

PTO IMPLEMENTATION APPROVAL FORM

DBA & Client ID:

Authorized Client Contact for PTO:	Requested Start Date:	ClientSpace Case #:
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Refer to: <https://advanstaff.com/help/pto-plan-guidance/>

<input type="checkbox"/> New Policy <input type="checkbox"/> Existing Policy <input type="checkbox"/> Existing Policy w/Edits	FOR HRIS review/approval only: Level of Prism Automation that can be achieved with policy <input type="checkbox"/> Full Automation in Prism <input type="checkbox"/> Partial Automation – <i>*Requires client managed edits</i>	Copy An Existing Prism Plan? <input type="checkbox"/> Yes - Client ID: _____ <input type="checkbox"/> No
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Notes / Special Considerations:

Setup Option: Benchmark Plan -Or- Custom Plan

Client has elected: <input type="checkbox"/> Benchmark Plan (configuration options below) <input type="checkbox"/> Custom Plan (current design attached) <input type="checkbox"/> Custom Plan (policy is still in draft phase)	Source of Client Approved Employee Balances: <input type="checkbox"/> Client provided (utilize import template) <input type="checkbox"/> ASI balance reconciliation assistance (report) <input type="checkbox"/> ASI balance reconciliation assistance + client edits
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Custom Plan Notes / Considerations: *(Attach Full Copy of Policy to Handbook or PTO Module Case)*

Benchmark Plan Configuration Options

Type of paid leave (select one): <input type="checkbox"/> PTO <input type="checkbox"/> Vac/Sick	Eligible Employees (select 1 or both): <input type="checkbox"/> Full Time <input type="checkbox"/> Part Time	State Required Leave (list applicable states):	Eligible State Leave Employees: <input type="checkbox"/> Full Time <input type="checkbox"/> Part Time
<input type="checkbox"/> Flat Amount Per Pay Period w/Calendar Benefit Year	<input type="checkbox"/> Hours Work/Paid Per Pay Period w/Calendar Benefit Year	<input type="checkbox"/> Annual Lump Sum aka Front Load w/Anniversary Benefit Year	Waiting Period From Hire Date (Usage):

Seniority Tier Creation:	Total Hours Earned:	Carryover of Unused Hours (from one benefit year to the next):	Available Balance Maximum:
From Hire -or- "XX" Months:			
After "XX" Months of Service:			
After "XX" Months of Service:			
After "XX" Months of Service:			
After "XX" Months of Service:			

Benchmark Plan Notes / Considerations:

HRIS Approval – *This plan has been reviewed and is approved for Prism Implementation*

Signature:	Date:
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