

Whether you've set up paid time off in the PTO or Leave pages, usage is the same. Below are the options for using PTO & Leave (all referred to as "PTO").

There are several options for how and who can enter PTO:

1. Employee enters PTO usage themselves
2. Employee sends a request for PTO usage that must be approved
3. Admin or Supervisor enters PTO usage

1. Employee Enters PTO Usage

Features menu: PTO Categories

Features menu: Leave Categories

PTO Menu

(or)

General Leave Settings

Allow Employees to enter PTO usage

Leave menu accessible to Employee

Check the box at the top of the page.

Now employees will see a new page called "Paid Time Off" when logged in.



Date Filter			
Pay Period	Date Range		
1/15/2023 - 1/28/2023 14 Days, 10 Weekdays	01/15/2023	-	01/28/2023
	Change Date		

Date	Hours	PTO Category	Remove
Tue 1/17/2023	7h 0m	Sick (33.00 Hrs Avail.)	<input type="checkbox"/>
1/25/2023	h m	Sick (33.00 Hrs Avail.)	
1/25/2023	h m	Sick (33.00 Hrs Avail.)	
1/25/2023	h m	Sick (33.00 Hrs Avail.)	

PTO Summary

PTO Category	Hours Earned & Used 1/15/2023 - 1/28/2023	Year To Date Date Range	Hours Before Start Date	Hours Earned This Year	Hours Used This Year	Current Available Hours	Future Hours Reserved	Unreserved Available Hours
Sick	0h 0m / 7h 0m	1/1/2023 - 1/25/2023	0h 0m	40h 0m	7h 0m	33h 0m	0h 0m	33h 0m
Vacation 3+	0h 0m / 0h 0m	1/1/2023 - 1/25/2023	57h 0m	3h 4m	0h 0m	60h 4m	8h 0m	52h 4m

Available hours as of this pay period

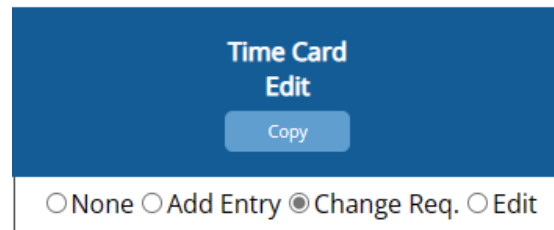
Usage that has been entered for the future

Available hours based on all usage entered for the current year

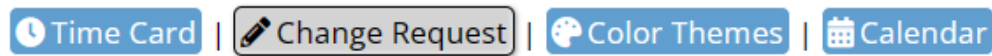
2. Employee Sends a PTO Request

Setup menu: Access

For each employee, choose **Change Req** under “Time Card Edit.” This gives them access to request PTO usage, as well as other changes to their time card.



Now employees will see a new page when logged in. This page will look almost identical to the Time Card Edit page you have in the Admin account. However, when the employee makes a change on the page, the change is greyed out until approved.



Date Filter		Filter	Help Links
Pay Period 1/15/2023 - 1/28/2023 14 Days, 10 Weekdays	Date Range 01/15/2023 - 01/28/2023 Change Date	Employee: David Miller	Help File

Date	In	Out	Hours	Entry Style	Project/PTO	Status	Remove	Day	Week
Sun 1/15/2023			8 h 0	Hours	Vacation 3+ (PTO 60.067 Hrs Avail.)	Add Request	<input type="checkbox"/> Remove		

New Time Card Entries [?]

Date	In Time	Out Time	Hours	Entry Style	Project/PTO
Wed 1/18/2023				In/Out	Vacation 3+ (PTO 60.067 Hrs Avail.)
Wed 1/18/2023				In/Out	Vacation 3+ (PTO 60.067 Hrs Avail.)

When there is a pending request, you will see it immediately after signing in as Admin. Any supervisors of the employee will also see it immediately after logging in. You can also access the requests in **Pending Requests** in the Time Card menu.

You can set up Admin email notifications for time card requests. This is in the Setup menu: General Setup Options, in the Time Card Edit section.

- Email when there is a change request
- Email when there is an edit

3. Admin or Supervisor Enters PTO Usage

For both Admin and Supervisor, adding PTO usage to a time card is the same process as making any change to a time card.

Time Card menu: Edit

Under New Time Card Entries, create a new line for the day.

New Time Card Entries [?](#)

Date	In Time	Out Time	Hours	Entry Style	Project/PTO
Sun 1/15/2023 ▼			8 h <input type="text"/> m	Hours ▼	Vacation 3+ (PTO 60.067 Hrs Avail.) ▼

For PTO, it's usually preferred to choose "Hours" Entry Style so that bulk hours can be entered, rather than a clock in and out time.

Don't forget to choose the PTO category. The available balance will update when you save changes.