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# HealthRoster Leave Entitlements



Blackpool Teaching Hospitals   
NHS Foundation Trust

People Centred

Positive

Compassion

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# Adding Annual Leave Entitlements

Adding annual leave entitlements are for NEW members of staff only.

To update a person's existing entitlement see 'Changing Annual Leave Entitlement Guide' on page 3.

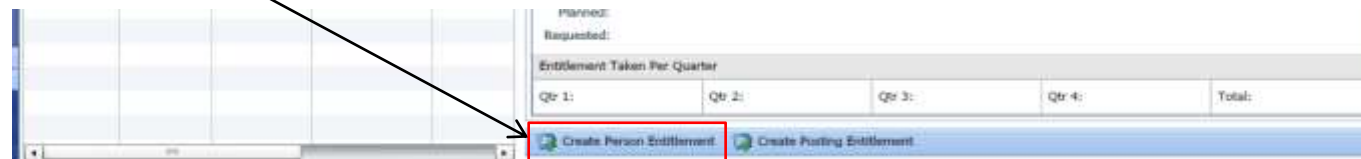
1. Calculate the person's leave entitlement

*Using the Annual Leave Calculator work out the person's entitlement for a full year AND for the remainder of the current year*

2. In HealthRoster select Personnel > Person Search and find the employee. Click on the 'Entitlements' tab



3. Click 'Create Person Entitlement'



4. In 'Base Hours' enter the entitlement for next year (full year) in decimal format

NB: *You do not need to use the 'Continuous Service Hours' section. However, if you wish to you would need to ensure the base hours are less any continuous service entitlement*

Entitlement Basis: Annual Rate  
Entitlement Type: Annual Leave  
Entitlement Units: Hours And Days  
Annual Period Start: 1 April  
Base Hours Per Year: 202.50  
Base Days Per Year: 27.00  
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 Per Year: 202.50  
Total Days Per Year: 27.00  
Effective From: 04/07/2016  
Initial Balance: 165.00

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. In the 'Initial Balance' box enter the leave for the current part year.

6. Click OK

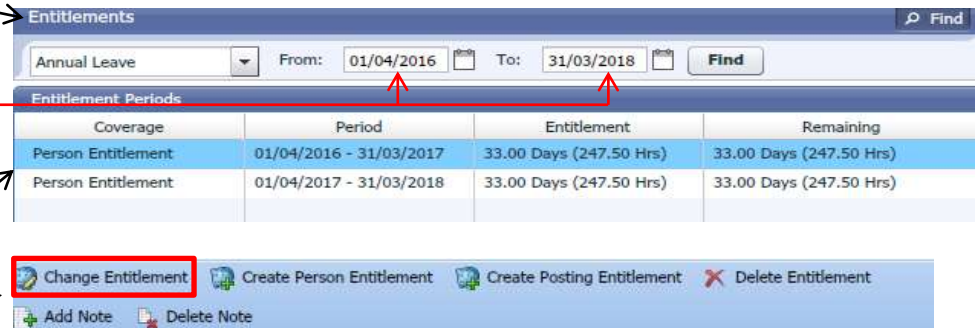
7. These are your visibility dates. You will only see leave periods between these dates. Therefore, to check the leave you have input, ensure that the 'from' and 'to' dates cover two or three years, e.g. from 01/04/2016 to 31/03/2018. Click 'Find'

Coverage	Period	Entitlement	Remaining
Person Entitlement	15/08/2016 - 31/03/2017	0.00 Days (0.00 Hrs)	0.00 Days (0.00 Hrs)
Person Entitlement	01/04/2017 - 31/03/2018	27.00 Days (202.50 Hrs)	27.00 Days (202.50 Hrs)

# Changing Annual Leave Entitlements

Use this option when a member of staff carries leave over, buys additional leave or reaches an NHS service threshold

1. **Find the employee** - In Personnel > Person Search. Then select the 'Entitlements' tab
2. **Annual Leave 'from' and 'to' view dates** - Check the 'from' date shows the start of the (or previous) leave year. Change the 'To' date to 31/03/2018. Click 'Find'
3. Highlight the leave period you wish to change
4. Click '**Change Entitlement**'



5. Make your changes as appropriate (use decimal format only). The 'Lieu Hours' box can be used for bought leave. The 'Total Hours Per Year' will show the total entitlement for that period. Click OK
6. Add a record/reason of the change – click 'Add Notes'. Ensure you have highlighted the appropriate period first. Notes will only be visible for that leave period.



## Changing Annual Leave Entitlements Continued...

**NB.** You will note that the subsequent years will remain as the 'Base Hours' from the previous year

Entitlements

Annual Leave From: 01/04/2016 To: 31/03/2019 Find

Entitlement Periods

Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2016 - 31/03/2017	38.40 Days (288.00 Hrs)	38.40 Days (288.00 Hrs)
Person Entitlement	01/04/2017 - 31/03/2018	33.00 Days (247.50 Hrs)	33.00 Days (247.50 Hrs)
Person Entitlement	01/04/2018 - 31/03/2019	33.00 Days (247.50 Hrs)	33.00 Days (247.50 Hrs)

Annual Leave Account

Person Entitlement

Period: 01/04/2017 - 31/03/2018

Entitlement:	247.50	Hours	33.00	Days
Remaining:	247.50	Hours	33.00	Days

Breakdown

Taken:	-	Hours	-	Days
Planned:	-	Hours	-	Days
Requested:	-	Hours	-	Days

Entitlement Taken Per Quarter

Qtr 1:	-	Qtr 2:	-	Qtr 3:	-	Qtr 4:	-	Total:	N/A
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Change Entitlement Create Person Entitlement  
 Create Posting Entitlement Delete Entitlement Add Note  
 Delete Note

When an entitlement is selected the 'Details' tab displays the new 'Entitlement Breakdown' section only if Continuous Service, Carry Forward or Lieu are entered.

Entitlements

Annual Leave From: 01/04/2016 To: 31/03/2019 Find

Entitlement Periods

Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2016 - 31/03/2017	38.40 Days (288.00 Hrs)	38.40 Days (288.00 Hrs)
Person Entitlement	01/04/2017 - 31/03/2018	33.00 Days (247.50 Hrs)	33.00 Days (247.50 Hrs)
Person Entitlement	01/04/2018 - 31/03/2019	33.00 Days (247.50 Hrs)	33.00 Days (247.50 Hrs)

Annual Leave Account

Person Entitlement

Period: 01/04/2016 - 31/03/2017

Entitlement:	288.00	Hours	38.40	Days
Remaining:	288.00	Hours	38.40	Days

Entitlement Breakdown

Base:	247.50	Hours	33.00	Days
Carry Forward:	3.00	Hours	0.40	Days
Lieu:	37.50	Hours	5.00	Days

Breakdown

Taken:	-	Hours	-	Days
Planned:	-	Hours	-	Days

Change Entitlement Create Person Entitlement  
 Create Posting Entitlement Delete Entitlement Add Note  
 Delete Note

# Employee Online


Employee Online also displays the corresponding carry forward/lieu hours

In the Rostering > Annual Leave section, scroll down to the 'Request Leave' section where you can view the 'Entitlement Balance' breakdown

Click on the blue 'i' icon and a pop up shows the breakdown detail

– Request Leave

Entitlement Balance

Entitlement: 288 hrs 

Remaining: 287.5 hrs

Taken : [Breakdown](#)

Planned : Base 247.5 hrs


Requested : Carry Forward 3 hrs

In Lieu 37.5 hrs

Continuous Service 0 hrs

Request Leave

Full day(s)  Partial day

From  

Number of days

End date