

PAID TIME OFF

SUMMARY

The University provides a Paid Time Off (PTO) Program for the purpose of providing staff with the opportunity to take time away from work without loss of compensation. The PTO Program is an inclusive time off program intended for use in connection with vacations, short-term injuries and illnesses (non-work related) of five (5) days or less, personal business, family care, and other needs which may require time off from work. The PTO Program combines vacation, sick, and personal leave, and must serve all these purposes. While a reasonable amount of paid time off should be taken annually by each employee, the timing and duration of successive days of paid time off is subject to satisfactory arrangements having been made for work to be continued in the employee's absence. A significant portion of the employee's allotted days should be viewed and taken as necessary for unexpected circumstances and illnesses, and while an employee may take the entire allotment for any one of the purposes, the circumstances under which they are taken will be considered with respect to job performance. Eligible staff accrue PTO hours based on their job classification, appointment effort (FTE) or hours paid each pay period (non-exempt employees), and years of service in accordance with an accrual schedule outlined in this policy. The PTO Program does not include paid time off for holidays.

- ZSR Library Faculty are also covered by this policy. For ZSR Library faculty accrual rates, please see the Reynolda Campus Faculty Handbook.
- For Graylyn PTO accrual rate, please see Graylyn policy.
- For Reynolda House PTO accrual rate, please see Reynolda House handbook.
- For Student Health Service accrual rates, please see Student Health Service PTO policy.

ELIGIBILITY

All full-time and part-time staff regularly scheduled (budgeted) to work 1000 hours or more per year are eligible for PTO. Staff who are scheduled (budgeted) to work less than 1000 hours per year are not eligible for PTO.

PTO GUIDELINES

PTO Scheduling –

To the extent possible, PTO is to be requested and approved by the supervisor in advance.

Supervisors are responsible for scheduling/tracking PTO in a manner that balances the operational and service delivery needs of the department (work unit) with the time off preferences of the staff. The University reserves the right to deny PTO requests which may have an adverse effect on its operations or cancel previously approved PTO requests if unexpected circumstances arise which require the staff's attendance at work.

PAID TIME OFF

In the event of illness or emergency preventing the staff from requesting PTO in advance, the staff is to notify the supervisor no later than the start of the workday (unless the situation makes this impossible) and explain the need for unscheduled time off.

PTO Reporting

Non-exempt: Staff are required to report PTO hours taken during each pay period by recording the PTO hours through the University’s time keeping system. PTO hours taken will be charged against the employee’s PTO account at the conclusion of the pay period during which it was taken.

Exempt: Staff are required to request PTO hours using the University’s leave management system. Supervisors are responsible for approving PTO requests made through the University’s leave management system.

Excused Absence Without Pay in Lieu of PTO – Staff carrying PTO balances may not opt to take excused absences without pay in lieu of PTO for purposes of saving accrued PTO time. Employees with insufficient PTO balances to cover requested periods of time off may be granted excused time off without pay at the discretion of the supervisor.

PTO ACCRUAL SCHEDULES

Exempt Staff

Full time (and eligible part-time) exempt staff and administrators will accrue PTO based on the following schedule:

Years of Service	Weeks per Year	Days per Year	Annual Accrual if Budgeted for 1950 Hours	Annual Accrual if Budgeted for 2080 Hours
Less than 5 years	Five (5) Weeks	25 Days	187.5 hours	200 hours
5 years or more, but less than 10 years	Six (6) Weeks	30 Days	225.0 hours	240 hours
10 or more years	Seven (7) Weeks	35 Days	262.5 hours	280 hours

Note: Senior Academic and Administrative Officers (HRPPM I-4, Human Resources Definitions) receive seven weeks of PTO regardless of years of service.

Note: The above limits are pro-rated for exempt staff budgeted to work less than 1950 hours per year.

The following formula is to be used in determining the annual PTO hours for regular exempt staff scheduled (budgeted) to work less than 1950 hours per year:

$$(\text{Total Budgeted Hours per Year}/2080) \times \text{Annual Accrual} = \text{Pro-rated Annual PTO.}$$

Example: An exempt staff employee with less than 5 years of service who is scheduled to work 1560 hours per year $(1560/2080) \times 200$
 $.75 \times 200 = 150$ PTO Hours per Year

To determine the monthly accrual for an exempt staff employee scheduled (budgeted) to work less than 1950 hours per year, divide the pro-rated annual PTO hours by twelve (12).

PAID TIME OFF

Exempt staff may draw against the entire balance credited annually to their account in January (or date of hire) with the stipulation that any PTO taken but not earned prior to separation will be deducted from the employee's last paycheck.

Exempt staff hired after January 1 will be advanced a pro-rated annual PTO balance at the time of hire based on the number of months remaining in the calendar year.

Those exempt staff beginning employment between the 1st and the 14th day of a given month will receive a full accrual for that month, whereas those employees beginning employment on the 15th day of a given month or thereafter will receive 50% accrual for that month. Conversely, those exempt staff terminating employment between the 1st and the 14th day of a given month will receive 50% accrual for that month, whereas those employees terminating employment on the 15th day of a given month or thereafter will receive a full accrual for that month. This same standard will be applied for those exempt staff beginning or returning from leaves of absence or any other status not subject to PTO accrual.

Fellows/Fellowships

Wake Forest Fellows and/or staff hired into Fellow positions on or after July 1, 2017 are eligible for two weeks of PTO to use during the year of their contract. Unused hours will not be paid out at the end of the appointment.

Non-Exempt Staff

Full-time (and eligible part-time) non-exempt staff will accrue PTO based on the following schedule:

Years of Service	Hourly Accrual	Annual Accrual if Budgeted for 1950 Hours	Annual Accrual if Budgeted for 2080 Hours
Less than 3 years	.0769 hrs.	150.0 hrs.	160.0 hrs.
3 years or more, but less than 10 years	.0962 hrs.	187.5 hrs.	200.0 hrs.
10 years or more, but less than 20 years	.1154 hrs.	225 hrs.	240 hrs.
20 or more years	.1346 hrs.	262.5 hrs.	280 hrs.

Note: The above limits are pro-rated for non-exempt staff budgeted to work less than 1950 hours per year.

Non-exempt staff earn PTO each pay period based on hours paid in accordance with the accrual schedule and criteria outlined above.

All hours worked are subject to PTO accrual, up to the annual accrual amounts based on budgeted hours.

PAID TIME OFF

Non-exempt staff will earn PTO for hours paid when absent from work in connection with: PTO, holidays, paid leave of absence, paid administrative leave, salary continuation for short-term disability, bereavement leave, and civil leave. Staff will not earn PTO when absent from work in connection with: excused or unexcused absences without pay including unpaid leaves of absence, or worker’s compensation leaves.

Annual accrual rates are to increase on the day of the achievement of the applicable service milestone.

PTO ACCOUNT BALANCE AND CARRY FORWARD LIMITS

Limits are imposed on the amount of PTO that can be maintained as a balance and on the amount of PTO that can be carried forward from one calendar year to the next. Current PTO account balances may not exceed one and one-half (1.5) times the staff members’ annual accrual rate. At the end of each calendar year, unused account balances up to the staff carry forward limit will be carried forward to the next calendar year. The carry forward limit is equal to one-half of the employee’s annual accrual.

Exempt staff are required to record PTO in the University’s leave management system. Ongoing staff who choose not to do so, and have the maximum accrued balance on December 31, will forfeit their carry forward balance into the coming calendar year and will begin the calendar year with only the accrual amount based on their years of service and budgeted hours. New staff hired between October 1 and December 31 are excluded.

PTO current account balance carry forward limits for full-time (and eligible part-time) exempt staff are reflected below:

Exempt Staff	Account Limit if Budgeted for 1950 Hours	Carry Forward Limit if Budgeted for 1950 Hours	Account Limit if Budgeted for 2080 Hours	Carry Forward Limit if Budgeted for 2080 Hours
Less than 5 years	281.25 hours	93.75 hours	300 hours	100 hours
5 years or more, but less than 10 years	337.50 hours	112.50 hours	360 hours	120 hours
10 or more years	393.75 hours	131.25 hours	420 hours	140 hours

Note: The above limits are pro-rated for exempt staff budgeted to work less than 1950 hours per year.

The following formulas are used in determining the annual PTO account limit and the annual PTO carry forward limit for regular exempt staff scheduled (budgeted) to work less than 1950 hours per year:

- Pro-rated Annual PTO X 1.5 = Annual PTO Account Limit
- Pro-rated Annual PTO X 0.5 = Annual PTO Carry Forward Limit

PAID TIME OFF

Example: An exempt staff member with less than 5 years of service who is scheduled to work 1560 hours per year $(1560/2080) \times 200$

$.75 \times 200 = 150$ PTO Hours (Pro-rated Annual PTO)

Annual PTO Account Limit = 150 PTO Hours $\times 1.5 = 225$ Hours

Annual PTO Carry Forward Limit = 150 PTO Hours $\times .5 = 75$ Hours

New Hires: The carry forward limit is based on one-half of the employee’s budgeted annual amount.

PTO current account balance carry forward limits for full-time (and eligible part-time) non-exempt staff are reflected below:

Non-Exempt Staff	Account Limit if Budgeted for 1950 Hours	Carry Forward Limit if Budgeted for 1950 Hours	Account Limit if Budgeted for 2080 Hours	Carry Forward Limit if Budgeted for 2080 Hours
Less than 3 years	225 hours	75 hours	240 hours	80 hours
3 years or more, but less than 10 years	281.25 hours	93.75 hours	300 hours	100 hours
10 years or more but less than 20 years	337.50 hours	112.50 hours	360 hours	120 hours
20 or more years	393.75 hours	131.25 hours	420 hours	140 hours

Note: The above limits are pro-rated for non-exempt staff budgeted to work less than 1950 hours per year.

New Hires: The carry forward limit is based on one-half of the employee’s budgeted annual amount.

Exempt and non-exempt staff whose PTO current account balances exceed their carry forward limit at the end of the calendar year will forfeit all hours in excess of this limit. Therefore, all staff should take care to ensure that PTO hours in excess of their carry forward limits are exhausted by the end of the calendar year to avoid forfeiture of PTO.

SEPARATION FROM UNIVERSITY EMPLOYMENT

Effective January 1, 2015, the university will not provide a PTO payout for any voluntary resignations or involuntary terminations.

Staff members that experience a reduction in force or position elimination are eligible for a PTO payout for any PTO earned but not taken, up to the PTO payout limits noted below.

Retirees are eligible for a PTO payout for any PTO earned but not taken. The PTO payout will be in the final paycheck.

The payout limits for exempt employees and administrators are reflected below:

PAID TIME OFF

Exempt Staff Service	Payout Limit
Less than 5 years	100 hours
5 years or more, but less than 10 years	120 hours
10 or more years	140 hours

The payout limits for non-exempt staff are reflected below:

Non-Exempt Staff Service	Payout Limit
Less than 3 years	80 hours
3 years or more, but less than 10 years	100 hours
10 or more years	120 hours
20 years or more	140 hours

GRANDFATHER CLAUSE

On January 1, 2002, the PTO Program superseded the vacation, sick, and personal leave programs previously in effect at the University. At the time of conversion, those staff members carrying accrued sick leave balances (not to exceed the annual carry over limits) are permitted to carry forward those hours in a separate sick leave account, called Sick Leave Reserve (SLR), to be used for personal illness, time required for medical treatments and care, or family illness. Sick leave may also be used to supplement Short Term Disability and Worker's Compensation. Once Sick Leave Reserve hours are exhausted, they will not be replenished. Sick Leave Reserve Balances will not be paid out upon termination of employment.