



## Factsheet

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

Column definitions
<p><b>Excess:</b> The balance the employee must reduce their leave by.</p>
<p><b>Leave Unit:</b> 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><b>Excess (Employee's Standard Day):</b> The excess leave balance converted to days based on employee FTE. (May differ if employee has a Roster.)</p>
<p><b>Hours Change:</b> 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><b>PL:</b> 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><b>Future Bookings:</b> This shows future approved leave bookings. This maybe useful when formulating future leave plans.</p>
What to do next?
<p>The <a href="#">Annual Leave Policy</a> requires formal approval for any excess leave carried over on <b>1 December 2023</b>. For practical purposes, leeway is given for the period up to and including <b>3 January 2024</b>.  <b>If you have a continuous leave booking that commences no later than 3 January 2024, and it fully clears the excess, no form is required.</b></p> <ul style="list-style-type: none"> <li>• All those on the report will need to complete a 'Request to Carry Forward Excess Annual Leave' form, unless they book and take leave up to and including 3 January 2024 that fully clears the 'Excess'.</li> <li>• At the date this Excess Leave report was run, those who already have an approved leave booking up to and including 3 January 2024, have had their 'Excess' adjusted accordingly.</li> <li>• Note the below section 'Ways to reduce excess leave balances', and undertake the actions.</li> <li>• The 'Request to Carry Forward Excess Annual Leave' form is in the 'Form Store' on the HR Division webpage.</li> <li>• Send all completed 'Request to Carry Forward Excess Annual Leave' forms to HR Services, Shared Services by <b>31 January 2024</b>.</li> </ul>
Ways to reduce excess leave balances
<ul style="list-style-type: none"> <li>• Ensure all staff enter and have approved their Christmas/New Year/January leave by <b>20 December 2023</b>.</li> <li>• Check who has entered this leave using the '<b>December Leave Bookings</b>' Business Objects report.</li> <li>• Check for missing past leave bookings using the '<b>Leave Bookings History</b>' Business Objects report.</li> <li>• Once leave is approved, check there is no remaining excess using the '<b>HRMS Annual Leave Summary</b>' Business Objects report.</li> </ul>
What will HR Services do in February 2024?
<ul style="list-style-type: none"> <li>• Identify who has a non-approved excess leave balance.</li> <li>• Book leave for each person as per the Annual Leave Policy.</li> </ul>
Who to contact for advice
<p><b>Leave Management advice</b> Contact your Divisional HR Manager, Senior Adviser or Adviser.  <a href="#">Divisional HR Support Contact</a></p> <p><b>Understanding the Report/Process</b> Contact Payroll at <a href="mailto:payroll@otago.ac.nz">payroll@otago.ac.nz</a></p>