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HealthRoster Leave Entitlements



Blackpool Teaching Hospitals 
NHS Foundation Trust

People Centred

Positive

Compassion

Excellence

Adding Annual Leave Entitlements

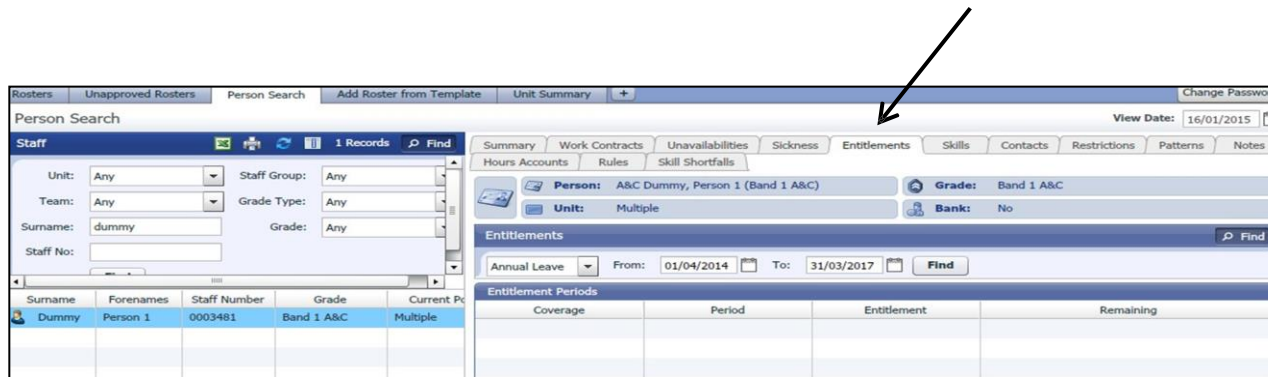
Adding annual leave entitlements are for NEW members of staff only.

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

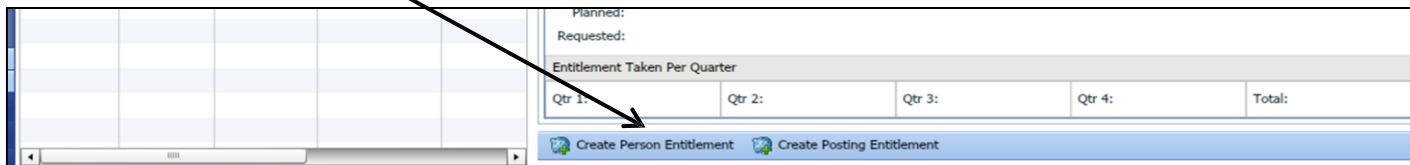
1. Calculate the person's leave entitlement

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 HeathRoster 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 the from and to dates cover two or three years, eg: from 01/04/2016 to 31/03/2018. Click 'Find'

Entitlements

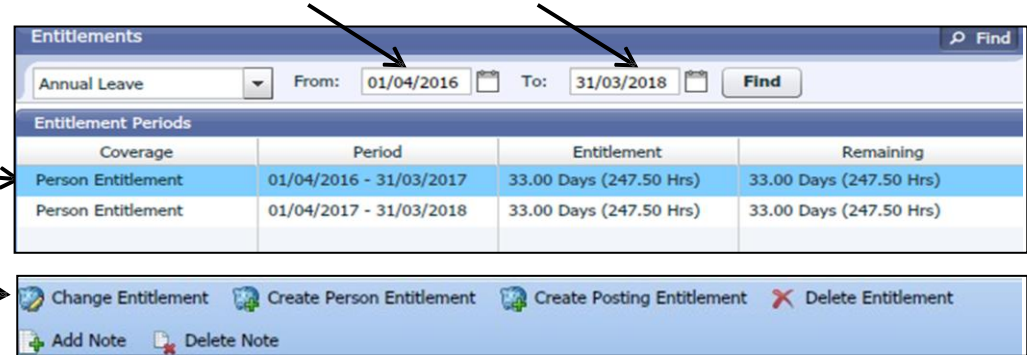
Annual Leave From: 01/04/2016 To: 31/03/2018 Find

| 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'

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

Entitlement Basis: Annual Rate

Entitlement Units: Hours And Days

Base Hours Per Year: 247.50 Base Days Per Year: 33.00

Continuous Service Hours: 0.00 Continuous Service Days: 0.00

Agreed Carry Forward Hours: 3.00 Agreed Carry Forward Days: 0.40

Lieu Hours: 37.50 Lieu Days: 5.00

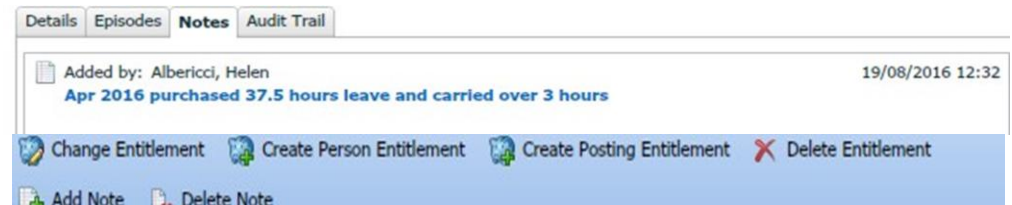
Total Hours Per Year: 288.00 Total Days Per Year: 38.40

Effective From: 01/04/2016

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

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.



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**

| 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 |
|--------|---|--------|---|--------|---|--------|---|--------|-----|

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**

| 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

Request Leave

Entitlement Balance

Entitlement: 288 hrs ⓘ

Remaining: 288 hrs

Taken : Breakdown

Planned : Base 247.5 hrs

Requested : Carry Forward 3 hrs

In Lieu 37.5 hrs

Continuous Service 0 hrs

Request type

Full day(s) Partial day

From 19 Aug 2016

Number of days Set

End date

Submit Leave Request

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.