



# mySchedule

## Annual Vacation – Manager Training

# mySchedule Vacation Process

- Employees will enter vacation requests in a series of rounds, each starting on a Friday morning, and closing on the following Tuesday morning
- Managers will review and approve these applications in seniority order, and then the process will repeat through five rounds
- Approved requests will be submitted to Staffing Services for entry

# Vacation Rounds

- There will be five rounds, and employees can have one selection approved in each round
- Rounds can have one of three status types
  1. **Active** – These rounds are open for applications and will be the next to close
  2. **Available** – These are future rounds – open for applications, but quotas and participants may change
  3. **Closed** – These rounds are no longer accepting requests

# Round Schedule

- On November 3<sup>rd</sup> at 10:00am, Round 1 will become **Active**, and all other rounds will be **Available**
- This chart indicates when each round will become **Active** for employees and when it will be **Closed** for applications:

Round	Opens		Closes	
	Date	Time	Date	Time
1	Nov 3	10:00am	Nov 7	10:00am
2	Nov 10	10:00am	Nov 14	10:00am
3	Nov 17	10:00am	Nov 21	10:00am
4	Nov 24	10:00am	Nov 28	10:00am
5	Dec 1	10:00am	Dec 5	10:00am

# Processing Schedule

- Managers will be able to begin processing 15 minutes after a round closes.
- The faster processing happens, the smoother the process will be – please attempt to have all processing complete before the next round opens

Round	Processing Opens		Processing Closes	
	Date	Time	Date	Time
1	Nov 7	10:15am	Nov 10	9:00am
2	Nov 14	10:15am	Nov 17	9:00am
3	Nov 21	10:15am	Nov 24	9:00am
4	Nov 28	10:15am	Dec 1	9:00am
5	Dec 5	10:15am	Dec 8	9:00am

# Who Will Participate?

- Non-contract staff and casual staff are excluded
- Employees with permanent status in a department and scheduled shifts on any date between Jan 1, 2024 and Dec 31, 2024
  - This means that staff scheduled to return from leaves during 2024 will be included
  - These employees may need to update passwords to log in, or to contact managers with their requests
  - Please reach out to employees who will return from leaves during 2024 to confirm they have access and are aware of the process

# Before Applications Begin

- Starting on October 5, 2023, the vacation process will be accessible to managers
- Before applications begin, managers should review the following, and make any updates necessary
  - Vacation Groups
  - Daily Quotas
  - Approver Access

# Vacation Groups

- By default, everyone in one occupation type in a unit will be grouped together
- Customized groups from last year are carried over
- You can modify these groups to better reflect how annual vacation is usually booked in your areas – the deadline to edit groups is October 27, 2023.
- Employees are automatically ranked by seniority within their vacation group
- Employees who are changing positions during the vacation year may have more than one vacation group – these employees can choose to apply in one group or the other in each vacation round



# Vacation Groups

- You will see the vacation groups for all units where you have manager access
- Groups can be combined to include multiple occupations/units as necessary. To combine groups in units with different managers, you may need to be delegated access to the other unit
- Combined groups can be separated, but the removed group will copy the quota of the combined group, and may need to be reviewed again

# Daily Quotas

- Each vacation group will have a quota indicating the number of employees who can be approved for vacation in each calendar day
- Quotas will default to 1 per day – these are not saved from last year
- Quotas can be set for all days, time ranges, a weekly pattern, or edited for individual days
- Quotas are for the full calendar day, and will use include day, evening, and night shifts based on the calendar date at shift start.
- Quotas can be updated during the process, but will not take effect for any Active or Closed rounds

# Vacation Entitlements

- In mid-October, managers will be sent an early draft version of the Estimated Vacation Entitlement report for their employees – this is just to assist with setting quotas and is not to be shared with employees
- An updated version of the report will be generated and distributed two days before applications start
  - Employees will receive their entitlements via email
  - These figures will be what is uploaded into mySchedule
  - We strongly recommend managers double-check quotas once the final report is distributed

# Approver Access

- To process requests, a manager or employee must be set as an Approver for a vacation group.
- Managers are automatically set as Approvers for groups in their own units.
- Any employee – even those without Manager access, can be set as an approver.
- If an employee group is removed from a vacation group, Approvers will need to be reset

# Processing Vacation Requests

- The processing screen will display the following information
  - Information about the round
  - The list of employees and the status of their requests
  - Employee contact information, banks, and comments
  - Employee requests and processing tools
- Requests are processed in seniority order – mySchedule will prevent processing out of order

# Processing Vacation Requests

- There are four possible actions for employee processing
  - Approve one of the preferences
  - Apply on behalf of an employee
  - Skip an employee who did not apply
  - Deny all employee preferences
- Skipping or Denying a request removes the employee from the round entirely – only use these options when the employee will not be granted a request for this round

# Processing Vacation Requests

- mySchedule will display the employee requests in order of their preferences
- The highest preference that fits within the unit quota and the employee's vacation hours will display as Recommended
- Managers can approve requests exceeding quotas and hours if necessary
- While processing, quotas will display the effect if this request is approved – a display indicating 2/2 means there is still space, while 3/2 indicates the quota is already filled
- Quotas and recommendations are only accurate for the next employee to be processed

# Applying on Behalf of Employees

- Managers can submit requests on behalf of employees via the processing screen
- Requests can be submitted in Active or Closed rounds, but not in Available (future) rounds
- Applications on behalf of employees work exactly the same as the employee application process
  - You will see the same quota information as the employee
  - Requests must include a minimum of three preferences
- Just like employee requests, you can submit requests that exceed unit quotas and available vacation hours



# Submitting Requests to Staffing

- After all employees in a round have been Approved, Skipped, or Denied, the round can be reviewed and submitted to Staffing
- Employees are not notified of their application results until the round is submitted
- Approved requests will appear in schedules after Staffing Services enters them into ESP
- After processing, quotas and approved hours will reflect scheduled vacation in ESP

# After the Final Round

- Employees may have additional requests to submit after Round 5 is complete. These requests should be submitted directly to managers using the existing Annual Vacation Request form
- The deadline to submit these requests is 12:00 PST on December 6, 2023.
- These additional requests should be submitted to Staffing by email by December 12, 2023

# Contact Us



Email support can be reached at [mySchedule@northernhealth.ca](mailto:mySchedule@northernhealth.ca)

Please send us:

- Questions
- Technical Problems
- Feedback about the Annual Vacation system