

# Paid Time-Off (PTO) for PB

HR-05-80

## About This Policy

**Effective Dates:**

09-26-1979

**Last Updated:**

01-01-2022

**Responsible University Administrator:**

Vice President for Human Resources

**Policy Contact:**

[IU Human Resources](#)

[askHR@iu.edu](mailto:askHR@iu.edu)

## Scope

This policy applies to full-time Professional Staff who chose to stay in the PB Time-Off Plan in 1985.

## Procedure

### Introduction to vacation and honorary vacation earnings in the PB Time-Off Plan

1. University service credit is used to calculate the amount of vacation staff earn in the PB Time-Off Plan.
2. Staff earn vacation hours while in pay status or absent with pay. They do not earn vacation time while on a leave of absence, while absent without pay, or during a temporary reduction in force.
3. Each employee and the employing unit records time off accruals and usage. These records are subject to audit throughout the year. At the end of each calendar year, time off balances are sent to the campus payroll office.

### Schedule of vacation earnings for levels 9-15

The following table shows the amount of vacation and honorary vacation earned by full-time staff in the PB Time-Off Plan with rank levels of 9 through 15.

Zero years through the completion of 3 years	10	0	10
From 4 years through 15	15	0	15
16 years through 29*	15	5	20
30 or more years	20	5	25

\* In the last pay period of the 29th year of service, staff receive a one-time earning of 5 days in addition to regular and honorary vacation earnings.

**Note:** Staff with interrupted university service start earning honorary vacation at the 20th year.

**Note:** Each day in the above table equals 8 hours.

### Schedule of vacation earnings for levels 16-24

The following table shows the amount of vacation and honorary vacation earned by full-time staff in the PB Time-Off Plan with rank levels of 16 through 24.

Zero years through the completion of 15 years	20	0	20
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From 16 through 19 years*	15	5	20
20 or more years	20	5	25

- In the last pay period of the 19th year of service, staff receive a one-time earning of 5 days in addition to regular and honorary vacation earnings.

**Note:** Staff with interrupted university service start earning honorary vacation in the 25th year.

**Note:** Each day in the above table equals 8 hours.

### Rules for using vacation

1. Staff not eligible for overtime must take vacation time in half or full-day increments, not hourly.
  - a. Time-off between  $\frac{1}{4}$  and  $\frac{3}{4}$  of a workday should be charged as a half-day.
  - b. Time-off for  $\frac{3}{4}$  or more of a workday should be charged as a full day.
  - c. Time-off for  $\frac{1}{4}$  or less of a workday should not be charged as vacation time.
2. Staff eligible for overtime must report the actual number of hours used, including tenths of hours.
3. Staff must have supervisory approval to take vacation time.
4. Multiple requests within a unit for the same vacation period are granted according to unit seniority.
5. Staff may accumulate unused vacation time from year to year. Upon separation from the university, staff will receive pay for a portion of unused vacation.

### Rules for using honorary vacation

1. Staff who accrue but do not use honorary vacation may accumulate it from year to year.
2. Staff not eligible for overtime must take honorary vacation in half or full-day increments, not hourly.
  - a. Time-off between  $\frac{1}{4}$  and  $\frac{3}{4}$  of a workday should be charged as a half-day.
  - b. Time-off for  $\frac{3}{4}$  or more of a workday should be charged as a full day.
  - c. Time-off for  $\frac{1}{4}$  or less of a workday should not be charged as honorary vacation time.
3. Staff eligible for overtime must report the actual number of hours used, including tenths of hours.
4. Staff who want to use honorary vacation earnings for a lengthy absence from work should have supervisory approval six months in advance. Supervisors are obligated to honor these requests unless more than one employee requests the same time. If this occurs, preference is given according to unit seniority.

### Bonus holidays for staff in the PB Time Off Plan

1. Bonus holidays are days off with pay.
2. Full-time staff in the PB Time-Off Plan earn one bonus holiday each quarter. The bonus holidays are received on April 1, July 1, October 1, and December 15. Each Bonus Holiday is equal to 8 hours.
3. With supervisory approval, staff may take a bonus holiday as soon as they receive it. Many staff use bonus holidays to cover office closings during winter break.
4. Staff must use accumulated bonus holidays by the end of December of the following year or lose them.
5. Staff not eligible for overtime must take the time in full-day increments. Staff eligible for overtime must report the actual number of hours used, including tenths of hours.

### Income protection plan earnings

1. The university provides income protection time to prevent staff from losing pay, i.e., to *protect their income* during personal or family illness, injury, and approved personal affairs. In other words, income protection time is a type of insurance, and earnings accumulate year to year.
  - a. Full-time staff earn one day per month, resulting in a maximum earning of 12 days in a calendar year. Each day is equal to 8 hours.

- b. Staff whose appointment is less than 75% do not earn income protection time
2. Staff do not earn income protection time while on a leave of absence, while absent without pay, or during a temporary reduction in force

### Use of income protection earnings

The following table explains how many hours staff can use for certain situations.

Staff who cannot work because of this reason	May use this many hours
Personal illness or injury (includes medical and dental appointments and disabilities resulting from pregnancy)	No limit; staff can use as many hours as they have accumulated.
Family illness or injury	Up to 5 days for any one period of illness or injury.
Personal affairs *	Up to 3 days per calendar year; may also charge to earned vacation.*

\* Staff may also charge personal affairs to vacation hours and carry over up to 24 hours of unused time for later use.

1. Unit heads and supervisors may ask for a physician's statement as proof of illness or injury.
2. Staff cannot "borrow" against future income protection earnings.
3. When caring for family, staff should use the allowable 5-day period to arrange for further care, if necessary. Members of the immediate family or household include the following:
  - a. Spouse as defined by Indiana law
  - b. An unmarried child at home
  - c. Relatives of the employee or spouse living with the employee
  - d. Parents, children, grandparents, grandchildren, brothers, sisters, and relatives of the spouse of the same degree who are solely dependent on the employee for emergency care
4. Staff may use income protection earnings in conjunction with Worker's Compensation. See the [Injury on the Job policy](#) or contact [IU Human Resources](#) for details.

### Personal affairs allowance for staff in the PB Time Off Plan

Staff may need to be away from work for reasons other than illness. Personal affairs time is an *allowance*, and it does not provide extra days off from work. If staff need to be away from work because of personal business such as religious holidays, funerals, legal matters, and university class attendance, then they *charge this time against income protection or vacation earnings in half or full-day increments for those not eligible for overtime and actual hours, including tenths of hours, for those eligible for overtime.*

### Schedule of personal affairs earnings

1. Full-time staff receive three days (24 hours) of personal affairs allowance per calendar year. They may carry over any current year's unused amount to the following calendar year. However, staff cannot accumulate or use more than six days (48 hours) in a calendar year. Used hours are first charged against the previous year's balance and then against the current year's balance.

### Conditions for using personal affairs allowance

1. To use the personal affairs allowance, staff must:
  - a. Have successfully completed the six-month, new-employee evaluation period.
  - b. Have sufficient earnings.
  - c. Request usage in advance.

2. Unit heads may deny requests (1) when it is evident that the absence will cause an undue hardship on the university compared to an employee's convenience or needs, or (2) when the request is inconsistent with this policy.

### **Funeral leave for staff in the PB Time Off Plan**

1. Staff have up to three working days (24 hours) off with pay for funerals and matters related to the death of certain relatives. These include a spouse defined by Indiana law, parent, brother, sister, child, grandparent, and grandchild. Also included are in-law relatives and step-relatives of the same degree and other relatives of whom the employee is the sole survivor. Staff must use these days within one week following the date of death.
2. Staff may be excused with pay to take additional time-off. They must charge this time to paid time-off benefits. They may also take the additional time-off (in full-day increments) without pay.
3. It is up to the discretion of a unit head to grant time-off with pay for staff to attend the funeral service of persons not mentioned in this policy (other relatives or close friends). Staff must charge this time to paid time-off benefits or take time-off without pay. Units are to report the number of hours charged to funeral leave on the attendance report.

### **Transferring to an academic appointment**

1. When staff in the PB Time-Off Plan transfer to academic appointments, they receive payment for accumulated time as provided in the [Pay/Salary Setting policy](#).

### **Separation pay for staff in the PB Time Off Plan**

1. Bonus Holidays
  - a. An employee who separates from employment on the last working day of March, June, or September (or the last workday before December 15 if that is not a workday) will receive the quarter's bonus holiday.
  - b. Some employees may receive payment for bonus holidays when they separate from the university. The benefit is one bonus holiday (eight hours for 100% FTE) for each quarter of the final calendar year of service. To be eligible, the employee must meet these three criteria:
    1. Be age 55 or older
    2. Be eligible for terminal life insurance coverage
    3. Have worked at least one month of each quarter
  - c. Staff who separate but do not retire receive payment for a bonus holiday that falls on the next workday following the last day worked.
2. Holidays that are still available for use within the specified time allowed.
3. Vacation time up to a maximum (excluding honorary vacation) of 200 hours, plus the number of vacation hours earned in an entire year. (This is called the employee's annual allowance.)
4. Compensatory time-off for Non-Exempt PAO Staff.
5. Honorary vacation up to a maximum of 480 hours.
6. Except as provided for separations with IU Retiree status or at time of death, employees do not receive separation pay for sick bank accruals.
7. Income protection time. Employees enrolled in PERF or IU Retirement 11.25% Plan with more than 152.0 income protection hours accrued receive pay at the rates listed below.
  - a. 25% of pay for 152.0 through 312.0 hours
  - b. 50% of pay for hours more than 312.0 hours.
8. Staff enrolled in the IU Retirement 10%, 12%, or 15% Plans do not receive separation pay for income protection (sick hours) with the exception noted below.
9. Exempt staff and Non-Exempt Non-Union PAO and PAU staff with vested rights in PERF and the IU Retirement 12% Plan.

- a. Employees can be covered under university service for vested rights in both PERF and the IU Retirement 12% Plan. In such cases, separation payment for accrued sick leave time is applicable if the years of employment under PERF equal 50% or more of the total service. However, the benefit is a multiple of the percentage of total employment under PERF.
  - b. This exception does not apply to staff enrolled in the IU Retirement 10% or 15% Plans.
  - c. Staff who are vested in both PERF and the IU Retirement 11.25% Plan will, for purposes of this policy, be treated as though they had continued PERF enrollment.
10. Exempt staff and Non-Exempt Non-Union PAO and PAU staff in the IU Retirement 15% Plan.
- a. Exempt staff and Non-Exempt Non-Union PAO and PAU staff in the IU Retirement 15% Plan will have vacation or PTO deducted from the interim benefit payment. Contact the campus human resources office for details.

## Sanctions

Managers, supervisors, and employees who violate this policy are subject to disciplinary action, up to and including termination.

## History

### January 2022

IU HR completed a full and substantive review to assess the ongoing need and effectiveness.

### February 2021

Updated the staff employee group terms due to Job Framework Redesign Project.

### May 2018

Removed same-sex domestic partner language.

### November 2017

Updated to remove PAS salary plan.

### September 2017

Removes Affidavit of Domestic Partnership.

### December 2016

Revised to add PAS salary plan.

### February 2016

This policy replaces the following policy:

Professional Staff and Support and Service Staff not Covered by a Union

- 10.7 - Paid Time Off for Staff in the PB Time Off Plan

This policy replaces parts of the following policy:

AFSCME (BL, IN, SB) 9.2 • CWA 13.4 • PA/SS 7.3 • Police (BL, IN, NW, SB, SE)

- Separation Pay
  - C.1.b.i.
  - C.1.b.ii.
  - C.1.b.iii.
  - C.1.b.iv.
  - C.1.b.v.
  - C.1.b.vi.

- C.2.b.ii.
  - C.2.b.iv.
  - C.2.b.iv.first dot
  - C.2.b.iv.second dot
  - C.2.b.v.
  - C.2.c.
  - C.2.c.i.
  - C.2.c.ii.
  - C.2.c.iii.
  - C.2.d.
  - C.2.d.i.
1. Indiana University approved the merging of *administrative* (AD), *professional* (PR), *other academic* (OA), and *counseling* (CN) positions into one functional classification called *professional*. At the same time, a new paid time off benefits plan was authorized for this group of employees. Both actions were effective January 1, 1985.
    - a. Enrollment in the new paid time off plan was optional for persons already employed by IU. Those who enrolled in the plan are identified as being in the [PA Paid Time Off Plan](#).
    - b. Enrollment in the [PA Paid Time Off plan](#) is required for persons appointed as of January 1, 1985.
  2. Employees who were previously called *administrative* (AD) or *professional* (PR) and who elected to remain in the previous time off benefit plan are identified as being in the PB Time Off Plan.
  3. Employees previously called other academic (OA) or counseling (CN) and who elected to remain in their previous fringe benefits plan should contact the Dean of the Faculties Office for related policies and procedures. These positions are identified as being in the PC Time Off Plan.

## Related Information

[Separation Pay for Unused Time Off Accruals](#)