

Instructions for Recording Exempt Staff Paid Time Off (PTO)

An employee's department is responsible for maintaining this record or a comparable paper or electronic record monthly. In January of each year, the department head is to review the previous year's record confirming its accuracy. The record is then submitted to the campus-designated office in a format established for the campus. Since the record may contain FMLA related information, its storage and access must be consistent with the provisions of the FMLA policy. These records are subject to audit throughout the year.

Staff classified as PANE will continue to use the Biweekly Attendance Record to record use of PTO.

How to Complete this Record

Hours Earned Each Month. The number of hours authorized by the PA Time Off Plan; 100% FTE = 20 hours earned (30 days per year) for those with 60 months of University Service Credit or less, or 24 hours earned (36 days per year) for those with more than 60 months of University Service Credit. Part-time employees receive a prorated amount. Hours are earned at the end of the last working day of each month.

Date Five Years Completed. This is the date on which the employee completes five years of university service credit. The employee will accrue 24 hours of PTO for the month in which this date occurs.

Note: It is not necessary to report University Service Credit.

Beginning Balances. The balance for each time off category carried forward from the previous year.

Initials. At the end of each month the employee and supervisor are to review the record, make any necessary corrections, and initial the record confirming its accuracy. Email messages or notations on an electronic record are appropriate alternatives to initials on a paper form; a face-to-face meeting is not required.

Summary codes for recording.

U = Total hours used in each category for the month.

E = Hours earned each month.

B = Balance at the end of each month. First, subtract the hours used during the month from the previous balance, then add the hours earned. Usage in a month cannot exceed the balance that exists at the start of the month.

Transfer To Sick. This is the number of paid time off hours to be transferred to "Sick Hours" (maximum of 96 hours for 100% FTE).

Final Balances. These balances are the beginning balances for the following year. The new balance for "Paid Time Off" cannot exceed the employee's annual allowance (either 30 or 36 days).

Signature Lines. The department head and employee are to sign the record at the end of each year stipulating to its accuracy. A face-to-face meeting is not a requirement.

When an employee separates or transfers

When an employee separates from the university, the employee's department is to send the originals of the record for the current year and all previous years to the human resources or payroll office as designated for the campus. When an employee transfers within the university, the employee's current department is to update and make a copy of the employee's record. The copy is to be sent to the employee's new department. The originals for the current year and all previous years are to be sent to the human resources or payroll office as designated for the campus.

For additional information about time off policies please refer to the Personnel Policies for Appointed Exempt and Non-Union Nonexempt Staff at: www.indiana.edu/~uhrs/policies/nonunion/main.html.