

# Casemanager – PTO, Holidays, Parental Leave & Benefits Changes (Dummy Policy)

**Purpose:** Provide clear, dummy policy language that answers common questions about PTO roll■over, company holidays (including the Friday after Thanksgiving), parental leave, and making mid■year benefits changes after life events (e.g., marriage).

**Scope:** Applies to all U.S. full■time employees unless a written agreement or local law states otherwise. Part■time employees may receive pro■rated benefits as noted.

**Disclaimer:** This document is a non■contractual, dummy sample policy. Casemanager may update or modify it at any time.

## Quick Answers (TL;DR)

- **PTO Roll■Over:** Up to **40 hours** of unused PTO **automatically rolls over** to the next calendar year. Any balance **over 40 hours expires at 11:59 p.m. on December 31**.
- **Friday after Thanksgiving:** **Observed as a company holiday.** No PTO request needed (unless you are scheduled to work for operational reasons and choose PTO instead).
- **Parental Leave (bonding):** Up to **12 weeks fully paid** for eligible employees, regardless of parent type (birth, non■birth, adoptive, or foster placement).
- **Birth■parent medical recovery:** **6–8 weeks** medical leave via Short■Term Disability (STD) at plan rates, in addition to the 12 weeks paid parental leave.
- **Benefits change after marriage:** **Yes** — marriage is a **Qualifying Life Event**. Submit changes **within 30 days** of the event. Coverage generally becomes effective on the **1st of the month following** the event (or request, if later). Otherwise, wait for **Open Enrollment (Nov 1–15)** with changes effective **Jan 1**.

## 1) Paid Time Off (PTO) & Holidays

### 1.1 PTO Accrual & Use

- **Accrual:** Full■time employees accrue PTO each pay period, totaling **15 days (120 hours)** per year in the first five years of service. After five years, PTO increases to **20 days (160 hours)** annually. Part■time employees accrue pro■rata based on scheduled hours.
- **Accrual Cap:** PTO accruals pause at **1.5x the annual accrual** (e.g., 180 hours for employees accruing 120 hours/year). Accruals resume when the balance drops below the cap.
- **Scheduling:** PTO requests require manager approval based on business needs. Minimum increment: **1 hour**.
- **Payout:** PTO is not cashed out during employment. Upon separation, unused, approved PTO may be paid out where required by applicable law.

### 1.2 Year■End Roll■Over & Forfeiture

- **Automatic Roll■Over:** Up to **40 hours** of unused PTO automatically rolls over to the next calendar year.

- **Forfeiture:** PTO above 40 hours is forfeited at year-end (11:59 p.m., December 31).
- **Exception:** Employees on an approved leave (e.g., FMLA/parental) that prevents usage in Q4 may request a one-time, 60-day grace extension for the overage; submit to HR by December 15.

### **1.3 Company Holidays (Observed Annually)**

Casemanager observes the following **paid** holidays each year:

- New Year's Day (Jan 1)
- Martin Luther King Jr. Day (3rd Mon in Jan)
- Memorial Day (last Mon in May)
- Juneteenth (June 19)
- Independence Day (July 4)
- Labor Day (1st Mon in Sep)
- **Thanksgiving Day (Thu)**
- **Day After Thanksgiving (Fri) ← Yes, this is an official holiday**
- Christmas Day (Dec 25)
- **Two Floating Holidays** (must be used in the calendar year; no rollover)

**Weekend Observance:** If a holiday falls on a Saturday, Casemanager typically observes it on **Friday**; if on a Sunday, Casemanager typically observes it on **Monday**.

**Essential Coverage:** Certain teams may be scheduled on holidays for operational needs. Eligible employees working a holiday receive holiday premium per the payroll policy and may bank an alternate day off with manager approval.

## **2) Parental Leave Policy**

### **2.1 Eligibility**

- Employees are eligible after **6 months of continuous service**.
- Applies to birth, non-birth, adoptive, and foster parents.
- Temporary employees and interns are not eligible unless required by law.

### **2.2 Duration & Pay**

- **Paid Parental Leave (Bonding)**: Up to **12 weeks at 100% of base pay**. May be taken **continuously** or **intermittently** (in full-week increments) within **12 months** of the birth/placement, with manager approval.
- **Birth-Parent Medical Recovery**: **6–8 weeks** (as certified by a healthcare provider) via **Short-Term Disability (STD)** at the plan's benefit rate. This medical leave typically runs **concurrently** with FMLA where applicable and is **in addition to** the 12 weeks paid parental leave.
- **Coordination with Laws & Programs**: Leave runs concurrently with **FMLA** and any applicable state programs (e.g., Paid Family & Medical Leave). If a state program pays benefits, Casemanager's pay will coordinate so that total pay does not exceed 100% of base pay.

### **2.3 Benefits, Job Protection & Seniority**

- Health benefits **continue** during paid parental leave under the same employee premium contributions.
- The employee's **job (or an equivalent position)** is protected consistent with FMLA and applicable law.
- PTO continues to **accrue** during paid parental leave; accruals may pause if on unpaid leave.

### **2.4 Requesting Leave**

- **Notice**: Provide **30 days' notice** (or as soon as practicable) with expected dates.
- **Documentation**: Submit medical certification (for birth-parent recovery) or proof of birth/placement for bonding leave.
- **How to Apply**: Start the request in the HRIS (WorkHub → Time & Leave → Parental Leave), then notify your manager and HR at **hr@casemanager.example**.

### **2.5 Additional Notes**

Holidays that occur during paid parental leave do **not** extend leave duration. Unused paid parental leave does not roll over, is not payable in cash, and must be used within **12 months** of the qualifying event.

## **3) Benefits Changes (Health, Dental, Vision, etc.)**

### **3.1 Open Enrollment**

- **Timing**: **November 1–15** each year.
- **Effective Date**: **January 1** of the following year.

- Changes requested outside this window generally are **not permitted** unless you experience a **Qualifying Life Event (QLE)**.

### **3.2 Qualifying Life Events (QLE) — Examples**

- Marriage or divorce
- Birth, adoption, or placement for adoption/foster
- Loss or gain of other coverage (e.g., spouse's plan ends)
- Change in dependent eligibility (e.g., child ages out)
- Significant change in residence affecting plan availability

### **3.3 Making Changes After a QLE (e.g., Marriage)**

- **Window to Act:** You must submit your change within **30 days** of the QLE date (e.g., your wedding date).
- **Effective Date:** Coverage changes are typically effective on the **1st of the month following the event** (or the **1st of the month following HR approval**, if later). If coordinated with loss of other coverage, effective date may align with that loss.
- **Documentation:** Upload **proof of the event** (e.g., marriage certificate) and, if applicable, **proof of loss of coverage**.
- **How to Submit:** HRIS (WorkHub → Benefits → Life Event Change) and notify HR at **benefits@casemanager.example** if assistance is needed.

### **3.4 HSA/FSA Considerations**

- **HSA:** You may update HSA contributions during the year, subject to IRS limits. Changes take effect on the next available payroll.
- **FSA (Health/Dependent Care):** Changes generally allowed only during Open Enrollment or within **30 days** of a QLE, consistent with plan rules.

## **4) Where to Find This Policy & Help**

- **Intranet:** People → Policies → **PTO, Holidays, Parental Leave & Benefits**.
- **HR Contacts:**
  - General HR: **hr@casemanager.example**
  - Benefits: **benefits@casemanager.example**
  - Leave of Absence: **leave@casemanager.example**

## **5) Appendix: Answering the Three Sample Emails**

### **Email 1 (Jessica R.) — PTO Roll■Over & Friday After Thanksgiving**

- **Roll■Over:** Up to **40 hours** of unused PTO **automatically rolls over**; anything above 40 hours expires at **11:59 p.m. on December 31** (see §1.2).
- **Friday After Thanksgiving:** **Yes, it is a company holiday.** No PTO request is needed unless you've been scheduled for coverage (§1.3).

#### Email 2 (Marcus T.) — Parental Leave Details

- **Weeks Covered:** 12 weeks fully paid for bonding for eligible employees; 6–8 weeks additional medical recovery via STD for birth parents (§2.2).
- **Pay:** Bonding leave is 100% of base pay; STD for medical recovery pays at plan rates, with total coordination not to exceed 100% (§2.2).
- **Both Parents? Yes** — bonding leave applies equally to birth, nonbirth, adoptive, and foster parents (§2.1–2.2).
- **Where to Read More:** This document; intranet path noted in §4.

#### Email 3 (Samantha L.) — Changing Health Plan After Marriage

- **Can I Change Now? Yes** — Marriage is a Qualifying Life Event; submit changes within 30 days (§3.3).
- **Do I Have to Wait for Open Enrollment? No**, if within 30 days of the event. Otherwise, you must wait for Open Enrollment (Nov 1–15) with changes effective Jan 1 (§3.1–3.3).
- **Effective Date:** Typically the 1st of the month following the event or approval; documentation required (§3.3).

## 6) Revision History

v1.0 — October 29, 2025: Initial dummy policy published.