

# PTO Donation Quick Guide

Audience: Eligible employees

## Introduction

Carnegie Mellon University recognizes that employees or employee's family members may have a Catastrophic Illness (as defined in the [PTO Donation Guidelines \[pdf\]](#)) that results in a need for time off that exceeds their current accrued, unused PTO balance. To address this need, CMU has adopted this PTO Donation Program whereby eligible employees may donate accrued PTO from their accrued, unused balance(s) to a PTO Donation Bank. The PTO Donation Bank will be made available to employees who have been impacted by a Catastrophic Illness (as defined by the IRS). Participation in the Program is strictly voluntary for both donors and recipients.

CMU has partnered with PTO Exchange to make donating and requesting PTO seamless. This guide aims to show you how to:

- [Use the Dashboard – Check Available Balances](#)
- [Donate Your PTO](#)
- [Request Donated PTO](#)
- [Use Donated PTO](#)
- [Check PTO Donation Request Status](#)

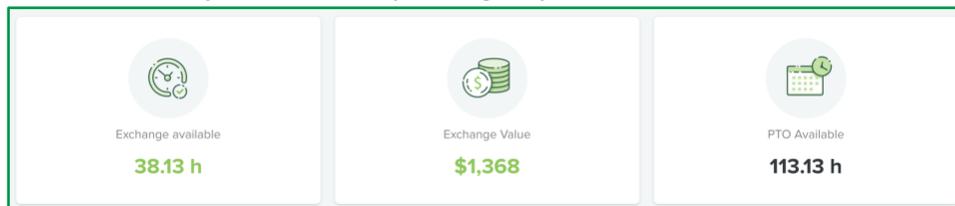
## Resources are available for questions about:

- Donation eligibility
- Request eligibility
- CMU's PTO Policy
- Tax Implications

Visit the [PTO Donation Program Webpage](#) or send an email to [Leaves Administration](#).

## Use the Dashboard – Check Available Balances

1. Log in to [PTO Exchange](#) using your Andrew Email and Password.
2. The PTO Exchange homepage will show your **Dashboard** that contains useful information regarding your balances:
  - **Exchange Available** - The total amount of hours that are available for an employee to donate. This value is critical to a PTO donator.
  - **Exchange Value** - The total ascribed monetary value of the hours that are available for an employee to donate. This value is illustrative only and does not limit the amount of hours you may donate.
  - **PTO Available** - The total amount of PTO hours that someone has in the current PTO balance. This value is critical to a PTO donator since after making any donation this balance must remain at 75/80 hours (i.e., 10 days) or more (depending on your workweek).



**Note:** When donating or requesting PTO, keep in mind your standard workweek. For a 37.5-hour workweek, 7.5 hours is equivalent to 1 day and for a 40-hour workweek, 8 hours is equivalent to 1 day.

## Donate PTO

1. Log in to [PTO Exchange](#) using your Andrew Email and Password.
2. On the PTO Exchange homepage, click **Sharing** then **Share with co-worker**.



3. In the Sharing details, input the **number of hours** you wish to donate. This will also give you a glimpse of your available hours to share.

The screenshot shows a form titled 'Sharing details'. It has a 'Number of hours' input field. Below it, it says 'You have 23.13 hours available to share'. Under 'Pool information', there is a dropdown menu for 'Sharing pool' set to 'CMU PTO Donation Program'. There is a 'Comment' field and an 'Optional' section. At the bottom, there is a checkbox for 'I agree to the terms of service' and two buttons: 'Submit' and 'Cancel'.

**Note:** There is only one Sharing Pool (CMU PTO Donation Program) and a comment is not required.

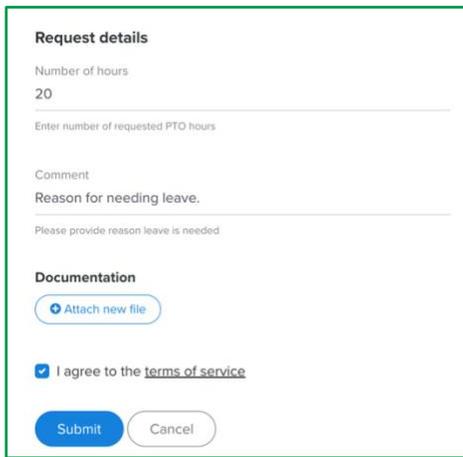
4. Click the checkbox to agree to the terms of service then click **Submit**.
5. The **Thank you for sharing!** message will display. You will also receive an email notification confirming your donation.

## Request Donated PTO

Before you request Donated PTO, please ensure that you have prepared both your [Leave Donation Request Form \[pdf\]](#) and [Physician's Certification of Catastrophic Illness Form \[pdf\]](#).

**Note:** The treating physician must sign the Physician Certification. These forms will be validated upon review of your request.

1. Log in to [PTO Exchange](#) using your Andrew Email and Password.
1. In the request form, input:
  - a. The **number of hours** you wish to request.
  - b. A **comment** indicating a brief description of the reason.
  - c. **Documentation** that includes both of the following:
    - i. [Leave Donation Request Form \[pdf\]](#)
    - ii. [Physician's Certification of Catastrophic Illness Form \[pdf\]](#)



2. To check the status of your request, proceed to the [Recent Activity](#) section.
3. Once the request for Donated PTO is approved, proceed to the [Use Donated PTO](#) section.

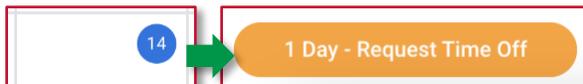
**Note:** Upon request approval, the Donated PTO hours will be available in Workday **the next day**.

## Use Donated PTO

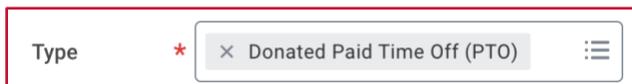
1. Log in to [Workday](#) with your Andrew Email and Password.
2. Click **Menu** then click the **Time Off** app.



1. In the **Request Time Off Calendar** select the days on which you would like to utilize the Donated PTO, then click **Request Time Off**.



2. In the **Request Time Off** overlay, in the **Type** field, select **Donated Paid Time Off (PTO)**.



3. Input the **Daily Quantity** and then click **Submit**.
4. The request will be reviewed and approved by your supervisor.

## Recent Activity (Check Request Status)

From your [PTO Exchange](#) homepage, scroll down to **Recent Activity** to find useful information regarding your requests:

Recent activity <a href="#">View all activity</a>						
ID	Type	Date	Hours	Amount	Status	
Share 23	Sharing request	13 Nov 2023	20	\$512.82	● Submitted	

### Status:

- Submitted
- Approved
- Denied

### Hours:

- The total amount of a donation

### Date:

- The date a donation was initiated

### Additional Details:

The following columns in the Recent Activity are also available, but do not affect the status of your requests:

- **ID:** The system-assigned Request Number.
- **Type:**
  - "Sharing donation" indicates your donations
  - "Sharing request" indicates your requests
- **Amount:** The total ascribed monetary value of the hours donated or received. This value is illustrative only.