How to Process Annual Vacation

Introduction

The Annual Vacation module on mySchedule allows employees to make vacation requests for the upcoming year while providing managers with an organized, streamlined method of processing employee vacation requests.

Advantages

- Organized method of allocating annual vacation
- Easy to use module integrated into mySchedule
- Insight into vacation bank balances
- Allows employees to create more informed vacation requests
- Automatically display conflicts to help approve the best outcome for your unit
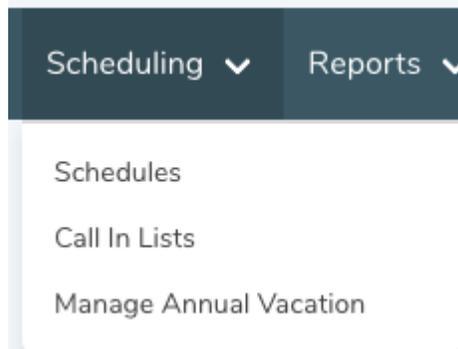
Sections

Instructions

Access the Annual Vacation Module

1. Login to mySchedule.vch.ca with your VCH user account.

2. Click on the **Scheduling** menu item located in the top left of the screen
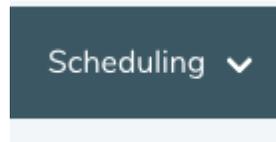
3. Click on **Manage Annual Vacation**

Manage Annual Vacation

This is the main page for the Annual Vacation module. It contains a list of vacation groups in which you have permission to either manage the group or process vacation request.

Manage VCH Annual Vacation 2020

Jan 01 2020 - Dec 31 2020

Deadline to Edit: Aug 27 2019, 23:00 PDT

Manage Vacation Groups
Disclaimer: Must be logged in as a Manager in order to edit a vacation group.

Name	Current Round	Employee Submissions ⓘ		
Neonatal Intensive Care Unit RN 112	Round 1	4	Process	Edit Group

A **vacation group** is defined as groups of units and occupations and are used to help organize vacation requests from employees, while still ensuring that you have sufficient staff scheduled throughout the year.

An example of a vacation group:

> Unit: Neonatal Intensive Care Unit
> Occupation: Registered Nurse (RN 112)

As you log into the Annual Vacation module, you will be able to view the vacation group(s) you manage for the upcoming year. Employees are automatically assigned to vacation groups based on their scheduled shifts.

Quotas

Each vacation group is assigned a quota. A quota is the maximum number of hours which can be approved for vacation per calendar day.

You can also view additional information for each vacation group, such as the current open round and the number of submissions ready for you to process.

Rounds

Vacation requests are processed in a series of rounds. Each round is a separate timeframe where employees can submit their vacation requests in order of preference. A manager or approver will process employee vacation requests in order of seniority and preference.

Neonatal Intensive Care Unit RN 112

Neonatal Intensive Care Unit RN 112

Round 1 — ACTIVE — open for submissions

OPEN 07:00 AM PDT Aug 28, 2019 — CLOSE 03:00 PM PDT Aug 28, 2019

Submissions Ready
4

Most Senior Unsubmitted
S. VOULA CHRONOPOULOS

Total Submissions
4/7

View

Round 1.5 — NOT YET AVAILABLE

OPEN 03:30 PM PDT Aug 28, 2019 — CLOSE 04:30 PM PDT Aug 28, 2019

Submissions Ready
0

Most Senior Unsubmitted
COLEEN NYLANDER

Total Submissions
0/7

View

During the Annual Vacation process, rounds will have one of the following statuses:

Active:
- The round is open to receive employee vacation requests.
- Managers/approvers cannot process vacation requests during this time.

Closed:
- The round is no longer accepting any vacation requests from employees.
- Information is read-only for employees.
- Managers and approvers can process vacation requests

Not Yet Available
- The round has not yet opened.
- It is scheduled to open on a specific date and time in the future.

Within each round section, you can also view the following information:
- **Open**: This is the timestamp in which the Active round is initiated.
- **Close**: This is the timestamp in which the Active round is closed. Managers can process requests after this timestamp, but employees may no longer submit new vacation requests through mySchedule.
- **Submissions Ready**: The number of employee submissions that are ready for you to process.
- **Most Senior Unsubmitted:** The employee with the highest seniority who has not yet submitted a vacation request.
- **Total Submissions**: The current total number of employee submissions.

Process Requests

The processing page will allow managers or approvers to collectively view information about the vacation group, process each employee requests in order of seniority, and submit the final results to the scheduling team where they will input approved requests in ESP.

Round & Vacation Group Information

The top section of the processing page contains information regarding the vacation group and current round.

Vacation Group Name: A combination of the unit and the occupation class.

Round Information: Current status, round number, "Active" date range.

Number of Employees: Total number of employees in the vacation group.

Submissions Ready: The number of employee submissions that are ready for you to process.

Most Senior Unsubmitted: The employee with the highest seniority who has not yet submitted a vacation request.

Total Submissions: The current total number of employee submissions. Approved Requests: The number of approved requests from a manager

Approved Requests: The number of approved requests from a manager

List of Employees

The left section of the processing page contains a list of employees in the vacation group, ranked by seniority. The first employee has the highest seniority in the vacation group.

Below each employee name is their submission status. An employee may have the following submission statuses:

- **No Requests:** An employee has not submitted any vacation requests.
- **Pending**: The employee has submitted vacations requests and is awaiting manager/approver processing.
- **Approved**: A manager or an approver has approved the employee's vacation request for the current round.
- **Skipped (No Submissions)**: An employee did not submit any vacation requests and the round is closed. This status indicates that a manager has skipped this employee due to no participation.
- **Denied**: A manager or an approver has denied all the employee's vacation requests.

Employee Details and Requests

The main section of the processing page outlines employee information along with a summary of their vacation requests.

Standard employee information is displayed:
- Employee Name
- Seniority Ranking: where an employee's seniority ranks within the vacation group.
- Phone number(s)
- Email
- Employee Comment

Vacation Banks

Employee vacation banks are displayed along with their balances. Vacation bank balances are updated throughout the annual vacation process. Employees can have two different vacation banks to use for vacation requests:
- **Estimated Entitled Vacation**: Estimated Vacation Entitlement amounts have been reduced by any vacation hours accrued over an individual's maximum entitlement.
- **Supplemental Vacation:** An additional allotment of vacation

Vacation Bank Balances:
- **Available**: this balance reflects the previous vacation balance before considering their vacation request.

- **Requested**: this balance reflects the number of hours from the vacation request itself. The employee's top requested vacation request is loaded as default.
- **Remaining**: this balance reflects the remaining vacation hours after their vacation request is applied.

Vacation Requests

The employee's list of vacation requests are displayed, ranked in order of their preference. Each request displays the ranked order, requested date(s), total number of hours, status, and any additional warnings. Requests can be expanded to see a detailed daily breakdown.

Note that the quota displayed is before the pending shift is applied. If the quota reads 0/8, selecting "Approve" for an 8 hour shift will update the quota to 8/8.

Warnings

Requests that contain conflicts are highlighted with warnings. There are two types of warnings in which a vacation request may trigger:

- **Exceeded Quota**: The vacation request exceeds the daily quota
- **Exceeded Vacation Hours**: The vacation request contains more hours than the amount available in the employees vacation bank.

An employee cannot submit a vacation request that contains a warning. However, some warnings may arise after processing has begun.

Processing Vacation Requests

- Requests must be processed in order of seniority. The employee list is already ranked by seniority. The system will not allow an employee to be processed outside of the queue.
- You can view employee requests at any time by clicking on them. Selecting an employee who is not next in line for processing will be read-only.
- When you select an employee who is ready for processing, all of their requests are displayed in order of preference. An employee's most preferred request that is conflict-free will be highlighted as "recommended".

A manager can make three different actions on employee vacation requests:

1. Approve

- A manager can approve a request by clicking the "Approve". Once a request has been approved,
- it cannot be edited.
- Vacation requests can be approved with or without a warning.
- If a warning exists, a manager is required to include a comment to scheduling staff. Otherwise,
- including a comment is optional.
- Before approving a request,you can indicate if relief is required.

Ranked Requests

Date	Shift	Hours	Daily Quota ⓘ	Weekly Quota ⓘ	Supernumerary ⓘ
1 Jan 13 - 17, 2020	37.5 hrs	Added by Manager	Recommended		^
Jan 13, 2020	07:30 - 15:30 PST	7.500	7.5 / 8 ●	37.5 / 200 ●	-
Jan 14, 2020	07:30 - 15:30 PST	7.500	7.5 / 8 ●	37.5 / 200 ●	-
Jan 15, 2020	07:30 - 15:30 PST	7.500	7.5 / 8 ●	37.5 / 200 ●	-
Jan 16, 2020	07:30 - 15:30 PST	7.500	7.5 / 8 ●	37.5 / 200 ●	-
Jan 17, 2020	07:30 - 15:30 PST	7.500	7.5 / 8 ●	37.5 / 200 ●	-
5 DAYS	5 SHIFTS	37.500			

Comments

300

Approve

2. Add Request On Behalf

- A manager can add vacation requests on behalf of an employee. This options becomes helpful if an employee is unable to submit vacation requests during the annual vacation process, or if all their requests have conflicts and an alternative option is required.

- Submissions on behalf of an employee will be marked as "Added by Manager"

3. Skip Employee's Participation

- If an employee has no submissions after a round is closed and chooses not to participate, a manager can skip that employee.
- Once a manager approves or skips an employee, the request is confirmed and the employee is immediately notified via an email notification.

Review & Submit to Scheduling

After all rounds are processed, the manager will be able to review the results of the annual vacation process and submit the results to scheduling staff.

The review and submit page displays all approved vacation requests for that vacation group. You will be able to review the details of the approved requests, and modify the Manager Comments before submitting to the scheduling team.

- **Employee**: Employee name and ID number
- **Unit**: Unit of the employee request
- **Occupation**: Occupation of the employee request
- **Start & End Date:** Start and end date of the approved request
- **Conflicts**: Indicates whether the request (Exceeds Employee's Vacation Hours, Exceeds Quota for the Vacation Group)
- **Supernumerary**: Indicates if the request includes supernumerary shifts
- **Manager Comment**: Displays your comment – this can be modified.

The Submit button will send all requests to the scheduling team to input into ESP. A confirmation will display once it has been submitted.

General Notes

- If an employee is a part of multiple vacation groups, they can only participate in one vacation group per round.