

	<b>POLICY</b> Number: 7311-30-004 Title: Vacation Usage, Carry Over and Payout
Authorization <input type="checkbox"/> President and CEO <input checked="" type="checkbox"/> Vice President, Finance and Corporate Services	Source: Director, Human Resources Cross Index: 7311-30-010 Date Approved: June 10, 2013 Date Revised: November 15, 2016 Date Effective: December 1, 2016 Date Reaffirmed: Scope: SHR

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## OVERVIEW

The vacation year for Staff is April 1 to March 31. This policy will comply with the provisions of the Collective Bargaining agreements.

## DEFINITIONS

**Manager means** out of scope (OOS) direct report.

**Staff** means in-scope and OOS employees.

**Vacation means** the vacation credit available in the current vacation year. This information is reported in the department's Employee Status Report.

### 1. PURPOSE

The purpose of this policy is to ensure that Staff receive and use Vacation in the intended year, and to decrease the accrued financial liability to Saskatoon Health Region (SHR).

### 2. PRINCIPLES

- 2.1** Collective Bargaining Agreements provide Vacation benefits and conditions more favorable than the Labour Standards Act.
- 2.2** SHR is committed to a healthy workplace through ensuring that all staff receive annual Vacation leave.
- 2.3** SHR is committed to coordinating activities with our Vacation management processes, thereby ensuring every opportunity or annual Vacation leave for staff.

### **3. POLICY**

#### **Vacation Usage**

- 3.1** SHR staff shall use their entitled Vacation in the given vacation year, except where a Collective Bargaining Agreement provides for a carry over.
- 3.2** Vacation credits are earned during the current vacation year and are allocated to be taken in the following vacation year. However, Staff have access to vacation credits as earned monthly.
- 3.3** Vacation credits are non-cumulative from one vacation year to another except as where allowed under a Collective Bargaining Agreement or in extenuating/exceptional circumstances that would have prevented Staff from using their Vacation credits.
- 3.4** Vacation usage must be spread over the entire vacation year.  
3.4.1 Every attempt will be made to accommodate Staff preferences based upon each department's vacation plan and the applicable Collective Bargaining Agreement. Failing this, staff may be required to take Vacation at less desirable times throughout the year.
- 3.5** Each department/unit/sector will develop criteria to determine a Vacation usage plan. Each unit/department/sector(s) Vacation usage plan must be communicated to staff by December 31<sup>st</sup> of each year.  
3.5.1 Consideration must be given to the following:
- Maximum Staff per classification to access vacation at any given time,
  - Appropriate staff mix (if necessary) e.g. Junior to Senior / RNs to LPNs,
  - Prime Vacation periods,
  - Staff complement (FT vs PT),
  - Relief requirements.
- 3.6** SHR discourages the canceling of confirmed Vacation for Staff, but recognizes that situations do arise that require such action. Applicable Collective Bargaining Agreements and the Labour Standards Act applies.

#### **Vacation Carry-Over**

- 3.7** In extenuating circumstances, or as provided for within a Collective Bargaining Agreement, Staff may be eligible to carry over a maximum of five (5) vacation days.
- 3.8** Requests for carry over of greater than five (5) Vacation days must be submitted to the respective OOS Manager/Supervisor no later than January 31<sup>st</sup> of each vacation year for approval.
- 3.9** Any exception to the maximum must be approved by the Director, Human Resources.

#### **Vacation Payout**

- 3.10** Staff will schedule and access Vacation during the vacation year.  
3.10.1 In extenuating circumstances this is not always possible. In these situations, Staff may request a Vacation payout.  
3.10.2 Requests for payouts must be made in writing, after October 1<sup>st</sup> and before March 1<sup>st</sup>, of each year.

- 3.10.3 The authority to approve Vacation payouts rest with the Director, Human Resources in consultation with the Director, Financial Reporting and Operations in any given fiscal year.
- 3.10.4 In order for Staff to receive a Vacation payout the individual must have taken a minimum of three (3) weeks paid Vacation leave during the vacation year.
- 3.11** Staff on Long Term Disability or Workers Compensation Benefits, who are medically unable to return to work prior to the end of the current vacation year, will be considered for a pay out of unused entitled Vacation time. The OOS Manager/Supervisor will give consideration to the following:
- Length of time the employee has been away from work,
  - Employee's projected return date,
  - Vacation time remaining in his/her entitled bank, and
  - Allowing the employee access to some paid Vacation time upon his/her return to work (including Vacation time accrued for the upcoming vacation year).

#### **Vacation Pay Upon Termination of Employment**

- 3.12** The use of vacation entitlement as part of notice when an employee terminates will not be approved. After the last day worked, the employees will be paid out any outstanding vacation entitlement upon termination.

### **4. ROLES AND RESPONSIBILITIES**

#### **4.1 All Staff**

- 4.1.1 Monitor own vacation credits.
- 4.1.2 Use vacation credits in the current vacation year.
- 4.1.3 Request Vacation carry over/payout in compliance with this policy.

#### **4.2 OOS Managers/Supervisors**

- 4.2.1 Develop criteria to determine their department/unit/sector Vacation usage plan.
- 4.2.2 Approve/deny Vacation usage, carry-over and/or payout in compliance with this policy and applicable Collective Bargaining Agreements.
- 4.2.3 Manage Vacation usage for all Staff in their department/unit/sector in compliance with this policy.

#### **4.3 Director, Human Resources**

- 4.3.1 Approve Vacation carry-over in excess of 5 days.
- 4.3.2 Provide OOS Managers/Supervisors with a written response within fourteen (14) calendar days.

### **5. POLICY MANAGEMENT**

The management of this policy including policy education, monitoring and implementation is the responsibility of the Manager. Amendment is the responsibility of the Director, Human Resources.

### **6. NON-COMPLIANCE/BREACH**

Non-compliance with this policy may result in disciplinary action up to and including termination of employment.

## PROCEDURE

Number: 7311-30-004

Title: Vacation Usage, Carry Over and Payout

Authorization

- President and CEO
- Vice President, Finance and Corporate Services

Source: Director, Human Resources

Cross Index: 7311-30-010

Date Approved: June 10, 2013

Date Revised: November 15, 2016

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Scope: SHR

## OVERVIEW

The process for Vacation requests are outlined in each Collective Bargaining Agreement.

### 1. PURPOSE

The purpose of this procedure is to provide OOS Managers/Supervisors with assistance in the Vacation management process.

### 2. PROCEDURE

Prior to the Vacation selection process:

**2.1** Each department/unit/sector will develop criteria to determine their Vacation usage plan. This plan will detail the Staff complement eligible to be on Vacation at any given time throughout the vacation year.

2.1.1 It is advisable to post the master plan in a location easily accessible to all staff. This will allow Staff ample time to determine their Vacation time preferences.

2.1.2 OOS Managers/Supervisors should consider creating temporary vacancies to provide Vacation relief for permanent Staff, especially during peak vacation times.

**2.2** Selection for Vacation will begin as outlined in the Collective Bargaining Agreements (e.g. first posting, second posting).

**2.3** Vacation requests received after the second posting, if applicable, are granted on a first come first serve basis and approval is based upon department/unit/sector criteria.

2.3.1 After the second posting, OOS Managers have the authority to schedule remaining Vacation in consultation with individual Staff. It is suggested, that Managers/Supervisors meet with each Staff member to draw up a schedule for the use of remaining Vacation days.

### Vacation Carry-Over

**2.4** Requests for carry over of greater than five (5) vacation days must be forwarded to the applicable OOS Manager no later than January 31<sup>st</sup> of each vacation year.

- 2.5** Unless the Collective Bargaining Agreement states otherwise, all Staff apply in writing to their OOS Manager requesting Vacation carryover.
- 2.5.1 The request should include the amount of carryover, rationale for the request including extenuating circumstances and plans for future usage. In most cases, a maximum carryover of five (5) days will be approved.
- 2.6** Requests for carry over of greater than five (5) days must be forwarded to the Director, Human Resources.
- 2.6.1 Requests must include the OOS Manager's/Supervisor's initial approval of the request, number of days to carry over, extenuating circumstances involved (e.g. on maternity leave for majority of vacation year and plan for usage).
- 2.7** The Director, Human Resources makes a decision based on the information provided and responds in writing to the OOS Manager/Supervisor within fourteen (14) calendar days.

### **Vacation Payout**

- 2.8** Requests for Vacation payouts must be made in writing, after October 1<sup>st</sup> and before March 1<sup>st</sup>, of each year.
- 2.9** Requests are forwarded to the OOS Manager/Supervisor for approval and then to Payroll Services for processing.
- 2.10** Vacation payouts for Staff on Long Term Disability or Workers Compensation Benefits are initiated by the respective OOS Manager/Supervisor, following a discussion with the individual and advisement of the impending payout.
- 2.10.1 The OOS Manager/Supervisor requests the payout through Payroll Services.
- 2.11** Vacation payouts for Staff who are terminating will be paid out on the final pay period with SHR.

### **3. PROCEDURE MANAGEMENT**

The management of this procedure including procedures education, monitoring and implementation is the responsibility of the Manager/Supervisor. Amendment is the responsibility of the Director, Human Resources.

### **4. NON-COMPLIANCE/BREACH**

Non-compliance with this procedure may result in disciplinary action up to and including termination of employment.