![Project UltiPro logo](The Salvation Army)

# Adding Paid Time Off (PTO) Plan to an Employee

Overview: Employee Administrators assign **Paid Time Off** plans for new hires and existing employees. This job aid shows how to add PTO plans.

**NOTE:** See job aid **PTO Plans – Salvation Army** for a list of PTO Plans.

IMPORTANT: PTO selection must align to the entitlement policy shown in the employee's Time and Attendance section. For Union staff – union selection, entitlement policy and PTO plans must match. If they do not match PTO balances may not transfer to UTA.
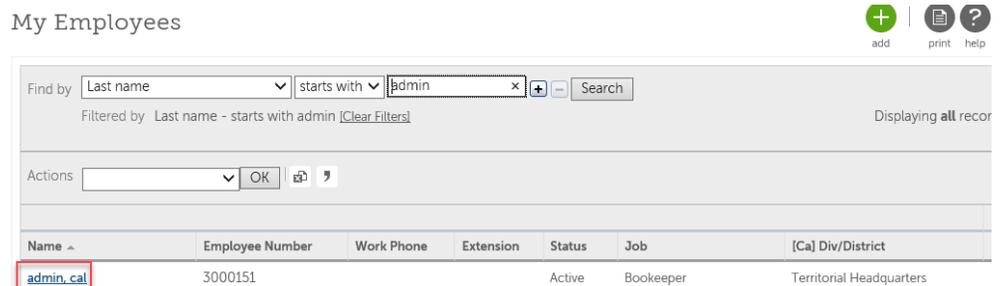
Accessing PTO Plans Screen

1. Click **Menu.**
2. Select **Administration** Menu.
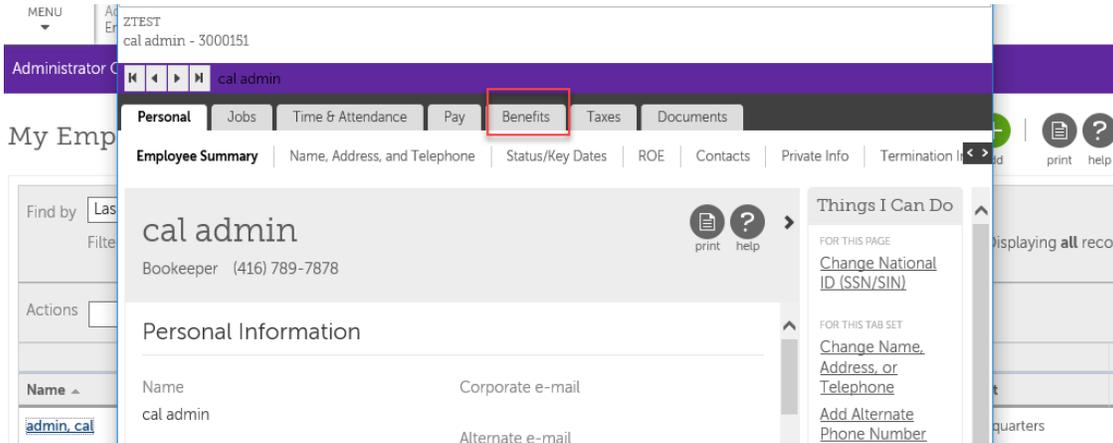3. Select **My Employees**.
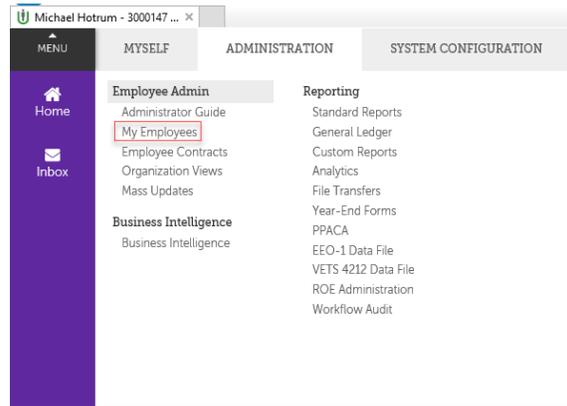
4. The search criteria defaults to **Last Name**. Click on the down arrow to select a different search criteria. Below, we typed in a last name.
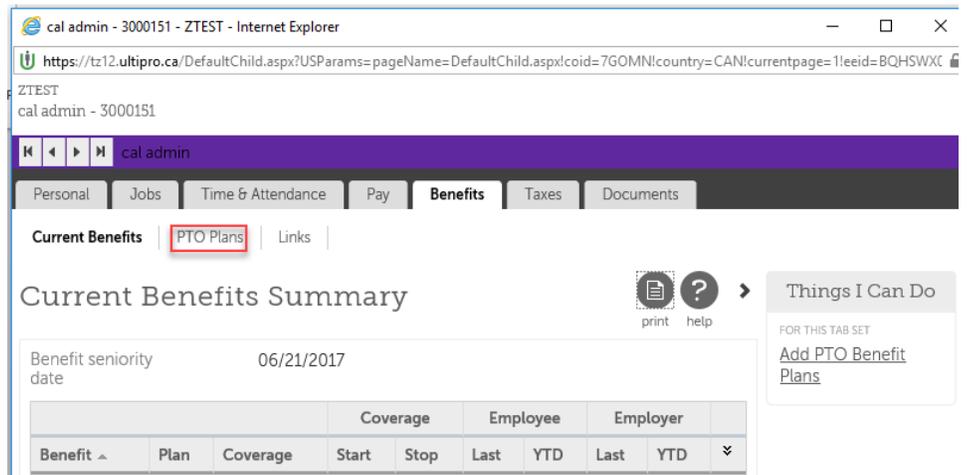5. Click **Search**.
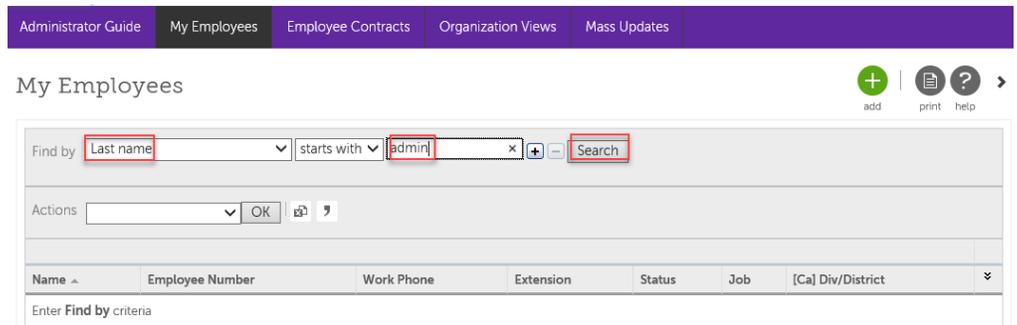
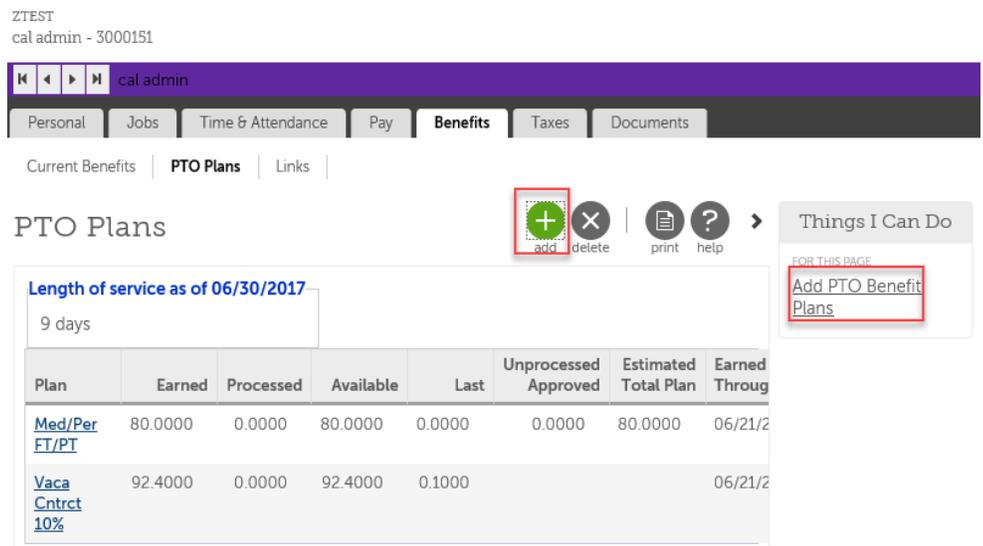6. The employee listing displays. Click on the employee name.

7. The employee information screen displays. Click on *Benefits*.

8. Click *PTO Plans*.
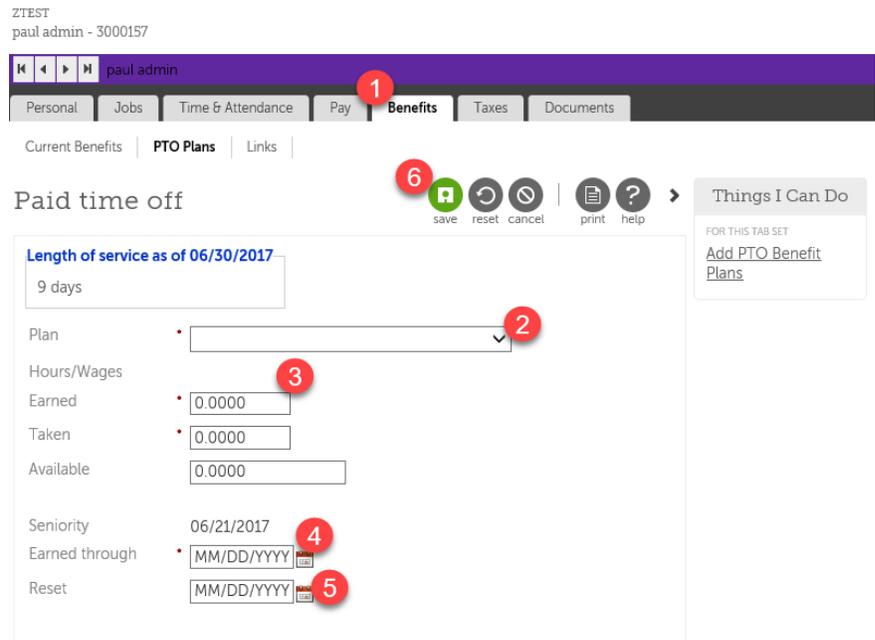

9. The **PTO Plans** screen displays. Click the *Add* icon or click *Add PTO Benefit Plans*.

10. The **Paid Time off** screen appears.

ZTEST
paul admin - 3000157

1. Click the Plan drop arrow to see a list of plans. Select one **(see the list on the next page)**.
2. Type in *Earned* hours. How many hours do they get as part of this plan?
3. If they have already used some of the time, enter it in the **Taken** field.
4. *Seniority Date* is the actual hire date. Type in *Earned Through Date* - This field is the end date of the latest pay period. It represents the latest pay period in which an accrual was added to the PTO balance. The PTO balance is current to this date.
5. Type in the *Reset Date*. This is the date when the PTO plan needs to be "reset" to its original value. The date is based on the PTO plan.
   a. **Example:** I work at THQ and I am attached to the TSA vacation plan. The TSA vacation plan runs from Jan 1 to Dec 31 every year. This means that every Dec 31, this plan will reset and on Jan 1, I will get a fresh new balance. Therefore my reset date is Dec 31, 2017.
   b. If someone is hired in the middle of 2018, then their reset date will be Dec 31, 2018.
   c. For employees governed by a Collective Bargaining Agreement the reset date is the last day of the annual cycle.

   NOTE: If adding or adjusting PTO payout plans ensure the Earned Through and Reset dates are the same. Both fields should be set to the end date of the previous pay period.

6. Click *Save*.
7. Click *Submit* when the summary screen appears.

Note: Anyone who is attached to an accrual vacation plan (a non- vacation payout plan) must also be attached to the *Vaca Additnl %* plan. This is meant to ensure employees are accruing vacation on extra / OT hours in cases where they work extra hours.

UltiPro Job Aid - Adding PTO Plans ver 6 Feb '18   3