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:

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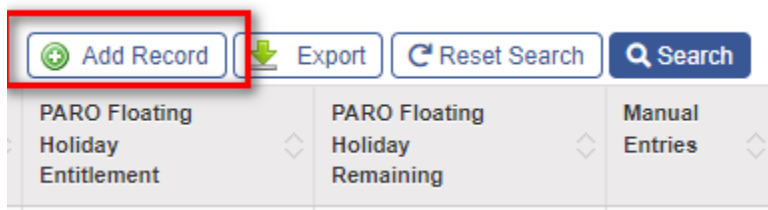
2. A new window will open. Search for your learner and enter the following:
   a. Request Type: *Vacation*

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

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.
   ▪ Ie: *July 1, 2024*
e. Press "Save" button to save your changes

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 Level	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			2	1	1	✔
2024 - 2025	01-Jul-2024 - 30-Jun-2025		Vascular Surgery	PGY1	20			7	1	1	✔

click blue "hyperlinked" trainee name to view 2023-2024 ledger

01-Jul-2023 - 30-Jun-2024

Request Type: --Select--

Vacation Days Entitlement:	20	Vacation Days Remaining:	0
Professional Leave Entitlement:	7	Professional Leave Remaining:	2
PARO Holiday Entitlement:	1	PARO Holiday Remaining:	1
Lieu Days:	-4	Sick Days:	0

[Export] [Reset Search] [Search]

Training Session	Request Type	Request	Start Date	End Date	Number of Days	Submitted By	Posted Date	Comment
2023 - 2024	Professional Leave	61969	07-Sep-2023	10-Sep-2023	-2		15-Aug-2023	
2023 - 2024	Off Call	65499	13-Jan-2024	14-Jan-2024	0		18-Sep-2023	
2023 - 2024	Off Call	65498	20-Jan-2024					
2023 - 2024	Vacation	65492	24-Oct-2023					
2023 - 2024	Lieu Day	67022	23-Oct-2023					
2023 - 2024	Lieu Day	67026	21-Nov-2023					
2023 - 2024	Off Call	68349	16-Dec-2023					
2023 - 2024	Vacation	71308	17-Feb-2024					
2023 - 2024	Vacation	71310	14-Feb-2024					
2023 - 2024	Vacation	73155	14-Mar-2024	15-Mar-2024	-2		16-Feb-2024	
2023 - 2024	Vacation	73156	04-Apr-2024	08-Apr-2024	-3			
2023 - 2024	Vacation	73622	16-Apr-2024	22-Apr-2024	-5			
2023 - 2024	Lieu Day	75962	03-Apr-2024	03-Apr-2024	-1			
2023 - 2024	Vacation	75374	23-May-2024	26-May-2024	-2			
2023 - 2024	Professional Leave	75657	21-Jun-2024	23-Jun-2024	-1		25-May-2024	
2023 - 2024	Professional Leave	75658	27-Jun-2024	30-Jun-2024	-2		25-May-2024	
2023 - 2024	Vacation	--			-7	Reid, Cheyenne	28-May-2024	💬

Comments

Comments: == Cheyenne Reid @28-May-2024 11:07am ==
moving approved 2023-2024 vacation carry over into 2024-2025

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click on "comment" bubble to view notes

Showing 1 to 18 of 18 entries   [Previous] [1] [Next]

b. **2024 – 2025:**

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	Manual Entries
2023 - 2024	01-Jul-2023 - 30-Jun-2024		Vascular Surgery	PGY1	20			2	1	1	✔
2024 - 2025	01-Jul-2024 - 30-Jun-2025		Vascular Surgery	PGY1	20			7	1	1	✔

click blue "hyperlinked" trainee name to view 2024-2025 ledger

QUESTIONS?

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

- To submit a ticket, please visit medsishelp.mcmaster.ca.