

<b>HUMAN RESOURCES MEMORANDUM 09-010</b>		DATE ISSUED: 04/22/2009
SUBJECT: <b>VACATION/ANNUAL LEAVE OVER MAXIMUM</b>		REFERENCE: None
TO: Managers, Supervisors, Personnel Liaisons, and Attendance Clerks		SUPERCEDES: None

**PLEASE ENSURE THAT THIS INFORMATION IS SHARED WITH YOUR EMPLOYEES**

**Purpose**

The purpose of this Human Resources (HR) Memorandum is to provide a list of employees whose leave balances are projected to exceed the maximum balance allowed and to provide employees, managers, and supervisors with information on how to reduce the exceeded balances.

**Who is Affected**

Attached is a listing provided by the State Controller's Office (SCO) which indicates employees whose balances are over the maximum as of January 1, 2009.

**Action Needed**

Each employee should request annual leave/vacation leave time off during the calendar year to ensure they do not exceed maximum balance allowed.

If an employee does not request sufficient annual leave or vacation time off during the calendar year and will exceed the maximum allowed, the manager or supervisor should develop a schedule with the employee to liquidate the excess balance.

The Division, Branch, Office or Agency Executive is delegated to approve annual leave/vacation carryover for their employees. The maximums allowed are:

- Annual Leave - 640 hours
- Vacation – 640 hours

**Budgetary Impact**

Division, Branch, Office or Client Agency Executives, managers and supervisors should be aware that when an employee separates from State service by retiring or resigning, a lump sum payment is made to the employee for any unused compensable leave credit balances.

The compensable leave credits include:

- Annual Leave/Vacation
- Compensating Time Off (CTO)
- Personal Leave
- Personal Holiday
- Holiday Credit
- Excess
- Sick Leave – when the employee was on worker's compensation, has been approved for a disability retirement and has been determined to be permanent and stationary by Worker's Compensation.

## **Lump Sum Projection**

When lump sum payments are made, the time to be paid off is projected in the vacant position until the balances equal zero. The projection of any lump sum payment will encumber the position until the leave is exhausted, unless the employee is paid from blanket funds.

For this reason, the manager or supervisor should attempt to keep employees' annual leave/vacation carry over to no higher than the maximum limit.

Allowing employees to exceed the maximum limit may result in not being able to refill the position until the projection is completed.

## **Approval**

The Office Chief or Agency Executive may approve the annual leave/vacation carry over for their staff only.

- Requests for annual leave/vacation carry over for the Department of General Services (DGS) Office Chiefs are to be directed to the appropriate Deputy Director.
- Requests for annual leave/vacation carry over for the DGS Deputy Directors are to be directed to the DGS Chief Deputy Director.
- Requests for annual leave/vacation carry over for the DGS Chief Deputy Director is to be directed to the Director of DGS.
- Requests for Client Agency Executives are to be directed to their respective Agency Secretary or Board or Commission Chairperson.

## **Contact**

Questions regarding this HR memorandum should be directed to your assigned Personnel Analyst.

/s/

MARIA J. LOPEZ, Manager  
Personnel Operations

MJL/kits

Cc: OHR STAFF