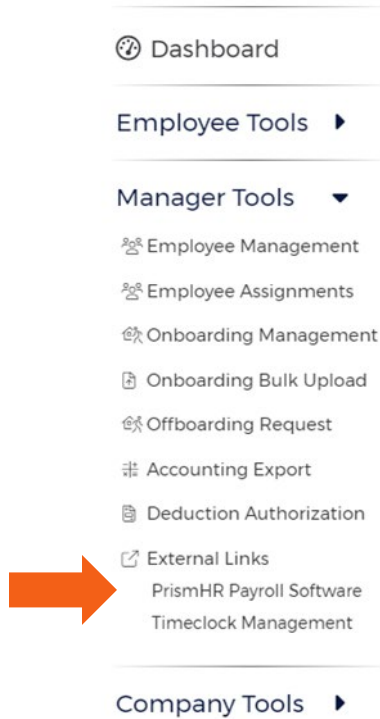


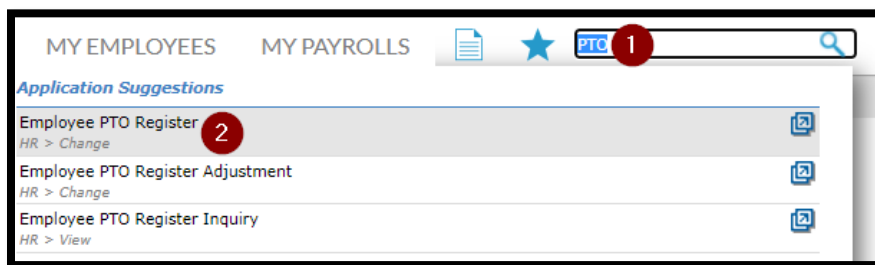
Login to Helpside Tools at tools.helpside.com

Under **Manager Tools**, click on **PrismHR Payroll Software**



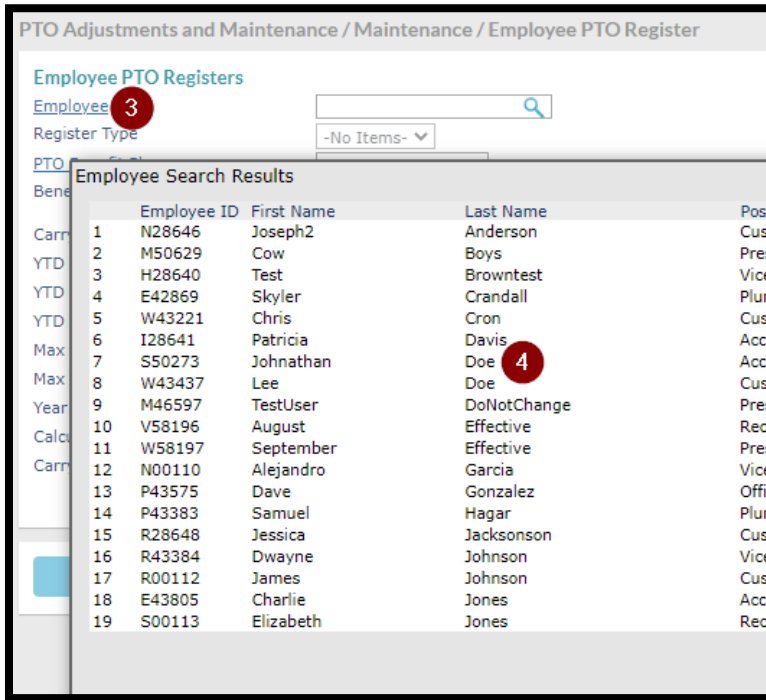
Step 1: Type "PTO" in the search bar.

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



Step 3: Click on **Employee**. The Employee Search Results screen will pop up.

Step 4: Click on the **employee's name**.

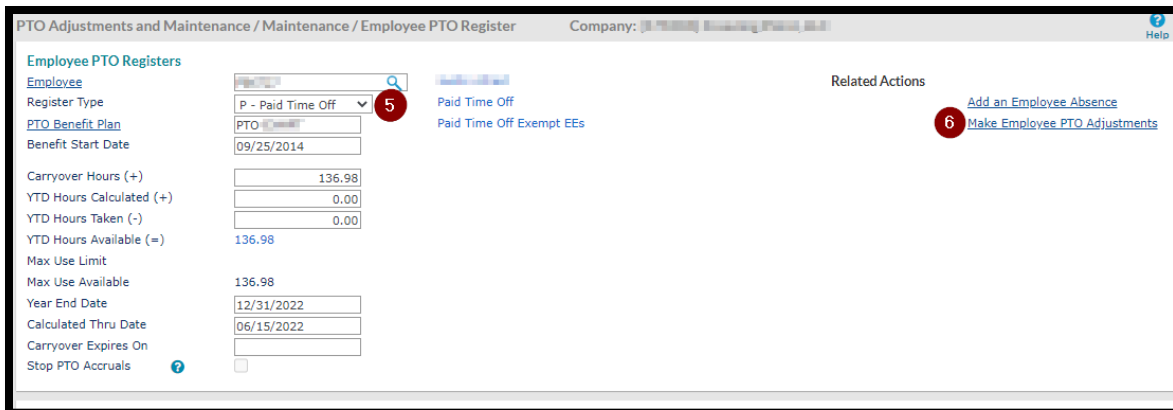


The screenshot shows the 'Employee PTO Registers' page. A red circle with the number '3' highlights the 'Employee' link in the top left. Below it, an 'Employee Search Results' table is displayed with columns for Employee ID, First Name, Last Name, and Position. A red circle with the number '4' highlights the name 'Doe' in the 'Last Name' column of the 7th row.

	Employee ID	First Name	Last Name	Pos
1	N28646	Joseph2	Anderson	Cus
2	M50629	Cow	Boys	Pre
3	H28640	Test	Browntest	Vice
4	E42869	Skyler	Crandall	Plur
5	W43221	Chris	Cron	Cus
6	I28641	Patricia	Davis	Acc
7	S50273	Johnathan	Doe	Acc
8	W43437	Lee	Doe	Cus
9	M46597	TestUser	DoNotChange	Pre
10	V58196	August	Effective	Rec
11	W58197	September	Effective	Pre
12	N00110	Alejandro	Garcia	Vice
13	P43575	Dave	Gonzalez	Offi
14	P43383	Samuel	Hagar	Plur
15	R28648	Jessica	Jacksonson	Cus
16	R43384	Dwayne	Johnson	Vice
17	R00112	James	Johnson	Cus
18	E43805	Charlie	Jones	Acc
19	S00113	Elizabeth	Jones	Rec

Step 5: In **Register Type** select the type of PTO plan.

Step 6: Click **Make Employee PTO Adjustment**.



The screenshot shows the 'Employee PTO Registers' form. A red circle with the number '5' highlights the 'Register Type' dropdown menu, which is currently set to 'P - Paid Time Off'. To the right, under 'Related Actions', a red circle with the number '6' highlights the 'Make Employee PTO Adjustments' link.

Employee PTO Registers

Employee: [Search]

Register Type: P - Paid Time Off

PTO Benefit Plan: PTO

Benefit Start Date: 09/25/2014

Carryover Hours (+): 136.98

YTD Hours Calculated (+): 0.00

YTD Hours Taken (-): 0.00

YTD Hours Available (=): 136.98

Max Use Limit: 136.98

Max Use Available: 136.98

Year End Date: 12/31/2022

Calculated Thru Date: 06/15/2022

Carryover Expires On: [Date]

Stop PTO Accruals: []

Related Actions:

- Add an Employee Absence
- Make Employee PTO Adjustments

Step 7: In **Register Type** select the type of PTO plan you are adjusting.

Step 8: In **Effective Date** enter in the date of the employee earned the hours.

Step 9: Enter in the number of hours in Calculated Hours or Carry-Over Hours. (Entering hours into the incorrect field or entering a date into the Calculated Thru Date can cause the employee to not accrue their full amount for the year.)

Calculated Hours – use for new hire pro-rate hours.

Carry-Over Hours – use for additional hours given.

Calculated Thru Date – always leave this blank.

Step 10: Enter a **Comment** that will help the employee understand why the adjustment was made.

Step 11: Click **Save**.

PTO Adjustments and Maintenance / Adjustments / Employee PTO Register

PTO Register Adjustment

Journal ID: New

Employee: [Searchable Field]

Register Type: P - Paid Time Off (7) Paid Time Off

Effective Date: 07/01/2022 (8)

Calculated Hours: 8.00 (9)

Carry-Over Hours: [Empty Field]

Calculated Thru Date: [Empty Field]

Comment: Pro-rate from hire date thru 12-31 (10)

Save (11) Clear

Step 12: Verify the employee's **balance** is now correct.

PTO Adjustments and Maintenance / Maintenance / Employee PTO Register

Employee PTO Registers

Employee: [Searchable Field]

Register Type: P - Paid Time Off Paid Time Off

PTO Benefit Plan: PTO- [Searchable Field] Paid Time Off

Benefit Start Date: 09/25/2014

Carryover Hours (+): 136.98

YTD Hours Calculated (+): 0.00

YTD Hours Taken (-): 0.00

YTD Hours Available (=): 136.98 (12)

Max Use Limit

Max Use Available: 136.98

Year End Date: 12/31/2022

Calculated Thru Date: 06/15/2022

Carryover Expires On: [Empty Field]

Stop PTO Accruals: