mySchedule Annual Vacation – How to Apply for Annual Vacation

Introduction

The Annual Vacation module on mySchedule allows employees to make vacation requests for the upcoming year.

Advantages:
- Create informed vacation requests
- Online for easy access and planning
- Information about how likely your request is to be approved
- Insight into pending vacation requests from more senior employees
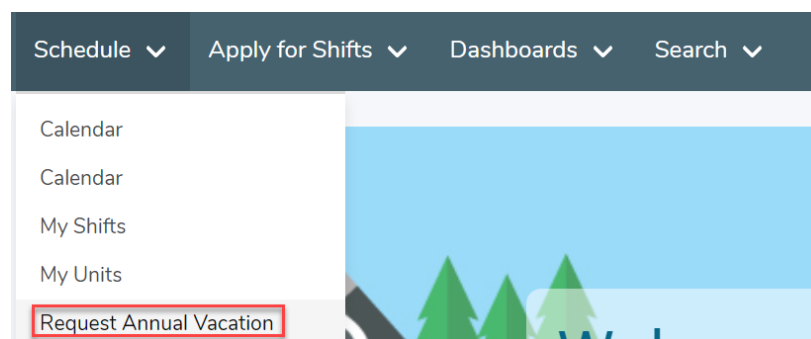
Sections:

1. Access the Annual Vacation Module

- Login to mySchedule.northernhealth.ca with your Northern Health user account.

- Click on the **Schedule** menu item located in the top left of the screen:
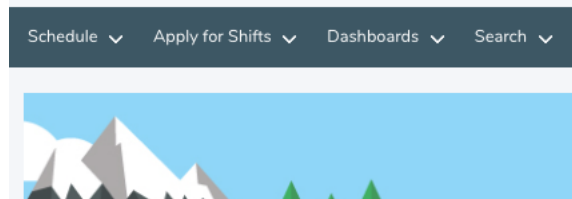
- Click on **Request Annual Vacation:**

Below is the Annual Vacation Employee main page. This page will allow you to view and select from the **vacation groups** you belong to.

> A **vacation group** contains groups of employees identified by ESP home unit and occupation code. By default, a group is a single occupation code within a single unit, though managers can combine these groups to include multiple occupation codes in one unit, and/or occupation codes from multiple units
>
> An example of a vacation group:
> Unit: UHN Neonatal Intensive Care U
> Occupation: DC1j (20000-DC1 Nurse)

Vacation groups are automatically assigned based on your position information and scheduled shifts. Most employees will belong to one vacation group, but if you are switching primary positions during the vacation year, you may be eligible to participate in multiple groups. Employees with multiple groups can only apply in one group per vacation round.

Note: Only full-time and part-time employees can participate in the Annual Vacation process on mySchedule. This includes casual employees in terms that provide vacation hours and temporary change of employee status for the duration of the term.

- **Name:** This is the vacation group name, which is either the unit and occupations involved, or a custom name selected by your manager
- **Current Round:** This indicates the current open round – future rounds are available even if this field indicates N/A
- **Eligibility Range:** This reflects the date range in which you hold the position within that vacation group for the upcoming year. You can only select vacation that falls within your eligibility range
- **Apply button:** This button will take you to the main page for this vacation group

The vacation group main page has three main sections:

A. Employee Information
B. Vacation Rounds
C. Approved Vacation Requests

A

JOHN KRASINSKI
Union NURSES

Current Home Unit:			421 - UHN APAU	
Current Home Occupation:			DC1j (20000-DC1 Nurse)	
Vacation Bank	Opening	Pending ⓘ	Approved	Available
Estimated Entitled Vacation	262.500	121.000	0.000	141.500
Supplemental Vacation	0.000	0.000	0.000	0.000

B

421 - UHN APAU DC1j (20000-DC1 Nurse)

Round 1	CLOSED
	ready for processing

| OPEN 01:00 PM PDT Aug 19, 2019 | - | CLOSE 05:00 PM PDT Aug 19, 2019 |

Eligibility Ranges ⓘ
Jan 1, 2020 - Dec 31, 2020

[View]

Round 2	ACTIVE
	open for submissions

| OPEN 05:30 PM PDT Aug 19, 2019 | - | CLOSE 05:00 PM PDT Aug 22, 2019 |

Seniority Ranking
2 / 4

Eligibility Ranges ⓘ
Jan 1, 2020 - Dec 31, 2020

[Apply]

Round 3 (FINAL ROUND)	AVAILABLE
	open for submissions

| OPEN 10:00 AM PDT Aug 26, 2019 | - | CLOSE 05:00 PM PDT Aug 30, 2019 |

Seniority Ranking
2 / 4

[Apply]

C

Approved Vacation Requests

Date	Total Days	Vacation Hrs Used	Round Granted
No vacation requests have been approved yet.			

Figure 1

A. Employee Information

JOHN KRASINSKI
Union NURSES

Current Home Unit:			421 - UHN APAU	
Current Home Occupation:			DC1j (20000-DC1 Nurse)	
Vacation Bank	Opening	Pending ⓘ	Approved	Available
Estimated Entitled Vacation	262.500	121.000	0.000	141.500
Supplemental Vacation	0.000	0.000	0.000	0.000

Your employee information is summarized at the top of this page, including union, current home unit(s) and current occupation.

Your vacation banks are displayed along with their balances.

I. Vacation Bank Types
- **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 2020. 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 original amount you are allocated for the annual vacation period.
- **Pending:** this balance reflects your most-preferred pending vacation request(s) before they are processed by a manager.

- **Approved:** this balance reflects the number of hours from approved vacations requests.
- **Available:** this balance reflects any remaining vacation hours that are available to apply towards vacation.

B. Vacation Groups & Rounds

Figure 2

I. Rounds

Vacation requests will be processed in a series of **rounds**. Rounds are shown on the central portion of the screen (see Figure 2). 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.

During the Annual Vacation process, rounds will have one of the following statuses:
- **Active**: the round is open to receive employee vacation requests, and quotas will display approved requests and pending requests from more senior employees
- **Available**: this is a future round that is open to receive employee vacation requests, but may display incomplete quota information
- **Closed**: the round is no longer accepting any vacation requests. Information is read-only.

II. Seniority Ranking

Within each round, you can view your seniority ranking. A seniority ranking is where your employee seniority ranks within that group of employees within the vacation group. If you belong to more than one vacation group, you may have different seniority rankings within each vacation group.

C. Approved Vacation Requests

All approved vacation requests will be summarized in this section (found at the bottom of the Employee Annual Vacation main page, see Figure 1) throughout the annual vacation process.

Approved Vacation Requests

Date	Total Days	Vacation Hrs Used	Round Granted
Jan 13 - Jan 17 2020	5 Days	37.5 Hrs	Round 1

2. Creating Vacation Requests

Click on the **Apply** button to enter that round and add or edit your list of vacation requests (see Figure 2).

Apply

The **Employee Create Request** page is displayed, where you can manage your list of vacation requests for the current round.

- **A.** Employee & Round Information
- **B.** Calendar & Creating Requests
- **C.** Review and Reorder Ranked List

002 - CO HR-Staffing Coordinator E762 (52079-Coord,Trng & Dvlpmt-Stfng Svc)
Vacation Group Eligibility ⓘ: Jan 1 - Dec 31, 2021

A

Round 3 OPEN

Open	Sep 22nd 2020, 10:51 AM
Close	Sep 23rd 2020, 10:51 AM

JOHN SMITH
Union NON CONTRACT | Seniority 1 / 1

Vacation Bank	2021 Vacation	Pending ⓘ	Approved	Available
Estimated Entitled Vacation	165.000	0.000	0.000	165.000
Supplemental Vacation	0.000	0.000	0.000	0.000

Figure 3

A. Employee & Round Information

At the top of the **Employee Create Request** page (see Figure 3), you will see information regarding the current round, such as vacation group, round, and your calendar eligibility within

the vacation group. Relevant employee information is also displayed, including your seniority ranking, union, and vacation banks & balances.

421 - UHN APAU DC1j (20000-DC1 Nurse)
Vacation Group Eligibility ❶: Jan 1 - Dec 31, 2020

Round 2 OPEN

Open	Aug 19th 2019, 17:30 PM
Close	Aug 22nd 2019, 17:00 PM

JOHN KRASINSKI
Union NURSES | Seniority 2 / 4

Vacation Bank	Opening	Pending ❶	Approved	Available
Estimated Entitled Vacation	262.500	121.000	0.000	141.500
Supplemental Vacation	0.000	0.000	0.000	0.000

B. Calendar & Creating Requests

In the middle section of this page (see Figure 3), the calendar displays a variety of information to help you easily create informed annual vacation requests.

Figure 4

On the monthly calendar view, each day displays a variety of information:
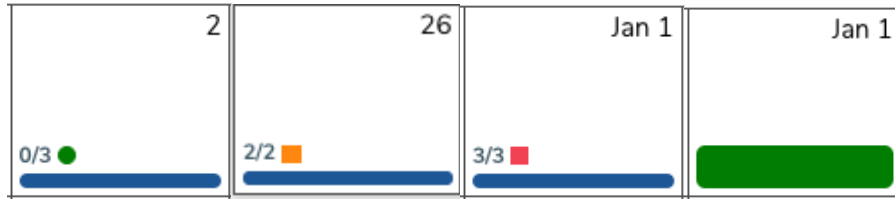
- A **scheduled shift** is represented by a horizontal blue line. Dates with multiple shifts will indicate display multiple blue lines.
- An **approved request** is represented by a horizontal green bar.
- The current **quota** is displayed as a total along with a colored likelihood indicator.
  - Each vacation group is assigned a quota. A quota is the maximum number of employees who can be approved for vacation per calendar day.
  - In the example above, 0/1 (or 0 out of 1) is displayed. The "0" is how many employees have been approved for vacation on this day, and the 1 is the quota, indicating how many total employees can be approved for vacation on this day
  - **Green** quotas (with a **circle** icon) have open space in the quotas
  - **Yellow** quotas (with a **triangle** icon) are filled with pending requests from more senior employees
  - **Red** quotas (with a **square** icon) are filled with approved or scheduled requests
  - Employees can requests shifts with any quota status, but green (circle) quotas are most likely to be approved.
- **Holidays and special dates** (such as Pay Day) will be represented by blue icons in the top corners of each cell. Note there are no holidays or special dates shown in the examples above.

When you select a date from the calendar (see Figure 4), the right panel in the calendar will populate with more detailed information:

I. How to Add a Vacation Request

1. Select your start date in the calendar (see Figure 4). The right panel on the calendar will populate with information
2. In the right panel, click on the **End Date** option. A small calendar will pop up. Within that small calendar, select the end date of your vacation request.

3. Click the **Add Request** button:

4. An overlay will appear summarizing this vacation request.

This overlay summarizes the following information related to your vacation request:
- **Requested Dates**: this is the date range you selected for a vacation request.
- **Likelihood Summary**: criteria which highlights if your vacation request has any conflicts regarding daily quota or available vacation hours.
- **Shift Details**: a detailed view of your vacation request, broken down by individual dates.
- **Vacation Banks**: a summary of your vacation banks and their adjusted balances if you decide to add this vacation request.
- **Supplemental Vacation**: If you wish to use supplemental vacation hours towards your vacation request, click on the checkbox and indicate how many hours you wish to use.

5. Click the **Add Vacation Request** button to add this request to your list of preferences.

C. Review and Submit Your Ranked List

The bottom section of the **Employee Create Request** page (see Figure 3), displays your ranked list of vacation requests in order of preference.

If you havent entered at least three preferences, or if you haven't saved your changes, you will see messages in red or orange:

I. Review Your Ranked List

Each vacation request in the Ranked Requests section (see Figure 3), display the following information:

- **Requested Dates**: this is the date range you selected for a vacation request

- **Likelihood Summary**: criteria which highlights if your vacation request has any conflicts regarding daily quota or available vacation hours
- **Status**: the status indicates the state of your request
  - **Pending**: waiting for a manager to process your requests
  - **Approved**: this request has been approved by a manager
  - **Not Approved**: the manager has approved one of your other preferences in this round
  - **Denied**: the manager has denied all preferences for this round

If the request was entered on your behalf by a manager, the preference will include an **Added by Manager** indicator.

II. Manage Your Ranked List

- **Re-order**: You can rearrange the order of your vacation requests by using drag & drop on each requests. After each rearrangement, the numbered list should update to reflect the new order, and you will see a notification in yellow that you have unsaved changes. You need to submit your vacation requests to save the changes.
- **Delete**: You can delete a request by clicking on the **Delete** button on each vacation request.
- **Edit**: If you wish to edit a vacation request, delete the request and re-add a new request with your changes.
- **Minimum**: A minimum of 3 vacation requests are required per round
- **Maximum**: A maximum of 20 vacation request are permitted per round.

III. Submit Your Ranked List

In order to submit your list of vacation requests, click on the **Submit Vacation Requests** button. If you wish to save any changes to your list of ranked vacation requests, click on the **Submit Vacation Requests** button.

SUBMIT VACATION REQUESTS

If a round is active or available, you can return to the annual vacation module and edit your list of vacation requests. In addition, you may include an optional comment with your list of ranked requests.

D. Warnings

There are two types of warnings in which a vacation request may trigger.

Exceeded Quota: Your vacation request exceeds the daily quota

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

You may still submit a vacation request that contains a warning, but the likelihood of manager approval is lower than a request without a warning. If you wish to submit a list of vacation requests that include warnings, you are required to include a comment to the manager.

3. Vacation Request Approval Process

- A manager will approve your vacation requests after the round closes.
- Once your vacation request is approved, you will receive an email notification and your status will be updated in the Annual Vacation module in mySchedule
- If all your vacation requests contain warnings, your manager will contact you directly to determine an alternative vacation request.
- If none of the requests can be approved, and an alternate selection cannot be approved, the request may be denied for this round, meaning no choices will be approved for this round

General Notes

- If you wish to switch vacation groups during a round and you have already submitted a list of vacation requests, you can clear your existing list and select another vacation group to participate in.
- Employees may only participate in one vacation group per round.
- All approved vacation requests will be displayed in the Annual Vacation module.
- Additional vacation requests after round 5 should be submitted to managers using the Annual Vacation Request forms. The deadline for these submissions is 12:00 PST on December 9, 2020.
- Disclaimer: Approved vacation may not appear in your schedule in mySchedule immediately, as approved requests must be entered into schedules by Staffing Services.