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# PTO Set-up Form

Email to payrollsupport@pmtworks.com or  
 Fax to 781.851.8491



Questions? Call 888-242-5737

## 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: \_\_\_\_\_