

Staff Vacation Procedures

Classification Human Resources	Table of Contents Purpose 1 Scope 2 Definitions 3 Procedures 4 Parent Policy 5 Instructions/Forms 6 Related Information 7 References 8 History 9
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- Purpose** **1** The purpose for the procedures is to expand on and provide additional details to those included in the Staff Vacation Policy.
- Scope** **2** This procedure applies to all Eligible Management and Professional Staff (MaPS) and Alberta Union of Provincial Employees (AUPE) and exempt-by-position employees in full-time and part-time positions.
- Definitions** **3** In this procedure:
- a) “Anniversary Date” means the date on which an employee commenced continuous service with the University of Calgary.
 - b) “Appropriate Manager” means the President, Vice-President, Dean or Director, Head of Administrative Unit, Department Head or Department Manager to whom the employee in question would normally report.
 - c) “Approval” or “Approved” means the Approval of, or Approved by, the Appropriate Manager.
 - d) “Eligible” employee means a person who is engaged, full-time or part-time, to perform work on an established schedule at the University of Calgary, and who is a member of Management and Professional Staff (MaPS), Alberta Union of Provincial Employees (AUPE), or who is an exempt-by-position Employee.
 - e) “Extenuating Circumstances” means any planned or unplanned situation that arises on a one-time or exception-basis for which the Employee will require additional Vacation Credits (e.g.,

sickness, marriage).

- f) "Management" in reference to a position, means a person to whom an Employee is directed to report and who is responsible for securing budgetary Approval.
- g) "Vacation in Advance" means Vacation Credits taken in Advance of earning them.
- h) "Vacation Credits" are the portion of a staff member's full Vacation Entitlement accumulated during the corresponding portion of the year. The maximum entitlement is determined as a function of the employment position (AUPE or MaPS) and the number of years of Service at the University.
- i) "Vacation Credit Year" means the 12 month period between an employee's anniversary dates.
- j) "Vacation Entitlement" means the number of days available to an Employee for use as Vacation in the current year.

Procedures

4 Vacation Entitlement and Accrual

4.1 Recurring part-time, casual and students earn a percentage and are paid out in lieu of vacation on their pay cycle.

4.2 A staff member on an approved reduced work load appointment shall receive a pro-rated portion of the Vacation Credits.

4.3 Employees with one (1) or more years of service as of the anniversary date will be granted paid vacation in accordance with the schedule set out in the appropriate staff agreement.

Carry over of vacation

4.4 Will not generally be permitted however, an employee may request approval from Management to carry over up to a maximum of five (5) working days from one year to the next. The following are situations where it may be acceptable to request vacation carryover:

- a) where an employee has intent to plan, schedule and request an extended vacation which requires more than the regular vacation credits that are available during that calendar year;
- b) where a long duration illness has prevented an employee from taking scheduled vacation; or

In extenuating circumstances, Management may request an employee to defer their vacation.

4.5 Approval of vacation carryover of the maximum of five (5) days will be based on the understanding that the carryover plus the next year's vacation entitlement will be taken prior to the end of the next vacation year.

4.6 Requests for carryover of vacations should be made on the Time-Off

Request Form at least 3 months prior to the employee's anniversary and should indicate the specific reason for the carryover.

Vacation in Advance

4.7 Subject to the written approval of Management, up to five (5) working days of vacation may be taken in advance of having earned them.

4.8 Requests for vacation in advance should be made in on the Time-Off Request Form and should indicate the specific reason for the advance.

Terminations

4.9 All earned vacation will either be used prior to the employees last day of employment or will be paid out to the employee on his/her last pay. (Article 29.05)(e).

Parent Policy **5** Staff Vacation Policy

Instructions/Forms **6** Time Off Request Form

Related Information **7** **Planning**

7.1 Vacation schedules should be part of overall department planning.

7.2 It is recommended that both staff members and managers review, early in the year the vacation credits a staff member is eligible for and plan vacation schedules well in advance.

7.3 Each year, a department may want to establish for that year, the 'peak work periods' and the 'minimum staffing levels' model to determine how many staff are needed to service the department.

7.4 Requests for vacation should be submitted as early in the year as possible for departmental planning purposes. Where a conflict exists between two or more vacation request, every effort will be made to work with the employees to reach a compromise. In the event that a compromise cannot be reached, seniority may be used to determine the vacation approval.

7.5 Managers and staff members should work to ensure that where possible, practical and desirable, the staff member's work load is covered during the time that staff member is away.

7.6 It is the responsibility of the departments to set up a vacation schedule to reduce the vacation liability.

Scheduling

7.7 In order to track vacation requests, staff members will be required to complete and submit a 'Request for Leave' form which would be approved in advance by Management.

7.8 Upon receipt of a "Request for Leave" form, management will endeavour to approve or deny the request for leave within two weeks of receipt of the request form.

7.9 When a staff member leaves employment with the University, all unused vacation credits must, by law, be paid to the staff member.

7.10 It is essential that vacation credits are recorded by the manager and updated in the HCM timesheet system.

Special Circumstances

7.11 In Extenuating Circumstances, (e.g. death of a family member, hospitalization due to illness or accident) during a staff member's vacation period, the portion of the vacation period affected may be rescheduled to a time mutually agreeable to both the staff member and the manager. In such cases, the manager may request documentation to verify the need to reschedule. The manager should consult with Human Resources to determine how or whether to reallocate vacation time.

7.12 Because of sudden staffing changes, or other unforeseen circumstances, it may be necessary for a manager to request a staff member to reschedule a previously approved vacation. The employee must be given appropriate notification and the request to reschedule must not be made lightly.

Paid Holiday

7.13 When a day observed as a paid holiday occurs during an Employee's vacation period, the day shall be recorded as a statutory holiday and not a day of vacation.

Illness/Hospitalization

7.14 An employee who becomes hospitalized for twenty-four (24) consecutive hours or more during a vacation period may cancel the remainder of the vacation and use sick leave. The Employee must provide documentation/proof of hospitalization. (Article 30.01) (b)

Sick Leave.

7.15 This is not normally the practice, however if an employee wishes to take a vacation during a medically supported sick leave, they must contact their Occupational Health Consultant. Any requests for vacation during sick leave must be approved by the treating physician and must not impede the treatment plan. The Occupational Health Consultant and the Human Resources Department must be made aware of this request. (Article 30)

Other Absence

7.16 Vacation entitlement is not earned during any absence because of sickness or injury, including injuries which are compensable under Workers' Compensation, beyond an accumulated maximum of 44 working days in each employment year or beyond 44 consecutive working days in respect to any one illness which continues from one employment year to the next employment year.(Article 29.03)

Bereavement

7.17 An employee, while on vacation, who becomes bereaved may

cancel the remainder of the vacation or portion of the vacation by contacting Management. (Article 29.13)

Cancelled Vacation

7.18 If Management or the employee must cancel an approved vacation, both parties should meet within one month to reschedule the vacation.

Retirement

7.19 Once an employee has submitted an approved retirement date all efforts must be made to ensure any earned but unused vacation credits are used prior to the retirement date. The maximum payout of vacation will be five (5) vacation days. (LOU Re: Reduced Duties Leading to Retirement).

Transfers within the University

7.20 Earned but unused vacation is automatically carried over to the new department.

- a) should an employee have approved carryover, it is the responsibility of the employee to notify the new department.
- b) should the new department not wish to honour this agreement to allow carryover of unused vacation, the current department must pay out the outstanding vacation balance owed prior to the transfer taking place.
- c) the results of the negotiation must then be documented in the offer letter.

History

8 *Approved:* March 24, 2010

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