Cleveland Clinic PTO Donations
Caregiver FAQs

Effective Feb. 26, 2021, caregivers have new choices in Workday when they want to donate a portion of their paid time off (PTO) to help support other caregivers.

Donations can be made:

- **To a colleague who has a medical emergency**
  - When you donate this way, you help caregivers who may not have enough PTO for recovery (e.g., surgery) or who need to be off work to care for a family member who is ill.

- **To a Caregiver Fund – there are two funds**
  - Donations to the **Caregiver Hardship Fund** are distributed as grants and help eligible applicants with unexpected financial hardships such as eviction, utility shutoffs, funeral expenses, etc.
  - Donations to the **Caregiver Catalyst Grants Fund** support your fellow caregivers' innovative project ideas that expand patient support services, lay the groundwork for medical breakthroughs, and implement health and wellness programs.

Please refer to the PTO Donation Policy for complete details.

All PTO Donations

- **Who is eligible to donate PTO?**
  Caregivers who have an eligible time off plan (e.g., PTO bank) and have successfully completed their new hire period may donate PTO.

- **Are there any tax implications if I donate my PTO to a caregiver?**
  When you donate PTO hours directly to another caregiver who is experiencing a medical emergency, you are *not taxed* on the PTO donation. The caregiver receiving your PTO donation *will be taxed* at the time the PTO hours are used.

- **Are there tax implications if I donate my PTO to a Caregiver Fund, either Caregiver Hardship or Caregiver Catalyst Grants Fund?**
  When you donate PTO to one of the general funds, you *are taxed* on the gross donation and regular deductions will be taken**.** The PTO hours are converted to dollars and the donor is taxed on the dollar value at their applicable tax rate; the net value is transferred to the fund chosen by the donor. However, this donation is tax-deductible within the guidelines of U.S. law. To claim a donation as a deduction on U.S. taxes, the donor must keep an email donation receipt as an official record.

- **How do I arrange to donate my PTO?**
  PTO Donation Requests are submitted through ONE HR Workday & Portal.
  - Log in to ccf.org/onehr and click on the "Requests" icon.
  - Go to "Create Request" and select "PTO Donation Request."
    After you submit your request, a confirmation of submission and a notification of approval or denial will be sent to your Outlook email**.**

- **How long does it take for the donation to be processed and disbursed?**
  PTO donated directly from caregiver to caregiver:
    - Once the donation request is approved and processed, the donated hours will be deducted immediately from the donor's PTO bank in Workday and credited to the recipient's PTO bank.

  PTO donated to a **Caregiver Fund – Caregiver Hardship or Caregiver Catalyst Grants Fund:**
    - Once the donation request is approved, the hours will be deducted immediately from the donor's PTO bank in Workday. After processing, an email receipt will be auto-generated and sent to the caregiver.
    - In addition, caregivers can check their last paystub to show the YTD amount under post tax deductions.
    - A PTO donation receipt will also be provided by Philanthropy once the gift has been processed by payroll.

- **Are there any limits to the amount of PTO I can donate?**
  Yes. Caregivers must donate a minimum of four (4) hours and have a minimum balance of 80 hours of PTO (current year and banked) remaining after the donation – regardless of employment classification (i.e., full-time or part-time).

- **Can I retract my donation after it is submitted?**
  Once a PTO donation is submitted and approved, it cannot be retracted.

PTO Donations to a caregiver experiencing a medical emergency

- **Who is eligible to receive a donation of PTO hours?**
  A PTO donation can be made to a benefit-eligible caregiver with an accruable PTO plan (this excludes PRNs, temporary or contract workers and professional staff). The donation between fellow caregivers is an "hours to hours" exchange to benefit caregivers facing a medical emergency. The recipient must be on an approved leave of absence for a medical emergency and have exhausted (or will exhaust) their PTO.

- **What qualifies as a "medical emergency?"**
  For this purpose, a medical emergency is a caregiver's medical condition (or a caregiver's family member's medical condition) that requires the caregiver to be absent from work – and results in a substantial loss of income because the caregiver has exhausted (or will exhaust) their PTO.

- **How are my PTO hours transferred to a fellow caregiver?**
  A Workday Absence representative will arrange for the PTO to be transferred on an equal value basis. For example, Cathy and Edward are both caregivers.
    - Cathy donates 10 PTO hours to Edward
    - Cathy makes $18 per hour for a value of $180 ($18 times 10 hours)
    - Edward makes $15 per hour
    - Edward receives 12 hours in his PTO bank ($180 divided by 15)

- **If I donate PTO hours to another caregiver, will I be taxed on my donation?**
  The donator *will not be taxed* when hours are donated to another caregiver. The recipient of the PTO hours *will be taxed* when they use the PTO hours.

- **Is there a limit to how much PTO I can donate to another caregiver?**
  Yes. Caregivers must donate a minimum of four (4) hours and have a minimum balance of 80 hours of PTO (current year and banked) remaining after the donation – regardless of employment classification (i.e., full-time or part-time).

- **Is there a limit to how much PTO a caregiver can receive?**
  Yes. The total PTO hours received by a caregiver cannot exceed the amount needed for their medical emergency, up to a maximum of 240 hours for a full-time caregiver (pro-rated for a part-time caregiver).

- **Can I donate PTO hours to multiple caregivers?**
  Yes, PTO donations should be submitted individually per each recipient in Workday.

- **What happens if the caregiver I designate to receive PTO does not have a documented medical or FMLA leave?**
  Approval and processing of PTO donations can be completed only with proof of a medical emergency (as defined in the PTO Donation Policy). If necessary, the Workday Absence representative will contact the recipient caregiver and request documentation.

- **Can I donate PTO hours to a fellow caregiver experiencing some other type of hardship?**
  PTO hours donated directly to another caregiver can be made only if the recipient is experiencing a medical emergency. Caregivers who experience other types of hardship may apply to the Caregiver Hardship Fund for a grant.

- **Am I able to donate PTO hours to relatives or family members?**
  You can donate PTO hours to a family member as long as they are otherwise eligible (e.g., they have an accruable PTO plan and are experiencing a qualifying medical emergency).

- **Will the recipient of my donation be notified of my identity?**
  Each PTO Donation request allows the donator to indicate whether or not they would like to remain anonymous.

- **I don't know of a specific caregiver who needs PTO for a medical emergency. Is there a general fund that benefits caregivers where I can direct my PTO donation?**
  There are currently two funds established for the benefit of Cleveland Clinic caregivers, and you may choose to donate PTO to either one or both of these funds. The **Caregiver Hardship Fund and Catalyst Grants Fund** accept PTO donations year-round.

PTO Donations to a Caregiver Fund

- **What is the difference between the Caregiver Hardship Fund and the Caregiver Catalyst Grants Fund?**
  Both are "general" funds that have been established for the benefit of Cleveland Clinic caregivers.

Donations to the **Caregiver Hardship Fund** are distributed as grants and help eligible applicants with unexpected financial hardships such as eviction, utility shutoffs, funeral expenses, etc.

Donations to the **Catalyst Grants Fund** support your fellow caregivers' innovative project ideas that expand patient support services, lay the groundwork for medical breakthroughs, and implement health and wellness programs.

You can also click here to learn more about our Caregiver Giving Program.

- **Who is eligible to receive grants from the Caregiver Hardship Fund?**
  Full-time and part-time caregivers at all Cleveland Clinic U.S. locations are eligible to apply. Caregivers working at Indian River, Martin Health, Mercy Hospital and Union Hospital should refer to their hospital's specific programs and guidelines. Professional staff members should contact the Office of Professional Staff Affairs for assistance with hardships.

- **Can my donation to either of these general funds be designated to a specific caregiver?**
  No. Donations to these funds cannot be designated to a specific individual, but rather are deposited into a general fund for distribution based on qualifying need.

- **How can I refer someone to apply to the Caregiver Hardship Fund?**
  Information about the **Caregiver Hardship Fund** can be found on the ONE HR Portal at ccf.org/onehr. Under "My Well-Being," click on "Caregiver Hardship Fund."

- **If I receive benefits from the Caregiver Hardship Fund, will my identity be disclosed?**
  No. All caregiver hardship matters are strictly confidential.