



Benefit Trust

Providing Benefits to Oregon Homecare
and Personal Support Workers

Paid Time Off: Frequently Asked Questions

How many hours of PTO can I earn?

If you are an eligible PSW or HCW, you can earn 20 hours of PTO benefits each February 1st and July 1st, for a total of 40 PTO benefit hours each year, which are designed to be used in connection with taking time-off from regularly scheduled hours with a consumer.

How are my PTO benefits calculated?

Your PTO benefits are determined based on your total gross wages earned in the first month of the eligibility determination period in which you worked 80 or more hours of covered employment. If your rate of pay changes, your PTO benefits will be calculated based on your wage rate during the month you first become eligible for each cycle of benefits.

How do I request PTO benefits?

If you have worked the required number of hours to earn a PTO benefit, the Trust will mail you an eligibility packet containing a Benefit Request Form, a Form W-9,

a Beneficiary Designation Form and a postage paid envelope. You must complete and return the Form W-9 to the Trust Administrative Office to be eligible for PTO benefits under the Trust. When you are ready to receive payment of your PTO benefits, you must complete and submit the Benefit Request Form in your eligibility packet.

What if I do not request my PTO benefits?

If you are eligible to receive PTO benefits but you do not complete a Benefit Request Form, your benefit will be automatically paid to you in February of the year following the year in which you earned it. Please note that you will not be eligible for PTO benefits unless you have completed and returned a Form W-9. You can submit a W-9 securely online via DocuSign.

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The benefits of the Homecare Workers Supplemental and Benefit Trusts were negotiated by SEIU Local 503 homecare and personal support workers through their bargaining team.

What is the timeline for claiming PTO benefits?

To receive your PTO benefit by the 15th of the month, you must submit, and the Trust must receive, all required documentation by the 5th of the month. To receive your PTO benefit by the last Friday of the month, you must submit, and the Trust must receive, all required documentation by the 20th of that month.

Will I receive a Form 1099?

If your PTO benefit is over \$600 in a single year, the Trust is required to send you a Form 1099. Please note that your PTO benefit is considered taxable income during the year in which you earn it, regardless of whether you receive a Form 1099 from the Trust.

How do I find a back-up care provider for my Consumer?

It is not your responsibility to find your own replacement when you take paid leave. The Consumer/Employer has the primary responsibility for selecting and hiring their providers. Paid leave must be prior authorized by the Consumer/Employer, relief must be available if necessary and the appropriate Agency must be notified in order to authorize the Substitute Worker's hours. Sometimes the Consumer/Employer will require assistance from the Case Manager/Personal Agent/Service Coordinator in finding a suitable replacement provider.

Why do I need to complete the PTO Beneficiary Designation Request Form?

The Beneficiary Designation Form allows you to designate a beneficiary, and an alternate beneficiary, to receive any accrued PTO benefit remaining upon your death prior to receiving such benefit. If no beneficiary designation is made, or if your designated beneficiary does not survive you or if they cannot be located, the accrued balance will be paid to the executor of your estate.

Why do I have to submit a W-9?

Because your PTO benefit is considered taxable income and the Trust may be required to file an information return with the IRS, you must submit a Form W-9 to the Trust Administrative Office.

Can I get my Paid Time Off benefit via Direct Deposit?

Yes! To enroll in Direct Deposit, submit a Direct Deposit Form with a voided check to the Trust Administrative Office. After you request your benefits through a Benefit Request Form, your benefits will be electronically deposited without you having to wait for a check or go to the bank. Note: You must have a bank account to be eligible for Direct Deposit.

I thought I was going to get a check—how does this work?

Paid Time Off benefits are determined twice a year, in February (based on hours worked the preceding October, November and December), and in July (based on hours worked in March, April and May). Paid Time Off Benefits accrued and

unclaimed in any calendar year will be paid out by check once annually, the following February, provided the Trust Administrative Office received a Form W-9 from you before January 31st. As long as you have accrued PTO hours, you can claim Paid Time Off benefits any time of the year by submitting a Benefit Request Form to the Trust Administrative Office. Please consult Dates to Remember for further details.

Where is my Paid Time Off check?

If you are eligible for Paid Time Benefits and submitted a Benefit Request Form, please keep in mind this timeline:

- Benefit Request Forms submitted by the 5th of the month will be processed for payment on the 15th of the month.
- Forms submitted between the 6th and the 20th of the month will be processed for payment on the last Friday of the month.

Forms submitted after the 20th of the month will be processed for payment on the 15th of the following month.

Once a form has been processed, please allow another ten business days for your Paid Time Off check to arrive.

If you have already filed a Form with the Trust Administrative Office but you have not submitted a Benefit Request Form, your Paid Time Off benefits accrued in a calendar year will be paid by check in February of the following year.

If you are expecting a Paid Time Off check and feel it may have gotten lost, please contact the Trust Administrative Office at 844-507-7554, Option 3 then Option 2.

Why do I have to pay a fee for a canceled check?

Banks charge fees to cancel a check after it's been emitted. For this reason, we encourage participants to wait a minimum of ten business days after a check has been issued before requesting a new check.