



Factsheet

How to Read the Excess Annual Leave Report and What Happens Next

Column definitions
<p>Excess: The balance the employee must reduce their leave by.</p>
<p>Leave Unit: This will show whether the 'Excess' is in either Days or Hours. For those who are part-time or have ever been part-time it will display in Hours. It cannot be changed back to days.</p>
<p>Excess (Employee's Standard Day): The excess leave balance converted to days based on employee FTE. (May differ if employee has a Roster.)</p>
<p>Hours Change: A 'Y' indicates the person had an increase or decrease in work hours since 1 December the previous year. This may be one of the factors why the person has an excess balance.</p>
<p>PL: A 'Y' indicates that at the time this report was run the person is on Parental Leave. This may be one of the factors why the person has an excess balance.</p>
<p>Future Bookings: This shows future approved leave bookings. This maybe useful when formulating future leave plans.</p>
What to do next?
<p>The Annual Leave Policy requires formal approval for any excess leave carried over on 1 December 2024. For practical purposes, leeway is given for the period up to and including 3 January 2025. If you have a continuous leave booking that commences no later than 3 January 2025, and it fully clears the excess, no form is required.</p> <ul style="list-style-type: none"> • All those on the report will need to complete a '<i>Request to Carry Forward Excess Annual Leave</i>' form, unless they book and take leave up to and including 3 January 2025 that fully clears the 'Excess'. • At the date this Excess Leave report was run, those who already have an approved leave booking up to and including 3 January 2025, have had their 'Excess' adjusted accordingly. • Note the below section '<i>Ways to reduce excess leave balances</i>', and undertake the actions. • The '<i>Request to Carry Forward Excess Annual Leave</i>' form is in the 'Form Store' on the HR Division webpage. • Send all completed '<i>Request to Carry Forward Excess Annual Leave</i>' forms to HR Services, Shared Services by 31 January 2025.
Ways to reduce excess leave balances
<ul style="list-style-type: none"> • Ensure all staff enter and have approved their Christmas/New Year/January leave by 23 December 2024. • Check who has entered this leave using the 'December Leave Bookings' Business Objects report. • Check for missing past leave bookings using the 'Leave Bookings History' Business Objects report. • Once leave is approved, check there is no remaining excess using the 'HRMS Annual Leave Summary' Business Objects report.
What will HR Services do in February 2025?
<ul style="list-style-type: none"> • Identify who has a non-approved excess leave balance. • Book leave for each person as per the Annual Leave Policy.
Who to contact for advice
<p>Leave Management advice Contact your Divisional HR Manager, Senior Adviser or Adviser. Divisional HR Support Contact</p> <p>Understanding the Report/Process Contact Payroll at payroll@otago.ac.nz</p>