PTO balance reminder email

For calendar-year plans, send the first reminder in early September and a final one in mid-November, before holiday schedules close. Send a mid-year nudge in May or June.

YEAR-END USE-IT-OR-LOSE-IT

Subject: Reminder: use your PTO by [Deadline]

Hi [First Name],

As of [Balance Date], you have [Balance Hours] hours of PTO.

Under our PTO policy, [up to Carryover Cap hours carry into next year / unused PTO does not carry over], so any hours above that will be lost after [Deadline].

To use it:

1. Talk to your manager about dates as soon as possible. December fills up fast.
2. Submit your request in [System Name] by [Request Deadline].

You can check your up-to-date balance anytime in [System Name]. If your balance looks wrong, reply to this email and we'll check it.

Thanks,
[HR Contact Name]
[Title], [Company]

CARRYOVER CAP NOTICE

Subject: Your PTO balance is close to the cap

Hi [First Name],

Your PTO balance is [Balance Hours] hours. Our policy caps accrual at [Cap Hours] hours. Once you reach it, you stop earning new PTO until your balance drops below the cap.

At your current accrual rate, you'll hit the cap around [Cap Date]. To keep earning, plan some time off before then.

Any questions, just reply.

[HR Contact Name]
[Company] HR

MID-YEAR NUDGE

Subject: Have you booked any time off this year?

Hi [First Name],

Quick check-in: you have [Balance Hours] hours of PTO available, and you haven't taken time off since [Last Leave Date].

Summer slots tend to go first, so if you're planning anything, now is a good time to talk to [Manager Name] and get it on the calendar.

[HR Contact Name]

TO MANAGERS

Subject: Year-end PTO: requests coming your way

Hi [Manager First Name],

We've reminded employees about the [Deadline] PTO deadline. Attached is a list of your team members with more than [Threshold] hours they could lose.

A few asks:

- Respond to time-off requests within two business days.
- Plan coverage now for [Peak Weeks] using the same rules as the rest of the year: [first-come, first-served / max people off per shift].
- If you can't approve someone's time before the deadline for business reasons, tell HR by [Date] so we can discuss options.

Thanks,
[HR Contact Name]

SUBJECT LINE IDEAS

- Reminder: use your PTO by [Deadline]
- You have [Balance Hours] hours of PTO left
- Your PTO balance is close to the cap
- Have you booked any time off this year?
- Don't lose your PTO: deadline [Deadline]
- Year-end PTO: requests coming your way
- Plan your time off before [Deadline]

SMS / WHATSAPP VERSION

Hi [First Name], you have [Balance Hours] hrs of PTO. Hours above [Carryover Cap] are lost after [Deadline]. Talk to your manager and request time in [System Name] by [Request Deadline]. -

[Company] HR

Placeholders to replace: [First Name], [Manager First Name], [Manager Name], [Balance Hours], [Balance Date], [Carryover Cap], [Cap Hours], [Cap Date], [Deadline], [Request Deadline], [Last Leave Date], [Threshold], [Peak Weeks], [System Name], [HR Contact Name], [Title], [Company]