

POLICY & PROCEDURE

Paid Time Off (PTO)

DEPARTMENT:	Work Life Engagement
SCOPE:	Staff
EFFECTIVE DATE:	April 1, 2019
REV. DATE:	
APPROVED BY:	Cabinet 02/15/2019 (effective 04/01/2019)

POLICY RATIONALE:

Paid Time Off (PTO) is provided to manage intentional and unintentional breaks in work obligation without losing substantial compensation. It seeks to provide access to rest, recovery from illness, and continuity in time of personal and family need.

PROCEDURE:

Eligibility

Exempt and non-exempt staff are awarded paid time off in accordance with full-time equivalency (FTE). Employees with less than 50% FTE are ineligible.

Award

Eligible employees are awarded PTO on January 1 of each calendar year based on years of service (outlined below). PTO awarded to new employees is prorated in the 0-1 service range allowing all eligible employees, at their first year anniversary, to be in the 1 service year range (Example: An employee is in the 4th service year in the calendar year they will have 4 years of service). Since PTO is awarded in advance each year, unused awarded PTO is subject to proration upon voluntary separation.

Service	Days
0 - 1	15 (120 hrs)
1	16 (128 hrs)
2	17 (136 hrs)
3	18 (144 hrs)
4	19 (152 hrs)
5	20 (160 hrs)
6	21 (168 hrs)
7	22 (176 hrs)
8	23 (184 hrs)
9	24 (192 hrs)
10+	25 (200 hrs)

Use of Paid Time Off

Planned Absences

Staff employees are expected to request in advance the use of two or more days of PTO. However, all planned absences should be mutually agreed upon by the staff member and their supervisor prior to the date of absence. Requests will be approved according to departmental practice and staffing requirements. Failure to obtain approval for planned absences may result in loss of pay for the absence.

Unplanned Absences

If the need arises to be off work due to personal or family illness or emergency, staff employees are expected to notify their supervisor or other designated individual, normally one hour before scheduled to begin working. Departmental practices for notification of unplanned absence may vary and should be followed. The university may request an explanation of the use of unplanned PTO in excess of 3 consecutive work days. Failure to provide the requested explanation may result in loss of pay for the absence.

Reporting Procedures

Time reporting procedures may be found in the Anderson University Staff Employment Handbook.

International Education/TRI-S Leadership Absences

The university recognizes the educational value and personal enrichment gained through International Education/Tri-S experiences. Therefore, a staff member asked to lead an International Education/Tri-S group because of work experience, acquired education and skills, or personal attributes, may take one trip per fiscal year of up to two weeks (80 hours, prorated by FTE) duration as "time worked." The use of accumulated PTO will be expected for time away from regular university staff duties for leadership of more than one International Education/Tri-S experience in a fiscal year.

Staff involved in leadership of an International Education/Tri-S experience should have a Tri-S Leadership Authorization Form signed by the Director of International Education. This form should be submitted with the regular PTO Report for the month in which the trip was taken.

Accumulated PTO must be used for International Education/Tri-S experiences in which the staff member is a participant only and not a designated group leader.

Annual Maximum

A maximum of 120 PTO hours may be carried into the new calendar year (January 1). PTO balances may be greater than 120 hours during the year, but PTO in excess of 120 hours on December 31 will be forfeited unless directed to be converted to sick leave reserve.

New Employees

PTO will accrue during the initial trial period of employment (60 days), however, is not available for use. Upon successful completion of the trial period, PTO will be available for use under these guidelines in accordance with the following prorated formula for 100% FTE:

$$1.25 \text{ PTO days awarded for every month remaining in the calendar year at date of hire} \\ \text{(including the month of hire)} = \text{prorated PTO days}$$

For employees less than 100% FTE, multiply the number of prorated days above by the FTE equivalent. If an employee does not successfully complete their initial trial period, accrued PTO is not paid.

Staff may request a waiver of any of these guidelines. Requests should be submitted in writing to the Director of Work Life Engagement and the immediate supervisor. The request should include the specific exception requested and the reason.

Sick Leave Reserve

Banking/Using Sick Leave Reserve

Unused PTO may be converted to sick leave reserve in one hour increments from December 1 - December 31st. The university matches each hour of PTO an employee elects to convert to sick leave reserve. Employees may request PTO be converted to sick leave reserve at other times provided the request is due to a serious or urgent medical condition.

Sick leave reserve hours are available immediately for time off due to illness or injury to the employee or immediate family with medical verification, including FMLA qualifying events. Sick leave reserve is not paid out upon leaving university employment.

Sick Leave Accumulation

Reserve days may be accumulated up to a maximum of six months, or 1044 hours. Accumulated reserve hours are not available for payout upon retirement, end of employment/resignation, or termination of employment.

Medical Certification

A physician's statement is required to begin using sick leave reserve and may be required periodically to verify continuing disability until the staff member returns to work. A release from the physician will be required to return to work. Refer to the Leave of Absence Policy in the handbook for additional leave information and requirements.

Shared Leave

Shared leave is a voluntary donation program that allows employees to support one another in a specific time of need (medical emergency). Benefit eligible employees, based on FTE, that have exhausted all available leave (PTO and sick leave reserve) may be able to obtain additional paid time from a pool of donated leave.

A medical emergency is defined as an extreme or life-threatening personal illness or injury, or care for a spouse, child, or parent who is experiencing an extreme or life-threatening illness or injury that will require the prolonged/extended absence of the employee from duty and will result in a substantial loss of income to the employee due to the exhaustion of all paid leave available, apart from the leave sharing plan. Medical verification of the underlying condition is required at application with the potential of ongoing verification.

To apply for shared leave, an employee must be eligible to receive a PTO benefit, be in good standing, past the initial 60 day trial period, exhausted all leave time, and have a qualifying medical emergency as defined above. Shared leave awarded cannot exceed a total of 30 days in a calendar year.

Donation of unused PTO by eligible employees must be in increments of 4 hours or more, and can be made at anytime. No employee may donate more than half of their awarded PTO in a calendar year. The university does not match time donated to the shared leave program. Shared leave donations cannot be transferred from a personal sick leave reserve account.

Donations to the shared leave bank are not tax deductible.

Paid Time Off Due to:

Separation from Employment

Accumulated PTO will be paid upon retirement or termination of employment up to a maximum of 40 hours for less than 15 years of service, or 80 hours for 15 or more years of service. PTO cannot be used to extend last day of employment at separation. Employees cannot use PTO during the final two weeks before separation date unless with supervisor permission.

Change of Position

Accumulated PTO will be paid in the event of a change from a PTO eligible position to a position not eligible for PTO. A maximum of 40 hours will be paid for less than 15 years of service, or 80 hours for 15 or more years of service. The amount payable will be calculated as of the last day in the position for which PTO was accumulated and paid upon the change in position.

Required Notice

A staff member must give notice of intent to leave as indicated in the Staff Handbook to receive maximum PTO allowed. If less than the required notice is given, payout of PTO may be reduced.

Sick Leave (Faculty, Executives, and Select Staff)

Tenure, tenure track, non-tenure track faculty, executive staff and select staff employees not eligible for paid time off benefits receive sick leave credited to a sick leave reserve. Sick leave is accrued at the rate of one month per year of employment, prorated based on full-time equivalency. Sick leave accumulates to a maximum of 6 months of paid time.

Paid Holidays

Staff employees working at least 20 hours per week, or 50% of full-time, in a benefit eligible position receive Holiday Pay (maximum 8 hours per Holiday) provided the holiday falls on the employee's normally scheduled workday. Holidays are observed on the dates announced each year. Paid holidays normally include: New Year's Day, MLK Day, Good Friday, Memorial Day, Independence Day, Labor Day, Mid-Fall Holiday (2 days), Thanksgiving (2 days) and Christmas (5 days). *Exception:* Actual holiday time off may vary for salaried staff working in a department that is required to provide campus services on the announced holiday (Example: Police and Security Services). The adjusted holiday time off must be taken within 30 days of the regularly scheduled holiday.

Holiday pay is not considered hours worked for overtime determination. However, if an hourly employee is asked to work on a holiday, they will be paid at regular time, which amounts to double-time when added to the holiday pay. An employee leaving university employment does not receive holiday pay for any holiday occurring after the last day worked.

Bereavement Leave

In the event of a death in the staff employee's "immediate" family, the university will provide up to three days off with pay for an employee working at least 20 hours per week, or 50% of full-time in a benefit eligible position. Employees are permitted one-half day for the funeral of a co-worker. Paid Time Off may be used to extend the funeral leave provided by the university.

"Immediate family" is defined as the employee's spouse, parent, child, grandchild, sibling, grandparent, a family member living in the employee's home, or corresponding in-laws. With the approval of the Director of Work Life Engagement, bereavement leave for other special relationships may be approved.

Personal Business Time Off

Personal affairs should be conducted after working hours whenever possible. When situations arise that make it necessary to be off work, approval must be received from the supervisor. Paid Time Off may be used for personal business.

Jury Duty

An employee called to jury duty will be paid the difference between their regular pay and the payment received for jury services. Notify the Director of Work Life Engagement of jury duty and provide a copy of jury duty earnings or the check received for jury services to the payroll coordinator. Employees are expected to report for work on days or partial days when not required to perform jury duty.