

This tool is used to help organizations review or finalize their PTO plans. Answer the following questions to ensure maximum PTO policy coverage and understanding. Return completed form to Helpside if you wish for Helpside to track your accruals.

Basic Plan Information:

- What PTO plan works for the organization?
 - Unlimited PTO – no cap on what an employee can use
 - Leave Bank – a total amount of hours to be used in a year for whatever reason
_____ How much will be offered?
 - Vacation PTO – a specific number of hours or days to be used for vacation time
_____ How much will be offered?
 - Holiday PTO – this can be used for holidays and/or floating holidays
_____ How much will be offered?
 - Sick PTO – for sick days
_____ How much will be offered?
- How do employees request to use PTO?
 - Email their direct supervisor
 - Enter time off on a company time off calendar
 - Complete a Time Off Request Form
 - Other _____
- How is PTO tracked?
 - Helpside
 - In House
- When do employees begin to accrue time off?
 - On first day
 - After 90 days
 - After 180 days
 - Other _____
- At what point do employees earn additional PTO?
 - On their anniversary date
 - After one year
 - After five years
 - Other _____

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Holiday PTO Questions:

- Which days are company recognized paid Holidays?
Ex. Federal/state paid holidays
 - New Year's Day Memorial Day Independence Day Labor Day
 - Veterans Day Thanksgiving Day Day After Thanksgiving Christmas Eve
 - Christmas Day Other _____
- What stipulations do employees have in order to receive holiday pay?
 - Yes No Do employees have to work the day before and/or after the holiday?
 - Yes No Do employees have to work the holiday to receive pay?
- Who will PTO be offered to?
 - Yes No Full Time Employees
 - Yes No Part Time Employees
- What happens when a holiday falls on a weekend or on a day the employee is not scheduled for work?
 - Yes No Will they be given a floating holiday?
 - Yes No Will it be paid regardless?
 - Yes No Will they be given the day before or the day after the weekend off for the holiday?
- Do employees get the selected holidays above off paid or do they have to work the holiday?
 - Paid
 - Have to work the holiday
 - Both
- Do employees have to work a certain number of holidays per year?
 - Yes No Due to business needs, holidays may need to be worked. Will employees work some holidays?
- Is a holiday premium rate offered?
 - Time and a half
 - Double time
 - Flex time
 - Floating time
 - Other _____

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Transition PTO:

- Is unused accrued PTO paid out upon termination/resignation?
 Yes No Will PTO be paid out? (some states have specific laws about paying out PTO)

- Use it, lose it or roll over PTO plans.
 Yes No Will employee lose PTO time it not used?
 Yes No Does PTO roll over to the next year?
If "yes", how much rolls over to the next year?
_____ Number of hours to roll over in to the next year

MISC. PTO Questions:

- What additional time off is offered to hourly employees?
 Yes No Does the organization give more PTO in addition to the paid holidays above?
Ex. 40 hours in a year. This can be different or the same policy for salary employees.

- What additional time off is offered to salary employees?
 Yes No Does the organization give more PTO in addition to the paid holidays above?
Ex. 40 hours in a year. This can be different or the same policy for hourly employees.

- Is PTO time transferrable?
 Yes No Will employees be allowed to "donate" PTO time to other employees?
If "yes" Is there a cap on how much can an employee donate?
_____ Number of hours to allowable to donate

- Does my state have additional sick leave laws?
Certain states have additional sick leave laws that require employers to give a certain type of time off and a certain amount of time off to employees. Check your state laws to determine if additional sick time is required of the organization.

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