

## MANAGING STAFF EXCESS LEAVE ACCRUALS

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### 1. OVERVIEW

This procedure prescribes the responsibilities and actions required to actively monitor and manage staff members' accumulation of excess leave consistent with the [University of Adelaide Enterprise Agreement \(as amended\)](#) and [Workforce Management Policy](#).

### 2. SCOPE AND APPLICATION

- 2.1 The procedure for annual leave applies to all staff members except casual staff.
- 2.2 The procedure for long service leave applies to all staff with the exception of staff who have formally notified the University of the date they intend to retire, which is within the next 2 years.

### 3. PRINCIPLES

- 3.1.1 The effective management of staff leave requires that staff enter all annual leave and long service leave that they take into Staff Services Online (SSO) for prompt approval by their supervisor/manager.
- 3.1.2 Supervisors will monitor annual leave and long service leave balances in [Staff Services Online \(SSO\)](#) to ensure staff members' record and take planned leave.
- 3.1.3 Supervisors should review annual leave plans as part of the Planning, Development and Review (PDR) meetings.

### 4. PROCEDURES

#### 4.1 Managing Staff Excess Annual Leave Accruals

- 4.1.1 The supervisor will determine if a staff member has accrued more than 30 days annual leave (35 days for shift worker) or part time equivalent.
- 4.1.2 The supervisor will meet with or contact the staff member to seek agreement to develop a plan to reduce the balance below 30 days by taking annual leave and ensuring that the leave is entered and approved in [Staff Services Online \(SSO\)](#).

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- 4.1.3 Where an agreement cannot be reached, the supervisor will advise the staff member in writing that a leave plan must be put in place or their leave dates will be directed by the University. Use the [Notification of Excess Annual Leave Balance email/letter](#) as a guide.
- 4.1.4 Where excess annual leave is not taken/agreed in accordance with 4.1.3 the supervisor will direct the staff member to take annual leave using the [Requirement to take Annual Leave formal advice](#) as a guide and enter and approve the leave in [SSO](#) on behalf of the staff member using the absence management function.
- 4.1.5 Where the University's operational needs prevent the staff member from taking annual leave immediately following the 3 month notice period, and their balance cannot be reduced to 30 days (35 days for shift workers), the supervisor is to plan the days on which annual leave will be taken within 12 months of the notice period expiring.

## 4.2 Managing Staff Excess Long Service Leave Accruals

- 4.2.1 The supervisor will determine if a staff member has accrued more than 80 days long service leave or part time equivalent.
- 4.2.2 The supervisor will meet with or contact the staff member to seek agreement to develop a plan to take long service leave to reduce the balance below 30 days and ensure leave is entered and approved in [Staff Services Online \(SSO\)](#).
- 4.2.3 Where an agreement cannot be reached, the supervisor will advise the staff member in writing that a leave plan must be put in place or their leave dates will be directed by the University. Use the [Notification of Excessive Long Service Leave Balance letter](#) as a guide.
- 4.2.4 Where excess long service leave is not taken/agreed in accordance with 4.2.3 the supervisor will direct the staff member to take annual leave using the [Requirement to take Long Service Leave formal advice](#) as a guide and enter and approve the leave in [SSO](#) on behalf of the staff member using the absence management function.
- 4.2.5 A staff member and their supervisor may agree on the deferral of long service leave subject to an agreed leave management plan being established.

## 4.3 Reporting Annual and Long Service Leave Accruals

- 4.3.1 Faculty Human Resource Managers and/or Faculty/Division Finance Managers may extract leave reports through the workforce analytics dashboard to actively monitor leave balances and report to the Head of School/Branch.
- 4.3.2 Where leave balances exceed the 30 days annual leave or 80 days long service leave the Head of School/Branch will ensure that a leave plan is agreed between the staff member and their supervisor.

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## 5. RELATED DOCUMENTS AND POLICIES

[University of Adelaide Enterprise Agreement](#)

[Workforce Management Policy](#)

[Leave Entitlement Procedure](#)

### 5.2 Related legislation

[Fair Work Act 2009](#) (Cth)

### 5.3 Useful Web-links

[Staff Services Online \(SSO\)](#)

[Workforce Analytics Dashboard](#)

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