Year-end PTO checklist

Vacation Tracker

vacationtracker.io/blog/year-end-pto/

November

- [ ] Record each location's reset date.
- [ ] Separate statutory and extra company leave.
- [ ] Review local carryover and expiry rules.
- [ ] Send personal balance reminders.
- [ ] Set minimum cover by team and skill.
- [ ] Publish the holiday request deadline.
- [ ] Agree on Christmas priority rules.
- [ ] Announce any shutdown dates.

December

- [ ] Resend balances after approved bookings.
- [ ] Resolve competing holiday requests.
- [ ] Explain denials and offer alternative dates.
- [ ] Review swaps against coverage needs.
- [ ] Remind employees before applicable expiry dates.
- [ ] Assign holiday handovers.
- [ ] Load next year's local holidays.
- [ ] Reconcile taken leave and cancellations.

January

- [ ] Apply each location's carryover rules.
- [ ] Display opening balances and expiry dates.
- [ ] Export balances for payroll.
- [ ] Save Christmas allocations for next year's rotation.