

Managing Staff in the PTO Management System

Exempt Penn Staff Coming Directly into Your Org

If Staff Member is a:	Follow These Steps
New Hire	<ul style="list-style-type: none"> • Assign supervisor • Train staff member on PTO System • If staff does not appear in your PTO org, contact Sharon Aylor (aylorsh@upenn.edu)
From PTO Participating Org	<ul style="list-style-type: none"> • Assign new supervisor • No need to import balances
From Non-PTO Participating Org	<ul style="list-style-type: none"> • Obtain initial balances from previous org • Import initial balances via Initial Balances Flat File • Train staff member on PTO System

Penn Staff Coming Directly into Your Org from a Former Penn Non-Exempt Regular Position OR Staff Transfer Within Your Org from Regular Non-Exempt to Regular Exempt Position

If Staff Member is a:	Follow These Steps
From PTO Participating Org	<ul style="list-style-type: none"> • BA makes appropriate changes in Penn Works to reflect the new job status • Obtain time balances from former supervisor • Import initial balances via Initial Balances Flat File • Train staff member on PTO System
From Non-PTO Participating Org	<ul style="list-style-type: none"> • BA makes appropriate changes in Penn Works to reflect the new job status • Obtain time balances from former supervisor • Import initial balances via Initial Balances Flat File • Train staff member on PTO System

Exempt Staff Who Were Former PTO System Users, Then Transferred to Non-PTO Orgs and are Now Coming into Your Org

If Staff Member is a:	Follow These Steps
From Non-PTO Participating Org	<ul style="list-style-type: none"> • Contact Sharon Aylor (aylorsh@upenn.edu) and request an update to the System Manage Date for the staff member • Once System Manage Date is updated, update the balances via the Employee Balance Information Screen (pg. 14 of Admin. Guide) • Assign supervisor • Train staff member on PTO System

Exempt Staff Who Were Former PTO System Users, Left Penn and are Now Coming into Your Org

If Staff Member is a:	Follow These Steps
New Hire and Eligible for Bridging of Service Periods Policy	<ul style="list-style-type: none"> • Advise staff member to submit written request for bridging to Mae Barnes, Human Resources Benefits Dept. at mbarnes@upenn.edu • Once bridging is completed, contact Sharon Aylor (aylorsh@upenn.edu) to request update of System Manage Date • Once System Manage Date is updated, update the initial balances via the Employee Balance Information Screen (pg. 14 of guide) • Assign supervisor • Train staff member on PTO System
New Hire and Not Eligible for Bridging of Service Periods Policy	<ul style="list-style-type: none"> • Contact Sharon Aylor (aylorsh@upenn.edu) to request update of System Manage Date • Once System Manage Date is updated, update the initial balances via the Employee Balance Information Screen (pg. 14 of guide) • Assign supervisor • Train staff member on PTO System

Exempt Staff Who Were Not Former PTO System Users, Left Penn and are Now Coming into Your Org

If Staff Member is a:	Follow These Steps
From Non-PTO Participating Org	<ul style="list-style-type: none"> • If staff member is eligible for Bridging of Service Periods Policy, advise staff member to submit written request for bridging to Mae Barnes, Human Resources Benefits Dept. at mbarnes@upenn.edu • Assign supervisor • Train staff member on PTO System

Staff Leaving Your Org

If Staff Member is:	Follow These Steps
Going to Another PTO Participating Org	<ul style="list-style-type: none"> • Do not clear balances • Remove supervisor
Going to a Non-PTO Participating Org	<ul style="list-style-type: none"> • Share staff member's balances with new org • Remove supervisor • Clear balances after taking screen shots of Employee Balance Information Screen and history screens for staff file
Going to Non-Exempt Penn Position	<ul style="list-style-type: none"> • Share staff member's balances with new org • Remove supervisor • Clear balances after taking screen shots of Employee Balance Information Screen and history screens for staff file
Leaving University	<ul style="list-style-type: none"> • Staff must first be terminated in PennWorks before retrieving PTO System balances • Retrieve PTO balance for payout at separation the first work day after the termination is effective or thereafter • Designated person must complete Vacation Payout at Separation Form • Print balances summary and history screens for staff file • Clear staff member's balances