

Advocate Health Care System Policy Manual

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Subject: Associates Care-PTO Sharing
12/15/99
Origination Date:**Resource:** Human Resources**Approval:** Senior Vice President,
Human Resources**Supersedes:** Revised Policy**Review Date:** **03/15/2006****Revised Date:** **08/01/2008**

I. POLICY

It is the policy of Advocate Health Care (Advocate) to provide associates the opportunity to request PTO for a medical or personal emergency or to demonstrate their compassion for fellow associates by donating their Paid Time Off (PTO) to assist other associates who have exhausted their PTO benefits.

Eligibility

Full time, Part-time A, and Part-time B associates who have a medical or personal emergency that will require them to miss work and have exhausted their PTO balance.

II. DEFINITIONS

Medical Emergency is a medical condition of an associate or an immediate family member that requires the associate's absence from work for a period of time and would result in a substantial loss of income for the associate because they have exhausted their PTO balance. NOTE: PTO Sharing hours may not be used to supplement disability pay or workers compensation, but can be used for the elimination period (the first 10 days prior to starting their disability compensation).

Personal Emergency is a circumstance in which the associate has been granted time off that requires the associate's absence from work for a period of time and would result in a substantial loss of income for the associate because the associate has no remaining PTO balance. The situation would be unforeseen and needs immediate attention requiring an unplanned absence from work. Examples include things like a house fire, a basement flood or severe weather damage to your property. It does not include things like snow days, day care issues or car trouble. Your manager or Human Resources reserves the right to request supporting documentation to determine if the use of PTO Sharing time for a personal emergency is appropriate.

III. PROCEDURE

A. Request for Additional PTO

1. Any associate who has exhausted or is about to exhaust (has 8 hours or less in their PTO bank at time of request) may make a request for additional PTO by going to Advocate Online “Benefits” pages and selecting PTO Sharing under the Paid Time Off menu. Use the “PTO Sharing Request form” and fax it to HR Direct. An associate’s manager (or a coworker, through their manager) may also make a request in the absence of the associate at HR Direct.
2. If approved, the associate may receive up to 40 hours of PTO from the PTO Sharing Fund per request. The associate can make as many requests as they need not to exceed 80 hours per calendar year. Part-time associates will be awarded a prorated maximum.

FTE	Annual Maximum Available
1.0	80 hours
.9	72 hours
.8	64 hours
.7	56 hours
.6	48 hours
.5	40 hours

B. Donation

1. Anyone interested in donating PTO can go online to Advocate Benefit pages to Paid Time Off and then under PTO Sharing to print off a form to make the donation. Forms should be faxed to HR Direct.
2. Hours cannot be donated to another individual directly. They are placed in the site’s donation account for everyone to access.
3. Associates may not donate more than 25% of their available PTO balance as of their most recent pay period. Additional allocations up to the 25% limit maybe made at any time.
4. Once hours have been donated, they will not be returned to the donating associate.
5. Per IRS regulations, donated hours may not be considered “charitable gifts” for income tax purposes. They are also not considered compensation to the donating associate.

6. Additionally, any PTO that is removed from an associate's account at year-end, (because that PTO allocation would exceed the maximum carry over), will be credited to the PTO Sharing Fund for that facility and made available for donation to any requesting associate.

C. Payment of PTO hours

1. If hours are approved, they will appear the pay period following the request.
2. Amounts paid to associates are deemed to be compensation and are subject to income tax, other withholdings and regulatory reporting requirements.

IV. EXHIBITS/ATTACHMENTS

Advocate Cares – PTO Donation Form Attachment A

Advocate Cares – PTO Sharing Request Form Attachment B