

**We have 2 people in our billing department, and they cannot take PTO at the same time. But, they often request off when the department is swamped with month-end billings. I was wondering if other members limit the amount of ‘times’ employees can take PTO at month-end or say they can’t go at that time.**

***Summary - 21 responses, all unanimous that business needs come first.***

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Most businesses have a monthly billing cycle - either EOM or BOM - so they usually state "business needs" take precedence over the PTO need. Anyone working in the Billing dept should understand this & work out the PTO around the busy time.

Hope this helps!

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You must schedule your PTO vacation in advance & request your supervisor’s approval. Your **Supervisors has the right to approve or deny** your request of vacation schedule. **Reasons for denial may be production schedules, absence of other employees etc.**

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*Our employee handbook includes language that vacation requests are subject to production needs (which would impact office area needs as well).*

#### **Vacation usage guidelines**

Vacation hours can only be taken on normally scheduled workdays. Vacation requests must be pre-scheduled and pre-approved per department guidelines. Vacation dates must be approved in advance by the employee's supervisor. Management reserves the right to restrict vacation requests based on production needs. Vacation hours can be filled in for scheduled work days up to the number of hours scheduled.

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A compromise discussion is invaluable. Explain the situation and ask if they could postpone PTO until Billings are completed.

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We don't have a set policy and it doesn't happened often but we will deny vacations if we are too busy.

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At my previous job no one in accounting, customer service, or operations could take off at the end of the month or the beginning of the month. We processed financial transactions and all billings were done on the first few days of the month, quickly followed by month end processing. Customer service and operations had to be on hand to make sure month end processing went smoothly and also to be able to assist the customers.

At my current job, I know that I can't take off at month end/beginning of the month for billings and financials, or when I need to do payroll.

I would create a black out period for your billing department (and any other areas that are affected) that time off cannot be during month end billings. Define it as X business days prior to month end and X business days at the beginning of the month.

It is not uncommon to have black-out periods no matter what industry. I know that the news department at our local tv network affiliate cannot take off during ratings months, sports playoffs (if the local teams are still playing), and other big events in the city.

It should be common sense, but creating a black out period will define it. Also the supervisor should not approve any time off requests that affect the company's productivity. In our production area we cannot always approve PTO requests depending on the production schedule.

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I say, just chain them to their desks, bring them water and an empty bottle!

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We do not allow our folks time off at those times. If they can somehow cover the work, maybe one day. Also our folks know not to ask unless it is imperative.

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Wow – that's a dilemma.

We are a small company so we don't limit the amount of "times" people can take vacation during the end of the month. Our staff tries to work around other people's days off and understands when we say no to their vacation requests if someone else is already off.

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We will limit PTO by Departments and Staffing needs. Otherwise when they take PTO is their preference.

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We have a number of different restrictions on departments that limit PTO when it would be worst for the company. We accommodate special requests when we can, but running the business comes first, so I suggest blocking month end days.

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We require employees to state their request as 1st choice, 2nd choice, etc. and determine who is allowed off by looking at the choice level and then the seniority of the two individuals. If both requests are marked as 1st choice then the person with the most seniority is approved to take off. The other person's 2nd choice automatically becomes his or her first choice. If three or more employees are requesting same dates this same method applies.

This method has worked well for us and sometimes employees will change their choice if there is a conflict.

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Managers are given the authority over scheduling. Employees can only request time off it is up to management to approve time off. If business requires attendance the manager can reject the request and even cancel already approved time off. In the latter case if a vacation had been planned and there are costs associated with the cancelation of reservations the company would and should reimburse the employee.

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We ABSOLUTELY have the final say on PTO based on what's happening in the office. Our employees know that the work must get done timely. We will try to accommodate people but yes, the company's needs come first!

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We do have PTO rules.

1. We have a meeting with all in a department and review all request in the conference room together to make sure there is no overlap of coverage. Generally, any issues are resolved at this time. We place most of the responsibility on the employees to work it out. Once this has been done vacation for the quarter is approved. If someone is taking a vacation that in in a future quarter, then we ask that that request be included in our quarterly review meeting with the entire department and the individual requesting the future date simply states the dates and people are now aware of it. This does not include personal day or other leave item. If someone wants to submit vacation for the approved quarter after the review meeting, we simply start from the position that it will not be approved; but, we will do everything we can to allow the request. Most of the time when this happens, and it happens less and less the more we focus on the quarter request meeting, we are able to accommodate the request.
  2. We do not let like staff off at the same time in any department, meaning if there is two in accounting with similar roles, same press operators on different shifts, etc, only one can be off at a time.
  3. We do not allow vacation by supervisor at month end.
  4. We do not let accounting have vacation at year end.
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Absolutely! All time off requires approval from two parties. Plant employees get approval from their supervisor and then the master scheduler. Office staff from the office manager and a senior manager.

Within every department there is a standard for minimum staffing requirements. No time off is approved that causes staffing to fall below that number in any department. Accounting is perhaps the most obvious and knowing this expectation they no longer even ask to be off at the same time. Cross training and job coverage is mandatory.

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PTO is "subject to approval - first-come, first-served." This avoids the issues of seniority and discriminatory policy, as well.

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We do not allow except with approval for employees to schedule PTO at close or end of month. If it is approved no more than one person can be off with a larger department then your.

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We limit 1 person per department based on seniority if the request is received before March 15th. After March 15th, vacation is granted on a first come first serve basis. All requests are reviewed by department managers and are subject to scrutiny based on company need. We have denied multiple requests because we are too busy to allow someone time off. Generally though, we try to work through it with the employees if we are considering denial. Occasionally we have required them to work overtime prior to the requested day off to keep the workload in check.

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We do have times that at least one person would have to be covering this activity. It is not unreasonable to have this expectation. A lot of the times it is just explaining and communicating the expectation and then of course there are times for exceptions, but then everyone is on the same page.

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For our operations, the business need of the organization comes before any vacation time even if staff scheduled PTO time has been approved. Telling staff they can't take PTO is also acceptable if warranted.

If the department resource is only two people then a PTO policy or restriction clause might need to be established. Involve the staff for feedback on how to meet business/customer month end demands while still working to accommodate time off. Then develop a staffing model such as month end requires (70%) of their month end billing reports to be completed before final PTO approval is given despite the employee PTO "request".

Based on the work to be performed, I would add that two people during the month cannot have overlapping PTO at any time if it contributes to the month end workload. Don't forget it's also ok for the leader or manager to roll up their sleeves as well from time to time to get the work done and accommodate employee earned PTO time off with their families.