

STANDARD OPERATING PROCEDURE	
Title	Annual Leave – Annual Rate
Purpose	How to add an annual rate of leave
Aim	To have a basic entitlement of annual leave every year with only the hours for bank holidays being inputted.

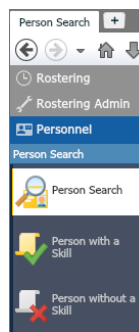
Contents

Section	Description	Page
A	Create a Person Entitlement	2-4
B	Changing an Entitlement	5-6

A) Create a Person Entitlement

Details of a person's annual leave entitlements are found on the Entitlements details tab via Edit Person or in Personnel > Person Search.

1. Select the Personnel master group and Person Search task group.
2. Find the person and click on the name to select them.



The screenshot shows the 'Person Search' interface. On the left is a navigation menu with 'Personnel' and 'Person Search' highlighted. The main area has search filters: Unit, Staff Group, Working Unit, Team, Grade Type Category, Surname (test), Grade Type, Staff No., and Grade. A 'Find' button is visible. Below the filters is a table of staff members.

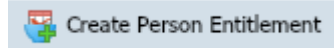
Surname	Forenames	Staff Number	Grade	Contracted Time	Date Joined NHS	Current Unit
Testing	Abigail	ETEST1024	Band 2 Radiology Helper	37:30		Test Unit
Testing	Amanda	ETEST1005	Band 5 Radiographer	22:30		Test Unit
Testing	Anne	ETEST1022	Band 2 Radiology Helper	37:30		Test Unit
Testing1	Byron	ETEST0001	Band 6 Radiographer	37:30		Test Unit
Testing	Catherine	ETEST1009	Band 5 Radiographer	22:30		Test Unit
Testing	Charlotte	ETEST1011	Band 5 Registered Nurse	37:30		Test Unit

3. Click on the Entitlements tab on the right hand side of your screen.
The current entitlement period is displayed by default. To view other years entitlements, change the To and From dates in the filter and click Find.

The screenshot shows the 'Entitlements' details page for a person. At the top are tabs for Summary, Work Contracts, Unavailabilities, Sickness, Entitlements (selected), Documents, Skills, Contacts, Restrictions, Patterns, and Notes. Below the tabs are filters for Person (RAD Testing1, Byron (Band 6 Radiographer)), Grade (Band 6 Radiographer), Unit (Test Unit), and Bank (No). The main section is titled 'Entitlements' and has a 'Find' button. Below this is a filter for 'Annual Leave' with 'From' date 01/04/2019 and 'To' date 31/03/2020. A table below shows the entitlement periods.

Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2019 - 31/03/2020	277.50 Hrs	207.00 Hrs

4. To create a person entitlement, click the Create Person Entitlement action button at the bottom of the screen.



Entitlement Basis:

Choose Annual Rate

Entitlement Type:

Select Annual Leave

Entitlement Units:

Select Hours Only

Annual Period Start:

This will always be the start date of a financial year (1st April).

Create Person Entitlement

Entitlement Basis:

Entitlement Type:

Entitlement Units: Hours And Days

Annual Period Start: 1 April

Base Hours: 0.00 Base Days: 0.00

Continuous Service Hours: 0.00 Continuous Service Days: 0.00

Agreed Carry Forward Hours: 0.00 Agreed Carry Forward Days: 0.00

Lieu Hours: 0.00 Lieu Days: 0.00

Total Hours: 0.00 Total Days: 0.00

Effective From: 17/03/2014

Note: The carry forward and lieu time entered will only apply to the first entitlement period created. To add further entries, please open the individual entitlement once created.

OK Cancel

Base Hours:

Enter the person's basic entitlement, excluding bank holiday hours.

Agreed Carry Forward Hours:

Enter any hours carried forward into the first full entitlement period to be added.

Lieu Hours:

Enter the person's bank holiday entitlement.

Effective From:

If the effective from date is anything other than an annual period start day, an initial balance will be required. This will create a Fixed Amount from the Effective From date to the start of the annual period.

Create Person Entitlement

Entitlement Basis: Annual Rate

Entitlement Type: Annual Leave

Entitlement Units: Hours Only

Annual Period Start: 1 April

Base Hours: 247.50

Continuous Service Hours: 0.00

Agreed Carry Forward Hours: 0.00

Lieu Hours: 60.00

Total Hours: 307.50

Effective From: 03/06/2019 Initial Balance: 210.00

Note: The carry forward and lieu time entered will only apply to the first entitlement period created. To add further entries, please open the individual entitlement once created.

OK Cancel

5. Selecting Annual Rate Basis will create all entitlement periods rolling forward and apply the same Base Hours for every year.
6. Bank Holiday Entitlements (Lieu Hours) will need to be added manually using the Change Entitlement process.

To see future periods, set the To date filter to a date beyond the end of the current entitlement period (1st April the following year). Or set the From date filter to a date beyond the end of the current entitlement period (31st March the following year).

Summary Work Contracts Unavailabilities Sickness Entitlements Documents Skills Contacts Restrictions Patterns Notes
Hours Accounts Visa Rules Skill Shortfalls iCals Person Hours Periods Roster Snapshots Attached Units

Person: RAD Testing1, Byron (Band 6 Radiographer) Grade: Band 6 Radiographer
Unit: Test Unit Bank: No

Entitlements Find

Annual Leave From: 01/04/2019 To: 31/03/2020 Find

Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2019 - 31/03/2020	307.50 Hrs	237.00 Hrs

Details Episodes Notes Audit Trail

Person Entitlement

Period: 01/04/2019 - 31/03/2020

Entitlement: 307.50 Hours
Remaining: 237.00 Hours

Entitlement Breakdown

Base: 247.50 Hours
Lieu: 60.00 Hours

Breakdown

Taken: 60.00 Hours
Planned: 10.50 Hours
Requested: - Hours

Entitlement Taken Per Quarter

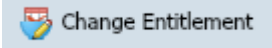
Qtr 1: 22.93 %	Qtr 2: -	Qtr 3: -	Qtr 4: -	Total: 22.93 %
----------------	----------	----------	----------	----------------

B) Changing an entitlement

If a person changes contracted hour's part way through an entitlement period then the current year's entitlement will be a total of their old and new contracted hours. Calculating this entitlement should be done in line with the trusts annual leave policy.

1. Set the date filter to include future entitlement periods. Click Find.

Entitlements			
Annual Leave	From: 01/04/2019	To: 31/03/2022	Find
Entitlement Periods			
Coverage	Period	Entitlement	
Person Entitlement	01/04/2019 - 31/03/2020	307.50 Hrs	237.00 Hrs
Person Entitlement	01/04/2020 - 31/03/2021	247.50 Hrs	247.50 Hrs
Person Entitlement	01/04/2021 - 31/03/2022	247.50 Hrs	247.50 Hrs

2. Select the entitlement to update and click on the Change Entitlement button at the bottom of the screen. 

3. Enter the new Base Hours and Lieu Hours as per your re-calculation.

Base Hours:

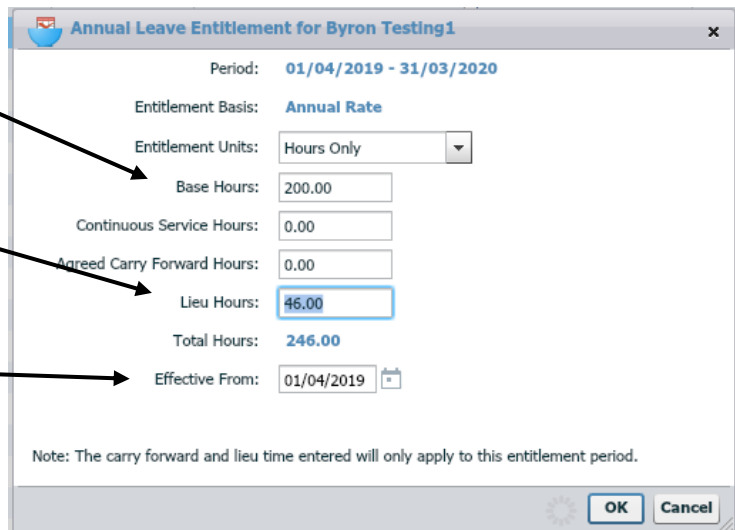
Enter the new Base Hours as per your re-calculation.

Lieu Hours:

Enter the new Lieu Hours as per your re-calculation.

Effective From:

Set the Effective from Date to the start of the period you are updating. Click OK.



Annual Leave Entitlement for Byron Testing1

Period: 01/04/2019 - 31/03/2020

Entitlement Basis: Annual Rate

Entitlement Units: Hours Only

Base Hours: 200.00

Continuous Service Hours: 0.00

Agreed Carry Forward Hours: 0.00

Lieu Hours: 46.00

Total Hours: 246.00


Effective From: 01/04/2019

Note: The carry forward and lieu time entered will only apply to this entitlement period.

OK Cancel

You will be required to change the next entitlement period Base Hours so that the Annual Rate will update for the years rolling forward.

1. Select the next year's entitlement period and click on Change Entitlement.


 Change Entitlement

Entitlements			
Annual Leave	From: 01/04/2019	To: 31/03/2022	Find
Entitlement Periods			
Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2019 - 31/03/2020	246.00 Hrs	175.50 Hrs
Person Entitlement	01/04/2020 - 31/03/2021	200.00 Hrs	200.00 Hrs
Person Entitlement	01/04/2021 - 31/03/2022	200.00 Hrs	200.00 Hrs

Base Hours:
Enter the new Base Hours for the contracted hours changed to.

Lieu Hours:
Enter the new Lieu Hours for the contracted hours changed to.

Effective From:
Set the Effective from Date to the start of the following period. Click OK.



Annual Leave Entitlement for Byron Testing1

Period: 01/04/2020 - 31/03/2021

Entitlement Basis: Annual Rate

Entitlement Units: Hours Only

Base Hours: 220.00

Continuous Service Hours: 0.00

Agreed Carry Forward Hours: 0.00

Lieu Hours: 32.00

Total Hours: 252.00

Effective From: 01/04/2020

Note: The carry forward and lieu time entered will only apply to this entitlement period.

OK Cancel

This sets your new Base Hours to start from the next financial year to be what your contracted hours are.