

VOLUNTARY SHARED PTO LEAVE POLICY

SUMMARY

The intent of this policy is to allow one staff employee (the “Donor”) to donate PTO leave to assist another staff employee (the “Recipient”) when the Recipient or an immediate family member of the Recipient experiences a prolonged medical condition resulting in the Recipient being placed on qualifying medical leave. Exceptions may be made in instances of an unforeseen life-threatening incident or when the employee experiences a non-medical related crisis.

ELIGIBILITY

Must be a regular full-time or part-time Wake Forest University staff employee

Employed by Wake Forest University for at least 90 consecutive work days

Scheduled (budgeted) to work 1000 hours or more per year

Eligible to earn PTO

Must exhaust all PTO before using donated PTO

Staff employee receiving payments through long term disability are not eligible to receive donations.

QUALIFYING CONDITION

A prolonged medical condition is one that requires absence from work for at least five consecutive workdays supported by medical certification listing the condition, prognosis, and the estimated time for treatment or recovery. An exception to the five-day requirement may be made if:

1. The Recipient has had previous absences for the same condition as that for which shared PTO leave is currently being requested.
2. The Recipient is involved in an unforeseen life-threatening accident.
3. The Recipient experiences a non-medical related crisis.

GENERAL GUIDELINES

Leave will be donated on a staff employee to staff employee basis. Establishment of a leave “bank” is expressly prohibited.

The donation and receipt of leave will be completely voluntary and kept confidential. Anyone who interferes with a staff employee’s right to choose whether to donate or receive leave will be subject to disciplinary action up to and including dismissal based on personal conduct.

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Solicitation of leave is prohibited.

Staff employee leave records are confidential.

The Donor cannot receive compensation for the leave donated.

The minimum amount to be donated is **four** hours and subsequent donations in one-hour increments. The minimum amount to be donated is one hour in the event of an unforeseen life threatening accident or when an employee experiences a non-medical related crisis.

The amount donated by a non-exempt staff employee is not to reduce the donor's PTO balance below five days. The amount donated by an exempt staff employee is not to reduce the donor's balance below five days of the earned and unused balance.

Sick Leave Reserve may not be donated under this PTO Leave Program.

Donated PTO hours are removed from the Donor's balance and added to the Recipient's balance in the next available payroll period, or may be retroactive for up to 30 days from the date the Recipient's application is approved.

Donations not made to a specified staff employee will be evenly distributed to staff employees on the confidential wait-list maintained by the Human Resources representative.

Donations provided must be utilized in the PTO accrual year they were given.

The Recipient must exhaust all available sick leave and PTO before using donated PTO.

Participation in this program does not provide job protection (see policy on Family and Medical Leave).

APPLICATION PROCESS

An application to receive or donate leave must be approved by the Recipient's Supervisor, and ultimately the department head, before it is forwarded to Human Resources. The department's determination as to whether or not a Recipient's application will be forwarded is based in part on the Recipient's past compliance with University leave policies and availability of funds within the department to cover the absences. Approval for shared leave is not guaranteed.

Applying for Voluntary Shared PTO Leave:

The Recipient should complete an "Application for Shared PTO Leave Form" (signed by supervisor and department head), the "Medical Certification Form" (also completed and signed

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by a health care provider) and the “Family and Medical Leave Request Form” (if applicable) and submit to the Human Resources representative.

Forms will be reviewed and verified for accuracy and eligibility as identified in this policy by the Human Resources representative.

Recipient and supervisor will be notified of determination of application.

Approved applications will result in Recipient’s name added to the confidential list of recipients.

Donating Voluntary Shared PTO Leave:

The Donor should verify the need for donations by contacting the Human Resources representative.

The Donor should complete the “Medical Leave – Shared PTO Donation Form.”

If the (Donor) does not have a specific recipient in mind, indicate “Unspecified Recipient” on the donation form. Donations will then be evenly distributed to staff employees on the confidential wait-list.