Colleague PTO Donations in Workday

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Updated: 4/14/2017
Donating PTO to Another Colleague
Role: Time Off Partner

Donated PTO should be adjusted based on the difference in pay between the Donator and Recipient.

In this example:

• Colleague A (Donator) wants to donate 8 hours of his PTO to Colleague B (Recipient).
• Colleague A's pay rate = $20/hr; Colleague B's pay rate = $10/hr.

\[
(\text{Donator Hourly Rate} \times \text{Hours Donated}) \div \text{Recipient Hourly Rate} = \text{Adjusted PTO Hours}
\]

\[
20 \times 8 = 160 \div 10 = 16
\]

Colleague B should receive 16 hours of PTO.

To record the donation, the Time Off Partner should conduct the following steps in Workday:

• Step 1: Decrement PTO Bank for Colleague A (Donator):
• Step 2: Add PTO to Colleague B's (Receiver) Bank
Donating PTO to Another Colleague

Step 1: Decrement PTO for Colleague A (Donator):

1. For Worker A (Donator) select **Related Actions > Time and Leave > Maintain Accrual and Time Off Adjustments/Overrides**. The Maintain Accrual and Time Off Adjustment/Overides screen will display.

2. Under **Adjustments**, click the " + " to add a row.

3. In the **Select Accrual/Time Off** field, select the Ministry's PTO/vacation plan that includes "Donate Time Off." This will decrement the bank, but won't pay out money to the employee.

4. In the **Unit** field, type the number of hours Colleague A is donating.

5. In the **Period** field, select the period the hours were donated.

6. In the **Comments** field, type the Employee Id of the colleague the hours were donated to and any other pertinent information.

7. Click **OK**.

8. Click **Done**.
Donating PTO to Another Colleague
Step 2: Add PTO to Colleague B's (Receiver) Bank

1. For Worker B (Receiver), select Related Actions > Time and Leave > Maintain Accrual and Time Off Adjustments/Overrides. The Maintain Accrual and Time Off Adjustment/Overrides screen will display.

2. Under Adjustments, click the " + " to add a row.

3. In the Select Accrual/Time Off field, select the Ministry's PTO/vacation plan that includes "Donate Time Off."

4. In the Unit field, type the number of hours Colleague B is receiving. **Note:** Use a negative (-) number so that it will add to the bank but not affect any accruals for the period or year.

5. In the Period field, select the period the hours were donated.

6. In the Comments field, type the Employee Id of the colleague the hours were donated from and any other pertinent information.

7. Click OK.

8. Click Done.
Donating PTO to a Charity
Roles: Payroll Partner and Time Off Partner

In this example, the colleague has elected to donate 8 hours of PTO as a charitable donation. These donations are taxable. Trinity Health has determined that they should be processed quarterly via off cycle checks and the donations are at the NET amount (after taxes).

There are two steps to this process. The first completed by the Payroll Partner; the second completed by the Time Off Partner.

Step 1: Payroll Partner Calculates Off Cycle Check and Updates Net AMT

1. Enter the PTO hours on an Off-Cycle Check using earnings code 4082_PTO Donation to Charity
2. Calculate the check.
3. Take the net amount and update the specific Foundation/Charity Deduction code. The amount for the deduction is what the employee would identify on their tax return as their charitable contribution.
4. Recalculate the check.
5. Validate the net amount is $0.00.
6. Complete the check.

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Donating PTO to a Charity
Step 2: Time Off Partner Decrements PTO

1. For Worker A (Donator) select Related Actions > Time and Leave > Maintain Accrual and Time Off Adjustments/Overrides. The Maintain Accrual and Time Off Adjustment/Overrides screen will display.

2. Under Adjustments, click the " + " to add a row.

3. In the Select Accrual/Time Off field, select the Ministry's PTO/vacation plan that includes "Donate Time Off." This will decrement the bank, but won't pay out money to the employee.

4. In the Unit field, type the number of hours the colleague is donating.

5. Click OK.

6. Click Done.