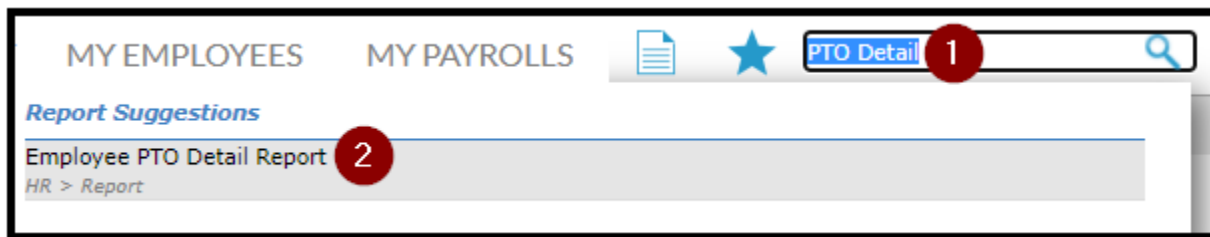


### To View All Employees:

Go to: [helpside.com](https://helpside.com) -> Employer -> Manager (MSS) Portal

Step 1: Type "PTO Detail" in the search bar.

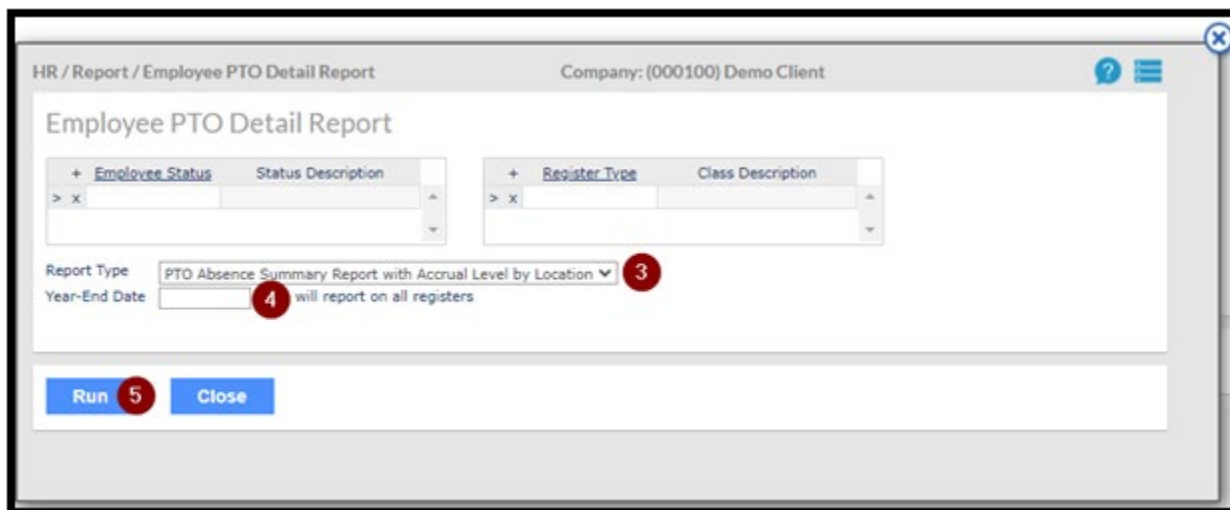
Step 2: Click on **Employee PTO Detail Report** from the list.



Step 3: Select **PTO Absence Summary Report with Accrual Level** in the Report Type.

Step 4: Remove the auto-generated **Year-End Date**.

Step 5: Click **Run**.

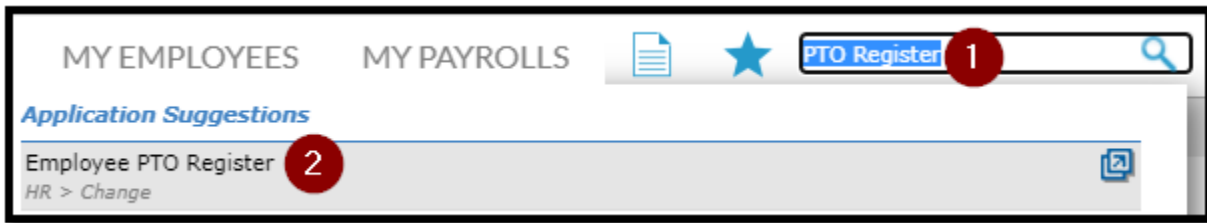


### To View Individual Employees:

Go to: [helpside.com](https://helpside.com) -> Employer -> Manager (MSS) Portal

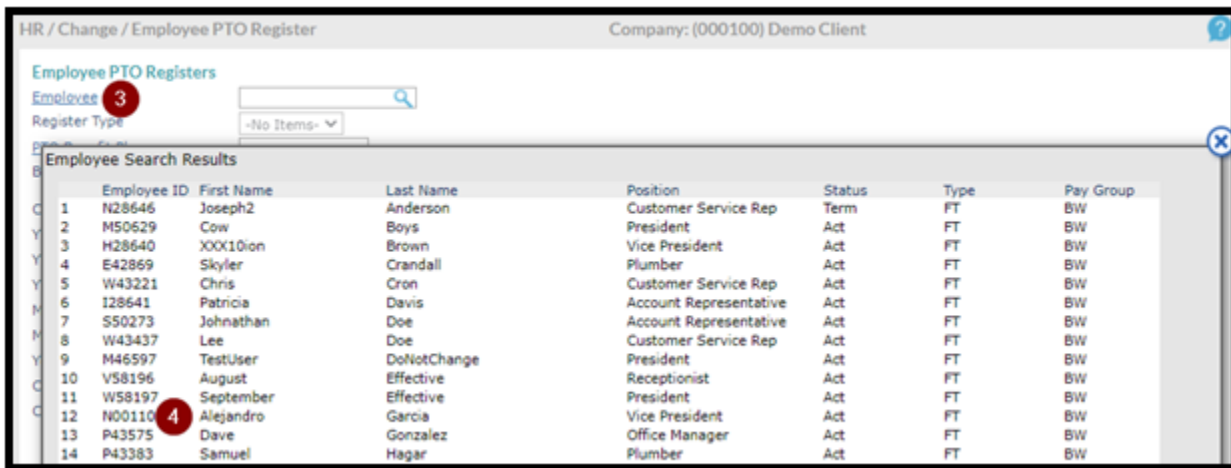
Step 1: Type in "PTO Register" in the search bar.

Step 2: Select **Employee PTO Register** from the list.



Step 3: Click **Employee**.

Step 4: Select the employee's name.



Step 5: In the **Register Type** drop-down box, select the desired plan to view balance, hours taken, and hours accrued.

HR / Change / Employee PTO Register Company: (000100) Demo Client

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**Employee PTO Registers**

Employee N00110 Alejandro Garcia

Register Type P - Paid Time Off Paid Time Off

PTO Benefit Plan PTO Paid Time Off

Benefit Start Date 02/01/2015

Carryover Hours (+) 28.77

YTD Hours Calculated (+) 129.22

YTD Hours Taken (-) 8.00

YTD Hours Available (=) 149.99

Max Use Limit

Max Use Available 149.99

Year End Date 01/31/2021

Calculated Thru Date 03/21/2020

Carryover Expires On

Stop PTO Accruals

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**Paid Hours Absent Details**

PTO Date	Code	Reason	Hours	Annotation	Leave Request ID	Comment
03/21/2020	PTO	Paid Time O	-8.00	VOUCHER# 000394		

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**Hours Calculated/Carry-over Details**

Date	Hours Calculated	Carry-over	Annotation
01/01/2021	120.00		Yearly accrual
03/27/2020	4.61		CALCULATED THRU 03-21-20
03/13/2020	4.61		CALCULATED THRU 03-07-20
01/31/2020		28.77	CARRYOVER 01-31-20
05/01/2019	4.61		CALCULATED THRU 04-06-19
01/31/2019		24.16	CARRYOVER 01-31-19

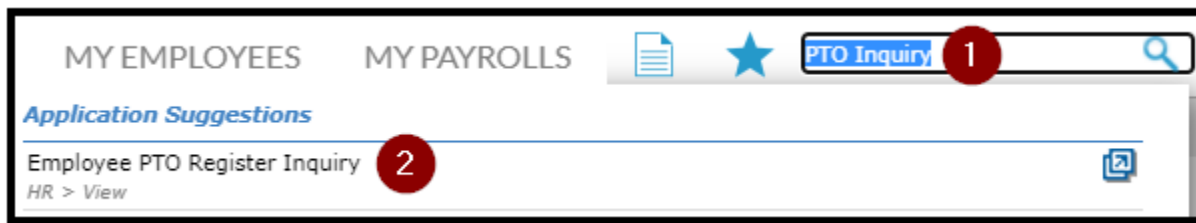
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### To View Lost PTO Carryover:

Go to: [helpside.com](https://helpside.com) -> Employer -> Manager (MSS) Portal

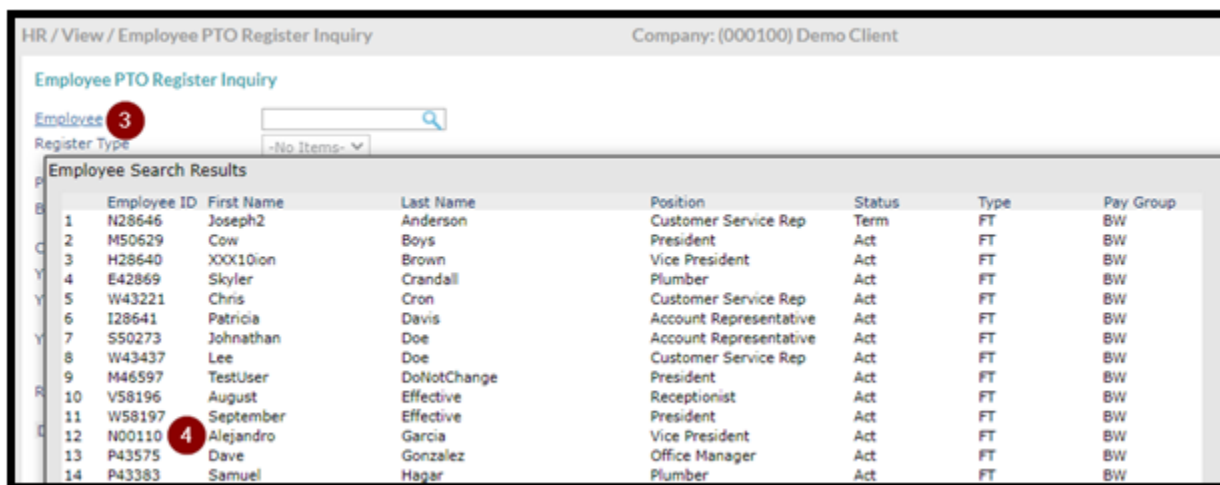
Step 1: Type in "PTO Inquiry" in the search bar.

Step 2: Select **Employee PTO Register Inquiry** from the list.



Step 3: Click **Employee**.

Step 4: Select the employee's name.



Step 5: In the **Register Type** drop-down box, select the desired plan.

Step 6: In the **Report View** drop-down box, select **Year End History**. Compare "Carryover Hours" to "Year End Balance". The difference is the amount lost at year end.

HR / View / Employee PTO Register Inquiry Company: (000100) Demo Client

### Employee PTO Register Inquiry

Employee:   GARCIA ALEJANDRO

Register Type:  **5** Paid Time Off

PTO Benefit Plan: PTO Paid Time Off

Benefit Start Date: 02/01/2015

Carryover Hours (+) **28.77** Year End Date: 01/31/2021

YTD Hours Calculated (+) 129.22 Calculated Thru Date: 03/21/2020

YTD Hours Taken (-) 8.00 Carryover Expires On:

YTD Hours Available (=) 149.99

Report View:  **6**

Year End Date	Carry-over	Hours Calculated	Hours Used	Year End Balance
01/31/2017	20.00	11.08	10.00	21.08
01/31/2019	21.08	3.08	0.00	24.16
01/31/2020	24.16	4.61	0.00	<b>28.77</b>