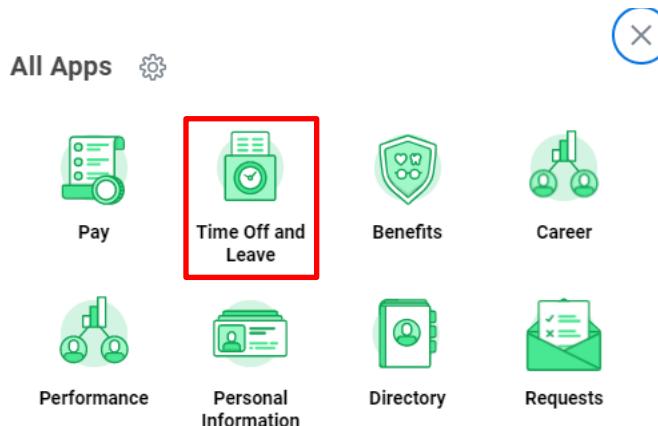


Time Off: Request a PTO Donation

Employee

Scope: Use this process to request to donate PTO hours to another caregiver who is experiencing financial hardship or donate PTO hours to the Caregiver Catalyst Grants Fund.

Start: On the Workday Homepage click **View All Apps** to select the **Time Off and Leave** worklet.



PTO Donation to a Caregiver

1. Click **Request PTO donation** under task window.

Click below to complete task

- Review PTO Accrual
- PTO Accrual Schedule
- Request a Time Card Correction
- Request a Leave of Absence
- Request PTO Donation** (This item is highlighted with a red box)
- Less (2)

2. Click **Create Request** under Actions.

Actions

Create Request

3. Enter **Request Type** by clicking on **Prompt** icon .

Request Type *



4. Select **All** and select **PTO Donation**

Create Request

Request Type *

Search	
X PTO Donation to a Caregiver ...	

5. Click **OK**.

6. Complete all required fields.

Time Off: Request a PTO Donation

Employee

PTO Donation to a Caregiver

Policy: Donation of PTO hours to another caregiver who experiences a medical emergency that requires absence from work and creates a financial hardship. A medical emergency may be due to the employee's own medical condition – or their family member's medical condition.

Tax: The donor is not taxed; the recipient is taxed when they use the PTO hours.

Donor requirements:

- Completion of initial employment period
- Minimum 80 hour PTO balance following donation
- Minimum 4 hours donated
- PTO hours in the PTO bank/balances cannot be used to donate hours.
- Donor is not entitled to a charitable deduction on their tax return for the amount donated. (The PTO is donated to an individual, not to a charitable organization.)

Recipient Requirements:

- Completion of initial employment period
- Must be on a documented medical leave or FMLA leave (recorded in Workday/OnBase)
- Leave must be due to a medical emergency that requires absence from work and creates a financial hardship. Medical emergency may be due to the employee's own medical condition – or their family member's medical condition.
- Low PTO balance that will exhaust while on leave.
- Total PTO time received cannot exceed 240 hours for a full-time caregiver (prioritized for a part-time caregiver).

The name of recipient (Required)

Recipient's employee ID (Required)

0

Brief explanation of the reason they are choosing to donate PTO to this employee (medical emergency). (Required)

7. Click Submit

Process is now complete.

PTO Donation to a Caregiver Fund

1. Click PTO Donation to a Caregiver Fund

Create Request

Request Type * PTO Donation to a Caregiver Fund

OK Cancel

2. Select which Caregiver Fund you wish to donate to.

3. Enter the **Amount of PTO hours** you wish to donate.

4. Check **two boxes** to confirm and authorize the reduction of PTO hours.

Which Caregiver fund do you wish to donate to? (Required)

- Caregiver Hardship Fund
- Caregiver Catalyst Grant

Amount of PTO hours you wish to donate: (Required)

0

Check two boxes to confirm and authorize the reduction of PTO hours as stated. If both boxes are not checked, the request will be sent back. (Required)

⋮

5. Click Submit.

Process is now complete.