
mySchedule Manager Guide - Annual Vacation - Processing Vacation Requests

Introduction

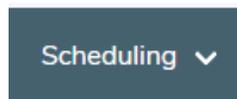
The Annual Vacation module on mySchedule allows employees to make vacation requests for the upcoming year, while providing managers with an organized, streamlined method of processing employee vacation requests.

Advantages:

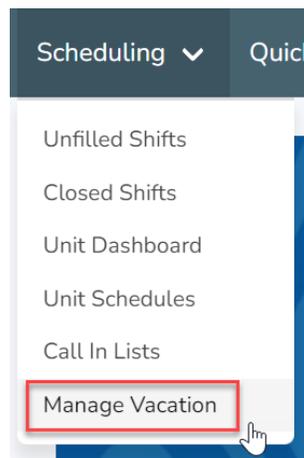
- Easy to use module integrated into mySchedule
 - Insight into vacation bank balances
 - Allows employees to create more informed vacation requests
 - Automatically display conflicts to help approve the best outcome for your unit
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Access the Annual Vacation Module

1. Login to myschedule.northernhealth.ca with your Northern Health user account.
2. Select the **Scheduling** menu item located in the top left of the screen:

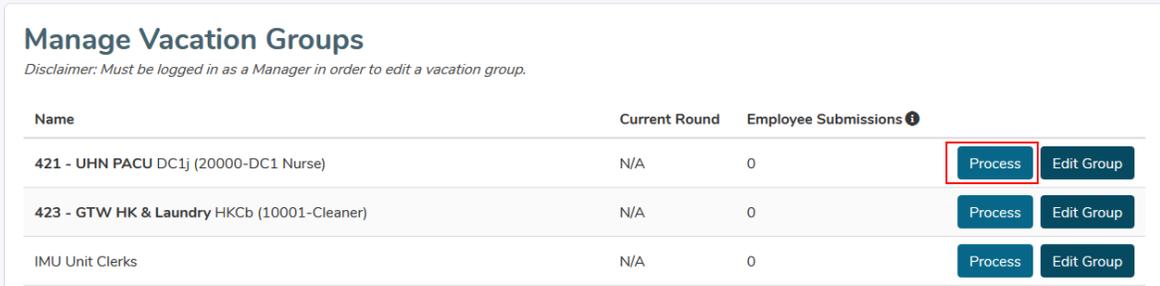


3. Select **Manage Vacation**:



Vacation Groups

1. The **mySchedule Annual Vacation** module groups employees into vacation groups, based on the employee's home unit, home occupation, and schedule data.
 - By default, each vacation group contains the employees in one ESP unit with one primary occupation. Groups may reflect edits made in previous vacation years.
 - Only full-time and part-time employees (or casuals in positions that provide vacation hours) can participate in the Annual Vacation process on mySchedule
 - Employees working in multiple positions throughout the vacation selection year may be included in multiple vacation groups
 - Managers can edit vacation groups before the vacation selection process begins – see the **Annual Vacation – Editing Vacation Groups** document or the **Annual Vacation – Manager Video 2 – Editing Vacation Groups** video for details
2. On the **Manage Vacation Groups** page, select **Process** to access the vacation group you want to process.



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

Name	Current Round	Employee Submissions ⓘ		
421 - UHN PACU DC1j (20000-DC1 Nurse)	N/A	0	Process	Edit Group
423 - GTW HK & Laundry HKCb (10001-Cleaner)	N/A	0	Process	Edit Group
IMU Unit Clerks	N/A	0	Process	Edit Group

If the **Process** button is not present and instead says **View**, you will need to add Approver access for this group. See the **Annual Vacation – Assigning Approver Access** document or the **Annual Vacation – Manager Video 3 – Assigning Approver Access** video for details.

Vacation Rounds

1. 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 will process employee vacation requests in order of seniority and preference. Rounds can be viewed from the Round selection page.

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

- **Active:**
 - The round is open to receive employee vacation requests.
 - This round is the next to close and be processed
 - The list of employees who can participate in this round is finalized
- **Available:**
 - The round is open to receive employee vacation requests.
 - This is a future round, and is available but not formally open
 - The employees who can participate in this round may change if their position or schedule data change
- **Closed – ready for processing:**
 - The round is no longer accepting any vacation requests from employees.
 - Information is read-only for employees.
 - Managers continue to process vacation requests until the processing window closes
- **Closed – processing complete:**
 - All employee requests in this round have been processed, and the round has been submitted to Staffing Services for entry
 - Information is read-only for employees and approvers – no further action is required

Round status can be viewed at the top-right corner of each round on the Round Selection page:

The screenshot displays four rounds in a vertical list. Each round has a colored header bar with the round name and status. Round 1 is red and 'CLOSED ready for processing'. Round 2 is green and 'ACTIVE open for submissions'. Round 3 is green and 'AVAILABLE open for submissions'. Round 4 is blue and 'CLOSED processing complete'. Each round includes an 'OPEN' and 'CLOSE' date/time range and a 'View' button. Round 2 and 3 also show submission statistics.

Round	Status	Open Date/Time	Close Date/Time	Submissions Ready	Most Senior Unsubmitted	Total Submissions
Round 1	CLOSED ready for processing	02:28 PM PDT Aug 20, 2019	12:50 PM PDT Aug 22, 2019			
Round 2	ACTIVE open for submissions	12:51 PM PDT Aug 22, 2019	12:51 PM PDT Sep 5, 2019	1	None	1/1
Round 3 (FINAL ROUND)	AVAILABLE open for submissions	12:52 PM PDT Sep 6, 2019	12:52 PM PDT Sep 7, 2019	0	TEST EMPLOYEE	0/1
Round 1	CLOSED processing complete	10:22 AM PDT Sep 17, 2020	10:49 AM PDT Sep 17, 2020			

2. The Round selection page indicates information about when each round opens and closes.

- **Open:** This is the date and time in which this round will become Active. Prior to this time, the round will be in Available status.
- **Close:** This is the date and time at which this round will become Closed. Processing will be available shortly after this time.

- **Submissions Ready:** The number of employee submissions that are ready for you to process when the round closes.
- **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 out of the total number of employees

3. Select the **Process** button for the Closed round you want to process. If you are an Approver for this group and the button indicates View rather than Process, the round is either not yet available for processing, or processing (and submission to Staffing) is already completed:



Understanding the Processing Page

The Processing page has four main sections:

- Round and Group Information**
- Employee List**
- Employee Details**
- Employee Requests and Processing Tools**

A. Round and Group information

NH 2020: Round 1 Processing

361 - GRB Food Services C3b (10062-Cook III), FW2b (10101-Food Service Worker II (NB))

CLOSED Round 1 Aug 28, 2019 6 Employees

Submissions Ready	Total Employee Submissions ⓘ	Most Senior Unsubmitted	Approved Requests
4	4	TEST EMPLOYEE 3	0

The first section indicates basic information about the group and round:

- **Vacation Group Name:** The default or custom name for this vacation group
- **Round Information:** Current round status, round number, and “Active” date range.
- **Number of Employees:** Total number of employees in the vacation group.

NH 2020: Round 1 Processing

361 - GRB Food Services C3b (10062-Cook III), FW2b (10101-Food Service Worker II (NB))

CLOSED Round 1 Aug 28, 2019 6 Employees

The second section indicates summary information about employee submissions for this round. These fields will update as requests are entered and processed.

- **Submissions Ready:** The number of employee submissions that remain to be processed
- **Total Employee Submissions:** The current total number of employee submissions.
- **Most Senior Unsubmitted:** The employee with the highest seniority who has not yet submitted a vacation request.
- **Approved Requests:** The number of approved requests from a manager

Submissions Ready	Total Employee Submissions ⓘ	Most Senior Unsubmitted	Approved Requests
4	4	TEST EMPLOYEE 3	0

B. List of Employees

TEST EMPLOYEE 1	APPROVED
TEST EMPLOYEE 2	APPROVED
TEST EMPLOYEE 3	SKIPPED (NO SUBMISSIONS)
TEST EMPLOYEE 4	DENIED (BY MANAGER)
TEST EMPLOYEE 5	PENDING
TEST EMPLOYEE 6	NO REQUESTS

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.

The next employee to be processed is indicated with a small blue icon. This icon is for information only, and it not a button – clicking anywhere on the square for this employee will bring up the employee information:



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

- **No Requests:** An employee has not yet submitted vacation requests.
- **Pending:** The employee has submitted vacations requests and awaiting manager processing.
- **Approved:** A manager 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 (By Manager):** Neither the employee submitted requests nor any alternates can be approved – this employee is excluded from this round and will have no selection approved.

Once a manager processes an employee's vacation request, their status bar will update – employees with Approved requests will highlight in green, while employees with Denied requests will highlight in red.

C. Employee Details

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

TEST EMPLOYEE 1					
Seniority 1 / 6					
Phone #1: 250-555-5555			Phone #2: 250-555-5555		
Work Phone: Unspecified			Email: Test.Employee1@northernhealth.ca		
Eligibility: 361 - GRB Food Services - FW2b (10101-Food Service Worker II (NB)) (Jan 1 - Dec 31, 2020)					
Employee Comment: No Comment					
Vacation Bank	Opening	Available	Requested	Remaining	
Estimated Entitled Vacation	143.550	143.550	32.500	111.050	
Supplemental Vacation	0.000	0.000	0.000	0.000	

Standard employee information is displayed:

- Employee Name
- Seniority Ranking: where an employee's seniority ranks within the vacation group.
- Phone number(s)
- Email
- Employee comments

Employee vacation banks are displayed along with their balances.

I. Vacation Bank Types

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.
 - The estimated amounts are based on the assumption that employees are working their full FTE's from today to the end of the accrual year.
 - Employees who are on leave will have their estimated vacation entitlement reduced each pay period they are on leave.
 - The amounts on this report do not reflect what's currently on the vacation dashboard.
 - The dashboard reflects the current year, and the Estimated Vacation Entitlement report is for next year (the vacation selection year). The amount in the Estimated Vacation Hours will not correctly reflect the entitlement for employees that have had a reduction in their FTE during the accrual year.

- **Supplemental Vacation:** Applicable to FBA, HSPBA, NBA; an additional allotment of vacation may be earned upon reaching a minimum of 25 years of continuous service.

II. Vacation Bank Balances

- **Opening:** this balance reflects the employee's opening vacation balance and will not change throughout the process
- **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.

D. Employee Requests and Processing Tools

The employee's list of vacation requests are displayed, ranked in order of their preference.

The screenshot shows a 'Ranked Requests' section with three entries. Each entry is a horizontal box containing a rank number in a green circle, the requested dates, the total hours in a black pill, a status label in a black pill, and a green 'Recommended' label. A dropdown arrow is on the right of each entry. Below the list are two buttons: a dark blue 'Create Request on Behalf' button and a red 'Deny This Employee's Requests' button.

Rank	Requested Date(s)	Total Hours	Status	Additional Info
1	Jan 6 - 10, 2020	32.5 hrs	Added by Manager	Recommended
2	Jan 15, 2020	6.5 hrs		
3	Jan 16, 2020	6.5 hrs		

Each request displays the ranked order, requested date(s), total number of hours, status, if it was added by a manager, and any additional 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

The screenshot shows a single vacation request entry. It includes a rank number in a grey circle, the requested dates, the total hours in a black pill, and a status label in a black pill. A red 'Quota Exceeded' warning is displayed to the right of the entry. A dropdown arrow is on the right of the entry.

Rank	Requested Date(s)	Total Hours	Status	Warning
1	Jan 3 - 31, 2020	107 hrs	Added by Manager	Quota Exceeded

Exceeded Vacation Hours: The vacation request contains more hours than the amount available in the employees vacation bank.

1 Jan 3 - 31, 2020 **107 hrs** **Added by Manager** Vacation Hours Exceeded ▼

An employee may still submit a vacation request that contains a warning. If they submit a list of vacation requests that include warnings, they are required to include a comment to the manager.

Requests can be expanded to see a detailed daily breakdown:

Ranked Requests ⓘ

1 Jan 10 - 21, 2022 **75 hrs** **Added by Manager** **Recommended** ⤴

Date	Shift	Hours	Quota ⓘ	Supernumerary ⓘ	Relief Required ⓘ All Yes \ All No
Jan 10, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 11, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 12, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 13, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 14, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 15, 2022	NO SHIFT	0.000	-	-	-
Jan 16, 2022	NO SHIFT	0.000	-	-	-
Jan 17, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 18, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 19, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 20, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
Jan 21, 2022	08:30 - 16:30 PST	7.500	1 / 2 ●	-	----- ▼
12 DAYS	10 SHIFTS	75.000			0/10

Comments

The expanded details include:

- Date – Each date included in the request, including days off
- Shift – The hours of each scheduled shift, or NO SHIFT on days off
- Hours – The paid hours of each scheduled shift
- Quota – The quota, if this request is approved (see notes below for more information)
- Supernumerary – Whether the shift is supernumerary
- Relief Required – whether all shifts, no shifts, or a mix of shifts require relief coverage

NOTE: Quotas are calculated for the most senior employee who has not been processed for this round – viewing employees out of order will not display accurate quota information

NOTE: While processing, the quota field will indicate the state of the quota if this request is approved. This means that if the quota is 2, a display indicating 2/2 does have space available – the request will only exceed the quota if the request indicates 3/2 or higher.

For example, this request will fit within the quota:

1 Jan 6 - 15, 2020 60 hrs Added by Manager Recommended				
Date	Shift	Hours	Quota ⓘ	Supernumerary ⓘ
Jan 06, 2020	06:00 - 14:00 PST	7.500	2 / 2 ●	-
Jan 07, 2020	06:00 - 14:00 PST	7.500	2 / 2 ●	-
Jan 08, 2020	06:00 - 14:00 PST	7.500	2 / 2 ●	-

This example, however, will exceed the quota for January 6th, if approved:

1 Jan 3 - 31, 2020 107 hrs Added by Manager				
Date	Shift	Hours	Quota ⓘ	Supernumerary ⓘ
Jan 03, 2020	06:00 - 14:00 PST	7.500	1 / 2 ●	-
Jan 04, 2020	06:00 - 14:00 PST	7.500	1 / 2 ●	-
Jan 05, 2020	14:00 - 18:00 PST	4.000	1 / 2 ●	-
Jan 06, 2020	14:00 - 18:00 PST	4.000	3 / 2 ■	-

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, and their quota information will not be up to date.
- 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". Managers are not required to approve the Recommended request, and should approve the highest employee preference possible when considering operational requirements.

1	Jan 6 - 10, 2020	32.5 hrs	Recommended	<input type="button" value="v"/>
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A manager can take one of four different actions on employee vacation requests:

- A. Approve
- B. Create Request on Behalf
- C. Skip an Employee's Participation
- D. Deny an Employee's Requests

A. 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 and the employee. Otherwise, including a comment is optional.
- Before approving a request, you must indicate if relief is required for each shift in the request. All Yes marks all shift as requiring relief, All No marks all shifts as not requiring relief, or the drop-down menu can be used to select Yes or No for each individual shift.

Ranked Requests

1
Jan 10 - 14, 2022
37.5 hrs
Added by Manager
Recommended
^

Date	Shift	Hours	Quota ?	Supernumerary ?	Relief Required ? <small>All Yes \ All No</small>
Jan 10, 2022	08:00 - 16:00 PST	7.500	1 / 2 ●	-	<input type="text" value="....."/>
Jan 11, 2022	08:00 - 16:00 PST	7.500	1 / 2 ●	-	<input type="text" value="....."/>
Jan 12, 2022	08:00 - 16:00 PST	7.500	1 / 2 ●	-	<input type="text" value="....."/>
Jan 13, 2022	08:00 - 16:00 PST	7.500	1 / 2 ●	-	<input type="text" value="....."/>
Jan 14, 2022	08:00 - 16:00 PST	7.500	1 / 2 ●	-	<input type="text" value="....."/>
5 DAYS	5 SHIFTS	37.500			0/5

Comments

900
Approve

As managers are unable to make changes to “Approved” request, please inform Staffing of any changes required for a request by adding comments to the request prior to submitting to Staffing. This will ensure that Staffing is aware of how to process this vacation request.

B. Create 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.
- Managers must contact the employee directly in order for find alternative options to input into the system.
- Submissions on behalf of an employee will be marked as **Added by Manager**

Please see the **Annual Vacation – Applying on Behalf of Employees** document or the **Annual Vacation – Manager Video 6 – Applying on Behalf of Employees** video for full details on how to enter applications on behalf of employees.

C. Skip an 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.



- A confirmation overlay will appear – select Cancel to return to the previous screen, or select Skip to finalize the action

Confirmation

Are you sure you want to skip this participant?

This action will process this employee as "Skipped". This action cannot be undone



- If multiple consecutive employees in seniority order did not submit requests, the Skip Multiple button can be used to mark these employees as Skipped and to proceed to processing the next applicant with submissions.



- A confirmation overlay will appear – select Cancel to return to the previous screen, or select Skip Multiple again to finalize the action

Confirmation

Are you sure you want to skip multiple participants?

This action will process every subsequent employee without a request as "skipped" until the next most senior participant with a request.

Cancel

Skip Multiple

- **Note: Skipping a request is final – no choice can be added or approved for the employee in this round.**

D. Deny an Employee's Applications

- If you have contacted an employee who cannot be approved for any of their selections, and they decline to enter an alternate request for that round, you can also deny all of their requests.
Note: Denying a request is final – no choice can be added or approved for the employee in this round – do not use the denial feature to notify an employee to submit alternate choices.
- Comments should be entered in the comment field for each individual preference – the employee will see these comments explaining the denials on the website and in the email notifying them of the denial
- To deny the request, select the Deny This Employee's Request button

Deny This Employee's Requests

- A confirmation overlay will appear – select Cancel to return to the previous screen, or select Deny This Employee's Requests again to finalize the denial.

Confirmation

This action will deny all requests within the round for this employee. This action cannot be undone.

Cancel

Deny This Employee's Requests

After All Requests are Processed

- Once all employees have been Approved, Skipped, or Denied for a round, the **Submit to Scheduling** button will activate.
- Starting in 2020 (the 2021 vacation selection process), the process was streamlined to remove the review section – requests are now submitted directly from the processing page.

- Requests **must** be submitted to Staffing in order to complete processing for the round – employees will receive email notifications of approvals or denials when the round is submitted.
- Messages will appear to guide you in submitting the round without navigating away from this page. It is possible to navigate away from the page and return to submit the round later, if necessary – this will not cause any errors or loss in data.

This vacation round is fully processed but has not been submitted to scheduling.

- To submit the round, select the Submit to Scheduling button at the bottom of the window:

Submit to Scheduling

- A confirmation overlay will appear – select Cancel to return to the previous screen, or select Submit to Scheduling again to finalize the submission.

Confirmation

Are you sure you want to submit this vacation round to scheduling?

Cancel Submit to Scheduling

- Once the round is submitted, a confirmation message will appear – at this point all tasks for the round have been completed:

This vacation round is fully processed and has been submitted to scheduling. [Click here for more details.](#)

Additional Notes

- If an employee is a part of multiple vacation groups, they can only participate in one vacation group per round. If they have participated in another group, their employee status will indicate that they have entered no requests in this round.

- Reminder to engage with your staff during annual vacation, and avoid bottlenecks. Utilize the “Most Senior Unsubmitted” field to help identify employees who have not yet submitted their vacation requests.
- If an employee’s vacation requests are all conflicted, managers are required to contact employees directly to find an alternative to submit into the system before proceeding. Alternatively, an employee may also receive confirmation at this point that an employee wishes to not participate in the current round, and the manager may deny that employee’s requests, removing them from the round entirely.
- If an employee has no submissions and did not contact them before the round closed, managers can assume the employee has decided not to participate in the current round.
- Approved vacation will only appear in employee schedules as it is entered into ESP by Staffing Services. As updates are entered, quotas and vacation banks will update to reflect ESP schedule information, so changes like partially approved requests will deduct the appropriate amount of vacation hours once mySchedule received the updated schedule data.