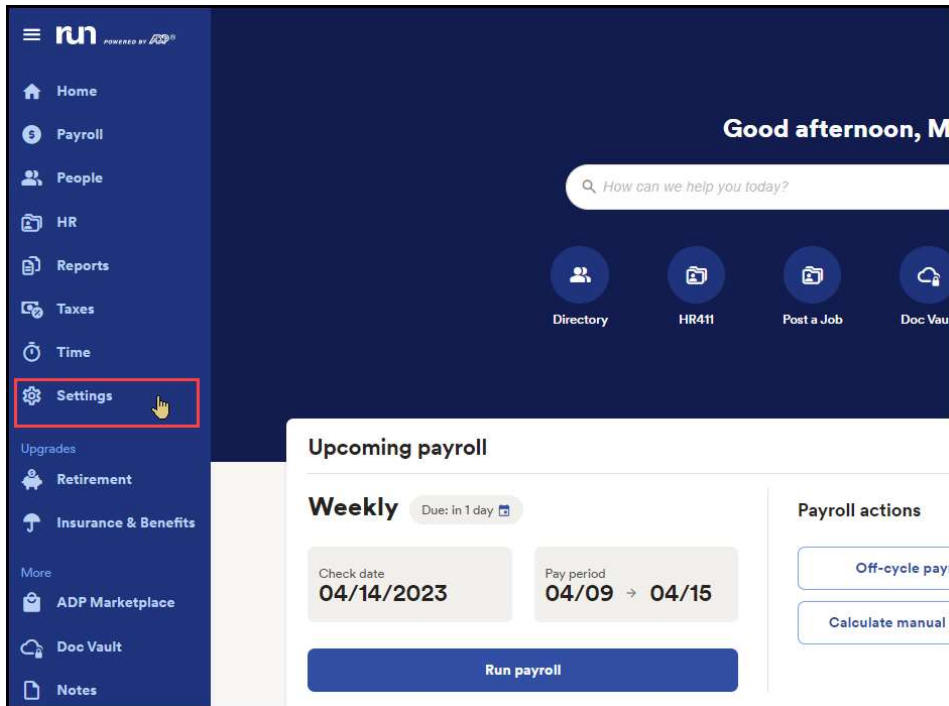
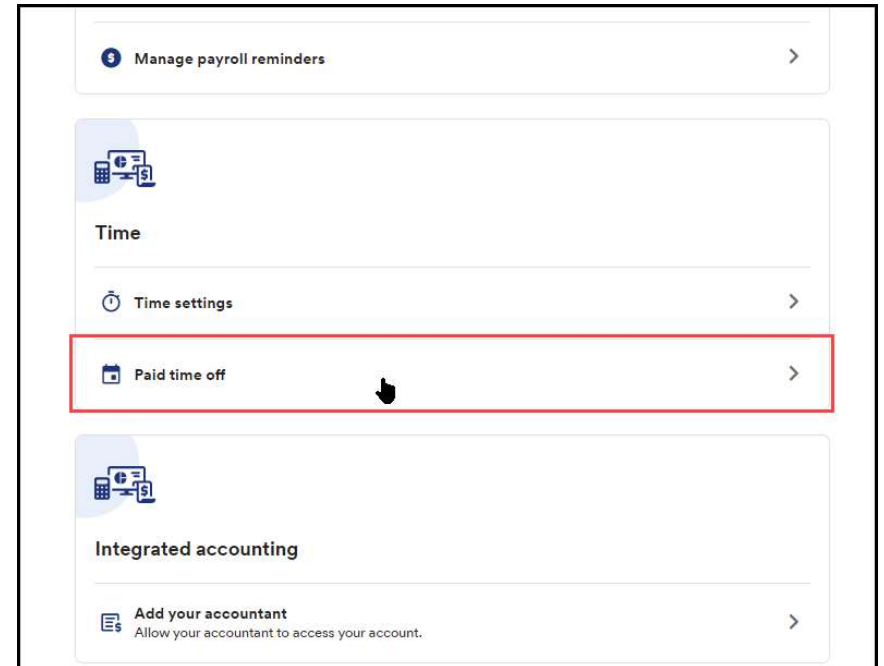


Multiple PTO Plans

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



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



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.

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
Personal (Hourly Employees)	Per Pay Period	0.7692 hours	2

[+ Add plan](#)

Do you want to include PTO earnings on your employee pay stubs?

No Yes

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.

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
Personal (Hourly Employees)	Per Pay Period	0.7692 hours	2

[+ Add plan](#)

Do you want to include PTO earnings on your employee pay stubs?

No Yes

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

Let's set up your PTO plan

Paid Time Off, or PTO, lets you track time off for your employees.

State and local laws may have specific requirements for paid sick or other leave plans. [Learn more before setting up your plan.](#)

What type of PTO plan would you like to set up?

Vacation

Sick

Personal ✓

Parental Leave

+ Add your own

[Edit custom PTO types](#)

Next

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

Tell us about the employees in this plan.

You can set up different plans for different groups of employees, for example, full time, part time, salaried, hourly, or any other employee group with a unique PTO plan.

[Back](#) **Next**

Multiple PTO Plans

- 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**.

Now let's start to set up your new Personal (Salary Employees) plan

How do your employees earn PTO for this plan?

Each hour worked
Portion of PTO for every hour worked

Each pay period
Portion of PTO for every pay period worked

Annual allowance ✓
Fixed number of hours per year

Default available hours for the year

 ⓘ

Back

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.

Do you want to add work anniversary awards?

You can reward your employees with extra PTO based on how long they've worked for the company. (Some companies call these awards tenure-based PTO awards.)

ⓘ PTO increases will occur after the PTO annual reset date (the annual allowance reset). [Learn more about work anniversary awards](#)

Default Amount: 40 hours per year

Anniversary	New PTO allowance
+ Add work anniversary award	

Back

Next

- 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**.

When does this plan reset every year?

Calendar year (On January 1) ✓

Hire date (On the employee hire date)

Custom date (On the date you select)

Back

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.

How do you handle unused hours for this plan?

Balances are either cleared or carried over with your first payroll after the plan resets every year. [Learn more](#)

Clear hours (Clear any unused Personal hours at the end of the year.) ✓

Carry over hours (Keep some or all unused Personal hours.)

Back

Next

- 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**.

Additional options

Automatically add new employees to this plan
When you hire employees, we'll add them to the plan automatically. You'll be able to override this for individual hires if you want to.

[Back](#) [Next](#)

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

Review your Personal (Salary Employees) plan before saving

Review and edit your employees' PTO plan below.

Plan details [Edit](#)

Plan name	Personal (Salary Employees)
Method	Annual allowance
Default hours	40 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](#)

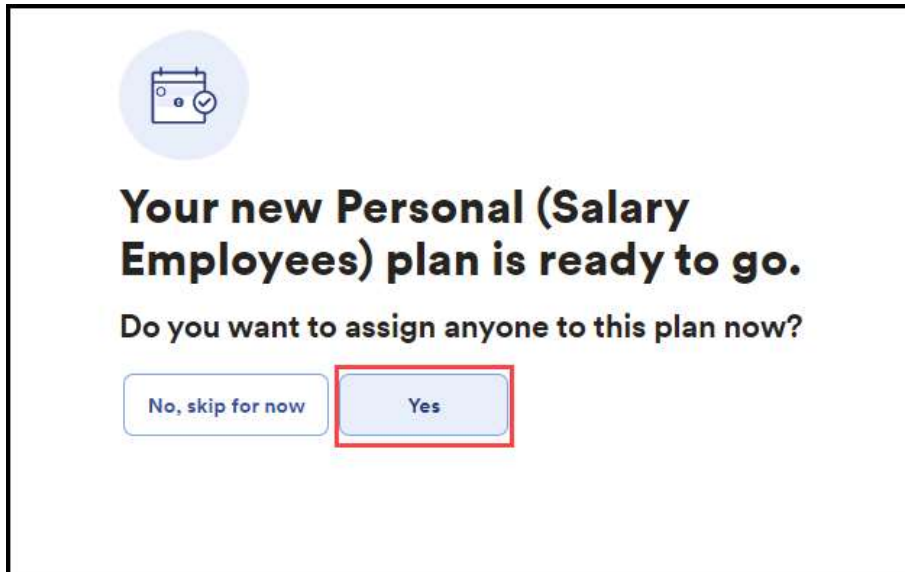
Plan resets	Calendar year (Jan 1st)
Unused hours	Clear hours

Additional options [Edit](#)

Automatically add employees to this plan	No
--	----

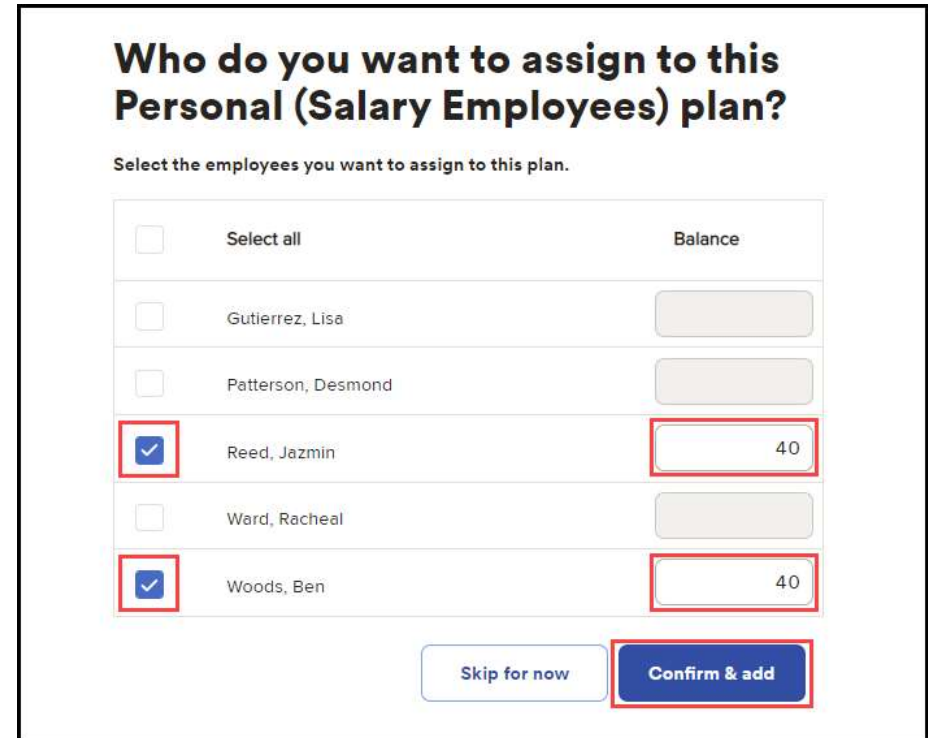
[Back](#) [Confirm and add](#)

- 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**.



A confirmation dialog box with a calendar icon and a checkmark. The text reads: "Your new Personal (Salary Employees) plan is ready to go. Do you want to assign anyone to this plan now?" Below the text are two buttons: "No, skip for now" and "Yes". The "Yes" button is highlighted with a red border.

- 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**.



A screen titled "Who do you want to assign to this Personal (Salary Employees) plan?" with the instruction "Select the employees you want to assign to this plan." Below is a table with columns for selection, employee name, and balance.

<input type="checkbox"/>	Select all	Balance
<input type="checkbox"/>	Gutierrez, Lisa	<input type="text"/>
<input type="checkbox"/>	Patterson, Desmond	<input type="text"/>
<input checked="" type="checkbox"/>	Reed, Jazmin	<input type="text" value="40"/>
<input type="checkbox"/>	Ward, Racheal	<input type="text"/>
<input checked="" type="checkbox"/>	Woods, Ben	<input type="text" value="40"/>

At the bottom right are two buttons: "Skip for now" and "Confirm & add". The "Confirm & add" button is highlighted with a red border.

15 Now we have successfully setup multiple Personal Plans.

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
Personal (Hourly Employees)	Per Pay Period	0.7692 hours	2
Personal (Salary Employees)	Annual Allowance	40 hours	2

[+ Add plan](#)

Do you want to include PTO earnings on your employee pay stubs?

No Yes