Vacation calculation

NOTIZ

The German screenshots used in this chapter will be replaced by English ones as soon as possible!

Overview

In the following you will recieve information about:

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- Alternativ yearly entitlement day[3]
- Entitlement days or hours[4]
- Entitlement yearly[5]
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VACATION ENTITLEMENT

Addtion of the anual entitlement

It is absolutely necessary to make a selection here for the enumeration date!

The following are available for selection

- **Entryday**
- **Calender Year**

Only in absolutely exceptional cases should another day be used. If there is a need for an alternative enumeration date, this must be entered under "Alternate yearly entitlement day"**. However, this should only be the exception!**

Entitlement (yearly)

Here, the anount of the vacation entitlement (in days or hours) is specified, which the respective employee is entitled to in a full year.

Entitlement in days or hours?

Here the selection is made whether the vacation entitlement specified under "Entitlement (yearly.)" is credited in **days or hours** per year.

Option	description
Days	Vacation entitlement is evaluated in days per year
Houers	Vacation entitlement is evaluated in hours per year

Special claim

Here, the special leave entitlement per year can be entered for the person in question. These special leave days are used, for example, in the event of a wedding, relocation, death or the partner giving birth to a child.

value	unit
numerical	days/hours per year

ALIQUOTATON

Aliquotation method in entry year

Basically, a distinction must be made as to whether the entry occurred in the first half of the year (01.01. - 30.06.) or in the second half of the year (01.07. - 31.12.).

Entry in the first half-year (01.01. - 30.06.)
The complete vacation entitlement is distributed proportionally over the first six months using the following formula.
(Holiday entitlement / number of days in the year) * days from entry date = current vacation entitlement rounded up to whole days.

In the sixth month, the remaining vacation entitlement is added to the remaining vacation account.

Entry in the second half of the year (01.07. - 31.12.)
In this case, the entitlement is first aliquoted. Then the vacation is divided and credited in the first six months in the current and new vacation year:

1. first, the vacation entitlement is calculated on an aliquot basis:
*(vacation entitlement / number of days in the year) * (12/31 - entry date) = aliquot vacation entitlement [rounded up to whole days].*

2. division of vacation entitlement in the first six months up to 31.12.
The vacation entitlement is credited to the remaining vacation account according to the following formula:
*(vacation entitlement / number of days in year) * days from entry date = current vacation entitlement [rounded up to whole days].*
In the sixth month, the remaining vacation entitlement is credited to the remaining vacation account.

3. at the beginning of the new vacation year, the vacation entitlement is credited until the six months are reached as of the last day of the year:
*(full vacation entitlement / number of days in the year) * days from 01.01. = current vacation entitlement [rounded up to whole days].*

Partial aliquotation in case of resignation or reasons such as parental leave

If the employee leaves, the entitlement in the leaving year is also reduced.

In order to ensure this, there is a checkbox "**Aliquotqation leave and e.g. parental leave**". This checkbox is deactivated in the default setting.

If such a factoring should be applied in the organization, the checkbox must be set here!

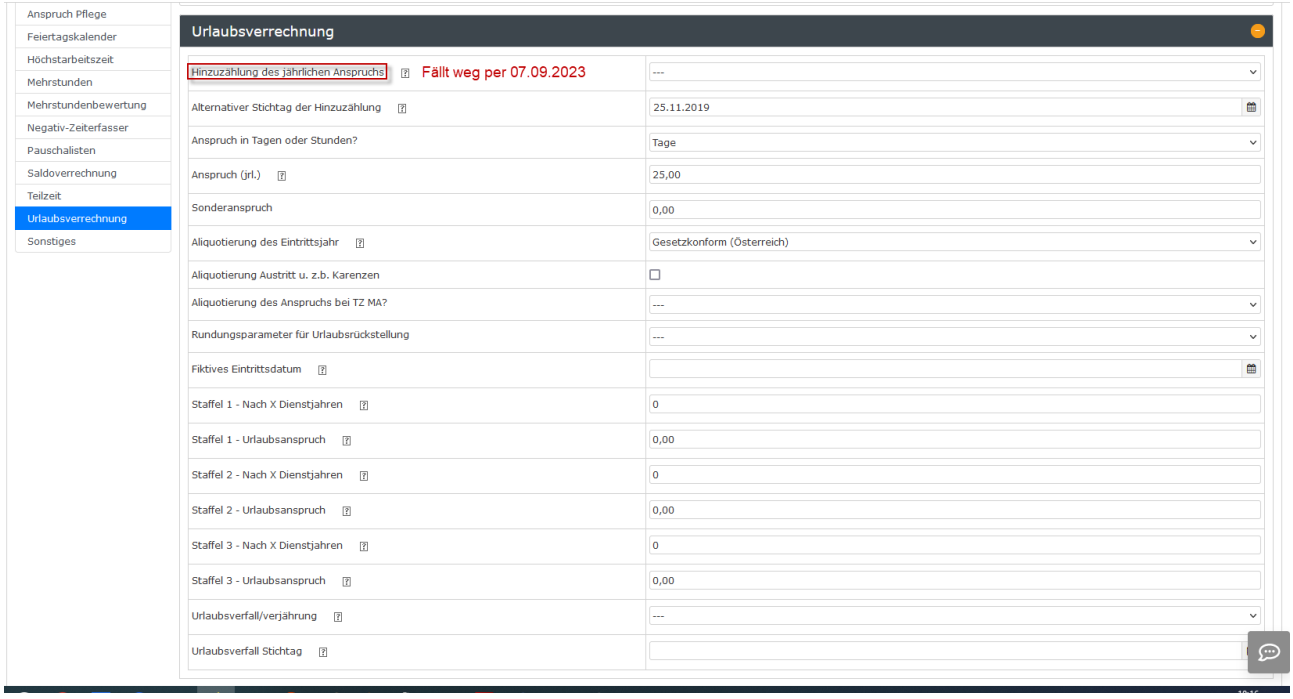
*(Vacation entitlement / days in year * days from start of leave year to leaving date) = new entitlement [Result is not rounded!]*

Aliquoting in the case of erroneous reasons such as parental leave

Here, too, the activation of the checkbox "**Aliquotqation leave and e.g. parental leave**" has an effect.
As soon as the corresponding absences are entered for the employee (exclusively via 'from - to date' and not via subsequent absence reason), the days without the absence reason are determined for the respective leave year.

Then the vacation entitlement for that year is reduced using the following formula:

*(lVacation entitlement / days in year * days without reason for error in the respective leave year) = new entitlement [result is rounded up].*
The **new aliquotation variant as of 07.09.2023**. determines according to which type the vacation entitlement is factored in the case of entry and exit



The type of vacation calculation is also an influencing factor; this is determined under "Vacation calculation: yearly entitlement"[16]:

- For "Calendar date" the 01.01. of the year counts for the calculation of the vacation entitlement.
- For "Entry date" the exact entry date counts for the calculation of the vacation entitlement.

Parameter in Personalwolke	Description
No	Vacation calculation with calendar year: no factoring in the event of entry during the year, vacation entitlement only at the beginning of the next calendar year

	Vacation calculation with entry date: no factoring, addition of the entire annual entitlement on the entry date.
legal standard (Austria)	**Entry in the first six months (01.01. - 30.06.)** The complete vacation entitlement is distributed proportionally over the first six months using the following formula. *(Vacation entitlement / number of days in the year) * days from entry date = current vacation entitlement [rounded up to whole days].* In the sixth month, the remaining vacation entitlement is added to the remaining vacation account. **Entry in the second half of the year (01.07. - 31.12.)** In this case, the entitlement is first aliquoted. Then the vacation is divided and credited in the first six months in the current and new vacation year: 1. first, the vacation entitlement is calculated on an aliquot basis: *(vacation entitlement / number of days in the year) * (12/31 - entry date) = aliquot vacation entitlement [rounded up to whole days].* 2. division of vacation entitlement in the first six months up to 31.12. The vacation entitlement is credited to the remaining vacation account according to the following formula: (*vacation entitlement / number of days in year) * days from entry date = current vacation entitlement [rounded up to whole days].* In the sixth month, the remaining vacation entitlement is credited to the remaining vacation account. 3. at the beginning of the new vacation year, the vacation entitlement is credited until the six months are reached as of the last day of the year: *(full vacation entitlement / number of days in the year) * days from 01.01. = current vacation entitlement [rounded up to whole days].*
Aliquot	**Entry in the first six months (01.01. - 30.06.))** In this variant, the vacation entitlement is always calculated on a pro rata basis, unless the employee joins the company on January 1 of the year. 1. First, the vacation entitlement is calculated on a pro rata basis:

	*(vacation entitlement / number of days in the year) * (31.12. - entry date) = aliquot vacation entitlement [rounded up to whole days].* 2. Breakdown of vacation entitlement in the first 6 months As of the last day of the year, the vacation entitlement is credited to the remaining vacation account according to the following formula: *(vacation entitlement / number of days in the year) * days from entry date = current vacation entitlement [rounded up to whole days].* In the sixth month, the remaining vacation entitlement is credited to the remaining vacation account. **Entry in the second half of the year (01.07. - 31.12.)** Also in this case, the entitlement is first aliquoted. After that, the leave is divided and credited in the first six months in current and new leave year: 1. First, the vacation entitlement is calculated aliquot: *(vacation entitlement / number of days in the year) * (31.12. - entry date) = aliquot vacation entitlement rounded up to whole days.* 2. Breakdown of vacation entitlement in the first 6 months up to 31.12. As of the last day of the year, the vacation entitlement is credited to the remaining vacation account according to the following formula: *(vacation entitlement / number of days in year) * days from entry date = current vacation entitlement [rounded up to whole days].* In the sixth month, the remaining vacation entitlement is credited to the remaining vacation account. 3. At the start of the new vacation year, the vacation entitlement is credited until the six months are reached as of the last day of the year: *(full vacation entitlement / number of days in year) * days from Jan. 1 = current vacation entitlement [rounded up to whole days].* In the sixth month, the remaining vacation entitlement is credited to the remaining vacation account.
Aliquot part time	Is usually only relevant for municipalities. Here, the remaining leave is automatically factored when the weekly hours are changed. The remaining leave • increases, if the weekly hours increase

	• decreases if the weekly hours are reduced

Aliquotation of the entitlement with part time employees - Aliquotation when changing time models

If an employee changes the time model and the number of working days changes as a result, the following accounts are converted on the basis of the old working days and the new working days:

- *Current entitlement / current number of working days * new number of working days = new entitlement*
- *Remaining leave current year / current number of working days * new number of working days = new remaining leave current year*
- *Remaining leave previous year / current number of working days * new number of working days = new remaining leave previous year*
- *Remaining leave previous year / current number of working days * new number of working days = new remaining leave previous year*

Parameter in Personalwolke	Description
No	no aliquotation
Part-time according to weekly hours in the weekly program	calculation according to "Aliquot part time[17]"
art-time according to working days in the weekly program	The calculation is based on the formulas of "Aliquotation in case of resignation or reasons as parantal leave"[18]
Part-time factor	calculation according to "Aliquot part time[19]"

Rounding parameter of the vacation accrual

Here it is determined according to which method the factoring of the remaining vacation of an employee is to be calculated.

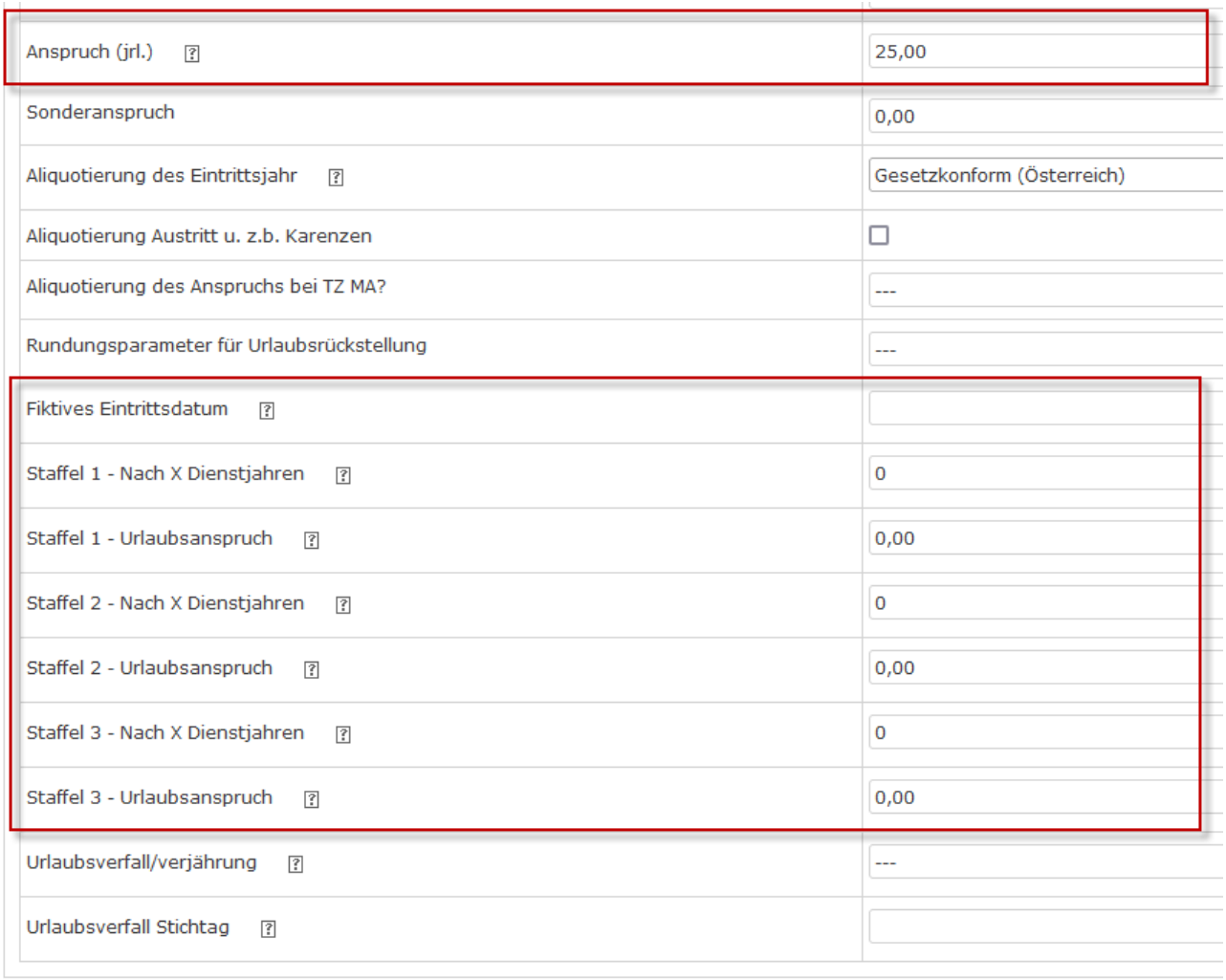
"**Shadow account**"

For vacation accrual, an aliquot remaining vacation balance is required. The system provides a "shadow account" on which a leaving factoring is performed for each day in the past. Per parameter it can be defined for the employee whether the result should be rounded or not.

option	description
Daily/Rounded upper bound (standard)	The vacation is calculated exactly according to the number of days and rounded up in the process
Daily/not rounded	Vacation is calculated exactly according to the number of days and rounded down
Monthly/not rounded	Vacation is calculated according to the remaining months in the company and rounded down in the process

VACATION STAGGING

The following parameters (marked in red) are relevant for this topic in Personalwolke.



Fictitious entry date

The fictional entry date is used to calculate the correct leave entitlement in terms of years of service (according to the scale). Since a certain number of years of service, school or university periods can be credited, the fictitious entry date is calculated to determine the position in the scale, regardless of the actual entry date. If no fictitious entry date is entered, no step change will occur.

value	unit
Datum	Day and month two digits, year four digits (DD.MM.YYYY) or use calendar

Levels and Entitlement

Level 1 (2/3/4) - after X years of working

In the Personalwolke, it is possible to define up to 4 different values for vacation entitlement per employee in a scale. Here, it is possible to specify after how many creditable years of service the person moves up to scale 1 and is thus entitled to more vacation entitlement.

value	unit
numerical	Number of years of service from which the 1st (2nd/3rd/4th) squadron is active

Level 1 (2/3/4) - Vacation entitlement

Here, the (increased) vacation entitlement provided for level 1 (2/3/4) is defined in days per year. After the predefined number of years of service has been completed, the vacation entitlement is automatically increased to this value.

value	unit
numerical	vacation entitlement per year in the 1st (2nd/3rd/4th) level

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The settings for level 2, 3 and 4 behave exactly the same as those for level 1, the number of necessary years of service and the new (increased) vacation entitlement are entered in each case.

Example

The collective agreement of a bank stipulates that the vacation entitlement is 30 days from the 20th year of service.

The entry looks like this:



The Bank's collective bargaining agreement stipulates that periods of prior service at other banks must also be included in these years of service.

Employee Charon joined the company in April 2022, but has already "brought along" 18 years of prior service at another banking institution. Therefore, to ensure her rightful vacation entitlement after 20 years of service, the fictitious entry date is set so that, after completing 20 years of service (18 years of service with the previous employer + 2 years of service with the current employer), she actually has 30 vacation days per year.

The following dates are important for correct recording:

- Start of service with the previous employer
- End of service with previous employer
- Creditable years of service with the previous employer (taking into account absences according to the collective agreement).

In the example, these are

- Start of service with current employer: 01.04.2022
- Start of service with previous employer: 01.03.2004
- End of service with previous employer: 01.02.2022
- Period of service: 17 years, 1 month
- Deductions: 1 year, 1 month maternity leave
- Creditable years of service at end of service: 16 years

These 16 years must be taken into account when entering the fictitious entry date.

The fictitious entry date is therefore: 01.04.2006

Date from which the 20 years of service are completed: 01.04.2026



VACATION EXPIRATION AND EXPIRATION DATE

Here the day in the year is defined on which the leave entitlement is credited to the remaining leave account. This setting also influences the behavior of the "Aliquot allocation in the year of entry" option. In addition, this cut-off date is also used to credit the entitlement for care/special leave.

- In case of allocation with **calendar year**, 1.1. should be entered here -> the leave entitlement will then be credited to the remaining leave account on 1.1. of each year. However, any other date can be defined for crediting the leave.
- In case of allocation with **entry date**, the entry date should be entered here -> the leave entitlement will then be credited to the remaining leave account annually on the anniversary of the entry date.

The respective entry is made in the field "Add annual entitlement".
If no selection option is suitable, there is the possibility of a date entry via the field "Alternative key date of the addition"..

> WARNUNG
> If no value is entered in this field, then no vacation will be credited!

value	description
Calendar year	offset against calendar year: 01.01.YYYY
entry dateEintrittsdatum	offset against entry year: DD.MM.YYYY

According to Austrian vacation law, an employee may take a maximum of 3 full years' vacation with him. If this threshold is exceeded, the oldest vacation entitlement expires after this time ("first in/first out" principle). Here, you can specify whether Personalwolke should automatically implement this rule. In addition, in the case of an earlier expiry of vacation days, a cut-off date can also be specified (explained above)

option	description
Yes	If the threshold of 3 years is exceeded, the oldest remaining vacation taken before this time is forfeited
No	If the threshold of 3 years is exceeded, the excess remaining vaction is NOT automatically forfeited
Reference date, vacation expiration DE	the leave entitlement from the previous year expires on the date selected under "Expiration date"

If the option "Key date, vacation expiry DE" has been selected in the setting "Vacation expiry/statute of limitations" mentioned below, any key date can be selected here on which the remaining vacation entitlement of the past year is to expire.

value	description
date	Form: DD.MM.YYYY - on this date (cut-off date), the remaining leave from the previous year automatically expires

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Example

Initial situation - Variant vacation expiraton date Germany:

- On 31.12. the employee has a (remaining) vacation of 5 days.
- On 1.1. the employee gets his new vacation in the amount of 25 days.
- The employee has vacation from 3.2. to 5.2.
- The cut-off date for the expiry of vacation is 31.3.

Date	vacation consumed	vacation actual year	vacation last year	vacation expiration
31.12.		5	0	0
01.01.		25	5	0
03.02.	1	25	4	0
04.02.	1	25	3	0
05.02	1	25	2	0
31.03.		25	0	2

The three vacation days in the current year are first deducted from the remaining vacation from the previous year until it is used up. On the cut-off date (31.03.), the unused remaining vacation from the previous year is then forfeited. If a vacation day is requested on the key date, it will be deducted from the remaining vacation before it expires (in the example above, this means that if another vacation day had been entered on 31.03., only 1 vacation day would have expired and not 2).
