

# Standard Operating Procedure (SOP): Annual Leave Planning and Scheduling Protocol

This SOP defines the **annual leave planning and scheduling protocol**, outlining procedures for submitting leave requests, approval workflows, ensuring adequate staffing levels, managing leave conflicts, and maintaining accurate records. The objective is to facilitate fair and efficient leave management, support workforce well-being, and ensure continuous business operations without disruption.

## 1. Purpose

To establish a standardized process for planning and scheduling annual leave, ensuring fairness, business continuity, and employee wellbeing.

## 2. Scope

This protocol applies to all employees and managers involved in the annual leave process within the organization.

## 3. Roles and Responsibilities

- **Employees:** Submit leave requests as per the procedure and in a timely manner.
- **Line Managers/Supervisors:** Review, approve or decline leave requests, and ensure adequate staffing.
- **HR Department:** Maintain leave records, monitor leave balances, and support conflict resolution.

## 4. Procedure

### 4.1. Submitting Leave Requests

1. Employees must submit annual leave requests at least [**X weeks/months**] in advance via the official leave management system or form.
2. All requests must include leave dates and duration.
3. Employees must check team leave schedules for potential conflicts before submitting requests.

### 4.2. Approval Workflow

1. Upon receipt, line managers/supervisors have [**X days**] to review and respond to requests.
2. Managers must assess team workload, coverage, and critical deadlines before approval.
3. Approved requests are forwarded to HR for records update; declined requests must include a reason.
4. If multiple requests overlap, priority is given based on *first-come, first-served*, critical business needs, or previously declined requests.

### 4.3. Ensuring Adequate Staffing

- Managers must ensure minimum staffing levels are maintained at all times.
- Limits may be set on the number of employees off at any one time in a team or department.
- Business-critical periods (e.g., peak seasons) may be blocked for leave except in exceptional circumstances.

### 4.4. Managing Leave Conflicts

- If multiple conflicting requests are submitted, managers must engage employees in finding a mutually agreeable solution.
- If no agreement is reached, management will decide based on fairness, business impact, and historical leave approval records.

### 4.5. Maintaining Accurate Records

- HR must update leave balances promptly after each approved leave.
- Employees may review their leave records at any time via the leave management system.
- All leave documentation must be retained according to company policy.

## 5. Monitoring and Review

- Leave patterns will be monitored periodically for fairness and operational impact.
- This SOP will be reviewed annually and updated as necessary.

## 6. References

- Company Leave Policy
- Leave Management System User Guide

7. Revision History

Version	Date	Description	Author
1.0	YYYY-MM-DD	Initial Release	HR Department