

Paid Time Off (PTO) for PB
HR



About This Policy

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Responsible University Office:

University Human Resources

Responsible University Administrator:

Vice President and Chief Financial Officer

Policy Contact:

University Human Resources

hrpolicy@iu.edu

Related Information

* Separation Pay for Unused Time Off Accruals

- Scope
- Procedure
- Sanctions
- History

Back to top ^

Scope

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

Back to top ^

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 department 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 department.

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.

Staff who have this amount of university service credit	Earn this amount of vacation days per year	Plus this amount of honorary vacation days per year	For a total of this amount of vacation days each year
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.

Staff who have this amount of university service credit	Earn this amount of vacation days per year	Plus this amount of honorary vacation days per year	For a total of this amount of vacation days each year
Zero years through the completion of 15 years	20	0	20
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 onetime earning of 5 days in addition to regular and honorary vacation earnings.

Note: Staff with interrupted university service start earning honorary vacation at 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 full-day increments. Staff eligible for overtime must report the actual number of hours used, including tenths of hours.
2. Staff must have supervisory approval to take vacation time.
3. Multiple requests within a department for the same vacation period are granted according to unit seniority.
4. Staff may use a maximum of 25 vacation days between January 1 and December 31 of each year. This limit does not apply to vacation time utilized during a family or medical leave of absence.
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 full-day increments. Staff eligible for overtime must report the actual number of hours used, including tenths of hours.
3. Staff may use a maximum of 60 honorary vacation days between January 1 and December 31 of each year. This limit does not apply to vacation time utilized during a family or medical leave of absence.
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 period. If this occurs, preference is given according to unit seniority.

Transferring to an academic appointment

1. When staff in the PB Time Off Plan transfer to academic appointments, they receive pay for accumulated time as provided in the provisions of the **Pay/Salary Setting policy**.

Bonus holidays for staff in the PB Time Off Plan

1. Bonus holidays are days off with pay, generally thought of as Christmas bonus days. (Many employees accumulate bonus holidays and use them to cover the closing of their department between Christmas and New Year holidays.)
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. Staff must use accumulated bonus holidays by the end of December of the following year or they lose them. 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.

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 individuals may receive bonus holidays when they terminate 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:
 - i. Be age 55 or older
 - ii. Be eligible for terminal life insurance coverage
 - iii. Have worked at least one month of each quarter
 - c. Staff who terminate but do not retire receive pay 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 specific time allowed.
3. Vacation time up to a maximum (excluding honorary vacation) of 200 hours, plus the number of vacation hours that the employee earns in a full year. (This is called the employee's annual allowance.)
4. Compensatory time off for PAO and PAU 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. Professional Staff with vested rights in both PERF and the IU Retirement 12% Plan

- a. It is possible for employees to 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. Persons 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. Professional Staff in the IU Retirement 15% Plan

- a. Professional 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.

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. Income protection earnings accumulate year to year.
 - a. Full-time Staff earn one day per month. This results 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.

Use of Income Protection Earnings	
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. Department 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, or same sex domestic partner as qualified by the university's Affidavit of Domestic Partnership
 - b. An unmarried child at home including the child of the same sex domestic partner
 - c. Relatives of the employee, spouse, or the same sex domestic partner living with the employee
 - d. Parents, children, grandparents, grandchildren, brothers, sisters and relatives of the spouse or the same sex domestic partner 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. For details, see the [Injury on the Job policy](#), or contact [Worker's Compensation](#) in Bloomington.

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*. 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 full-day increments for those not eligible for overtime and actual hours, including tenths of hours, for those eligible for overtime*. Charges to vacation earnings do not count against the amount of vacation staff can take in any calendar year.

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 next 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. Department heads may deny requests (1) when it is evident that the absence will cause an undue hardship on the university as 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 as defined by Indiana law, or same sex domestic partner as qualified by the university's Affidavit of Domestic Partnership, parent, brother, sister, child, grandparent, and grandchild. Also included are in-law relatives, step relatives, and the same sex domestic partner's 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. Using vacation hours does not count against the maximum amount of vacation time staff can use in a year. They may also take the additional time off (in full-day increments) without pay.
3. It is up to the discretion of a department 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 the time off without pay. Departments are to report the number of hours charged to funeral leave on the attendance report.

[Back to top ^](#)

Sanctions

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

[Back to top ^](#)

History

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.