



workiva

United States - PTO Policies



United States - PTO Policies

Paid Time Off (PTO)

Workiva makes Paid Time Off available to eligible employees for purposes of time away from work for vacations, illness, or any other personal matters. PTO is accrued as follows:

Years at Workiva	Definition of Year	PTO Hours Accrued Monthly	Annual Accrual in Weeks	Maximum PTO hours available in 'bank' at any point in time
First year of eligible employment*	From hire date until first anniversary	10	4 weeks (1 week granted on date of hire + accrue 3 weeks)	120 (3 weeks)
Second year of eligible employment	From first anniversary until second anniversary	13.33	4 weeks	120 (3 weeks)
3-5	From second anniversary until fifth anniversary	13.33	4 weeks	160 (4 weeks)
6-9	From fifth anniversary until ninth anniversary	16.67	5 weeks	200 (5 weeks)
10+	From ninth anniversary forward	20	6 weeks	240 (6 weeks)

*40 hours of PTO granted on the date of hire. Remainder of PTO in first year accrues at the rate of 10 hours/month

United States - PTO Policies

Accrual

- Years of service as a regular employee determines the rate at which employees accrue PTO. Employment in temporary or intern status does not count towards years of service for purposes of PTO accrual in case of moving to full-time eligible status.
- Employees become eligible for increased accrual on the first day following the anniversary of their regular full-time hire date.
- PTO accruals carry over up to the maximum amount shown. Once maximum accrual is reached, accrual will stop until balance drops below the maximum.
- PTO does not accrue during an inactive status of employment or unpaid leave of absence.

Requesting PTO

- PTO requests must be submitted for supervisor approval through Workday. You must have an accrued PTO balance in order to take PTO; borrowing PTO in advance of accrual is not permitted.
- All requests are subject to supervisor approval. You are expected to exercise consideration and good judgment when requesting time off from your supervisor. If you request time off during a particularly busy time, or at a time when many others have also requested time off, you may be required to postpone your time off.
- It is your responsibility to monitor your PTO balance to ensure time off requests are not made when there is not sufficient PTO balance to take time off. If you do not have sufficient PTO to cover a request for time off, you may request Personal Unpaid Leave. Personal Unpaid Leave must be approved by your manager and department Vice President in accordance with the Unpaid Leave Policy.

PTO with Other Types of Leave

- US only: Under the company's Family and Medical Leave Policy, you may request to use PTO in conjunction with approved, unpaid FMLA absences.
- In the case of approved short term disability, the employee may choose to use partial PTO to supplement disability payments.

United States - PTO Policies

Value of PTO at Separation

- Accrued, unused PTO will be paid on the employee's final paycheck, or as soon as possible or required under certain circumstances. Contact the Workiva Payroll Department for specific questions regarding PTO after separation.

Years of service as a regular full-time employee determines the rate at which employees accrue PTO. Employees become eligible for increased accrual on the first day following the anniversary of their regular full-time hire date. PTO accruals carry over up to the maximum amount shown. PTO hours cease to accrue during an inactive status of employment.

You are expected to exercise consideration and good judgment when requesting time off from your supervisor. If you request time off during a particularly busy time, or at a time when many others have also requested time off, you may be required to postpone your time off if it is for a reason other than illness. All requests are subject to supervisor approval, but approval will not be withheld for sick leave requests as required by state and local jurisdictions. Accrued PTO hours can be used to cover time away from work for vacations, illness or personal appointments. PTO requests must be submitted for supervisor approval through the employee payroll website. You must have an accrued PTO balance in order to take PTO. It is your responsibility to monitor your PTO balance to ensure time off requests are not made when there is not sufficient PTO balance to take time off. If you do not have sufficient PTO to cover a request for time off, you may request Personal Unpaid Leave. Personal Unpaid Leave must be approved by your manager and department Vice President in accordance with the Unpaid Leave Policy.

Worked Holiday Floating Holiday - US Only

In recognition of special instances when Workiva requires an eligible employee in the US to work on a Company holiday, Workiva will provide the following:

- 8 hours of holiday pay for the designated holiday in addition to pay for hours worked
- An additional paid day off (Floating Holiday) to be used within the next month of the holiday on which the employee was required to work and completed their shift.

United States - PTO Policies

Eligibility

- US-based permanent employees classified as non-exempt.
- Must be required to work on a day designated as a Company holiday as required for business operations.

Guidelines

- If Workiva requires an employee to work 8 hours (or more) on a designated holiday, the maximum eight (8) hours of Floating Holiday is available; it cannot be split over several days.
- If Workiva requires an employee to work less than 8 hours, the corresponding amount of Floating Holiday will be available and should be used at one time; it cannot be split over several days.
- The day selected as Floating Holiday must be agreed upon between the employee and their manager.
- The Floating Holiday cannot be “banked” and will not be paid out at the time of separation if not taken/used.
- The Floating Holiday will not count as hours worked for purposes of calculating overtime under federal or local laws, including FLSA.

The employee will request the floating holiday time off in Workday and the manager will review and determine approval of the time.

Part-Time/Intern Paid Sick Leave - US

Eligibility

Workiva provides paid sick leave to employees who work on a part-time (less than 30 hours per week) or temporary basis, including interns.

United States - PTO Policies

Procedures

Eligible employees will accrue eight (8) hours of sick time per month, up to a maximum accrual of 64 hours.

Leave under this policy may be used in connection with:

- Diagnosis, care or treatment of an existing health condition for, or the preventive care of an employee or an employee's immediate family member.
- The employee or family member has been a victim of domestic violence, sexual assault or stalking/harassment and needs to be absent from work for purposes related to such crime.
- A public official has ordered the closure of the school or place of care of the employee's child or of the employee's place of business due to a public health emergency, necessitating the employee's absence from work.
- School conference or meeting regarding a child's health or disability.

For purposes of this policy, family members include spouses, registered domestic partners, children (regardless of age), parents (including step-parents and parents-in-law), grandparents and siblings. Employees requesting time off under this policy should provide as much advance notice to their manager as practicable, and this time off must be recorded in Workday.

Unused time under this policy is not paid out at the time of separation from employment, nor does it go with the employee should they transfer to a full-time, benefits eligible role.

Leave under this policy may run concurrently with leave taken under other applicable policies as well as under local, state or federal law.

United States - PTO Policies

Family and Medical Leave Act - US

What is Family and Medical Leave?

The Family and Medical Leave Act (FMLA) gives qualified employees the right to take job-protected, unpaid leave of up to 12 weeks in a rolling 12-month period (or 26 weeks of leave within any 12-month period to care for a covered service member with a serious injury or illness). The leave must be for the birth and care of an employee's child; the placement with the employee of a child for adoption or foster care; the serious health condition of an employee or an employee's spouse, domestic partner, child or parent; to handle "exigencies" related to an immediate family member's military service or call-up for service; or to care for a family member who is injured during military service. The 12-month period is measured backwards beginning on the date on which the requested leave is to start.

Who Can Take Family and Medical Leave?

An employee is eligible for leave after she or he has worked for Workiva for 12 months, and for at least 1,250 hours during the 12-month period immediately prior to the date the leave begins. If both parents are employed by Workiva, and leave is taken for a birth or adoption of a child, their combined leave is limited to 12 weeks.

What Effect Will Family and Medical Leave have on my Benefits?

Workiva will maintain existing health benefits coverage during the leave period. Employees are required to continue co-payments (when applicable) during the leave. No unpaid leave will be considered working time for the purposes of accrual of leave hours. If the leave lasts longer than 12 weeks, the employee may elect benefits continuation through COBRA. A leave packet will be provided to all employees who request a leave of absence.

Can I Use Paid Time Off During This Leave?

Employees may but are not required to apply accrued PTO time towards a Family and Medical Leave. PTO leave hours cease to accrue during any type of unpaid leave of absence.

United States - PTO Policies

How Much Notice Do I Need to Give Before Taking Family and Medical Leave Notification to Workiva?

An eligible employee should notify his or her supervisor and the Workiva Benefits team of the need for FMLA leave at least 30 days in advance of foreseeable events and as soon as possible for unforeseeable events. Employees requesting family leave related to his or her own serious health condition; the serious health condition of a child, spouse or parent; or the care of a family member who is injured during military service will be required to submit a health care provider's Certification Form. An employee seeking leave for a qualifying exigency also will be required to submit a Certification to support the request. These forms will be provided to employees by the Workiva Benefits team and must be returned within 15 days after receipt by the employee.

Can Family and Medical Leave be Denied?

Leave may be denied a leave if the employee does not meet the requirements or has exceeded the time off allotted under the FMLA.

What are the Benefits to Me of Family and Medical Leave?

When FMLA leave ends, the employee will be reinstated to the same position, if it is available, or to an equivalent position for which the employee is qualified at the same rate of pay and benefits. If an employee fails to report to work promptly at the end of the approved leave period without notice, Workiva may assume that the employee has resigned.

What Types of FMLA Leave are Available to Me?

Employees may take FMLA leave on consecutive days, or under certain circumstances may use the leave intermittently or to reduce the workweek or workday, resulting in a reduced-hour schedule. Except for leave to care for a service member with a serious injury or illness, the leave typically may not exceed a total of 12 weeks over a 12-month period. Workiva may temporarily transfer an employee to an alternative position with equivalent pay and benefits if such a position would better accommodate the intermittent or reduced schedule.

For the birth, adoption or foster care of a child, Workiva and the employee must mutually agree to the schedule before the employee may take the leave intermittently or work a reduced-hour schedule. Leave for birth, adoption or foster care of a child must be taken within one year of the birth or placement of the child.

United States - PTO Policies

Military Leave and Benefits Rights

Under the Uniformed Services Employment and Reemployment Rights Act (USERRA), employees who are deployed in active service are entitled to military leave. Workiva will reinstate you following your return from leave as required by USERRA and other applicable law.

PTO Donation Policy - US

Workiva recognizes that employees who have a medical emergency or experience a major disaster may need time off in excess of available leave. To address this need, all regular full-time employees will be allowed to donate PTO time from their unused balance to their coworkers in need in accordance with the policy outlined below. All regular full-time employees are eligible to receive donated PTO. Participation in PTO donation is strictly voluntary.

Eligibility to Receive PTO Donations

Regular full-time US employees are eligible to receive donated PTO. Employees must have a situation that meets one of the following criteria:

- Medical Emergency - A medical condition of the employee or immediate family member that will require the prolonged/extended absence of the employee from work. Medical emergencies include injury of the employee or an immediate family member that poses a threat to life, requires inpatient or hospice health care, or conditions requiring long-term intensive treatments. Immediate family member is defined as spouse, domestic partner, child, parent or other relationship in which the employee is the legal guardian or sole caretaker.
- Major Disaster - A personal crisis of a severe nature that directly impacts the employee, caused by a major disaster or emergency as declared by the President and meeting the definition included in IRS Notice 2006-59.

Employees who receive PTO donations must use all of their own available PTO before receiving hours from other employees.

United States - PTO Policies

Making Donations

Regular full-time US employees are eligible to make donations. Employees who donate PTO must adhere to the following requirements:

- Donation minimum - 4 hours
- Donation maximum - The lesser of 40 hours or 50% of current PTO balance in any rolling 12-month period
- Employees currently on a leave of absence cannot donate PTO
- VTO cannot be donated

Other Considerations

- Donated PTO must be used by the employee within 12 months.
- Employees may receive a maximum of 480 hours (12 weeks) of donated PTO within a rolling 12-month period.
- Donated PTO may only be used for time off related to the approved request.
- PTO donated that is in excess of the time off needed will be returned to the donors.
- Donated PTO will not be paid out upon termination.
- Employees who donate their PTO will not be taxed on the value of their donated PTO.

Procedure

Employees who would like to make a request to receive donated PTO should contact benefits@workiva.com to initiate a request.

Employees who wish to donate their PTO will be directed to complete a PTO donation form. Once approved, donated PTO will be distributed to the employee(s) requesting the donation.

Approval

Requests for donations of PTO must be approved by the employee's immediate Supervisor, department VP, and the PTO Donation Committee.

Voting Day

Major federal/national election days are a paid holiday for employees. Please refer to the full holiday schedule in the HR Service Center for details.