

## ***Vacation Carryover Above the Allowable Maximums***

The CSU vacation accrual policy (Title 5) dictates forfeiture of vacation leave credits that exceed the allowable maximums on January 1. These maximums are based on the individual collective bargaining unit agreements and years of service for represented employees, and CSU policy for non-represented.

Below is information regarding the conditions when employees may be permitted to carry over vacation credits above the allowable maximums into the next calendar year. Also provided is a chart reflecting the maximum hours for carryover and the time limits during which employees must utilize the excess carryover.

### ***Conditions for Carryovers Above the Maximums***

All bargaining unit agreements, except Unit 8 (Police Officers), indicate an employee shall be permitted to carryover more than allowable credits when the employee was prevented from taking enough vacation to reduce the credits because the employee:

1. Was required to work as a result of fire, flood, or other extreme emergency;
2. Was assigned work of priority or critical nature over an extended period of time;
3. Was absent on full salary for compensable injury; or
4. Was prevented from using vacation previously scheduled to be taken in December because of being on paid sick leave.

The collective bargaining agreement for **Unit 8 (Police Officers)** does not provide a carryover provision. Therefore, no carryover of the maximum is allowed.

**Management Personnel Plan (MPP) and Confidential** employees may be authorized, based on operational circumstances that prohibited the use of sufficient vacation time within the calendar year. Approval shall be considered on a case-by-case basis. The excess carryover must be resolved no later than March 31<sup>st</sup>, per campus practice.

### ***Carry Over Maximums and Utilization Timelines***

Collective Bargaining Unit Identifier	Collective Bargaining Agreement Article Numbers	Maximum Hours for Carryover with Ten Years of Service or Less	Maximum Hours for Carryover with More than Ten Years of Service	Carryover Utilization Timeline
Physicians – Unit 1	22.2	272	384	March 31 <sup>st</sup>
CSUEU – Units 2, 5, 7 & 9	14.7, 14.10	320	440	June 30 <sup>th</sup>
Faculty – Unit 3	34.6, 34.7, 34.8	320	440	March 31 <sup>st</sup>
APC – Unit 4	26.7, 26.10, 26.11	320	440	June 30 <sup>th</sup>
SETC – Unit 6	16.2	272	384	March 31 <sup>st</sup>
SUPA – Unit 8	18.4	272	384	N/A
MPP		384	440	March 31 <sup>st</sup>
Confidential		384	440	March 31 <sup>st</sup>

### ***Procedures and Submittal Timeline for Authorizing Carryovers Above the Maximums***

To authorize an employee to have vacation carryover above the maximum, please submit a Year End Vacation Carry-Forward Request Form to Payroll Services. All overage must be resolved no later than March 31<sup>st</sup> or June 30<sup>th</sup>, dependent on employee group/bargaining unit. The request must include the signed approval of the HEERA manager and the division's vice president and be received by Payroll Services no later than January 31<sup>st</sup>.

## Year-End Vacation Carry-Forward Request

### Eligibility

Under the provisions of the certain Collective Bargaining Agreements and the Management Personnel Plan, an employee *may* be permitted to carry-over more than the allowable credits when the employee was prevented from taking enough vacation to reduce the credits due to one of the following reasons:

- Was required to work as a result of fire, flood, or other extreme emergency; or
- Was assigned work of priority or critical nature over an extended period of time; or
- Was absent on full salary for *compensable* injury; or
- Was prevented from using vacation previously scheduled to be taken in December because of being on paid sick leave.
- MPP and Confidential** – Based on operational circumstances was prohibited the use of sufficient vacation time during the calendar year, and requests for its use were denied.

### Instructions

- **Employee:** Complete Section I, check the appropriate box above, and submit the request form to your Dean/Director.
- **Dean/Director:** Complete Section II. If you recommend approval, sign and date the request form and forward it to the Vice President.
- **Vice President:** Complete Section III: Send the original to the Payroll Office, and a copy to the Dean/Director.

Section I - EMPLOYEE	
NAME: _____	BRONCO ID: _____
DEPARTMENT: _____	TOTAL HOURS TO BE CARRIED FORWARD: _____
<p>I understand that, if approved, the carry-over hours must be used within the following timeframe:</p> <ul style="list-style-type: none"> <li>· <b>Collective Bargaining Units 1 (Physicians), Unit 3 (Faculty) and Unit 6 (SETC):</b> Within the first quarter of the next calendar year (e.g. excess vacation credits on December 31<sup>st</sup> must be used by March 31<sup>st</sup> of the following year).</li> <li>· <b>Collective Bargaining Units 2, 5, 7 &amp; 9 (CSUEU) and Unit 4 (APC):</b> Within the second quarter of the next calendar year (e.g. excess vacation credits on December 31<sup>st</sup> must be used by June 30<sup>th</sup> of the following year).</li> <li>· <b>Management and Confidential:</b> Within the first quarter of the next calendar year (e.g. excess vacation credits on December 31<sup>st</sup> must be used by March 31<sup>st</sup> of the following year. (Education Code, Title 5 42726)</li> </ul>	
Employee Signature: _____	Date: _____
Section II – DEAN/DIRECTOR	
Approval Recommended: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Dean/Director Signature: _____	Date: _____
Section III – VICE PRESIDENT	
Approval Recommended: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Vice President Signature: _____	Date: _____
Section IV - PAYROLL	
AM Balance Adjustment: <input type="checkbox"/> Yes	Carry-Forward Taken: <input type="checkbox"/> Yes
Number of Hours Forfeited: _____	AM Balance Adjustment: <input type="checkbox"/> Yes <span style="float: right;">Payroll Tech: _____</span>