

Calculating Maximum Carryover of Vacation Hours and Annual PTO Usage Allowances for 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 [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* = 22 days
2. *Standard daily hours* = 40 weekly hours / 5 = 8 daily hours
3. *Maximum Annual Carryover of Vacation Hours* is 22 days x 8 daily hours = 176 hours total

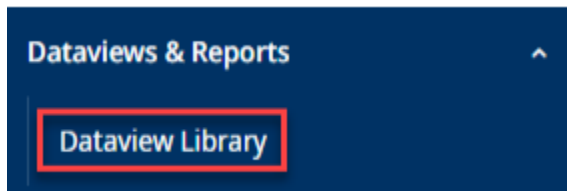
Viewing Current Available Balance Using a Dataview:

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.

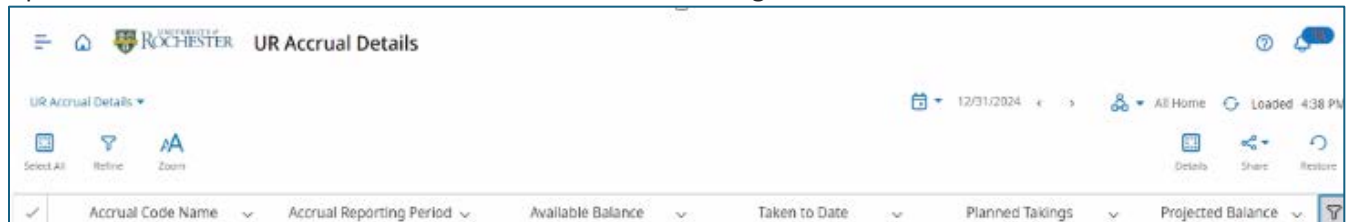
1. Click **Main Menu**



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:
 - Anticipated future grants from “today” through the end of the year based on your plan.
 - 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.
 - 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 Ending Vested 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) = 176 hours

Available Balance (from UKG UR Accruals dataview) = 356.97 hours

Potential hours subject to the annual max at plan year end is $356.97 - 176 = 180.96$ hours

Running the UR Accrual Details 1/1/25- 1/10/25(Current year start through day before plan year ends) -will show you the current plan year before the annual carryforward is applied.

Available balance – 356.97, takes into account future usage and grants, but does not take into account the accrual carryover limit.

Projected balance – takes into account the initial accrual carryover limit (based on an 8 standard daily hours maximum) at plan year-end (which will occur on the day of the plan year = 1/11/2025)

✓	Accrual Code Name	Accrual Reporting Period	Available Balance	Taken to Date	Planned Takings	Projected Balance
<input type="checkbox"/>	UR Vacation Approved Carryover	1/01/2025 - 12/31/2025	0.00	0.00	0.00	0.00
<input type="checkbox"/>	UR Vacation	1/01/2025 - 12/31/2025	356.97	32.50	0.00	352.37

Calculating Annual PTO Usage Allowance (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 work 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.

Union employee benefit plan years are for a specified date range each year (not a calendar year). Please note this process is different for non-union employees and instructions available [here](#).

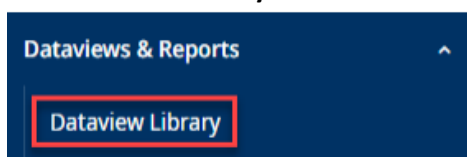
Calculate Year-To-Date Usage

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:

Union employee benefit plan years are for a specified date range each year (not a calendar year), therefore there is a multi-step process to determine the available balance.

- Run the **UR Accrual Details** dataview to pull in “Taken to Date” from the beginning of the plan year through the end of current calendar year. Ex. 2024: 1/14/2024 - 12/31/2024

✓	Accrual Code Name	Accrual Reporting Period	Available Balance	Taken to Date	Planned Takings	Projected Balance	UR ID
<input type="checkbox"/>	UR PTO	1/01/2024 - 12/31/2024	5.50	40.00	0.00	16.00	29230785
<input type="checkbox"/>	UR Vacation Approved Carryover	1/01/2024 - 12/31/2024	0.00	0.00	0.00	0.00	29230785
<input type="checkbox"/>	UR Sick Supplemental	1/01/2024 - 12/31/2024	344.00	0.00	0.00	344.00	29230785
<input type="checkbox"/>	UR Vacation	1/01/2024 - 12/31/2024	27.58	17.00	0.00	60.08	29230785

- Run the **UR Accrual Details** dataview to pull in “Taken to Date” for the remainder of the plan year. Ex. 2024 plan year: 1/1/2025-1/11/2025 (remainder of the benefit plan year).

✓	Accrual Code Name	Accrual Reporting Period	Available Balance	Taken to Date	Planned Takings	Projected Balance	UR ID
<input type="checkbox"/>	UR Vacation Approved Carryo...	1/01/2025 - 12/31/2025	0.00	0.00	0.00	0.00	29230785
<input type="checkbox"/>	UR Sick Supplemental	1/01/2025 - 12/31/2025	344.00	0.00	0.00	384.00	29230785
<input type="checkbox"/>	UR PTO	1/01/2025 - 12/31/2025	5.50	10.50	4.00	57.50	29230785
<input type="checkbox"/>	UR Vacation	1/01/2025 - 12/31/2025	27.58	32.50	0.00	176.00	29230785

Note: “Planned Takings” and “Projected Balance” always pulls through to the end of a calendar year, regardless of the date range selected.

6. Calculate the Total Amount Used or Planned in the Current Year:

Add the "Taken to Date" results from both dataviews = total amount used in the current plan year.

Example:

Taken to Date = 40 hours + 10.5 Hours = 50.5 hours

Total amount taken in the current plan year is 50.5 hours

7. Calculate the Potential Available Usage for the Remainder of the Year:

Subtract the *Annual maximum* - *the above total* = potentially available usage for remainder of plan year

Example:

Annual maximum is 56 hours

Potential available for use during the remainder of the year is 56 hours – 50.5 hours = 5.5 hours

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