

**POLICY GUIDELINES FOR PERSONNEL POLICIES FOR STAFF MEMBERS (PPSM) 2.210:
ABSENCE FROM WORK- MAXIMUM VACATION LEAVE AND PAID TIME OFF (PTO) ACCRUAL**

University of California, San Francisco (UCSF) Campus and Medical Center

I. SUMMARY

These local implementing guidelines are written to correspond to *Personnel Policies for Staff Members (PPSM) 2.210, Absence from Work-Maximum Vacation Leave Accrual* for Professional and Support Staff, as found in the PPSM Personnel Manual and *UCSF Medical Center Paid Time Off (PTO) Policy 4.02.03*.

The purpose of these guidelines is to assist supervisors, managers, and human resource representatives in administering the maximum vacation leave or PTO accrual for staff covered by the Personnel Policies for Staff Members (PPSM). The content below is not intended as a substitute for the absence from work provisions related to maximum vacation or PTO accrual contained in University policies.

II. OVERVIEW

As described in *PPSM 2.210: Absence from Work* and *UCSF Medical Center Paid Time Off (PTO) Policy 4.02.03*, the University provides vacation leave or PTO to eligible employees for personal use for primary reasons such as rest, relaxation, and renewal, and encourages employees to use their accrued vacation leave/PTO each year. An employee accrues vacation leave/PTO based on type of appointment (includes career, limited, and eligible appointments), years of qualifying service, and hours on pay status.

Vacation leave or PTO may be accrued to a maximum of two times the annual accrual rate whether the employee holds a full or part-time appointment. When an employee reaches their maximum accrual limit, no additional vacation leave/PTO may be accrued until the employee's balance falls below the maximum.

In rare circumstances where, due to operational considerations, an employee cannot schedule vacation/PTO within 60 working days of reaching the maximum accrual limit, upon request for approval the University will provide the employee an additional four months within which to take vacation leave/PTO in order to bring the employee's accruals below the maximum. Vacation/PTO shall continue to accrue during the additional four-month grace period. At the end of the four-month grace period, if the employee's hours are not brought below the maximum accrual levels, vacation leave/PTO will not accrue until after the vacation leave/PTO is brought below maximum accrual levels.

III. RESPONSIBILITIES

- A. The authority and responsibility to approve and schedule vacation leave/PTO rests with the supervisors, managers and department heads. Supervisors, managers and department heads are responsible for ensuring that employees schedule vacation leave/PTO prior to reaching their maximum accrual levels. Supervisors, managers and department heads are also responsible for monitoring and making appropriate adjustments to employees' vacation leave schedules when employees cannot schedule vacation leave/PTO prior to reaching maximum accrual levels.
- B. Employees are expected to responsibly monitor their vacation/PTO accrual hours, and may do so using the University's automated timekeeping system, HBS (Huntington Business System). Employees may review their vacation leave/PTO balances in HBS at any time.
- C. Employees and supervisors should review University policy and contact UCSF Human Resources- Labor and Employee Relations for any needed guidance and clarification.

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IV. PROCEDURES

- A. **Monitoring:** Supervisors and employees shall monitor vacation/PTO accrual hours to ensure that the maximum limit is not reached, causing employees stop accruing vacation leave/PTO. If nearing maximum accrual levels, supervisors and employees should begin planning how they will address the issue (see, "Scheduling and Approval" below). The University's automated timekeeping system will serve as an additional mechanism for monitoring and compliance with these guidelines.
- B. **"Over the Maximum Check" Alerts:** Supervisors and employees receive an alert from HBS in blue-colored font upon sign-in when employees are nearing their maximum vacation/PTO accrual levels (at or over 75% of the maximum limit). The Over-the-Maximum-Check will appear in red-colored font when the maximum vacation/PTO accrual limit has been reached.
- C. **Scheduling and Approval:** Before an employee reaches maximum accrual, the supervisor and employee shall meet to plan a vacation/PTO schedule for the employee that will allow the employee to reduce his/her vacation leave/PTO balance so that it is below the maximum vacation/PTO limit.
- D. **Processing of Vacation Accrual Extension Requests:** In the event a request for vacation leave/PTO is denied due to business operational reasons for an employee who will reach the maximum accrual limit, the supervisor and employee must complete a Vacation /PTO Accrual Extension Request form [Appendix A]. **Prior to the employee reaching the maximum accrual**, the completed form must be submitted to the HBS Processing Center via the e-mail, fax, or campus mail information indicated on the form.

After extension request has been processed, the employee will continue to accrue vacation leave/PTO in future accrual cycles above their maximum limit without loss of hours for the appropriate number of accrual cycles. Once the extension period has expired, the employee will no longer accrue vacation leave/PTO until the vacation leave/PTO balance falls below the maximum limit.

- E. **Exceptions to Requests for an Extension:** Any exceptions to the maximum vacation/PTO accrual leave policy must be reviewed and approved by Labor and Employee Relations.

V. RELATED INFORMATION

- A. *Personnel Policies for Staff Members 2.210: Absence From Work*
- B. *UCSF Medical Center Paid Time Off (PTO) Policy 4.02.03*
- C. *Personnel Policies for Staff Members 3: Types of Appointment*
- D. *Appendix A--Vacation or PTO Accrual Exception Request form, UCSF Campus and Medical Center*