Calculation of Prorated Remaining Vacation

General

When does this correction entry become necessary?

1. When an employee switches from full-time to part-time or vice versa

2. When time tracking is activated for an employee who was already working at the company before (beyond the vacation allotment cut-off date)

When a new employee joins, it must be decided whether it should be possible to evaluate the prorated remaining vacation balance during the year. It may also be necessary to display the prorated remaining vacation when an employee leaves during the year. For these two cases, logic has been implemented in the system that must be parameterized, as shown in the following examples.

> NOTIZ
>
> **Note**: if no evaluation of the **prorated** remaining vacation balance is needed, the following steps do *not* have to be carried out.

The calculated values are entered via the **correction client** (found under Administration - Time management). A detailed description of how to enter these values can be found at the end of this document: Entry in the correction client[1]

Examples

Initial situation:

Start date of time tracking (creation of the user in Personalwolke): February 1, 2024

Vacation cut-off date (date on which the annual vacation is credited): every January 1

At the time time tracking starts for the employee, the employee has 5 remaining vacation days from the previous year (= unused vacation entitlement). As of January 1, 2023, 25 days were automatically added to the employee's vacation allotment. The total vacation entitlement is therefore 30 days (see the following table).

Example 1: By the time time tracking starts, the employee has already consumed 6 vacation days. These are now, on the one hand, applied to the remaining vacation of the previous year, and on the other hand, the consumption not covered by the remaining vacation is deducted from the vacation allotment of the current year.
That is, these 6 vacation days are covered by the 5 remaining vacation days from 2023 on the one hand, and on the other hand 1 day is already deducted from the new vacation allotment from 2024.

The remaining vacation from 2023 is therefore completely used up and 24 days of the entitlement from 2024 remain (see the following table).

Explanation of the table contents:

- **Row 1**
  The remaining vacation - that is, vacation the employee has not used up - from the year 2023 (previous year) is 5 days. It is carried over unchanged to the next year.
- **Row 2 - Row 4**
  On the vacation cut-off date, here December 1, 2023, the new annual vacation / **remaining vacation** (25 days) is added to the **remaining vacation previous year** (5 days). This results in the **total remaining vacation** (30 days).

- **Row 5 - Row 8**
  On July 1, 2024, the employee had already taken 6 vacation days. When vacation days are consumed, they are first deducted from the **remaining vacation previous year** before the current **remaining vacation** is reduced.
  As shown in row 1, 5 vacation days are left from the previous year. After deducting the 6 vacation days taken, the **remaining vacation previous year** is used up and one day more was even consumed, which as a result has to be deducted from the **remaining vacation** of the current year.
- **Row 9 - Row 11**
  The current **remaining vacation** (25 days) is now reduced by the **remaining vacation previous year** result. Since the remaining vacation previous year result is negative in this case (-1), the new balance (on July 1, 2024) is 24 days.
- **Row 12**
  The number of days from December 1, 2023 to July 1, 2024 is 214.

Example 2:

By the time time tracking starts, the employee has already consumed 4 vacation days. These are now applied to the remaining vacation of the previous year. Of the 5 remaining vacation days from 2023, 1 day is left. It is added to the new vacation allotment from 2024.
The employee therefore has 26 vacation days still available for the current year (see the following table).

Explanation of the table contents:

- **Row 1**
  The remaining vacation - that is, vacation the employee has not used up - from the year 2023 (previous year) is 5 days. It is carried over unchanged to the next year.
- **Row 2 - Row 4**
  On the vacation cut-off date, here December 1, 2023, the new annual vacation / **remaining vacation** (25 days) is added to the **remaining vacation previous year** (5 days). This results in the **total remaining vacation** (30 days).
- **Row 5 - Row 8**
  On July 1, 2024, the employee had already taken 4 vacation days. When vacation days are consumed, they are first deducted from the **remaining vacation previous year** before the current **remaining vacation** is reduced.
  As shown in row 1, 5 vacation days are left from the previous year. After deducting the 4 vacation days taken, 1 day of the remaining vacation of the previous year is left.
- **Row 9 - Row 11**
  The current **remaining vacation** (25 days) is now increased by the **remaining vacation previous year** result. Since the remaining vacation previous year result is positive in this case (+1), the new balance (on July 1, 2024) is 26 days.
- **Row 12**
  The number of days from December 1, 2023 to July 1, 2024 is 214.

Example 3:

By the time time tracking starts, the employee has already consumed 22 vacation days.
The 5 remaining vacation days from 2023 are used to cover them. 17 consumed days remain, which are deducted from the new vacation allotment from 2023.
At the time time tracking starts, the employee therefore has 8 days of remaining vacation left (see the following table)

These are now applied to the remaining vacation of the previous year. Of the 5 remaining vacation days from 2023, 1 day is left. It is added to the new vacation allotment from 2024.

The employee therefore has 26 vacation days still available for the current year (see the following table).

Explanation of the table contents:

- **Row 1**
  The remaining vacation - that is, vacation the employee has not used up - from the year 2023 (previous year) is 5 days. It is carried over unchanged to the next year.
- **Row 2 - Row 4**
  On the vacation cut-off date, here December 1, 2023, the new annual vacation / **remaining vacation** (25 days) is added to the **remaining vacation previous year** (5 days). This results in the **total remaining vacation** (30 days).
- **Row 5 - Row 8**
  On July 1, 2024, the employee had already taken 22 vacation days. When vacation days are consumed, they are first deducted from the **remaining vacation previous year** before the current **remaining vacation** is reduced.
  As shown in row 1, 5 vacation days are left from the previous year. After deducting the 22 vacation days taken, the **remaining vacation previous year** is used up and 17 days more were even consumed, which as a result have to be deducted from the **remaining vacation** of the current year.
- **Row 9 - Row 11**
  The current **remaining vacation** (25 days) is now reduced by the **remaining vacation previous year** result. Since the remaining vacation previous year result is negative in this case (-17), the new balance (on July 1, 2024) is 8 days.
- **Row 12**
  The number of days from December 1, 2023 to July 1, 2024 is 214.

Entry in the correction client

How is the entry made?

The correction client is designed so that all entries regarding vacation always refer to the year in which the date selected above falls.
That means that if you want to change the remaining vacation figure for the year 2024, a date (the year-end) of the year 2024 must be selected.
This has the advantage that it is possible to specify the remaining vacation precisely as of a cut-off date.

The correction is made by editing the field "Remaining vacation current year" (red arrow). Clicking the edit icon (pencil) enables entry.

Using an absolute correction (=24), you enter here the number of vacation days the employee is still entitled to in the current year. This value is highlighted in light blue in the respective tables of the examples (*row 11*). How this number is arrived at is discussed in the three examples above under the respective items "**Row 9 - Row 11**".

The calculated prorated remaining vacation is displayed from the day after the correction in the row **Total remaining vacation prorated** (green arrow).