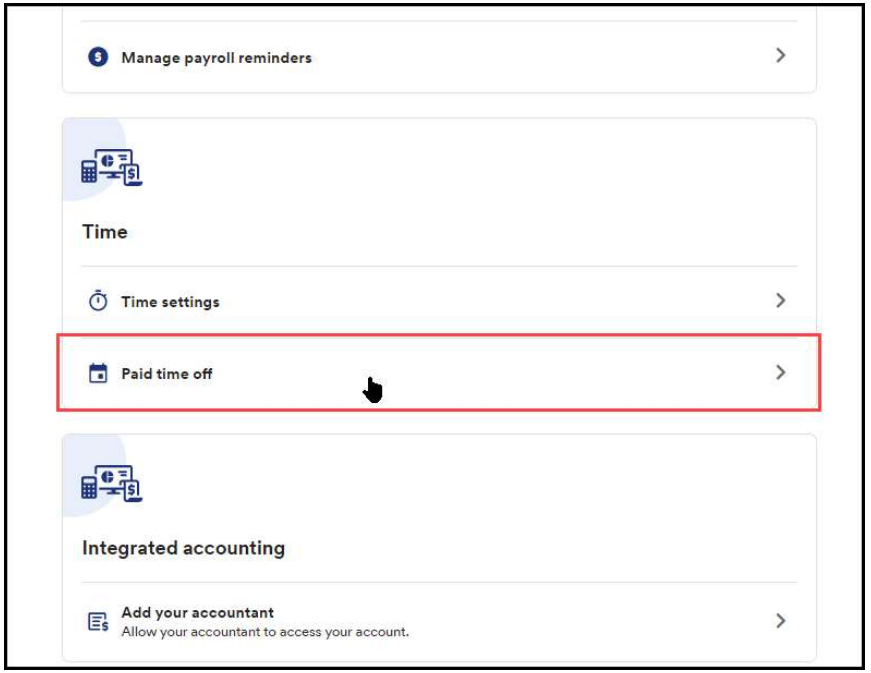
Multiple PTO Plans

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



2 Then, under the Time section select **Paid Time Off**.



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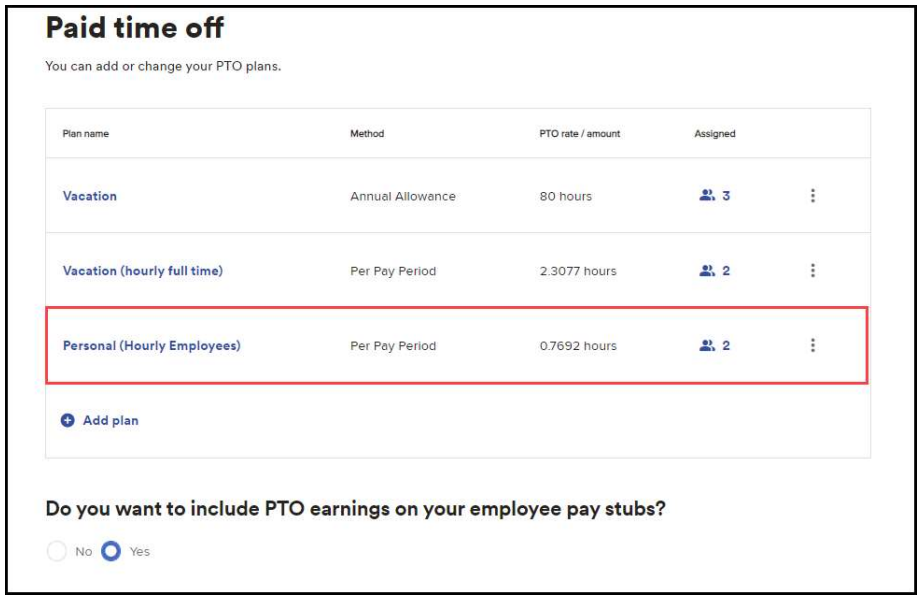
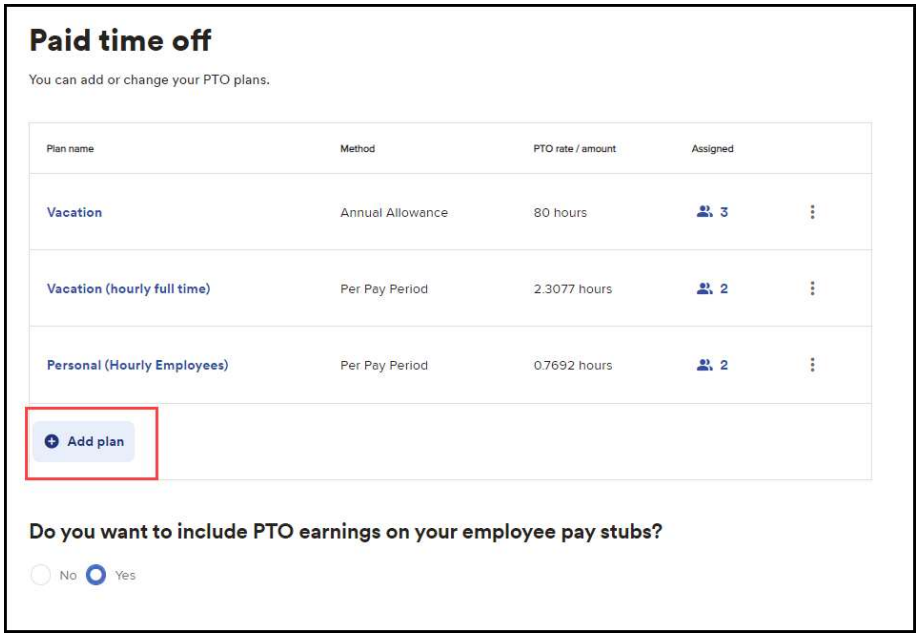
Multiple PTO Plans

3 Here we can see all there is already a **Personal Paid Time Off** plan for Hourly Employees. Timekeeping Plus allows you to create multiple plans of the same type for different employee groups.



4 To do this, click on **Add Plan**. This will start an intuitive walk-through experience that will assist you in setting up a new plan.



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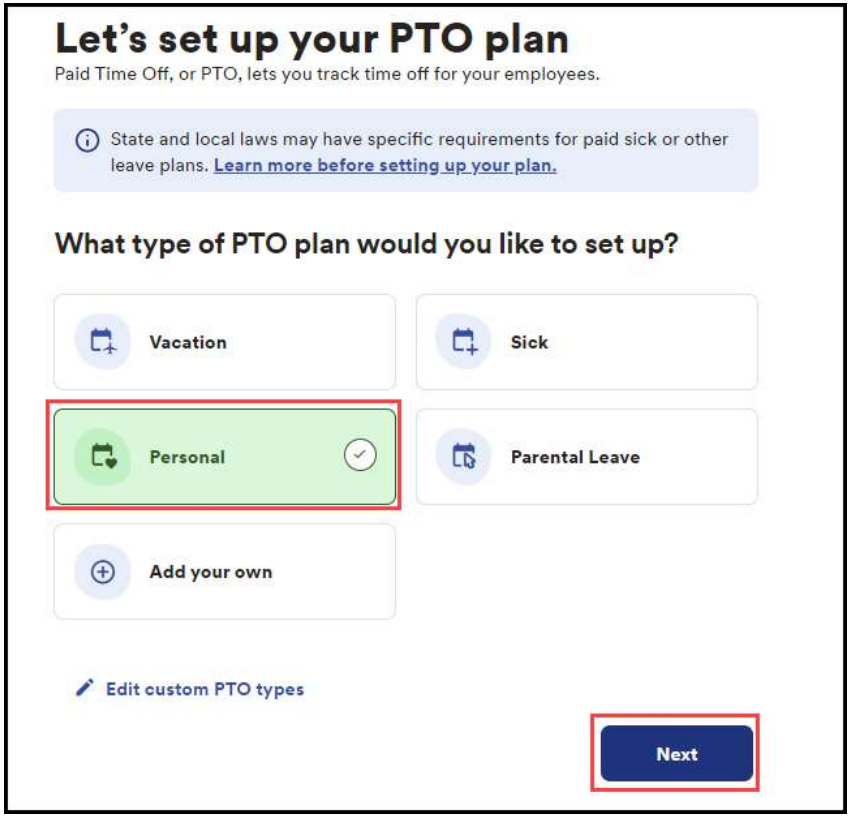
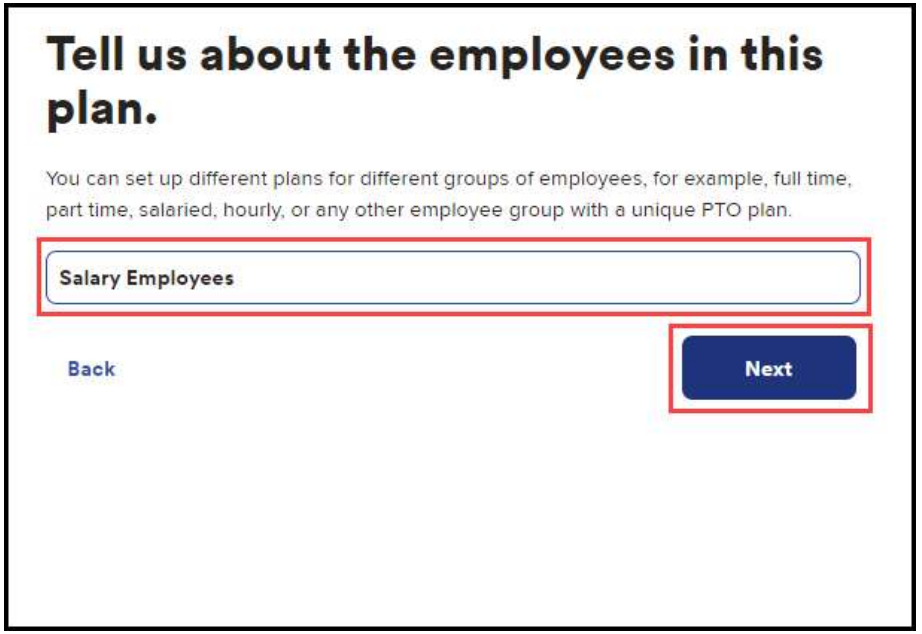
Multiple PTO Plans

5 Let's add a new Personal plan for Salary employees. Choose **Personal**, then click **Next**.



6 Since this is for **Salary** employees, let's call it as such. Then click **Next**.



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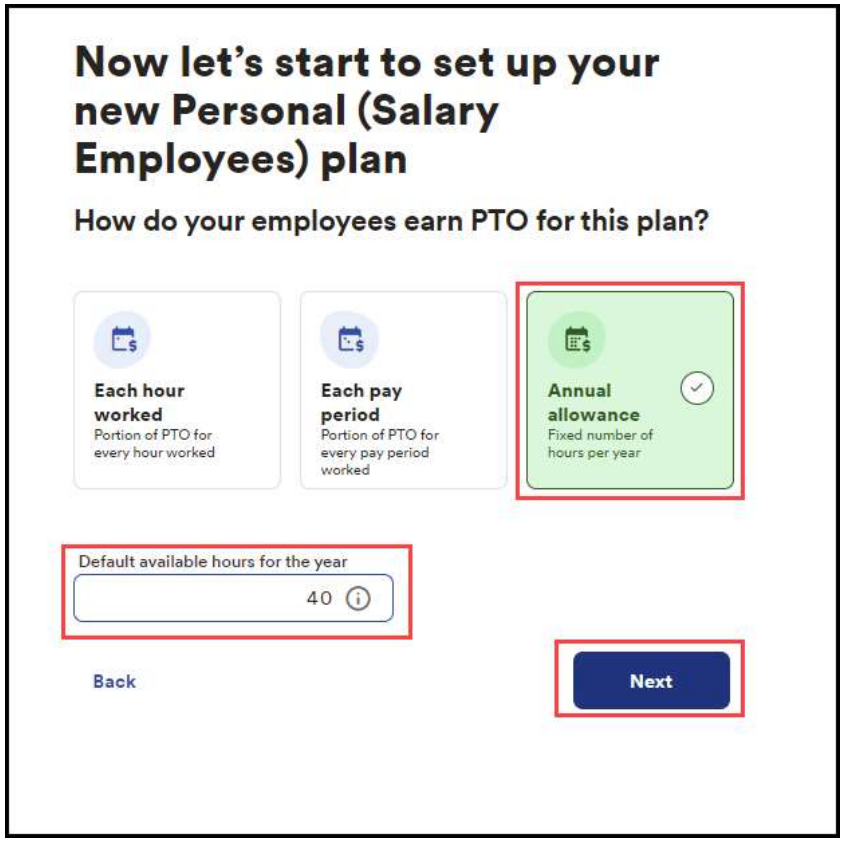
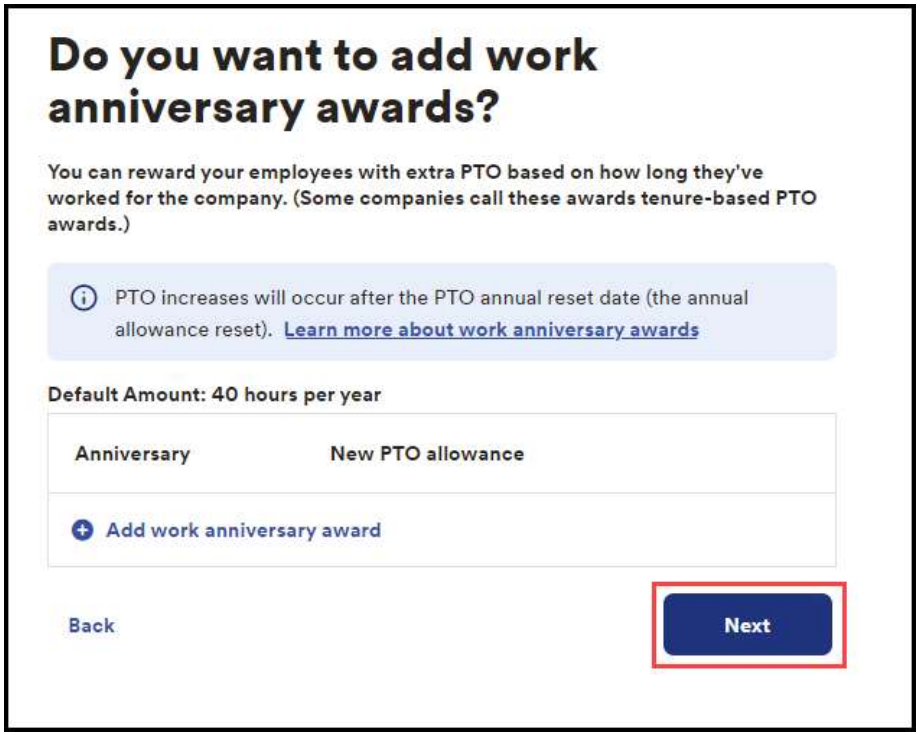
7 Here we can choose how the **PTO Accrues**. In this example, we are using **Annual Allowance** for Salary employees. We can also enter the amount of 40 hours. Then click **Next**.



8 Next, you have the option to **Add Work Anniversary Award** to reward your employees with additional PTO hours based on how long they have worked for the company. We can hit **Next** to continue.



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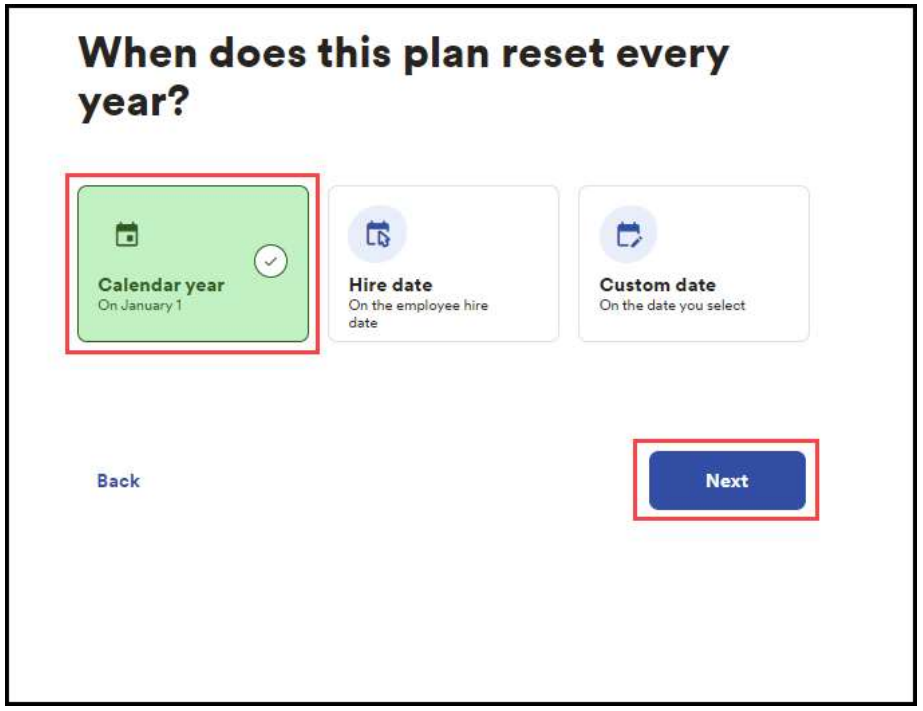
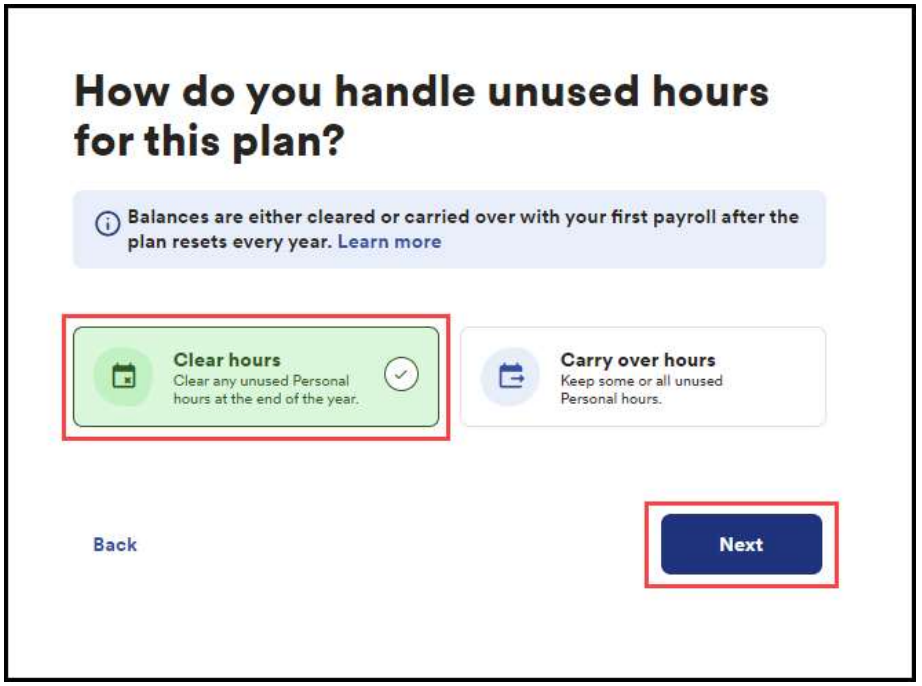
9 Here we can choose a **Reset Date** for the plan. In this example, we will select **Calendar Year** for January 1st, then click **Next**.



10 The next section will allow you to choose how you handle carryover. Selecting **Clear Hours** will purge all balances at the end of the year, while the **Carry over hour** option will let you enter an amount employees are allowed to carryover. Hit **Next** once done.



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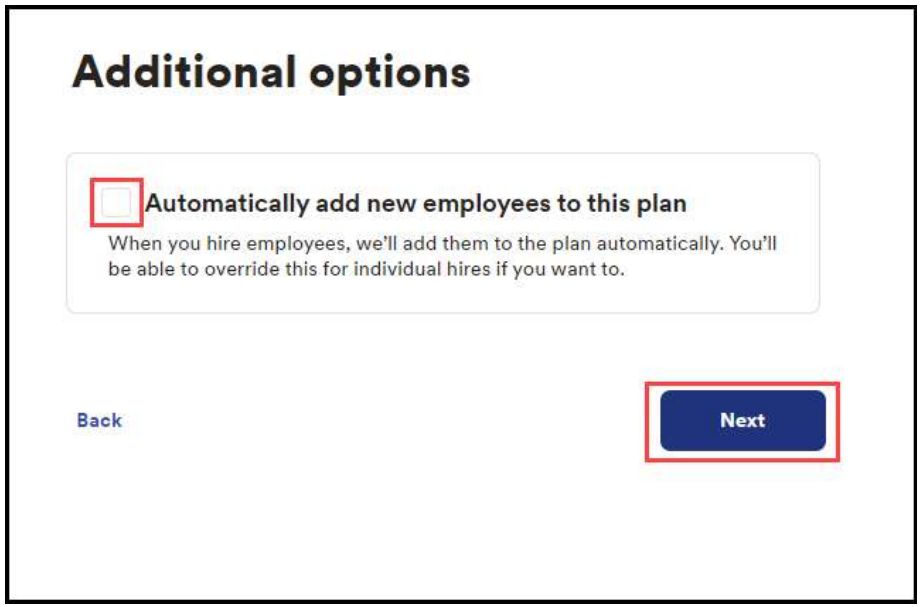
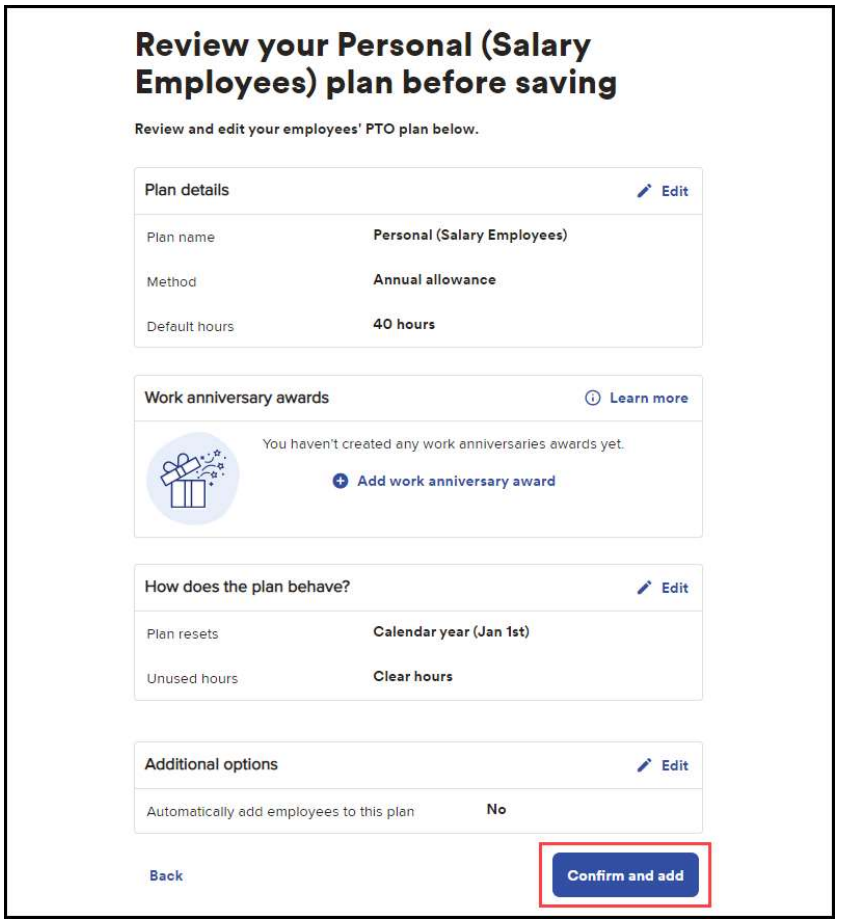
Multiple PTO Plans

11 Finally, we have the Additional Options. In this example, we don't want to assign employees automatically to the plan since this will be a separate plan only for **Salary** employees. **Uncheck** the box and click **Next**.



12 One last check of the plan before finalizing it by clicking **Confirm and Add**.



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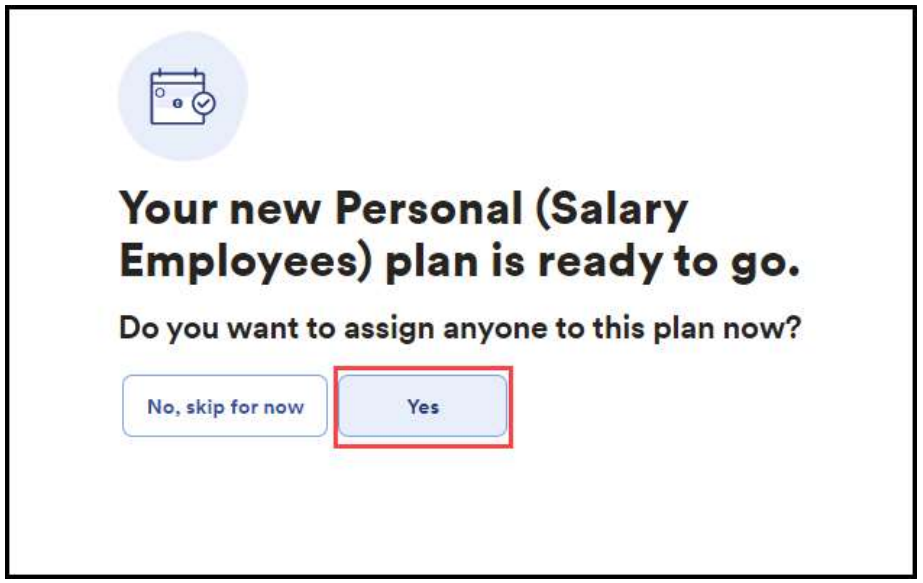
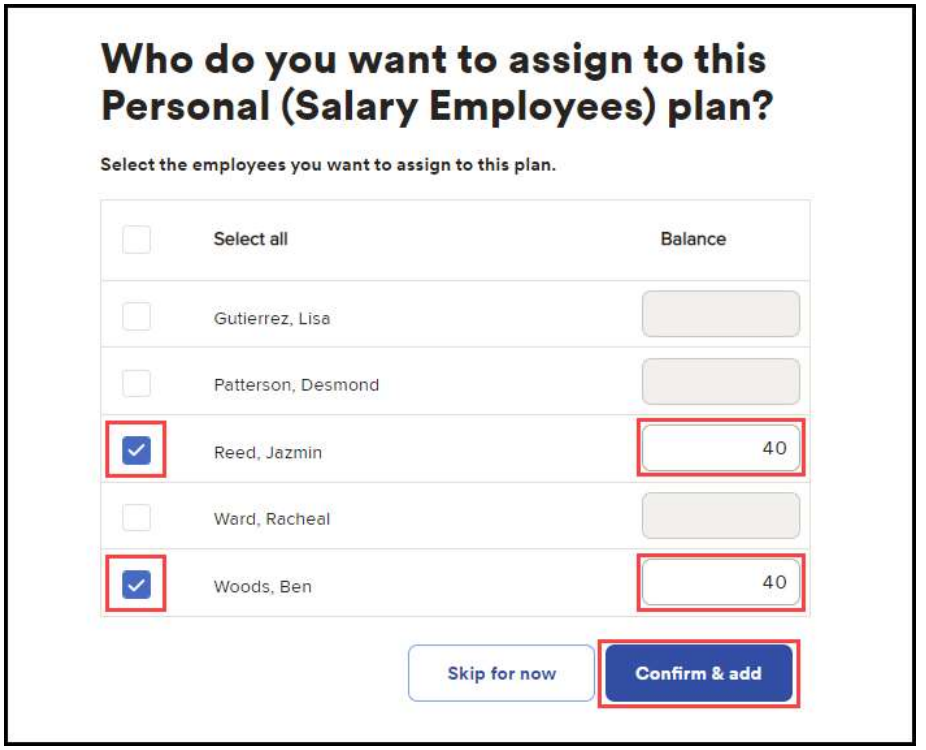
13 Next, a window will pop up letting you know the plan is ready to go. Let's add our Salary employees to the plan by selecting **Yes**.



14 We can choose to **Assign an Employee** to the plan by checking the box next to their name, adding in a balance for them, then clicking **Confirm & add**.



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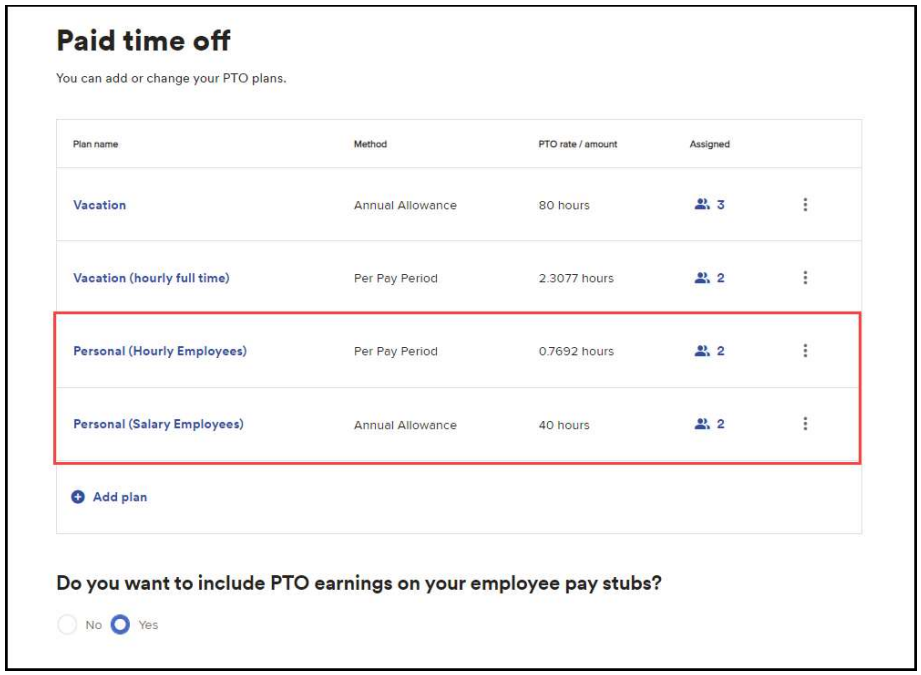
Multiple PTO Plans

15 Now we have successfully setup multiple Personal Plans.



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