



How to Transfer Approved Carry-Over Vacation into Upcoming Academic Year

TARGET AUDIENCE: RTO ADMINISTRATORS Updated May 28, 2024





Obtaining Approval from Program

Trainees are encouraged to use all accrued vacation within their defined entitlement year. However, unforeseen circumstances that occur may warrant approval for current vacation balances to be carried over into the trainee's upcoming entitlement year.

Before RTO Administrators carry-over vacation, we recommend that they obtain approval from their Program Director.

Any remaining vacation balance approved for carry-over must be manually managed through the RTO Ledger by the RTO Administrator. **This process is not done automatically.**

• NOTE: As per PARO Guidelines, any unused professional leave and PARO Floating Holiday balances cannot be carried over.

Accessing the RTO Ledger

- 1. Navigate to "RTO Ledger" from the left-hand navigation menu.
- 2. Search for the specific learner to open the learner's ledger.
- 3. Turn on the "training session" filter to view the current entitlement year, as well as the entitlement year you wish to carry the remaining balance into.

For the purpose of this guide, I will outline how to carry over the remaining (7) days from 2023 -2024 into 2024 – 2025:

RTO	FACULTY OF HEALTH SCIENCE: MCMASTER UNIVERSITY	s									1	≙ ⊕ ≡
Cheyenne Reid												
n Home	🗮 RTO Ledger Dashboar	rd										
	Training Session:	2024 - 2025, 2023 - 2024			 Annive 	rsary Date: Any				~		
RTO Ledger	Learner Level:	Select			✓ Learne	r Program:Select				~		
🌄 Lookups 🛛 🖪	Learner:											
🍃 Settings 🔛										🙆 Add Record 😽	Export C Reset Search	Q Search
🌄 Admin 🛛 🖶	Training Session	Entitlement Year	Learner	Learner Program	C Learner	Vacation Entitlement	Vacation Remaining	Professional Leave Entitlement	Professional Leave Remaining	PARO Floating Holiday Entitlement	PARO Floating Holiday Remaining	Manual Entries
	2023 - 2024	01-Jul-2023 - 30-Jun-2024		Vascular Surgery	PGY1	20 🚯	7	7	2	1	1	٢
	2024 - 2025	01-Jul-2024 - 30-Jun-2025		Vascular Surgery	PGY1	20 🚯	20	7	7	1	1	0
	Showing 1 to 2 of 2 entries											ous 1 Next

Deducting (Debiting) the Unused Amount from Current Entitlement Year

First, the RTO Administrator must add a record to "debit" the (7) remaining days from 2023-2024 that will be carried over into 2024 – 2025:

1. Click "+ Add Record" button on the top right-hand side of the trainee's ledger:

💿 Add Record	Export C Reset Search	Q Search
PARO Floating Holiday Entitlement	PARO Floating Holiday Remaining	Manual Entries

- 2. A new window will open. Search for your learner and enter the following:
 - a. Request Type: Vacation





- b. Number of Days: -7
- c. Comment: enter anything you want here that can be referenced at any time.
 - Ie: moving approved 2023-2024 vacation carry-over into 2024-2025
- d. Post Date: IMPORTANT ensure that the post date falls within the year you are deducting the vacation from. In most cases, the current date is fine as many people carry over vacation in advance.
 - Ie: 28-May-2024
- e. Press "Save" button to save your changes

🖪 Add RTO Days			anaura this data falle within antitlement year year
Fields with * are required.			are deducting from (ie: May 28, 2024 wil dedeuct
Learner*		Post Date*: 28-May-2024	from 2023-2024)
Request Type*	. Vacation	✓	
Number of Days*	Ens	ure that you enter a "-" before	
Comment*:	moving approved 2023-2024 vacation carry over into 2024-2025	your number to deduct	
			🔚 Save 🖊 Back

Crediting the Unused Amount to the Upcoming Entitlement Year

Next, the RTO Administrator must add a record to carry over the (7) remaining days into 2024 – 2025.

1. Click "+ Add Record" button on the top right-hand side of the trainee's ledger:



- 3. A new window will open. Search for your learner and enter the following:
 - a. Request Type: Vacation
 - b. Number of Days: 7
 - c. Comment: enter anything you want here that can be referenced at any time.
 - Ie: approved carry over from 2023-2024 entitlement year
 - d. Post Date: IMPORTANT ensure that the post date falls within the year you are carrying over into.
 - le: July 1, 2024
 - e. Press "Save" button to save your changes

🖪 Add RTO Days		
Fields with * are required.		
Learner*:		Post Date*: 01-Jul-2024 ensure that the post date falls within
Request Type*:	Vacation V	the entitlement year you are carrying over into
Number of Days*:	7	
Comment*:	approved carry over from 2023-2024 academic year	
		🔚 Save 🖕 Back





Viewing your Manual Entries

Once this records are added, you will notice that the "Vacation Remaining" balance for 2023-2024 now reflects "0", and the 2024-2025 balance now reflects "27".

• NOTE: the "Vacation Entitlement" column will remain unchanged (typically, "20") as entitlement is directly correlated with the training lines entered into MedSIS.

Training Session	Entitlement Year	Learner	Learner Program	Learner Level	Vacation Entitlement	Vacation Remaining	Professional Leave Entitlement	Professional Leave Remaining	PARO Floating Holiday Entitlement	PARO Floating Holiday Remaining
2023 - 2024	01-Jul-2023 - 30-Jun-2024	Abu Yousef, Yazan	Vascular Surgery	PGY1	20 🚯	0	7	2	1	1
2024 - 2025	01-Jul-2024 - 30-Jun-2025	Abu Yousef, Yazan	Vascular Surgery	PGY1	20 🚯	27	7	7	1	1

To view your manual entries, click on the blue "hyperlinked" trainee name to open up each respective ledger:

a. 2023 – 2024:

Training Session	Entitlement Year	Learner	Learner Program	Learner	Vaca Enti	ation tlement 🔿	Vacation Remaining	Professional Leave Entitlement	Professional Leave Remaining	PARO Floating Holiday Entitlement	PARO Floating Holiday Remaining	Manual Entries
2023 - 2024	01-Jul-2023 - 30-Jun-2024		Vascular Surgery	PGY1	20	click blu	e "hyperlinked	" trainee	2	1	1	0
2024 - 2025	01-Jul-2024 - 30-Jun-2025		Vascular Surgery	PGY1	20	name to	view 2023-202	4 ledger	7	1	1	0

				01-Ju	I-2023 - 30-Jun-2024				
Request Type:	Select				Vacation Days Entitlem	ent 20	Vacation Days Remaining: 0		
					Professional Leave Entitlem	ent: 7	Professional Leave Remaining: 2		
					PARO Holiday Entitlem	ent: 1	PARO Holiday Remaining: 1		
					Lieu Di	ays: -4	Sick Days: 0		
							Export	C Reset Search	
raining Session	Request Type	Request	Start Date	C End Date	O Number of Days	Submitted By	Posted Date	Comment	
023 - 2024	Professional Leave	61969	07-Sep-2023	10-Sep-2023	-2		15-Aug-2023		
023 - 2024	Off Call	65499	13-Jan-2024	14-Jan-2024	0		18-Sep-2023		
023 - 2024	Off Call	65498	20-Jan-2024 Comm	nents					
023 - 2024	Vacation	65492	24-Oct-2023	Comments					
023 - 2024	Lieu Day	67022	23-Oct-2023	Commonto.	== Cheyenne Reid @28-May-2024 11:0/am ==				
023 - 2024	Lieu Day	67026	21-Nov-2023		moving approved 2023-2024 vacat	ion carry over into 2024-2025			
023 - 2024	Off Call	68349	16-Dec-2023						
023 - 2024	Vacation	71308	17-Feb-2024					🖕 Back	
023 - 2024	Vacation	71310	14-Feb-2024						
023 - 2024	Vacation	73155	14-Mar-2024	15-Mar-2024	-2		16-Feb-2024		
023 - 2024	Vacation	73156	04-Apr-2024	08-Apr-2024	-3	100			
023 - 2024	Vacation	73622	16-Apr-2024	22-Apr-2024	-5	click on "com	ment" bubble to view		
023 - 2024	Lieu Day	75962	03-Apr-2024	03-Apr-2024	-1	1000	notes		
023 - 2024	Vacation	75374	23-May-2024	26-May-2024	-2		24-Apr 2024		
023 - 2024	Professional Leave	75657	21-Jun-2024	23-Jun-2024	-1		25-May-2024		
023 - 2024	Professional Leave	75658	27-Jun-2024	30-Jun-2024	-2		25-May-2024		
023 - 2024	Vacation				-7	Reid Chevenne	28.May-2024		

b. 2024 – 2025:

Training Session	Entitlement Year	Learner	Learner Program	Learner Level	Vac Enti	ation	Vacation Remaining	Professional Leave Entitlement	Professional Leave Remaining	PARO Floating Holiday Entitlement	PARO Floating Holiday Remaining	Manual Entries
2023 - 2024	01-Jul-2023 - 30-Jun-2024		Vascular Surgery	PGY1	20	click blu	e "hyperlinked	'' trainee	2	1	1	0
2024 - 2025	01-Jul-2024 - 30-Jun-2025		Vascular Surgery	PGY1	20	name to	view 2024-202	5 ledger	7	1	1	0





🗮 RTO Ledger Detail									
					2024 - 2025	can Alise Younad			
					01-Jul-2024 - 3	30-Jun-2025			
Request Type:	Select				~	Vacation Days Entitlement: 20	Vac	ation Days Remaining: 27	
						Professional Leave Entitlement: 7	Professio	onal Leave Remaining: 7	
						PARO Holiday Entitlement: 1	click "comment" hubble	Holiday Remaining: 1	
						Lieu Days: 0	to view notes	Sick Days: 0	
								Export	C Reset Search Q Search
Training Session		Request Type	Request	🛇 Start Date	🔆 End Date	Number of Days	Submitted By	Posted Date	Comment
2024 - 2025		Vacation	-			7	Reid, Cheyenne	01-Jul-2024	
Showing 1 to 1 of 1 entries			Comments					×	Previous 1 N
			Comments	== Cheyenne Reid @28-M approved carry over fr	ay-2024 11:22am == om 2023-2024 academic y	/ear			
							•	Back	

QUESTIONS?

If you have any questions or difficulties with this process, please submit a help ticket.

• To submit a ticket, please visit <u>medsishelp.mcmaster.ca</u>.