



AGENDA

Committees on Human Resources
Friday, September 20, 2024, at 9:00 a.m.
Location: 721 Oxford Ave, Eau Claire, WI • Room 3312

A majority of the county board may be in attendance at this meeting, however, only members of the committee may take action on an agenda item.

Join from the meeting link:

<https://eauclairecounty.webex.com/eauclairecounty/j.php?MTID=m968f672a2da30c931aa0b6c3fac16ad3>

Join by meeting number:

Meeting number: 2534 577 0359 Password: YNvJDw5fg57

Join by phone:

Dial in: 415-655-0001 Access Code: 2534 577 0359

1. Call to Order and Confirmation of Meeting Notice
2. Roll call
3. Public Comment
4. Review of meeting minutes – **Discussion/Action**
 - August 9, 2024
5. File No. 24-25/074: Resolution abolishing 1.0 (FTE) Crisis Supervisor position and creating 1.0 (FTE) Comprehensive Community Service (CCS) Supervisor position in the Eau Claire County Human Services Department – **Discussion/Action**
6. File No. 24-25/070: Resolution amending sections 2,3,4,5,6,7,8,10,11,12,13, and 14 of the Human Resources Policy 513 – Travel and Reimbursement Policy to update the policy and increase consistency and eliminate ambiguity in application of process – **Discussion/Action**
7. File No. 24-25/071: Resolution amending section 4, 10, 11, and 13 of the Human Resources Policy 425 – Paid Time Off (PTO) to update the policy regarding use of Eau Claire County FMLA PTO, to provide a standard PTO balance to newly hired exempt supervisory personnel, to modify the PTO service credit at hire practice, and to modify the payment upon separation based on years of creditable employment – **Discussion/Action**
8. 2025 Personnel Budget – **Discussion/Action**
9. Future Agenda Items
10. Announcements
11. Adjourn

Prepared by: Samantha Kraegenbrink – Executive Office Administrator

Please note: Upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through sign language, interpreters or other auxiliary aids. For additional information or to request the service, contact the County ADA Coordinator at 839-7335 (FAX) 839-1669 or (TDD) 839-4735 or by writing to the ADA Coordinator, Human Resources Department, Eau Claire County Courthouse, 721 Oxford Ave., Eau Claire, Wisconsin 54703



JOINT MEETING MINUTES

Committees on Human Resources and Finance &
Budget

Friday, August 9, 2024, at 9:00 a.m.

Location: 721 Oxford Ave, Eau Claire, WI • Room
1277

Committee on Human Resources Members Present: Supervisors DeLuka, Hoekstra, Myren, Schumacher, Sisk (online), Nancy Coffey (ex-officio)

Committee on Finance & Budget Members Present: Supervisors Dunning, Pagonis, Schumacher, Swanson, Zook

Staff Present in Person: Angela Eckman, Jason Szymanski, Dawn Edlin, Sharon McIlquham, Brittany Buhrow, Brian Bessa, Janet Quinn, Bethany Bremer

Staff Present Online: Kathryn Schauf, Sonja Leenhouts, Samantha Kraegenbrink, Vickie Gardner, Glenda Lyons

Others Present: Linda Skoglund and Alicia Schwartz, JA Counter

Chair Myren called both committees to order at 9:00 a.m. and confirmed compliance with open meetings law.

The committee clerk took roll call for both committees. Members present are indicated above.

Compensation Grid Matrix Adjustment

Angela Eckman reviewed minor adjustments needed to the current compensation grid due to FLSA updates to minimum salary thresholds. Due to compensation study, there are no current positions that are impacted by this change. A slight adjustment is needed to grid level A11 to maintain compliance moving forward. Sisk inquired about why no action/vote is needed. Since only one grid level is impacted and no employees are impacted, the recommendation was that this is informational only and would not need to go to the full county board. In the future, the committee needs to be certain that any changes to the pay grid that would have a fiscal impact be moved forward with action through the county board.

Self-funding Health Insurance Presentation

Linda Skoglund and Alicia Schwartz from JA Counter offered a presentation on implementing and administering a self-funded health insurance program.

2025 Human Resources Proposed Budget

Angela Eckman presented the 2025 budget request for Human Resources.

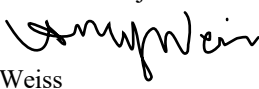
Motion: Hoekstra moved approval as presented

Vote: 5-0 via roll call vote

Future Agenda Items: vacancy report, policy change on FMLA

Announcements: Events at Beaver Creek from Pagonis and DeLuka; Eckman to appear on Dancing with the Stars

The committees adjourned at 10:33 a.m.



Amy Weiss
Committee Clerk

FACT SHEET

TO FILE NO. 24-25/074

This resolution abolishes the Crisis Supervisor position in the Human Services Department and replaces it with a Comprehensive Community Services (CCS) Supervisor position based on the needs of the Crisis and CCS program. The CCS Supervisor focuses on oversight of the additional internal staff that will be billing CCS. The cost of the position in CCS is fully funded by Medicaid (MA) and will have no impact on county funding. The cost of the CCS Supervisor is a cost \$111,962 and will be fully funded by MA.

Respectfully Submitted,

Angela Weideman

Angela Weideman
Human Services Director

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3 ABOLISHING 1.0 (FTE), CRISIS SUPERVISOR POSITION AND CREATING 1.0 (FTE)
4 Comprehensive Community Service (CCS) SUPERVISOR POSITION IN THE EAU CLAIRE
5 COUNTY HUMAN SERVICES DEPARTMENT
6

7 WHEREAS, the Human Services Department evaluates position vacancies as part of long
8 Range and strategic plans as well as organizational structure; and
9

10 WHEREAS, the Human Services Department assessed job descriptions and the structure
11 surrounding the departments current workforce; and
12

13 WHEREAS, the Crisis Program organizational structure change from the Human
14 Services Department was submitted to Human Resources for review; and
15

16 WHEREAS, abolishing the Crisis Supervisor position and creating a CCS Supervisor
17 Position will allow the Human Services Department to maintain a supervisor position and
18 mitigate costs in the crisis program and utilize MA funds to fully fund a supervisor position in
19 CCS.
20

21 NOW THEREFORE BE IT RESOLVED that the Eau Claire County Board of
22 Supervisors hereby approves abolishing 1.0 (FTE) Crisis Supervisor Position and creating of 1.0
23 (FTE) Crisis Supervisor position.
24

25 ENACTED:
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27 **Human Services Board**

	AYE	NAY	ABSTAIN
28 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29 Supervisor Katherine Schneider	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31 Supervisor Connie Russell	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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33 Supervisor David Hirsch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35 Supervisor Christy Tomczak	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37 Supervisor Deirdre Jenkins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39 Supervisor Nick Smiar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41 Citizen member Jeremy Beaulieu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
43 Citizen member Jim Catlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
44 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45 Citizen Member Kathy Clark	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
46 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
47 Citizen Member Paul Maulucci	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

48 Dated this _____ day of _____, 2024
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1 **Committee on Human Resources**

2 AYE NAY ABSTAIN

3 _____
4 Supervisor Allen Myren

5 _____
6 Supervisor Cory Sisk

7 _____
8 Supervisor Larry Hoekstra

9 _____
10 Supervisor Jim Schumacher

11 _____
12 Supervisor Heather DeLuka

13
14 Dated this _____ day of _____, 2024
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20 **Committee on Finance & Budget**

21 AYE NAY ABSTAIN

22 Dane Zook
23 Supervisor Dane Zook

24 Stella Pagonis
25 Supervisor Stella Pagonis

26 Jim Schumacher
27 Supervisor Jim Schumacher

28 Bob Swanson
29 Supervisor Bob Swanson

30 Jim Dunning
31 Supervisor Jim Dunning

32
33 Dated this 12th day of September, 2024
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FACT & RESOLUTION SHEET FOR POLICY 513- TRAVEL & EXPENSE REIMBURSEMENT

The travel and expense reimbursement policy was identified as an area that needed additional clarification due to inconsistencies in the way that different department heads were interpreting and enforcing the policy. While there were some minor changes made to this policy last July 2023, those updates were primarily focused on updating the specific dollar amounts referenced for meal per diems to reference the GSA (General Services Administration) recommended rates, which is updated more consistently.

Additionally, it was realized that there were increased opportunities for cost efficiencies as well as transparency and compliance by building in some internal controls.

A summary of the changes is provided below:

- **2.0-Definition** added to “Authorizing Party” that included flow of approvals for Board Chair and County Administrator.
 - 2.5-“Work Location” added to provide consistency and clarity for what starting and ending points employees would use to determine mileage. Also, including a specific reference to 100% remote employees and hybrid employees which was not part of the original policy.
 - 3.0-“Driver’s License” was added based on a suggestion from our insurance company to cover liability for those employee’s being asked to operate a vehicle within the scope of their employment.
- **4.1-Personal Auto Insurance language** was added because there wasn’t a clearly established process for collecting and maintaining copies of the required insurance coverage for each employee who was seeking mileage reimbursement and by whom. As a result of this, HR has worked with each dept head to determine which positions are required to operate a County Vehicle and which positions/employees would be asked to travel and in turn, operate their own vehicle, resulting in a reimbursement request. The language also adds clarifying language surrounding the maintenance of this insurance coverage, which helps protect the County from increased liability.
- **5.5-Added language** indicating that all reservations & payments need to be made in employee’s name for compliance purposes
- **5.6-Added the requirement** to submit an agenda for all conference related travels. This is to ensure transparency with any and all meals that may be included within the conference payment.
- **6.1-Eliminated the out-of-state mileage limitation** of 175 miles since employees can technically be in Minnesota in less than that and state borders can serve as the boundaries.
- **7.1-Reduced redundant language**
- **8.0-Added a separate section on Car Rentals** and included a cost analysis mileage requirement and calculator to assist employee’s in determining when a rental car may be more cost effective than to reimburse personal vehicle allowance. Introduced language that allowed flexibility for employees to use personal vehicle but limit reimbursement to the

lesser cost between the car rental and personal vehicle reimbursement to help in managing costs.

- **10.2-** Made it a requirement for itemized receipts with all eligible reimbursements.
- **12.3-** Eliminated a flat amount for carpooling reimbursement and introduced a rate from GSA that is consistently updated at a more competitive rate to further incentivize this cost saving alternative. At present the established charities mileage rate is set at \$.14/mile
- **13.3.4-** Referred all meal reimbursement amounts to the GSA determined amounts and clarified language that specifies that each meal will be reimbursed based on the allowable amount vs. a cumulative daily amount. There was a lot of conversation related to whether a per meal or a daily cumulative amount was most appropriate as not everyone eats all 3 meals and much depended on the time of event, travel distance, etc., however, it was determined that requiring an itemized receipt for each requested reimbursement would be the most transparent rather than reimbursing a potentially larger amount at one time.
- **14.2-** Adding language to solidify that late reimbursements will not be honored. This is to ensure the timeliest reporting and the most updated budgeting.

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3 AMENDING SECTIONS 2, 3, 4, 5, 6, 7, 8, 10, 11, 12, 13, and 14 OF HUMAN RESOURCES
4 POLICY 513 – TRAVEL AND REIMBURSEMENT POLICY TO UPDATE THE POLICY
5 AND INCREASE CONSISTENCY AND ELIMINATE AMBIGUITY IN APPLICATION OF
6 THE POLICY
7

8 WHEREAS, through a review of Eau Claire County policy 513 – Travel and
9 Reimbursement Policy the language in section 2, 3, 4, 5, 6, 7, 8, 10, 11, 12, 13, and 14 should be
10 increase consistency and eliminate ambiguity of the policy to better reflective the current Eau
11 Claire County practices; and
12

13 WHEREAS, these changes are more consistent with practices both in Eau Claire County
14 and other counties in the area; and
15

16 WHEREAS, the entirety of Policy 513 – Travel and Reimbursement Policy was discussed
17 throughout several meetings with the County Departments most impacted by the change in policy
18 to receive impact as to the current practices in application; and
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20 WHEREAS, these changes allow for consistency and clarity in application of the travel
21 and reimbursement for employees; and
22

23 WHEREAS, these changes provide fiscally sound practices for travel and reimbursement;
24 and
25

26 WHEREAS, it is believed these changes will have a positive fiscal impact for the County;
27 and
28

29 WHEREAS, the proposed changes to Policy 513 are attached and incorporated into this
30 resolution.
31

32 NOW, THEREFORE BE IT RESOLVED, the Eau Claire County Board of Supervisors
33 hereby approves the attached changes regarding Policy 513 - Travel and Reimbursement outlined
34 in the attached policy; and
35

36 BE IT FURTHER RESOLVED, the changes to Policy 513 – Travel and Reimbursement
37 Policy, which is attached and incorporated into this resolution, are hereby approved.

1 ENACTED:

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3 **Committee on Finance and Budget**

4 AYE NAY ABSTAIN

5 Stella Pagonis

6 Supervisor Stella Pagonis

7 Jim Dunning

8 Supervisor Jim Dunning

9 Dane Zook

10 Supervisor Dane Zook

11 Jim Schumacher

12 Supervisor Jim Schumacher

13 Bob Swanson

14 Supervisor Bob Swanson

15
16 Dated this 12th day of September 2024.

17

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19 **Committee on Human Resources**

20 AYE NAY ABSTAIN

21 Allen Myren

22 Supervisor Allen Myren

23 Larry Hoekstra

24 Supervisor Larry Hoekstra

25 Cory Sisk

26 Supervisor Cory Sisk

27 Heather DeLuka

28 Supervisor Heather DeLuka

29 Jim Schumacher

30 Supervisor Jim Schumacher

31

32 Dated this _____ day of September 2024.

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35 SM/yk

POLICY 513 TRAVEL AND EXPENSE REIMBURSEMENT

1. **Purpose.** To establish a uniform system for determining county responsibility for expenses incurred by employees and officers while performing official county business.

2. Definitions.

2.1 **Authorizing party.** ~~The finance and budget committee with respect to the county board chair; the county board chair with respect to the county administrator;~~ The county administrator with respect to department heads, public officials, and the county supervisors; the department heads with respect to subordinate employees; ~~and the chair of the board with respect to county supervisors, the county administrator and public officials other than officers.~~

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2.2 **Budgeted.** Appropriated by the county board or otherwise allocated in accord with Chapter ~~4.04~~ of the County Code.

2.3 **Person.** All public officials and employees of the county.

2.4 **Vehicles.** A means used for transporting people or goods, especially on land, such as a car or truck. ~~All motor drive surface forms of transportation.~~

2.4.2.5 Work Location: Designated county building in which work is performed. For 100% remote workers home base will be the designated work location. Hybrid positions will reference the designated county building.

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3. Driver's License.

3.1 All persons operating a vehicle through the scope of their employment are required to possess a valid driver's license.

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3.4. Personal Automobile Insurance.

3.4.1 All county employees who drive their personal vehicles on county business will be required to maintain, at a minimum, personal automobile insurance in the amount of \$100,000/\$300,000. The employee will provide Human Resources ~~their department head annually~~ with documentation verifying such insurance amounts upon hire and is presumed to be maintained.

4.5. General Travel Policy.

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POLICY 513 TRAVEL AND EXPENSE REIMBURSEMENT

Effective Date: January 1, 2012

Revised Date: November 2013; January 27, 2016; April 13, 2018;

July 1, 2023; August 2024

*Eau Claire County
Employee Policy Manual*

[4.15.1](#) Each person will be reimbursed for reasonable, necessary and actual travel expenses incurred in the performance of authorized official duties.

[4.25.2](#) Use of public transportation is encouraged.

[4.35.3](#) Each authorizing party will be responsible for ensuring that employees plan their travel with the principles of fiscal austerity and energy conservation in mind.

[4.45.4](#) Department heads and the County Administrator will determine departmental travel and training needs and authorize expenditures.

POLICY 513 TRAVEL AND EXPENSE REIMBURSEMENT

Effective Date: January 1, 2012

Revised Date: November 2013; January 27, 2016; April 13, 2018;

July 1, 2023; [August 2024](#)

*Eau Claire County
Employee Policy Manual*

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5.5 ~~All travel related reservations and payment must be made in the public official's or employee's name.~~

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5.6 ~~All employees shall provide agendas for any conference, summit, workshop, or seminar attended when seeking reimbursement.~~

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5.6 ~~4.5~~ Out-of state travel.

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6.1 All out-of-state travel ~~beyond 175 miles from the boundary of the City of Eau Claire at county expense~~ must have the prior written approval of the ~~authorizing party. county administrator.~~ Persons will submit a request for out-of-state travel to the ~~authorizing party county administrator~~ as far in advance of the time of travel as possible.

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6.2 All out-of-state reimbursement amounts will be determined by the GSA rate for the location of travel.

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5.16.3 ~~Per diem rates | GSA~~

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6.7. Travel Costs.

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6.17.1 ~~The person's authorizing party is responsible for reviewing travel expenditures and ensuring the travel expenses are within the budgeted amount. auditing the travel voucher and will review travel expenditures. Travel reimbursement will not exceed the budgeted amount. Expenditures in excess of the budgeted amount will not be reimbursed.~~

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6.27.2 ~~The maximum amount reimbursed will be the lesser of the commercial alternative rate and the vehicle mileage reimbursement amount.~~

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8. Car Rentals.

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8.1 All car reservations and payments must be made in the public official's or employee's name.

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8.2 The enterprise personal fleet mileage calculator must be filled out prior to travel over 200 miles roundtrip.

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8.2.1 Enterprise Mileage Calculator 2024.xlsx

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POLICY 513 TRAVEL AND EXPENSE REIMBURSEMENT

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July 1, 2023; August 2024

*Eau Claire County
Employee Policy Manual*

~~8.3~~ The maximum amount reimbursed will be the lesser of the commercial alternative rate and the vehicle mileage reimbursement amount.

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~~8.4~~ Fuel for car rentals is reimbursable with an itemized receipt.

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~~7.9.~~ Hotel/Motel Registration.

~~7.19.1~~ When registering in hotels or motels or signing for any official purposes, persons will use their business address.

~~8.10.~~ Lodging Expense.

~~8.10.1~~ The choice of lodging will be based primarily on cost with consideration given to accessibility in conducting business. When traveling alone, a person will make use of a single room rate. Only travel expenses for the authorized person will be reimbursed, and at the rate for a single room. ~~Guest expenditures will not be reimbursed.~~

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~~8.2~~ Lodging at convention, seminar, or meeting sites will be fully paid for by the County. For travel needs other than those listed, the maximum permitted amount for lodging for all in state travel will equal the state rate and will be automatically adjusted each time the state rate is adjusted.

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~~8.310.2~~ Itemized receipts are required for ~~A~~all lodging reimbursement requests. ~~expenses will be supported by the original machine printed receipts, or an original handwritten receipt.~~

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~~9.11.~~ State or third party reimbursements.

~~11.1~~ Employees being directly reimbursed for travel expenses from a third party will not be reimbursed by the County.

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POLICY 513 TRAVEL AND EXPENSE REIMBURSEMENT

Effective Date: January 1, 2012

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10.12. Private Vehicle Mileage Allowance.

10.12.1 The mileage allowance for use of private vehicles will equal the IRS rate, and will be adjusted annually.

10.12.2 Mileage between the employee's residence and work location place of employment will not be reimbursed paid.

12.3 Incentive payments for carpooling will be provided for drivers who carpool. The official incentive payment will be at the IRS established charities mileage rate an additional 2¢ per mile for each additional person on Eau Claire County business using a private vehicle.

10.3

12.3.1 When incentive payments are made, the total mileage expense will be charged in equal shares against the appropriate departmental accounts of the persons on travel status.

12.4 Standard mileage rates | Internal Revenue Service (irs.gov)

10.3.1

11.13. Meals.

11.13.1 Employees will be reimbursed for meals if the employee is attending an approved meeting, convention or seminar and a meal is not provided.

11.213.2 The claim for meals will represent actual, reasonable and necessary costs expended for meals, not to exceed the current Wisconsin GSA rate including tax and 20% maximum tip.

13.3 The meal per diem reimbursement will equal the GSA Wisconsin rate for the location and will be adjusted annually. The link to the GSA rate is in 13.3.1. Wisconsin rate with the current information can be found here at the bottom of the page following the standard rate.

11.313.3.1 https://www.gsa.gov/travel/plan-book/per-diem-rates https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-results/?action=perdiems_report&fiscal_year=2023&city=&state=WI&zip=

POLICY 513 TRAVEL AND EXPENSE REIMBURSEMENT

Effective Date: January 1, 2012

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July 1, 2023; August 2024

Eau Claire County Employee Policy Manual

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~~11.3.113.3.2~~ Itemized receipts are required for all meal reimbursement requests.

~~11.3.213.3.3~~ No reimbursement will be made for ~~the cost and tip on~~ alcoholic beverages.

~~11.3.313.3.4~~ ~~Meal reimbursements will be limited to the amount stated per meal, and not at the cumulative daily total. If the employee is required to purchase one meal while on county business, they will be limited to the amount stated per meal. If more than one meal is purchased, the employee will be allowed the total of these meals with the total being split among the meals at the employee's option.~~

12.14. Claiming Reimbursement of Authorized Expenditures.

~~14.1~~ All claims for reimbursement of authorized expenses must be submitted within 30 days on a Travel and Expense Reimbursement Form ~~authorized~~ provided by the Finance Department.

~~12.114.2~~ Late reimbursement requests will not be honored.

13.15. Appendices.

~~13.115.1~~ Travel/Expense Reimbursement Form (Appendix 513 A)

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FACTS & RESOLUTION SHEET FOR POLICY 425- PAID TIME OFF

The PTO Policy was last reviewed October 2022. There have been several changes both in the marketplace as well as with the current employee workforce of Eau Claire County that require actions.

4.1.1-The first modification requested is the addition of 40 hours of a PTO bank for all exempt supervisory and management staff only (for a total of 80 hours). Back in 2021, Eau Claire County added an initial PTO deposit of 40 hours for all full-time employees hired. This was to stay competitive with the marketplace where initial vacation deposits were common. At this time, there wasn't a differentiating amount between regular staff and supervisory staff.

Over the last several years, there has been a need for ECC to increase their initial deposit amount of PTO for supervisory level employees in order to capture talent when budget thresholds are met. This has primarily occurred with supervisory or management level positions where the market more commonly competes at an initial deposit of 2-3 weeks. This would also be a way that ECC could be more competitive without directly impacting the department's budget and drives consistency across the organization with how like positions are incentivized.

10- FMLA (Family Medical Leave Act)- entitles eligible employees of covered employers to take unpaid, job-protected leave for specified family and medical reasons with continuation of group health insurance coverage under the same terms and conditions as if the employee had not taken leave. Employees must meet eligibility requirements for the benefits as determined by the act.

During COVID, ECC, along with many other employers, elected to offer the State Wisconsin FMLA benefit of 2 weeks and having that be paid through the County. This was largely to help protect employees who were not with that employer long enough to build up a balance of time leading up to or during the period of the pandemic.

Since then, ECC is one of the last remaining Counties in the state to continue to offer this benefit as fully paid and have that benefit be available *before* using any of the employee's paid time off. Over the last several years, the trend for the number of FMLA claims has continued to grow at a significant rate from 66 in 2021, 114 in 2022, 130 in 2023 and over 200 expected in 2024. From a cost perspective, in 2023 ECC paid out a total of 2,217 hours of FMLA totaling \$62,606.45. As of July this year (2024), ECC has already paid out 2,695.7 hours totaling \$84,236.91 and is on track to double last year's totals.

To help in better understanding the demographic of users, HR did an analysis of the employee's currently utilizing this benefit. In that analysis, it was determined that the average length of service for employees who were utilizing this benefit was 8 years with the average PTO balance of that employee being between 200-300 hours. Based on this data, it would suggest that the integrity of what the benefit was originally planned for is no longer serving the intended purpose. HR is suggesting that we still maintain this benefit, however, position the 2 weeks paid benefit *after* exhaustion of all other provided benefit time so it can be focused on employees who are in most need of it. This is also more consistent with how other counties reference this benefit.

11.2- Payment Upon Separation. HR has reviewed several key criteria to better understand trends as it relates to employee turnover. One of the criteria evaluated was the average length of service of those employees turning over and based on our analysis, it was determined that a majority was happening between years 1-3. This is also consistent with the rest of the marketplace. The concern lies in how and where ECC is applying some of their separation payment practices. For example, when looking at the current workforce (663) and excluding those employees who were hired on or before November 3, 2013 (164), which is the group that was originally separated and grandfathered into the last policy amendment, we are left with 499 employees. When reviewing the years of service for employees up to year 3, they are as follows:

- Employees Hired in 2024= 56/499 or **11%**
- Employees with 1 year of service= 91/499 or **18%**
- Employees with 2 years of service= 80/499 or **16%**
- Employees with 3 years of service= 59/499 or **12%**
- Employees at the County 3 yrs or less= 286/499 or **57% (43% of overall workforce)**

Additionally, from an employee ROI (return on investment) perspective, it generally takes employees 1-2 years before they are fully trained and productive in their roles. Based on this analysis, it would be HR's recommendation that any separation payment practices not begin until after 3 years of service with the County. Progressively, it would also be HR's recommendation that any separation payments be used as a retention strategy tool with employees to honor their service contributions.

With these recommendations, the new policy would be modified in eligibility status only with the payout hours remaining the same. Specific updates are as follows:

- 1- Employees must have at least 3 years with the County to be eligible for any separation payment instead of just 1.
- 2- The next progression of separation payments would change from 1-3 years of service to 3-5 years of service.
- 3- The next progression going from 3-10 years to 5-10 years and therefore matching the years of service requirement to be fully vested with WRS.

From a budget standpoint, this should represent a cost savings for the County although it's harder to calculate due to the unknown nature of upcoming employee turnover. In 2023, the County distributed a total of \$363,386 for employee separations between cash payouts and Pelion (post-employment health plan record keeper) and has distributed \$171,400.51 through June 30th of 2024. Based on our employee trends, this action would represent cost savings while promoting employee retention.

13- PTO Service Credit at Hire- language was added and modified to ensure that all offers outside of our standard policy, be reviewed with the appropriate authorizing parties to ensure consistent and equitable practices across the County.

2
3
4 AMENDING SECTIONS 4, 10, 11, AND 13 OF HUMAN RESOURCES POLICY 425 – PAID
5 TIME OFF (PTO) TO UPDATE THE POLICY REGARDING USE OF EAU CLAIRE
6 COUNTY FMLA PTO, TO PROVIDE A STANDARD PTO BALANCE TO NEWLY HIRED
7 EXEMPT SUPERVISORY PERSONNEL, TO MODIFY THE PTO SERVICE CREDIT AT
8 HIRE PRACTICE, AND TO MODIFY THE PAYMENT UPON SEPARATION BASED ON
9 YEARS OF CREDITABLE EMPLOYMENT

10
11 WHEREAS, through a review of Eau Claire County policy 425 – Paid Time Off (PTO)
12 language in sections 4, 10, 11, 13 is modified with changes to address the use of Eau Claire County
13 FMLA PTO, to provide a standard PTO balance to newly hired exempt supervisory personnel, to
14 modify the PTO service credit at hire practice, and to modify the payment upon separation based
15 on years of creditable employment; and

16
17 WHEREAS, these changes are more consistent with practices both in Eau Claire County
18 and other counties in the area; and

19
20 WHEREAS, these changes allow for consistency in application and use of PTO; and

21
22 WHEREAS, these changes help promote employee retention and fairness in application;
23 and

24
25 WHEREAS, it is believed these changes will have a positive fiscal impact for the County;
26 and

27
28 WHEREAS, the proposed changes to Policy 425 are attached and incorporated into this
29 resolution.

30
31 NOW, THEREFORE BE IT RESOLVED, the Eau Claire County Board of Supervisors
32 hereby approves the attached changes regarding use of Eau Claire County FMLA PTO, to
33 provide a standard PTO balance to newly hired exempt supervisory personnel, to modify the
34 PTO service credit at hire practice, and to modify the payment upon separation based on years of
35 creditable employment; and

36
37 BE IT FURTHER RESOLVED, the changes to Policy 425, which is attached and
38 incorporated into this resolution, are hereby approved.

1 ENACTED:

2

3 **Committee on Finance and Budget**

4 AYE NAY ABSTAIN

5 Stella Pagonis

6 Supervisor Stella Pagonis

7 Jim Dunning

8 Supervisor Jim Dunning

9 Dane Zoek

10 Supervisor Dane Zoek

11 Jim Schumacher

12 Supervisor Jim Schumacher

13 Bob Swanson

14 Supervisor Bob Swanson

15
16 Dated this 12th day of September, 2024.

17

18

19

20 **Committee on Human Resources**

21 AYE NAY ABSTAIN

22 Allen Myren

23 Supervisor Allen Myren

24 Larry Hoekstra

25 Supervisor Larry Hoekstra

26 Cory Sisk

27 Supervisor Cory Sisk

28 Heather DeLuka

29 Supervisor Heather DeLuka

30 Jim Schumacher

31 Supervisor Jim Schumacher

32
33 Dated this _____ day of September 2024.

34

35 SM/yk

36

37

POLICY 425 PAID TIME OFF (PTO)

1. **Purpose.** To provide employees with a flexible means of utilizing paid leave time for planned and unplanned absences. Paid Time Off (PTO) can be utilized for any purpose, subject only to necessary request and approval procedures consistent with County and department policies.
2. **Eligibility.** Regular status employees working at least 20 hours per week (.50 FTE) are eligible for the benefits documented herein. Part-time employees working less than 20 hours per week (.50 FTE), temporary employees and seasonal employees as defined in Eau Claire County Policy 001 Definitions are not eligible.
3. **Definitions.**
 - 3.1 **Paid Time Off (PTO).** A benefit plan which consolidates all leave benefits into a single “account” of paid leave, for which the employee is responsible for managing.
 - 3.2 **Extended Leave Bank (ELB).** A bank which may be utilized for absences due to medical necessity for the employee or the employee’s immediate family, or for qualified FMLA absences, of more than 24 consecutively scheduled hours.
 - 3.3 **Benefit Time.** Refers to both PTO and ELB time.
 - 3.4 **Family Medical Leave Act (FMLA).** Provides time off for various medical and military purposes as defined by State and Federal law.
 - 3.5 **Planned PTO.** Requested and approved prior to the date for which the employee is requesting leave.
 - 3.6 **Unplanned PTO.** Requested or reported on the date the employee will not be reporting to work.
 - 3.7 **Post-Employment Health Plan (PEHP)/Health Trust Account.** An employee benefit to help pre-fund the future cost of health care expenses.
 - 3.8 **Creditable Employment.** Years of service with the County working in a regular full- or part-time position beginning with the Employee’s anniversary date as defined by Eau Claire County Policy 001 – Definitions and ending with the date of separation. Employment in a seasonal or temporary position is not considered creditable employment for purposes of PTO.

POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

4. Accrual.

4.1 All full-time employees hired into regular status positions will begin employment with a PTO balance of 40 hours.

4.1.1 Exempt Supervisory will begin employment with a PTO balance of 80 hours.

~~4.1.1~~

4.2 Part-time employees who are eligible to earn and use PTO will begin employment with a pro-rated number of hours, equivalent to one week. ~~hours~~

~~Part-time employees who are eligible to earn and use PTO will begin employment with a pro-rated number of hours, equivalent to one week.~~

Example: A .73 FTE employee will begin employment with 29.2 hours of PTO (40 hours*.73 FTE = 29.2 hours)

4.3 Full-time employees will accrue PTO according to the following accrual rates:

Length of Service	Hours Per Pay Period	Days Per Year	Maximum Accrual Hours
0 – 5 th Anniversary	6.4 hours	20.80 days	500 hours
5 – 10 th Anniversary	8.0 hours	26.00 days	500 hours
10 – 15 th Anniversary	9.5 hours	30.88 days	500 hours
After 15 th Anniversary	11 hours	35.75 days	500 hours

4.4 Exempt supervisory ~~levels~~ will accrue PTO according to the following accrual rates:

Length of Service	Hours Per Pay Period	Days Per Year	Maximum Accrual Hours
0 – 5 th Anniversary	8.0 hours	26.00 days	500 hours
5 – 10 th Anniversary	9.5 hours	30.88 days	500 hours
10 – 15 th Anniversary	11 hours	35.75 days	500 hours
After 15 th Anniversary	12.5 hours	40.63 days	500 hours

4.5 Part-time employees working at least 20 hours per week (.50 FTE) will earn PTO accruals based on the PTO accrual schedule in Section 4.2 at a prorated amount based on their percentage of full-time equivalency (FTE).

Example: A .73 FTE employee who has been employed for 4 years would earn 4.7 hours of PTO per pay period. (.73FTE*6.4 hours = 4.7 hours per pay period)

POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

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4.5.1 4.4.1 Part-time employees may accrue up to a maximum of 200 hours PTO hours.

4.6 PTO will not accrue during unpaid leaves or worker's compensation leave.

4.7 Part-time employees who transfer into a full-time position or whose hours are increased to full-time will be placed on the PTO accrual schedule based on their creditable employment with Eau Claire County. The employee's current PTO balance will transfer with the employee.

5. Minimum Usage Requirements.

5.1 Unless otherwise outlined in department work rules, non-exempt employees will use PTO in increments rounded to the nearest tenth of an hour as outlined in Policy 509, Timekeeping.

6. Planned PTO.

6.1 Employees must request Planned PTO as far in advance as practicable and must be approved in advance by the Department Head or designee, but not less than 24 hours in advance. Individual departments may require more advance notice for scheduled absences. Employees will follow department procedures for requesting PTO. PTO requests may be denied based on the needs of the department and the scheduled time off of other department employees.

6.2 Department Heads or designees may approve planned PTO requests of less than 24 hours' notice on a case by case basis.

7. Unplanned PTO.

7.1 Employees must report the use of Unplanned PTO at least one (1) hour prior to the start of the employee's scheduled shift, or as soon as practicable in cases of emergency or development of illness during the employee's work shift. Individual departments may require more advance notice for unscheduled absences. Employees will follow department procedures for requesting PTO.

8. Absence due to Illness or Medical Necessity

POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

- 8.1 Employees who are ill should not report to work. Department Heads or supervisors will assess the health of an employee and, if the employee is deemed to be "too sick to work", the Department Head or supervisor can send the employee home and will notify HR. If this occurs, the employee will be required to supplement the missed time according to Policy 509, Timekeeping.
- 8.2 If the absence qualifies as FMLA, Eau Claire County Policy 411, Leaves – Family, Medical, & Military will apply. The appropriate medical certification form(s) will be required.
- 8.3 After a medical absence, a physician's statement may be required to be submitted to Human Resources on the employee's first day back to work attesting to the employee's ability to return to work and safely perform the essential functions of the job with or without reasonable accommodation.
 - 8.3.1 Any work restrictions must be stated clearly upon the employee's return to work. Employees who have been asked to provide such a statement may not be allowed to return to work until they comply with this provision. PTO may be denied for any employee required to provide a doctor's statement until such a statement is provided.
- 8.4 The County has the right to arrange a second medical opinion to determine the validity of an employee's worker's compensation or illness claim, or to obtain information related to restrictions or an employee's ability to work at its own expense.

9. Unpaid Leave.

- 9.1 Generally, unpaid leave may not be taken until such time that the PTO account has been exhausted, as well as the ELB account if an employee would be eligible to use the ELB.
- 9.2 In the event of a temporary reduction in hours as scheduled by the County, an employee may take unpaid time if that employee's total balance of PTO and ELB hours is 40 hours or less.
- 9.3 If an employee's PTO balance is exhausted, the employee will revert to unpaid time. If this occurs without the prior authorizations of the Department Head and the director, the employee may be subject to corrective or disciplinary action.

10. FMLA.

- ~~10.1~~ State of Wisconsin FMLA. Eau Claire County offers two weeks of paid leave after exhaustion of all available time accrual balances such as PTO, Comp time and ELB without requiring the use of benefit time during approved Wisconsin FMLA.

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POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

Leave will be paid at an employee's normal rate for normally scheduled hours.

~~Any remaining leave may be taken unpaid, or supplemented with accrued benefit time.~~

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- 10.2** Federal FMLA. Employees may be required to use all accrued paid leave time before receiving leave without pay.

- 11.** Payment Upon Separation. Employees who leave the employ of the county in good standing through providing adequate notice as defined in Policy 105 or employees separated by the county for other than disciplinary or performance reasons will receive payment for unused PTO as outlined below.

- 11.1** Regular full-time employees hired on or before November 3, 2013 who leave their position in good standing will be eligible for PTO/ELB separation pay as follows:

11.1.1 Less than 10 years of employment. For an employee with less than 10 years of creditable employment in a regular position the employer will pay the total accumulated amount of PTO and ELB into the post-employment health plan as provided in 11.1.5 to a maximum of 180 hours at the employee's rate of pay at separation

11.1.2 10 years of employment. For an employee with 10 years or more of creditable employment in a regular position the employer will pay the total accumulated amount of PTO and ELB to a maximum of 480 hours with the first 200 hours paid in cash and the remainder into the post-employment health plan as provided in 11.1.5 at the employee's rate of pay at separation.

11.1.3 20 years of employment. For an employee with 20 years or more of creditable employment in a regular position the employer will pay the total accumulated amount of PTO and ELB to a maximum of 640 hours with the first 200 hours paid in cash and the remainder into the post-employment health plan as provided in 11.1.5 at the employee's rate of pay at separation.

11.1.4 20 years of employment and 50 years of age or retiring. For an employee with 20 years or more of creditable employment in a regular position, and 50 years of age or retiring, the employer will pay the total accumulated amount of PTO and ELB to a maximum of 1,000 hours with the first 200 hours paid in cash and the remainder into the post-

POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

employment health plan as provided in 11.1.5 at the employee's rate of pay at separation.

- 11.1.5 Election of Form of Benefit. Within thirty (30) days of receiving written notice of an employee's termination, the employer will elect the form in which the terminating employee will receive the Benefit. The Benefit can only be paid in one of the two forms outlined below. In making the election, the employer will consider several established factors including the terminating employee's access to other health insurance coverage, the value of the terminating employee's unused accumulated sick leave and extra retirement pay, and the ability of the terminating employee to demonstrate the need for coverage. The employer will notify the terminating employee in writing of the election made by the employer.

11.1.5.1 PRIME Trust, or the Medical Plan Trust.

11.1.5.2 Retirement Plan Trust and or 457 (b).

- 11.2 Regular full-time employees hired after November 3, 2013 who leave their position in good standing will be eligible for PTO separation pay as follows:

- 11.2.1 Less than ~~three one~~ years of employment. For an employee with less than ~~three one~~ years of creditable employment in a regular position, any benefit time is forfeited.

- 11.2.2 At least ~~three one~~ but less than ~~five three~~ years of employment. For an employee with at least ~~three one~~ but less than ~~five three~~ years of creditable employment in a regular position the employer will pay the total accumulated amount of PTO to a maximum of 80 hours in cash at the employee's rate of pay at separation.

- 11.2.3 At least ~~five three~~ but less than 10 years of employment. For an employee with more than ~~five three~~ but less than 10 years of creditable employment in a regular position the employer will pay the total accumulated amount of PTO to a maximum of 150 hours in cash at the employee's rate of pay at separation.

- 11.2.4 10 years of employment. For an employee with 10 years or more of creditable employment in a regular position the employer will pay the total accumulated amount of PTO to a maximum of 350 hours with the first 200 hours paid in cash and the remainder into the post-

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POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

employment health plan as provided in 11.2.6 at the employee's rate of pay at separation.

11.2.5 20 years of employment. For an employee with 20 years or more of creditable employment in a regular position the employer will pay the total accumulated amount of PTO to a maximum of 500 hours with the first 200 hours paid in cash and the remainder into the post-employment health plan as provided in 11.2.6 at the employee's rate of pay at separation.

11.2.6 Election of Form of Benefit. Within thirty (30) days of receiving written notice of an employee's termination, the employer will elect the form in which the terminating employee will receive the Benefit. The Benefit can only be paid in one of the two forms outlined below. In making the election, the employer will consider several established factors including the terminating employee's access to other health insurance coverage, the value of the terminating employee's unused accumulated sick leave and extra retirement pay, and the ability of the terminating employee to demonstrate the need for coverage. The employer will notify the terminating employee in writing of the election made by the employer.

11.2.6.1 PRIME Trust, or the Medical Plan Trust.

11.2.6.2 Retirement Plan Trust and or 457 (b).

11.3 Regular part-time employees who leave their position in good standing will be eligible for PTO separation pay as follows:

Length of Service	% of payout at time of separation	Maximum Payout Hours
0 – 1 st d Anniversary	0	0 hours
1 st – 3 rd Anniversary	20%	40 hours
3 rd – 5 th Anniversary	25%	50 hours
5 th - 10 th Anniversary	50%	100 hours
10 th -15 th Anniversary	75%	150 hours
After 15 years	100%	200 hours

11.4 Employees separated for disciplinary or performance reasons, or fail to provide an adequate notice of intent to separate, including working during the full notice period in accordance with Policy 105 Separation from Employment, will receive no separation benefit.

POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

12. Conversion.

When an employee with vacation leave and sick leave is transferring into a position with PTO accrual, the employee's total balance of vacation and sick will be converted to PTO, hour for hour up to 280 hours. Any hours in excess of 280 will be converted hour for hour into an ELB account.

13. PTO Service Credit at Hire.

13.1 In accordance with Section 4.1, eligible employees will begin employment with a PTO balance equivalent to one week.

13.2 A Department Head may ~~submit a written request recommend~~ to the Human Resource Director ~~for approval~~ that a new hire ~~may be given additional initial PTO balance in recognition of credit for length of service for~~ employment experience directly related to the position for which the employee is being hired. The recommendation must be in writing and based on the Department Head's assessment of the employee's qualifications beyond the minimum requirements, recruitment considerations, or length of similar service with a previous employer.

13.3 ~~The length of service credit plus the employee's subsequent actual length of service with the County will be the basis for future accrual determinations.~~ No additional length of service credit shall be granted after initial hire.

14. Extended Leave Bank.

14.1 An employee who is sick uses their PTO account for the missed time. Any time a single occurrence illness/injury results in the loss of more than 24 consecutively scheduled work hours, an employee with an ELB is eligible to use time from that bank. When that option is selected by the employee, they may choose for the deduction to revert back to the first day, so that the first 24 hours are deducted from the ELB (not the PTO account), plus the additional missed days. This should be documented as ELB on the employee timesheet.

14.1.1 To utilize the ELB, the employee may be asked to submit documentation from a physician to verify illness or injury.

14.1.2 The County reserves the right to have a second medical opinion at its own expense.

POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual

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14.1.3 The ELB may be used for a single occurrence illness/injury results in the loss of more than 24 hours' time to care for an immediate family member.

15. Death While An Active Employee.

15.1 All accumulated unused PTO and ELB for which the employee may have otherwise been eligible will be transferred to the Post Employment Health Plan (PEHP)/Health Trust Account as defined in Eau Claire County Policy 603.

15.1.1 If there is not a surviving qualified family member as defined in the Post Employment Health Plan policy, payment will be made to a deferred compensation plan.

16. Restrictions.

16.1 An employee cannot be paid for time at work and receive PTO pay for the same time.

16.2 PTO cannot be taken in excess of an employee's normally scheduled hours; or FTE.

16.3 PTO cannot be used before it is earned or in the same payroll period in which it is earned.

16.4 Employees voluntarily separating from employment cannot use PTO during the notice period required by Policy 105 Separation from Employment unless authorized by their direct supervisor and department head. Employees must work their last day of employment.

16.5 Upon written request, the County may allow employees to use accrued paid time during the initial three (3) day waiting period for worker's compensation benefits.

16.5.1 Following the initial three (3) day waiting period, employees may not supplement workers' compensation benefits by utilizing accrued paid time or any other means available to them through the County benefit program. Employees will receive benefits as outlined by, and in accordance with the Wisconsin Workers' Compensation Act.

POLICY 425 PAID TIME OFF (PTO)

Effective Date: November 3, 2013

Revised Date: November 2021, October 2022

Eau Claire County
Employee Policy Manual