Email: e-rostering@bfwhospitals.nhs.uk Website: http://www.bfwh.nhs.uk/working-for-the-trust/e-rostering-and-corporate-bench Phone: 01253 953690

HealthRoster Leave Entitlements



Blackpool Teaching Hospitals

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 HeathRoster select Personnel > Person Search and find the employee. Click on the 'Entitlements' tab

Posters	Unanoround Post	Barron Canno	Add Posta	from Templa	te Unit Summary +			\square		Change Par	sswore
Rusters	onapproved Rost	Person Searc	Aug Roster	nom rempia	te onic summary		- V.			change r di	
Person Se	earch						All and a second			View Date: 16/01/201	5
Staff		2 🖷 C	1 Records	₽ Find	Summary Work Contracts Hours Accounts Rules	Unavailabilities Sickne Skill Shortfalls	ss) Entitlement	s Skills	Contacts Rest	trictions) Patterns) No	otes
Unit:	Any	▼ Staff Group	Any		Person: A&C	Dummy, Person 1 (Band 1 A&	c)	Grade:	Band 1 A&C		
Team:	Any	Grade Type	: Any		Unit: Multip	le	~	Bank:	No		
Surname:	dummy	Grade	Any	1	Entitlements					PI	Find
Staff No:		Herr		E.	Annual Leave From:	01/04/2014 To:	31/03/2017	Find			
Sumame	Forenames	Staff Number	Grade	Ourrent Pr	Entitlement Periods						
La Dummy	Person 1	0003481 Bar	nd 1 A&C	Multiple	Coverage	Period	Entitler	nent		Remaining	

3. Click 'Create Person Entitlement'

	Planned: Requested:				
	Entitlement Taken Per Quar	ter			
	Qtr 1:	Qtr 2:	Qtr 3:	Qtr 4:	Total:
	Create Person Entitleme	nt 🛛 🔞 Create Posting Enti	tlement		
•					

	Create Person Entitlem	ent			×
4. In 'Base Hours' enter	Entitlement Basis:	Annual Rate	-		
the entitlement for next	Entitlement Type:	Annual Leave	-		
year (full year) in decimal 🛛 🔍	Entitlement Units:	Hours And Days	•		
format.	Annual Period Start:	1 April	-		
	Base Hours Per Year:	202.50	Base Days Per Year:	27.00	
NB: You do not need to use	Continuous Service Hours:	0.00	Continuous Service Days:	0.00	
the 'Continuous Service	Agreed Carry Forward Hours:	0.00	Agreed Carry Forward Days:	0.00	5. In the 'Initial
Hours' section. However, if	Lieu Hours:	0.00	Lieu Days:	0.00	Balance' box enter
you wish to you would need	Total Hours Per Year:	202.50	Total Days Per Year:	27.00	the leave for the
to ensure the base hours are	Effective From:	04/07/2016	Initial Balance:	165.00	current part year.
less any continuous service entitlement.	Note: The carry forward and lieu t To add further entries, please oper	ime entered will onl n the individual enti	y apply to the first entitlement p dement once created.	eriod created.	6. Click OK
				OK Can	cel

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. <u>Annual Leave from and to view dates</u> Check the from date shows the start of the (or previous) leave year. Change the To date to 31/03/2018. Click 'Find'

			Entitlements			P Find
			Annual Leave	From: 01/04/2016	° To: 31/03/2018 ⊂ (Find
			Entitlement Periods			
3. Highlight the lea	ave period you wish to change	2.	Coverage	Period	Entitlement	Remaining
			Person Entitlement	01/04/2016 - 31/03/2017	33.00 Days (247.50 Hrs)	33.00 Days (247.50 Hrs)
			Person Entitlement	01/04/2017 - 31/03/2018	33.00 Days (247.50 Hrs)	33.00 Days (247.50 Hrs)
4 Click (Change E	atitlomont'					
4. CIICK Change Li						
			Change Entitlement	Create Person Entitlement	Create Posting Entitleme	ent 🏋 Delete Entitlement
			👍 Add Note 🛛 🔓 Delete N	ote		
Annual Leave Entitleme	ent for Payroli Admin	×				
Period:	01/04/2016 - 31/03/2017		5 Make your ch	nanges as annronri	ate (use decimal f	ormationly) The (Lieu
Entitlement Basis:	Annual Rate		Hours' hox can h	e used for hought	leave The 'Total F	Hours Per Year' will
Entitlement Units:	Hours And Days		show the total e	ntitlement for that	period. Click OK	iours i ci i cui win
Base Hours Per Year:	247.50 Base Days Per Year:	33.00				
Continuous Service Hours:	0.00 Continuous Service Days:	0.00	6. Add a record	/reason of the cha	nge – click 'Add No	otes'. Ensure you have
Agreed Carry Forward Hours:	3.00 Agreed Carry Forward Days:	0.40	highlighted t	he appropriate per	iod first. Notes wi	ll only be visible for
Lieu Hours:	37.50 Lieu Days:	5.00	that leave pe	eriod.		
Total Hours Per Year:	288.00 Total Days Per Year:	38.40	Details Episodes Notes	Audit Trail		
Effective From:	01/04/2016		Added by: Albericci, H	elen		19/08/2016 12:32
			Apr 2016 purchased	37.5 hours leave and carrie	ed over 3 hours	
Note: The carry forward and lieu ti	me entered will only apply to this entitlement period	od.	🞲 Change Entitlement 👔	Create Person Entitlement	🙀 Create Posting Entitleme	ent 🕺 Delete Entitlement
	0	K Cancel	Add Note D. Delete	Note		

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)

Person Entitlement Period: 01/04/2017 - 31/03/2018 Entitlement: 247.50 Hours 33.00 Days Remaining: 247.50 Hours 33.00 Days Breakdown 33.00 Pays Days Days Planned: - Hours - Days Requested: - Hours - Days Entitlement Taker: - Hours - Days Requested: - Hours - Days Entitlement Taker: - Qtr 3: - Qtr 4: - Total	- 💓 Annua	I Leave Account					
Period: 01/04/2017 - 31/03/2018 Entitlement: 247.50 Hours 33.00 Days Remaining: 247.50 Hours 33.00 Days Breakdown 33.00 Days Days Taken: - Hours - Days Planned: - Hours - Days Requested: - Hours - Days Entitlement Taken: - Hours - Days Entitlement Taken: - Ker 2000 - Days	Person Entitle	ment					
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	Period:	01/04/2017 -	31/03/2	2018			
Remaining: 247.50 Hours 33.00 Days Breakdown -	Entitlement:	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	Remaining:	247.50	Hours		33.	00	Days
Taken: - Hours - Days Planned: - Hours - Days Requested: - Hours - Days Entitlement Taken Per Quarter - Days Days	Breakdown						
Planned: - Hours - Days Requested: - Hours - Days Entitlement Taken Per Quarter Qtr 1: - Qtr 2: - Qtr 3: - Qtr 4: - Total	Taken:	-	Hours			-	Days
Requested: - Hours - Days Entitlement Taken Per Quarter Qtr 1: - Qtr 2: - Qtr 3: - Qtr 4: - Total	Planned:	-	Hours			-	Days
Entitlement Taken Per Quarter Qtr 1: - Qtr 2: - Qtr 3: - Qtr 4: - Total	Requested:	-	Hours			-	Days
Qtr 1: - Qtr 2: - Qtr 3: - Qtr 4: - Total	Entitlement Ta	aken Per Quarter					
	Qtr 1: -	Qtr 2: -	Qtr 3:	-	Qtr 4:	-	Total:
Change Entitlement 100 Create Derson Entitlement	Qtr 1: -	ken Per Quarter Qtr 2: -	Qtr 3:	-	Qtr 4:	-	т
	🙀 Create Pos	sting Entitlement	🗡 Del	ete Entit	tlement		Add Note
🙀 Create Posting Entitlement 🛛 🗙 Delete Entitlement 🛛 🔒 Add Note	B. Dalata Nat						

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)

Person Entitleme	ent			
Period:	01/04/2016 -	31/03/2017	,	
Entitlement:	288.00	Hours	38.40	Days
Remaining:	288.00	Hours	38.40	Days
Entitlement Brea	akdown			
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
		Hours	-	Dave

Employee Online

Entitlement	288 hrs 🕕 🥢
Remaining	000 bes
Taken :	Breakdown
Planned :	Base 247.5 hrs
Requested	Carry Forward 3 hrs
	In Lieu 37.5 hrs
Request I	Continuous Service 0 hrs
Full day(s)	Partial day
From	19 Aug 2016
Number of d	ays Set
End date	

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.