6 PTO Set-up Form

Email to diane@yourpayrollsupport.com or
Fax to 781.851.8491

Employer Information

Date: _____ Company Name: _____

PTO Data

What do you want to track? ❏ **Vacation** ❏ **Sick** ❏ **Paid Time Off**

Does your plan(s) have multiple tiers? ❏ **No** ❏ **Yes** (please specify below)

EXAMPLE -
From 0 to 12 months employees accrue at .025 rate per hour worked to a max of 52
From 12 to 24 months employees accrue at .05 per hour worked to a max 104

VACATION

From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____
From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____
From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

SICK

From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____
From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____
From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

PTO

From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____
From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____
From_____ to _____ months employees accrue at _____ rate per _____ to a Max of _____

Additional Required Information - Please respond for each plan

When should we re-set your plan?   ❏ **On January 1st each year**   ❏ **On a specific date**

❏ **Employee Hire or Anniversary Date**   ❏ **Do not re-set**

Do your employees accrue or are they given a lump sum each year? ❏ **Accrue** ❏ **Lump sum**

Is there a wait time before employees can BEGIN their accrual? ❏ **Yes** ❏ **No**   How long? _____

Is there a wait time before employees can USE their accrual? ❏ **Yes** ❏ **No**   How long? _____

Do you allow your employees to Carry-Over PTO time? ❏ **Yes** ❏ **No**   If yes, How much per tier? _____

Is there an overall maximum amount of time your employees can have on the books at any time? ❏ **Yes** ❏ **No**   If yes, How much per tier? _____

Please supply the following information for each employee

Hire date: _____

Total Accrued to date: _____

Total Used to date: _____

Total Carry-Over: _____