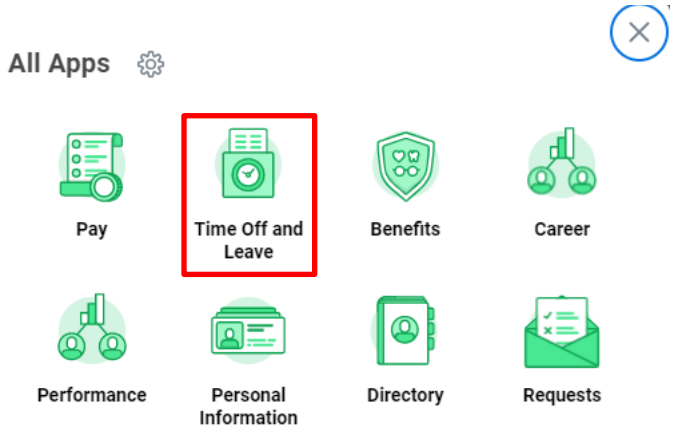
Time Off: Request a PTO Donation

Employee

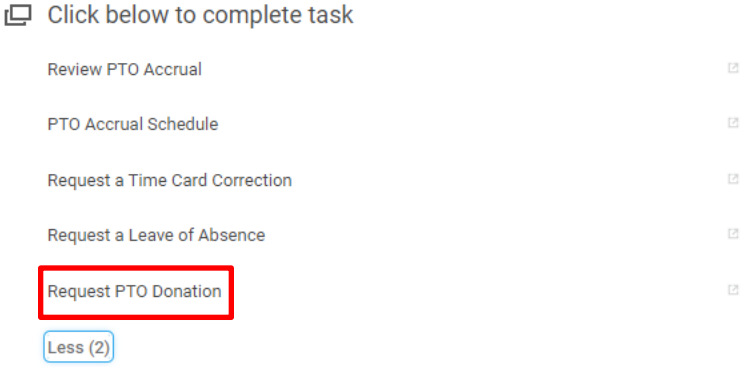
Scope: Use this process to request to donate PTO hours to another caregiver who is experiencing financial hardship or donate PTO hours to the Caregiver Catalyst Grants Fund.

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

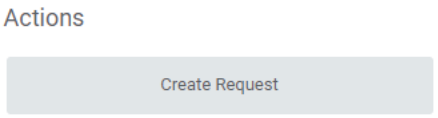


PTO Donation to a Caregiver

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



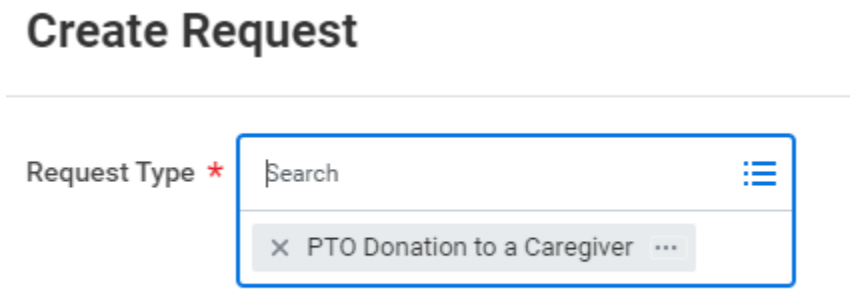
2. Click **Create Request** under Actions.



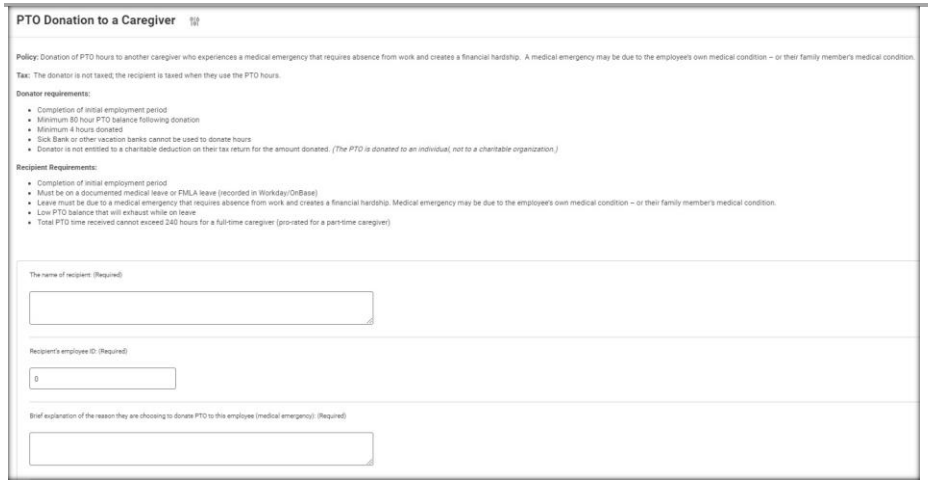
3. Enter **Request Type** by clicking on **Prompt** icon .



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



5. Click **OK**.
6. Complete all required fields.


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 donator is not taxed; the recipient is taxed when they use the PTO hours.

Donator requirements:

- Completion of initial employment period
- Minimum 80 hour PTO balance following donation
- Minimum 4 hours donated
- Sick Bank or other vacation banks cannot be used to donate hours
- Donator 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 (pro-rated for a part-time caregiver)

The name of recipient: (Required)

Recipient's employee ID: (Required)

0

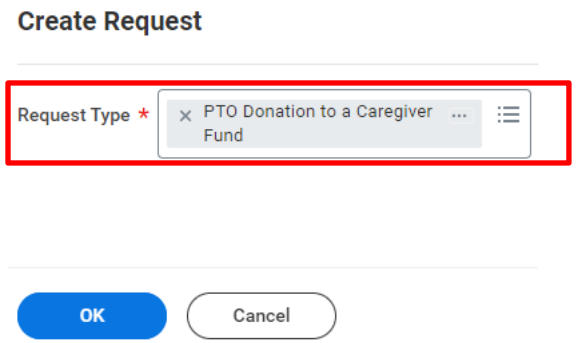
Brief explanation of the reason they are choosing to donate PTO to this employee (medical emergency): (Required)

7. Click **Submit**

Process is now complete.

PTO Donation to a Caregiver Fund

1. Click **PTO Donation to a Caregiver Fund**


Create Request

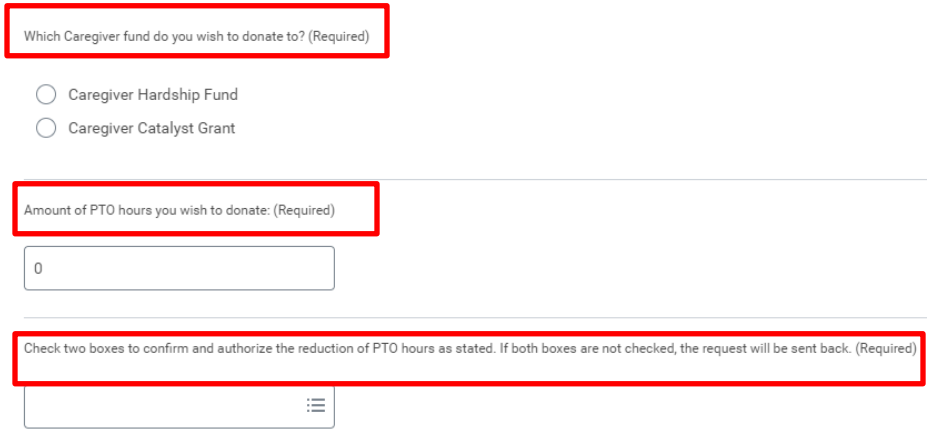
Request Type * × PTO Donation to a Caregiver Fund ...

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.