
Vacation Leave – Scheduling, Approval and Carry-over Procedure

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| Policy Sponsor: | Human Resources |
| Name of Parent Policy: | Vacation Leave – Scheduling, Approval and Carry-Over Policy |
| Policy Contact: | Compensation Assistant |
| Procedure Contact: | Compensation Assistant |
| Effective Date of Procedures: | October 10, 2012 |
| Review Date: | These procedures will be reviewed annually. |

Purpose

To outline the process to schedule, approve and carry-over vacation.

Definitions

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| AUPE | Alberta Union of Provincial Employees, Local 69. |
| AUFA | Athabasca University Faculty Association. |
| Eligible Staff Members | Academic (not including professional members of AUFA) staff members' eligible to apply for Research and Study Leave. Refer to article 1.21.3 in the AUFA collective agreement. |
| Excluded Staff Member | Excluded managers, excluded professionals and excluded support staff members that, by virtue of their employment roles, have an excluded employment contract with the University. These positions are out-of-scope and excluded from membership in a union or faculty association, and therefore are not covered under one of the collective agreements. |



Procedure

1.0 Scheduling

- 1.1 In accordance with legislation the following minimums must be taken in one unbroken period during the year unless the employee requests otherwise:
 - 10 days for employees with 5 or less years of service
 - 15 days for employees with greater than 5 years of service
- 1.2 The supervisor is responsible to ensure that the staff member schedules their vacation days as outlined in 1.1 above. Human Resources will provide a Vacation Scheduled Report, as of March 31st, to aid supervisors with this task. If the supervisor and staff member are unable to agree on a mutually satisfactory date to commence annual vacation, the supervisor can schedule the staff member's vacation by providing the staff member with a minimum 2 weeks of written notice of the date on which the staff member's annual vacation is to commence, and the staff member must take the vacation at that time.
- 1.3 Carry-over vacation days and earned current year vacation days should be used up prior to leaves without pay.
- 1.4 In the event vacation is not used prior to a leave without pay, carry-over vacation days and all vacation days earned up to and including the date of the staff member's return to work should be used prior to returning from leave but not beyond March 31st of the following year. However, in exceptional circumstances carry-over beyond March 31st may be allowed.

2.0 Approval

- 2.1 Staff members must apply to and receive authorization from their supervisor in advance of vacation leave.

3.0 Carry-over

- 3.1 Executive approval is required to carry-over any vacation. In the event of carry-over supervisors and Executive Officers need to encourage staff to take their carry-over vacation by March 31st of the following year.
 - a) Eligible staff member's vacation, as at December 31st, in excess of 10 days, will be automatically transferred as per the Special Research and Study Leave Policy for Academics. Vacation days of 10 days or less at that time will be considered as carried over vacation days and should be used by March 31st of the following year.



- b) A request for carry over must be made by September 15th of the year to the appropriate Executive Officer and will normally only be approved where vacation has not or cannot be taken before year end due to operational.
- c) The request must be made in writing and have the support of the dean/department head and the appropriate executive officer. Executive Officer approval will only be given after Executive Group has discussed all such requests. Requests must explain the circumstances that prevented the staff member from taking vacation and indicate when the accumulation will be taken in the following year. Once approved, the request will be forwarded by the appropriate Executive Officer to Human Resources.
- d) Where vacation carry-over has not been requested, Human Resources will bring the omission to the employee, the appropriate supervisor and dean/department head's attention. As a result, the supervisor will be expected to submit a request in writing following the procedures described in 3.1 (c) above.
- e) Notwithstanding the above, where there is a sudden unavoidable interruption of a staff member's scheduled vacation, and the staff member is not able to reschedule the vacation within the calendar year, the staff member, with the approval of the dean/department head and executive officer, may carry-over those days.
- f) Staff members will not lose their vacation entitlement; it must be scheduled and, if necessary, carried over as per this policy. Eligible Staff Members will transfer unused vacation over 10 days to special R & S leave.
- g) Executive Group will be responsible for monitoring and ensuring compliance with this policy. To facilitate this, Human Resources will provide Executive Group with a quarterly report which shows vacation days outstanding for each staff member.

4.0 Payout of Accumulated Vacation

- 4.1 The appropriate Executive officer may decline a request for carry-over, in extraordinary circumstances and impose a payout of the excess accumulated vacation
- 4.2 Upon termination, a staff member will receive pay for all accumulated vacation leave entitlement (pro-rated to the staff member's end date) on their final pay.
- 4.3 Where a staff member is in receipt of Long Term Disability benefits in excess of twenty-four (24) months and, as per the insurance company, it is not anticipated they will be returning to work, Athabasca University will payout any outstanding accumulated vacation entitlements. This payout does not adversely affect either the Long Term Disability or Canada Pension Plan disability benefit.



Applicable Legislation and Regulations

[Post-Secondary Learning Act](#)
[Alberta Employment Standards Code](#)
[AUFA Terms and Conditions](#)
[AUPE Collective Agreement](#)

Related References, Policies, Procedures and Forms

[Vacation Leave – Scheduling, Approval and Carryover Policy](#)
Eligible Staff Members should also read [Special Research and Study Leave Policy for Academics](#)
[Article 22 – AUPE Collective Agreement](#)
[Article 16.4 – AUFA Terms and Conditions Agreement](#)
[Division 6 – Alberta Employment Standards Code](#)

History

Executive Group, October 10, 2012, For Information (Revision)
Governors of Athabasca University, June 8, 2012, Motion # 177-7 (revisions to associated policy approved)
July 2006 - Reformatted
November 15, 2003 - Revised
May 31, 2002 - Revised
January 1, 1996 - Revised
November 1, 1994 - Revised