

PTO Plan Information

Complete this form to set up a new PTO plan or change your existing plan, and then email or fax it to your Sage Payroll Services support center. If you offer multiple plans, please complete a separate form for each plan.

Company name		Current date	
Customer code (four-digit company code)	Do you currently use an application to track PTO? Yes No		
Form completed by	Phone number	Email address	
New PTO plan	Change to PTO plan	Number of plans offered	
Special instructions			
Plan period dates			
Start date	Plan duration	Effective end date	
Plan type			
Annual	End of quarter	Rate per hour	Start of quarter
End of month	Amount per pay run	Start of month	
Accrue the following for each payroll run: Active employees in pay run Non-terminated employees in pay run Active employees paid in pay run		Start accruing after _____ days	
Tier information			
Move to a new tier			
Current plan period	Next plan period	Accrual rate	Maximum balance allowed
Tier details			
Start condition (number of days before employee starts to accrue time in this tier)			Employee service (or benefit) date
Additional tier (if applicable)			
Move to a new tier			
Current plan period	Next plan period	Accrual rate	Maximum balance allowed
Tier details			
Start condition (number of days before employee starts to accrue time in this tier)			Employee service (or benefit) date

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Additional tier (if applicable)			
Move to a new tier			
Current plan period	Next plan period	Accrual rate	Maximum balance allowed
Tier details			
Start condition (number of days before employee starts to accrue time in this tier)			Employee service (or benefit) date
Plan rules			
Plan period starting balance		Accrued time available	
Use as employees' service start date:			
Benefit date		Hire date	
Hours to use (for rate-per-hour plan types only)		Earnings type associated with plan	
Carry over rules			
Carry unused PTO over into the new plan year?		If you answered Yes to carrying over unused PTO, enter the Maximum carry-over amount	
Yes No			
Plan year start date			
Additional carry-over rules			
Plan exceptions			
Describe any exceptions to your plan.			