

Monitoring of annual leave taken

This is a checklist intended as an aid in following up that employees have taken annual leave during the year. Each organisation is to document how this is monitored and explain any discrepancies. Use this checklist to document your monitoring by entering the date on which you followed up.

In this checklist, we go through what you need to be aware of as well as how and when you should follow up. There is a list of the most common concepts and how you should interpret them at the end of the checklist.

[Read more about dealing with annual leave on the HR website](#)

[Read more about annual leave for teaching staff on the HR website](#)

YEARLY CYCLE FOR ANNUAL LEAVE

[Yearly cycle for the scheduling of annual leave, teaching staff](#)

[Yearly cycle for the scheduling of annual leave, technical and administrative staff](#)

REMEMBER!

In order to ensure correct handling of annual leave, several steps must be completed. Do this for the current year using the report "Semesterstatus" (Annual leave status) in Primula's report generator.

The report works on the assumption that annual leave must be taken as leave, and that the entire year's annual leave is scheduled during the year. Only employees entitled to more than 20 paid days of annual leave in a calendar year may carry over one or more of those remaining days to a subsequent year. This also applies to new employees. An employee can have a maximum of 30 saved days of annual leave in total.

A procedure is to be in place for each organisation setting out when applications for the main period of annual leave (in the summer) are to have been submitted, so that employees can receive a decision on the timing of annual leave at least two months before the leave starts (applies to the main period of leave). As a basic rule, all employees are to submit their leave applications in Primula before the leave begins. For routines regarding teaching staff, please read the next paragraph.

ANNUAL LEAVE FOR TEACHING STAFF

For teaching staff, special [leave procedures and important dates apply, these are described on the HR website \(in Swedish\)](#).

Given the nature of the doctoral studentship, doctoral students should preferably use their entire annual leave after midsummer, when annual leave for teaching staff is normally planned. Once leave has been approved in Primula, you can follow-up on exactly when employees take leave using Primula's staff statistics.

CHECKLISTA

| WHAT | HOW | WHEN | Date of task |
|--|--|------------------------------|--------------|
| You are to check that the employee <ul style="list-style-type: none"> has registered planned annual leave in Primula for the current year. has taken and registered annual leave in Primula for the current year, for example after the summer break. has taken out at least 20 days of annual leave during the year. does not have more than 30 saved days of annual leave. Ensure that new employees' earned annual leave is taken during the year (only those entitled to more than 20 days of paid annual leave can save annual leave). | <ol style="list-style-type: none"> Log in to Primula, choose "Report generator" under "Services" from the menu on the left of the page. Choose report "Semesterstatus" and retrieve your reports in Excel for each cost centre. You then obtain a report that provides current leave status including remaining saved days. Once leave has been approved in Primula, you can follow-up on exactly when employees take leave using Primula's staff statistics. | Ongoing | |
| Plan other annual leave. | In accordance with your procedure. | Ongoing | |
| Ensure that all planned annual leave is applied for and approved in Primula. | In the "Semesterstatus" report | Before annual leave is taken | |
| Start the year's leave planning according to your procedure, by obtaining leave requests from employees. | For example, by using an Excel file that everyone fills in. | February | |
| Ensure that all annual leave taken in the previous year is registered in Primula before excess days of leave are paid out in April. | "Semesterstatus" report. | February | |
| Complete the planning of annual leave in March to enable the employee to receive a decision at least two months before the period of annual leave begins. Inform all employees at the same time. In the event of disagreement on the timing of annual leave, contact your HR contact person without delay. | In accordance with your procedure. | By 31 March | |

| WHAT | HOW | WHEN | Date of task |
|---|--------------------------------|--|--------------|
| SSC pays out (with April's salary) any saved days of leave exceeding the number that may be carried over according to the General Agreements on Pay and Benefits for Government Employees, i.e. a maximum of 30 days. | SSC | April | |
| Ensure that any exceptions to teaching staff leave are approved in Primula. | In the "Semesterstatus" report | By 31 May | |
| Ensure that all days of annual leave taken are registered in Primula. Check that any adjustments are also registered in Primula. | In the "Semesterstatus" report | September–November | |
| Ensure that at least 20 days of annual leave are taken during the year and are registered in Primula. | In the "Semesterstatus" report | September–November | |
| Check that new employees' earned annual leave is taken during the year (only those entitled to more than 20 days of paid annual leave can save annual leave). | In the "Semesterstatus" report | September–November | |
| Ensure that saved annual leave days do not exceed the maximum as set out in the General Agreements on Pay and Benefits for Government Employees (maximum of 30 days). | In the "Semesterstatus" report | September–November | |
| Before the end of the year, you are to check that all annual leave is registered and approved. Remember to collate the list before the payroll run in January. Remember that the annual leave accumulators are emptied after the January payroll run, so after that it is not possible to collate reports for the previous years. | "Semesterstatus" report | December–January, but before the payroll run in January. | |

GLOSSARY FOR THE "SEMESTERSTATUS" REPORT

| Text in the report | What it means | Comments |
|---|---|--|
| Sparade (Saved) | Saved days of annual leave from previous years. | Up to 30 days can be saved. The remainder can be paid out in money. |
| Bet. Sem (Paid Annual Leave) | Annual Leave entitlement | Shows how many days of annual leave each employee has, based on the individual's age, for example. Read more on the HR website |
| Semesterförlängning (Extension of leave) | According to separate agreement Special employment according to agreement | This does not apply to Lund University, therefore zero is displayed. You can hide this column. |
| Uttagna sparade (Saved leave taken) | Saved leave taken | The column displays leave taken from previous years, i.e. saved days of leave taken. |
| Uttagna innevarande (Current leave taken) | Leave taken this year | The column displays days of leave taken during the year as well as approved planned leave. |
| Kvar sparade (Saved leave remaining) | This column displays annual leave days from previous years not taken | Remember that they are costlier because they are taken based another year's salary level. |
| Kvar innevarande (Remaining current year) | Days of leave not taken this year | This column displays annual leave days from the current year that have not been taken. You can see here whether employees have taken leave or not. |
| Kvar totalt (Total remaining) | All days of annual leave that the employee has remaining | This column shows both days from the current year and those that the employee has saved from previous years. |