
History of PTO Plans

Absences

Overview of Paid Time Off

Other ways of tracking PTO

Fast Formulas

FMLA

Common Issues

Costing PTO Accruals



- **Awarded on the first day of the year**
- **Awarded on a periodic basis**
- **Traditionally easy for admin to calculate awards**
 - ❖ Using 10th or 15th
 - ❖ Next full month
- **Borrowing or Advancing time**
 - ❖ How far negative can they go?
 - ❖ Payback when terminating

- **10.7 made a lot of assumptions**
- **Payroll Balances**
- **Accrual Start**
 - ❖ Hire Date
 - ❖ Beginning of Year
 - ❖ Six months after hire.

- **Anniversary**
- **Simple Balance Multiplier**
- **Payroll Calculation**
- **Rolling**

- **January**
- **June 1**
- **Hire Date**
- **Oracle added the Residual element**
- **PTO is not available for use until he rollover is run**

- **26 or 52 Period Payroll Rule**
- **Skip Suspended Status**
- **Hard Coded Awards Instead of using the Bands**
- **Awards Based on Hours Worked in Previous Period**
- **Dollar Amounts based on Hours Worked**
- **Different Awards Based on Status**
- **Allow Borrowing of PTO Time**

- **How Many Plans are Enough?**
- **When Changing Plans Time is Lost**
- **Only the BEE process checks for Available Time**
- **Until the Rollover is Run there is no time Available**
- **Fast Formulas are NOT Date Tracked**
- **PTO Plans Should be a Standard Link**
- **PTO Elements Should be Set Up as Earnings**

- **Ineligibility Formulas – Time Not Displayed until EE is Eligible**
- **If EE is not Enrolled in PTO Plan They Can Take All the Time They Want**
- **Elements Must Have Dates and Hours as Input Values**
- **Going From One PTO Plan to Another**

- **Military**
- **Bereavement/Death in Family**
- **Floating Holiday**
- **Grandfathered Vacation**
- **FMLA**
- **Baby Day**
- **Mental Health Day**
- **Comp Time**
- **Donated Sick Time**
- **Volunteer**

- **How to Prevent Balances from Displaying in OTL**
 - Do Not Make Them a Traditional PTO Plan
 - Do Not Add Them to Alternate Names
- **Professional Accrual Display Screen**
 - Do Not Make Them a Traditional PTO Plan
- **Self Service Accrual Display Screen**
 - Do Not Make Them a Traditional PTO Plan
 - Custom

Absence Detail(SQUARK, STANLEY)

Type: **Vacation Absence** Category: **Vacation Leave**
Reason: Occurrence: **1**

Date

Notified	12-AUG-2009	Time		Date		Time			
Projected Start	17-AUG-2009	Time	08:00	End	21-AUG-2009	Time	17:00	Duration	Days
Actual Start	17-AUG-2009	Time	08:00	End	21-AUG-2009	Time	17:00		Hours
									40

Authorized by: **JANNECE, EUGENE R** Number: **08181C**
Replaced by: Number:

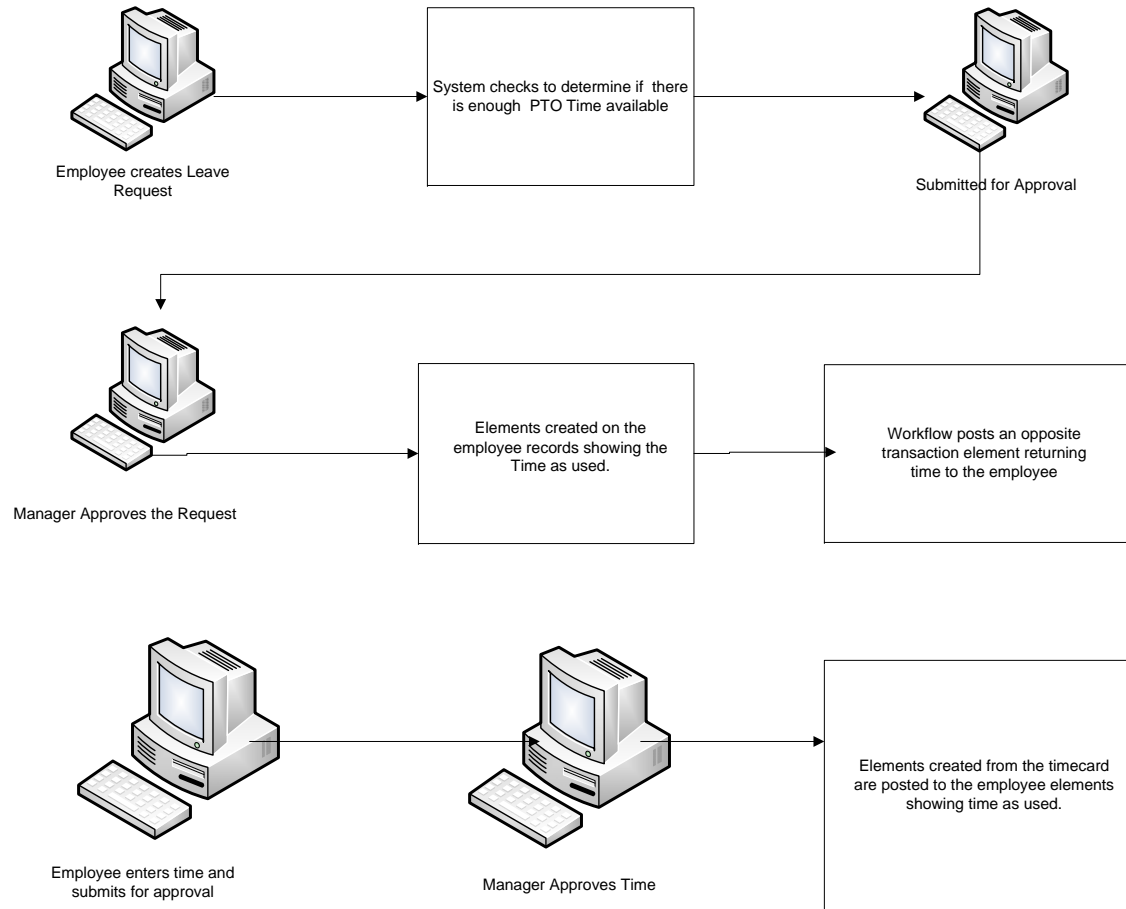
Balance Information

Associated Element: **Vacation Absence**

Running Total: **0**

In Current Year: **0** Hgurs Days No Balance []

- **Used for Companies with a lot of Salaried Employees and No Real Time and Attendance System**
- **An Absence is Required for Setting Up PTO Plans**
- **The Same Functionality is Used for Self Service Leave Request**
- **There is no Connection Between OTL and Leave Request. Unless**



- **Set Up Separate Earnings**
 - FMLA Sick
 - FMLA Vacation
 - FMLA Unpaid
- **Or Set Up an Information Element in Parallel to Usage**
- **Since Individual Elements are Stored it is Easy to Track a Rolling 12 Month Period**
- **The Elements can then be used in a Fast Formula**

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- **Plan 1**
 - Use Similar Calculations to the PTO Award
 - Place the New PTO Hours in a csv Report
 - Write the File and Import them into G/L
 - The Usage would relieve the Accrual Account
- **Plan 2**
 - Use the PTO Payroll Balance. It Exists on the DB
 - Reverse the Old Accrual in G/L
 - Load the Latest Accrual Multiplied by EE Rates
 - Use a SWAG Rate to Skip the Look Up
- **Plan 3**
 - Oracle Doc ID 294374.1
 - PTO – How to Reconcile Accrual Balances to G/L
 - Uses an Element Balance Feed to Payroll Results

Document ID	Subject
146702.1	Paid Time Off (PTO) Accruals and Accrual Formulas
267289.1	Almost Everything You Wanted to Know About PTO

Questions and Open Discussions



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