Calculating Maximum Carryover of Vacation Hours and Annual PTO Usage Allowances for Non-Union Employees

Vacation Carryover:

***Per** University Policy:*

Vacation is to be taken during the year it is earned and is to be utilized in the amount that mirrors one's normal work schedule for that day. Concurrent with the University philosophy, such periods of vacation are an important component of work life.

*At the beginning the plan year each January, **a maximum** of one year's accrual may be carried forward. Throughout the year, vacation accruals will continue to be earned, **but** will be reduced to one year's entitlement at the end of the plan year.*

Calculate the Maximum Number of Carryover Vacation Days:

To find your maximum number of carryover days, use the **Schedule of Annual Vacation Entitlement** table on the UR HR Policy Page:

Note that the Leave Plan is in the job catalog here, and Career Streams + Job Levels can be accessed here. Click the green job catalog button and type your job code or title as listed on your Job Profile in myURHR.

1. Find the Schedule of Annual Vacation Entitlement table and locate your Years of University Service to determine your **Annual Vacation Accrual in Days Per Year**.

2. A "day" of vacation is equal to one-fifth of your standard weekly work hours. Your standard daily hours are equal to your standard weekly work hours divided by 5, per the University Vacation policy.

3. To convert the **Annual Vacation Accruals** days to hours, multiply the total number of vacation days (see #1 below) by your position's standard daily hours (see #2 below). This will give you your maximum number of annual carryover hours (see #3 below).
   Example:
   1. Annual Vacation Accrual in Days Per Year = 30 days
   2. Standard daily hours = 40 weekly hours / 5 = 8 daily hours
   *3. Maximum Annual Carryover of Vacation Hours* is 30 days x 8 daily hours = 240 hours total

Viewing Current Available Balance Using a Dataview:

A **Dataview** is an online report or view that allows you to see data for a specific period of time and allows those with access rights to perform actions. Managers/Timekeepers can also access **Reports** that contain data as of a point in time for download, but are not interactive within the application.

1. Click **Main Menu**

2. Click **Dataviews & Reports**
3. Click **Dataview Library or Report Library**.
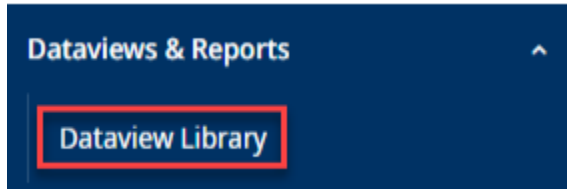
4. Select the **UR Accrual Details** dataview from the library

5. Open the **UR Accrual Details** dataview to illustrate the following:

- *Available Balance:* Your balance as of "today" (the date you entered in the dataview) includes future planned activity (such as previously submitted future usage requests and/or grants).
- *Taken to Date:* Withdrawals, or takings, from the accrual bank between the first day of the plan year and "today". These would be the total hours that you have already used this year
- *Planned Takings:* Withdrawals, or Takings, from the accrual bank that have already been entered for the future. These could be from previously submitted time-off requests or from timecard entries between "today" and the end of the plan year. They have not occurred yet, but are planned usage for the future.
- *Projected Balance*: forecasted plan year-ending balance that includes:
  o Anticipated future grants from "today" through the end of the year based on your plan.
  o Anticipated future "takings" from "today" through the end of the year. These could be from previously submitted future time-off requests or from timecard entries between "today" and the end of the plan year.
  o Initial annual carryover limit (based on an 8 standard daily hours maximum) at plan year-end.
6. Subtract **your** maximum annual carryover of vacation hours (obtained as described in step #3 from the HR policy) from the Available Balance in the dataview to understand the vacation hours that could potentially be subject to the carryover limit at the end of the plan year if not used.
   Example:
   Maximum Annual Vacation Carryover (from HR Policy based on your standard daily work hours) = 240 hours
   Available Balance (from UKG UR Accruals dataview) =480 hours
   Potential hours subject to the annual max at plan year end is 480 - 240 = 240 hours

   Running the UR Accrual Details 1/1- 12/30, will show you the current plan year before the annual carryforward is applied.

Available balance – 480, takes into account future usage and grants.

Projected balance – 240, takes into account the initial accrual carryover limit (based on an 8 standard daily hours maximum) at plan year-end (which will occur on 12/31/2024)

Calculating Annual PTO Usage Allowance (Non-Union Employees)

The PTO Plan provides an eligible employee with up to 56 hours of time off during the plan year. The calculation of PTO time is based on a projection of annual worked hours applied to a formula of 1 hour of sick time for every 30 hours worked up to a maximum of 56 hours per plan year. See UR Paid Time Off Policy Page for full details.

Note that PTO balances may exceed 56 hours in a plan year due to rollovers from prior years (see policy); however, only a maximum of 56 hours of PTO can be used in a plan year per UR HR Policy.

Please note this process is different for Union employees and instructions available here.
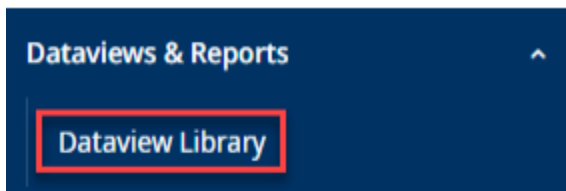
Calculate Year-To-Date Usage

To find your current year-to-date (YTD) usage and amount remaining for use in the current plan year, use the **UR Accrual Details Dataview** in UKG as outlined below:

1. Click **Main Menu**

2. Click **Dataviews & Reports**
3. Click **Dataview Library**

4. Select the **UR Accrual Details** dataview from the library.

5. Locate the line for UR PTO on the dataview:

Accrual Code Name	Accrual Reporting Period	Available Balance	Taken to Date	Planned Takings	Projected Balance
UR Vacation	1/01/2025 - 12/31/2025	26.45	0.00	104.00	166.70
UR PTO	1/01/2025 - 12/31/2025	91.52	8.00	10.00	91.52
UR Sick Supplemental	1/01/2025 - 12/31/2025	0.00	0.00	0.00	0.00
UR Vacation Approved Carryover	1/01/2025 - 12/31/2025	0.00	0.00	0.00	0.00
UR Vacation Supplemental	1/01/2025 - 12/31/2025	0.00	0.00	0.00	0.00

6. <u>Calculate the Total Amount Used or Planned in the Current Year:</u>
   Add the Taken to Date + Planned Takings = total amount used or planned to be used in the current plan year
   Example:
   Taken to Date = 8 hours
   Planned Takings = 10 hours
   Total amount taken or planned in the current plan year is 8 hours + 10 hours = 18 hours

7. <u>Calculate the Potential Available Usage for the Remainder of the Year:</u>
   Subtract from the *Annual maximum (review steps here) - the above total* = potentially available usage for the remainder of the plan year
   Example:
   Annual maximum is 56 hours
   <u>*Potential available for use during the remainder of the year* is</u> 56 hours – 18 hours = 38 hours

   Note: You can never use more than your PTO annual maximum in a given year (up to 56 hours).

8. <u>Evaluate PTO Time That Can Be Used:</u>
   Example:
   Potentially available for use during the remainder of the year = 38 hours
   While the Current Available balance (from UKG Accrual dataview) shows 91.52 hours, this includes additional rollovers from prior years and the maximum takings in a plan year cannot exceed 56 hours. Therefore, you can only use up to 38 more hours in addition to the 18 that is already planned.