

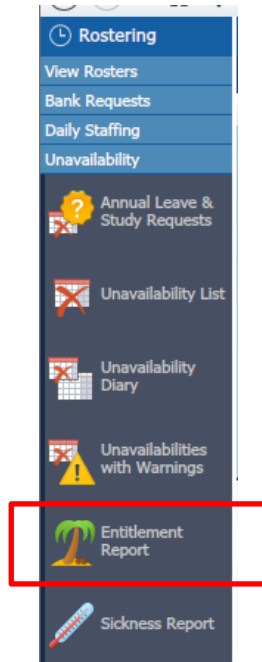
STANDARD OPERATING PROCEDURE	
Title	View Annual Leave Entitlement and Remaining Balances by Unit
Purpose	Ward Managers & Matrons can view remaining balances of annual leave for the financial year.
Aim	To help managers decision when approving annual leave.

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A) View Annual Leave Entitlement and Remaining Balances by Unit

- Log into HealthRoster
- Click 'Rostering', then 'Unavailability'
- Then click 'Entitlement Report'



- From this page, completed each field for your report and click find.


Entitlement Report

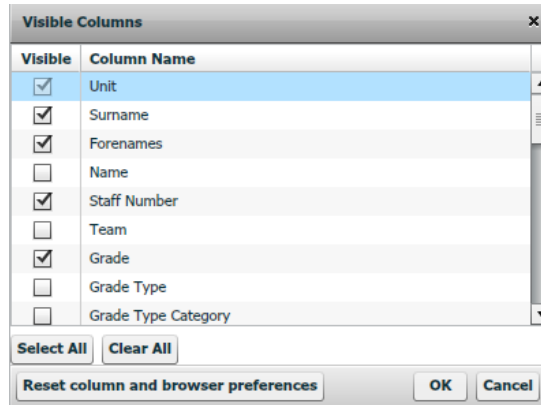
Entitlements 102 Records Find

Entitlement Type: Annual Leave Unit: Accident & Emergency - N Exclude Closed People:

- This will then generate a report of staff from your selected unit with information regarding annual leave.

Unit	Surname	Forenames	Grade	Period	Total Entitlement (...)	Remaining (Hrs)	Remaining (Days)	Planned (Days)	Entitlement Used (%)
Accident & Emergency -			Band 1 Housekeeper	01/04/2018 - 31/03/2019	39.00	156.0	26.00	12.00	33.33
Accident & Emergency -			Band 6 Registered Nurse	01/04/2018 - 31/03/2019	22.50	60.0	5.00	8.25	77.78
Multiple			Band 2 Admin & Clerical	01/04/2018 - 31/03/2019	38.40	288.0	38.40	0.00	-
Accident & Emergency -			Band 2 Healthcare Assistant	01/04/2018 - 31/03/2019	6.79	57.5	4.79	2.00	29.45

- By selecting  in the top right of your report page, you can filter to what columns you want to view.
- Click OK once you have chosen your options.



Visible	Column Name
<input checked="" type="checkbox"/>	Unit
<input checked="" type="checkbox"/>	Surname
<input checked="" type="checkbox"/>	Forenames
<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Staff Number
<input type="checkbox"/>	Team
<input checked="" type="checkbox"/>	Grade
<input type="checkbox"/>	Grade Type
<input type="checkbox"/>	Grade Type Category

Select All Clear All

Reset column and browser preferences OK Cancel

- Your filtered options will look like below.

Unit	Surname	Forenames	Staff Number	Grade	Period	Total Entitlement...	Remaining (Hrs)	Requested (Hrs)	Taken (Hrs)
Accident & Emergency -				Band 1 Housekeeper	01/04/2018 - 31/03/2019	234.0	156.0	0.0	6.0
Accident & Emergency -				Band 6 Registered Nurse	01/04/2018 - 31/03/2019	270.0	60.0	0.0	111.0
Multiple				Band 2 Admin & Clerical	01/04/2018 - 31/03/2019	288.0	288.0	0.0	0.0
Accident & Emergency -				Band 2 Healthcare Assistant	01/04/2018 - 31/03/2019	81.5	57.5	0.0	0.0

- By selecting one of the column headings, it will either filter in alphabetically or number order. An example below is by selecting the remaining (hrs) column.

Unit	Surname	Forenames	Staff Number	Grade	Period	Total Entitlement...	Remaining ...	Requested (Hrs)	Taken (Hrs)
Multiple				Band 2 Admin & Clerical	01/04/2018 - 31/03/2019	288.0	288.0	0.0	0.0
Accident & Emergency -				Band 6 Registered Nurse	16/04/2018 - 31/03/2019	262.5	262.5	0.0	0.0
Accident & Emergency -				Band 7 Registered Nurse	01/04/2018 - 29/07/2018	300.0	226.5	0.0	73.5
Accident & Emergency -				Band 6 Registered Nurse	01/04/2018 - 31/03/2019	300.0	214.5	24.0	24.0

- This filter can show who has the most remaining entitlement left for the financial year.