



Managing Staff Excess Leave Accruals Procedure

IMPLEMENTATION

Aim

This procedure prescribes the responsibilities and actions required for managing situations where staff members have accumulated excess leave consistent with the [University of Adelaide Enterprise Agreement](#) and the [Workforce Management Policy](#).

1 Objectives

- 1.1 To enable excess leave accruals to be actively managed in accordance with the [University of Adelaide Enterprise Agreement](#).

2 Scope and Application

2.1 Inclusions

For annual leave, this procedure applies to all staff members except casual staff.

For long service leave, this procedure applies to all staff members except where a staff member has notified a date for their intended retirement within two (2) years of the notified date.

2.2 Application

Managing staff leave requires that all Annual Leave and Long Service Leave taken is entered into [Staff Services Online \(SSO\)](#) and approved by the Supervisor/Manager.

3 Process: Managing Staff Excess Annual Leave Accruals

Person Responsible	Actions
3.1 Supervisor	<p>a) Monitor leave balances in Staff Services Online (SSO) to ensure that staff members take expected leave and enter it in SSO.</p> <p>b) Review annual leave plans for staff members as part of Planning, Development and Review (PDR) meetings.</p> <p>c) Determine if a staff member has accrued more than 35 days annual leave (40 days for shift workers) or part time equivalent.</p> <p>d) Meet with or contact the staff member to seek agreement to develop a plan to take annual leave to reduce the balance below 35 days and ensure the leave of absence is entered and approved in Staff Services Online (SSO).</p> <p>If an agreement cannot be reached</p> <p>e) Advise the staff member 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 (Appendix A) as a guide.</p>

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3 Process: Managing Staff Excess Annual Leave Accruals (Continued)

Person Responsible		Actions
3.1	Supervisor (Continued)	<p>If excess annual leave is not taken/agreed in accordance with 3.1(f)</p> <ul style="list-style-type: none"> f) Direct the staff member to take leave using the Requirement to take Annual Leave formal advice (Appendix B) as a guide; and g) Enter and approve the leave in SSO on behalf of the staff member using the Absence Management function. <p>If the University's operational needs mean that a staff member's annual leave balance cannot be reduced to 35 days (40 days for shift workers) immediately following the 3 month notice period</p> <ul style="list-style-type: none"> h) Plan the days on which annual leave will be taken within 12 months of the notice period expiring. i) Approve/enter leave in SSO as applicable.
3.2	Staff Member	<ul style="list-style-type: none"> a) Apply for leave through SSO once agreement has been reached on leave dates to reduce excess leave balance.

4 Process: Managing Excess Long Service Leave Accruals

Person Responsible		Action
4.1	Supervisor	<ul style="list-style-type: none"> a) Monitor long service leave balances in Staff Services Online (SSO) regularly to ensure that staff members take expected leave. b) Determine if a staff member has accrued more than 90 days long service leave or part time equivalent. c) 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 the leave of absence is entered and approved in Staff Services Online (SSO). <p>If an agreement cannot be reached</p> <ul style="list-style-type: none"> d) Advise the staff member 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 (Appendix C) as a guide. <p>If excessive Long Service leave is not taken in accordance with 4.1(d):</p> <ul style="list-style-type: none"> e) Direct the staff member to take leave using the Requirement to take Long Service Leave formal advice (Appendix D) as a guide. f) Enter and approve the leave in SSO on behalf of the staff member using the Absence Management function. <p>Note: Despite the preceding provisions of this section, a deferral of long service leave subject to an agreed leave management plan may be agreed.</p>
4.2	Staff Member	<ul style="list-style-type: none"> a) Apply for leave through SSO once agreement has been reached on leave dates to reduce excess leave balance.

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5 Process: Reporting Annual and Long Service Leave Accruals

Person Responsible	Action
5.1 Faculty/Division Finance Manager	a) Extract leave reports through the workforce analytics dashboard to actively monitor excess leave balances and report to the Head of School/Branch to ensure a leave plan is agreed where required.

6 Useful information and resources

6.1	University related documents and Policies University of Adelaide Enterprise Agreement Workforce Management Policy Leave Entitlement Procedure
6.2	Related Legislation Fair Work Act 2009 (Cth)
6.3	Useful Web-links Staff Services Online (SSO) Workforce Analytics Dashboard

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NOTIFICATION OF EXCESSIVE ANNUAL LEAVE BALANCE - TEMPLATE

Dear [Staff Member Name]

Re: Excessive Annual Leave Balance

As previously discussed, your annual leave balance now exceeds 35 days *[substitute 40 days for shift workers]* and you do not have an agreed leave management plan in place in Staff Services Online.

I advise that you have three (3) months from the date of this letter to reach agreement with me to take your excess annual leave. If a suitable leave plan is not in place within this time and evidenced by an approved leave of absence, via Staff Services Online, then in accordance with clause 4.1.7(b) of the Enterprise Agreement, you may be given notice to reduce your leave balance.

Please note, if the University's operational needs mean that your excess annual leave balance cannot be reduced to under 35 days by taking the leave within three (3) months of this communication, then we will need to resolve a leave plan which will set out the days on which the excess annual leave will be taken within 15 months of this communication. This leave plan will need to be entered and approved in Staff Services Online.

If there are any issues in relation to the scheduling of your excess leave I suggest that you make contact with me to discuss further (ext).

Yours sincerely

[Supervisor]

Cc: [staff file, records management office]

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REQUIREMENT TO TAKE ANNUAL LEAVE - TEMPLATE

Dear [Staff Member Name]

Re: Excessive Annual Leave Balance

On [insert date of earlier communication], I formally advised you that you were required to put in place an agreed plan to take your excess annual leave and reduce the balance to 35 days or less *[substitute 40 days for shift workers]*.

You have had three months' notice to put a leave management plan in place and have this entered and approved in Staff Services Online, but no plan is in place.

Consequently, in accordance with clause 4.1.7 of the Enterprise Agreement, I now give you notice that you are required to take your annual leave on the following days:

From [insert first date of leave] to [insert last day of leave] inclusive
(or as suitable to the University across more than one period of time).

As you would expect, during this period, you are not to report for work.

Please note that I will now enter this leave of absence in Staff Services Online on your behalf.

Should you wish to discuss these arrangements please contact me [insert extension].

Yours sincerely

[Supervisor]

Cc: Staff file, records management office

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NOTIFICATION OF EXCESSIVE LONG SERVICE LEAVE - TEMPLATE

Dear [Staff Member Name]

Re: Excessive Long Service Leave Balance

As previously discussed, your long service leave balance now exceeds 90 days and you do not have an agreed leave management plan in place in Staff Services Online.

I advise that you have six (6) months from the date of this letter to reach agreement with me to take your excess leave. If a suitable leave plan is not in place within this time and evidenced by approved leave of absence via Staff Services Online, then in accordance with clause 4.11.3(e) of the Enterprise Agreement, you may be given 6 months written notice to reduce your leave balance.

Please note, if the University's operational needs mean that your excess long service leave balance cannot be reduced to under 30 days (40 days for shift workers) by taking the leave within six (6) months from the date of this communication, then we will need to resolve a leave plan which will set out the days on which the excess annual leave will be taken within 30 months of the date of this communication. This leave plan will need to be entered and approved in Staff Services Online.

If there are any issues in relation to the scheduling of your excess leave I suggest that you make contact with me to discuss further (ext).

Yours sincerely

[Supervisor]

Cc: [staff file, records management office]

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REQUIREMENT TO TAKE LONG SERVICE LEAVE - TEMPLATE

Dear [Staff Member Name]

Re: Excessive Long Service Leave Balance

On [insert date of earlier communication], I formally advised you that you were required to put in place an agreed plan to take your excess long service leave and reduce the balance to 30 days or less *[substitute 40 days for shift workers]*.

You have now had six months' notice to put a plan in place and have this entered and approved in Staff Services Online, but no plan is in place.

Consequently, in accordance with clause 4.11.3(e) of the Enterprise Agreement, I now give you notice that you are required to take long service leave on the following days:

From [insert first date of leave] to [insert last day of leave] inclusive
(or as suitable to the University, across more than one period of time).

As you would expect, during this period, you are not to report for work.

Please note that I will now enter this leave of absence in Staff Services Online on your behalf.

Should you wish to discuss these arrangements please contact me [insert extension].

Yours sincerely

[Supervisor]

Cc: Staff file, records management office

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