



Back to Basics: Annual Leave

2. Entitlements

Hollie Archibald

Back to Basics Sessions

Managing Annual Leave Requests

Annual Leave Entitlements

Annual Leave Hours

Annual Leave Notifications

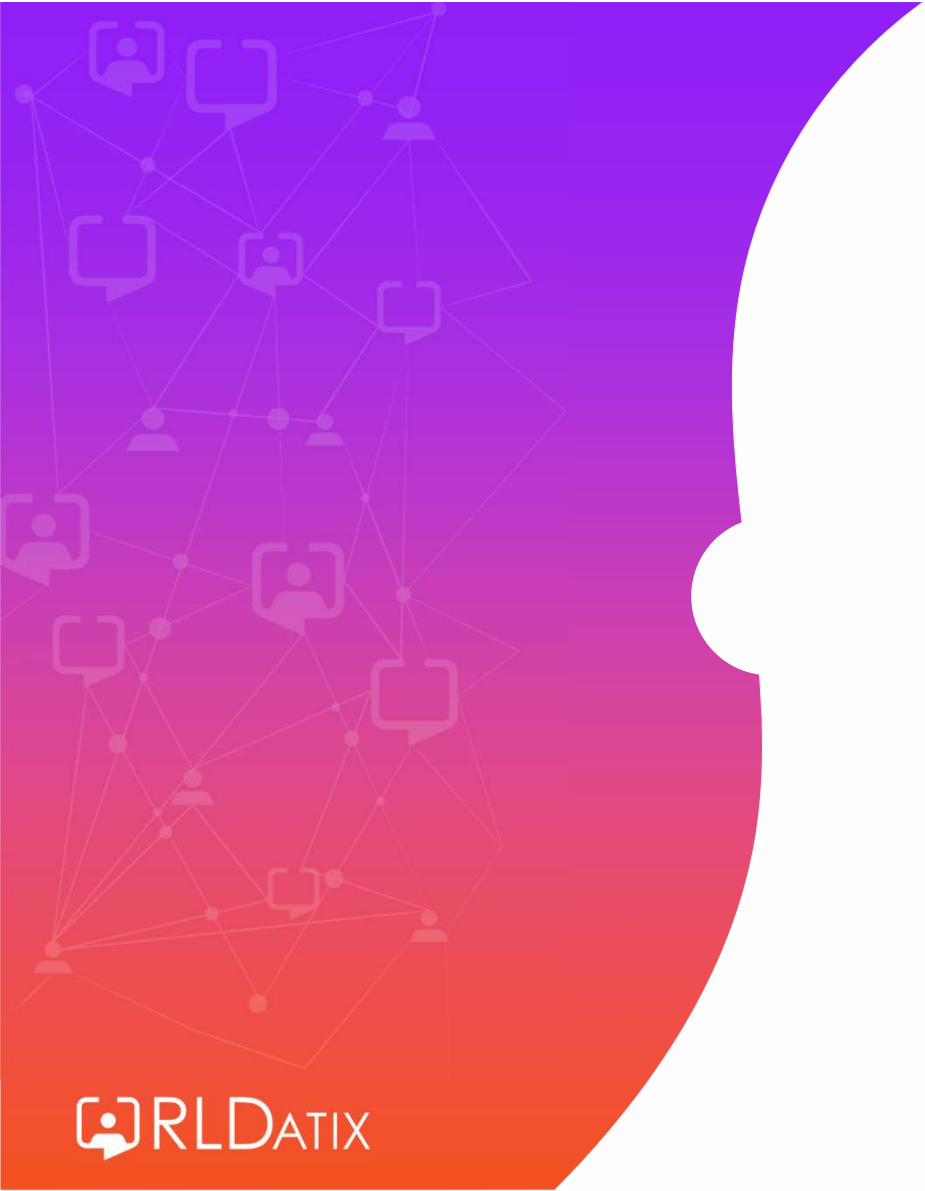
Annual Leave Rules

Objective

To understand the different types of entitlements, the ways they can be set up and how to manage them in Allocate Optima (formerly called HealthRoster).


Agenda





- What is an entitlement?
- Entitlement Types
- Person and Posting Entitlements
- Annual or Fixed Rate Entitlements
- Entitlement Fields
- Changing Entitlements
- Uploading Entitlements
- Other Annual Leave
- Entitlement Report





What is an Entitlement?

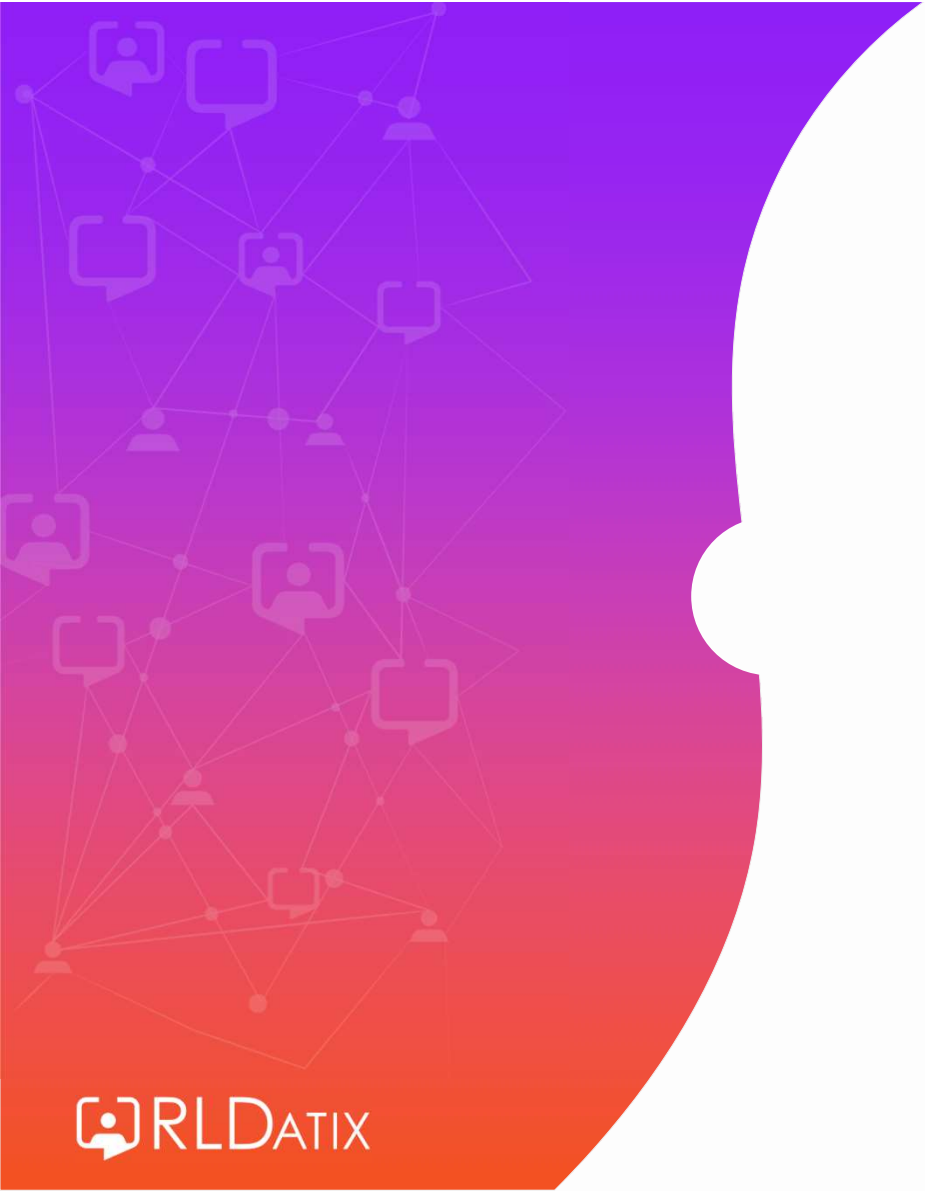
- An entitlement is an allowance of leave, from which the staff member can book time off

Entitlement Periods 

Annual Leave  From 01/04/2022 
To 31/03/2023  

 Create Person Entitlement  Create Posting Entitlement

Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2022 - 31/03/2023	40.00 Days (200.00 Hrs)	19.90 Days (99.50 Hrs)



Entitlement Types

Reference Data > Unavailability > Entitlement Types

Ref Data Tools: Entitlement Types

Ref Data Actions: Edit Entitlement Types

Navigation: Organisation | Payroll | Person | **Unavailability** | Rostering | Temporary Staffing | SafeCare | Attendance | Locations

Entitlement Types

Name ↑	Description	External Reference	Include Requested Leave	Is Obsolete	Default
ADO	ADO	-	-	-	Y
Annual Leave	Annual Leave	-	Y	-	Y
Bank Holiday	Public Holidays UK	-	Y	-	-
Birthday	Birthday	Birthday	Y	Y	-
Lifetime Holiday Entitlement	Lifetime Holiday Entitlement	-	-	Y	-
Medics Annual leave	Medics Annual leave	-	Y	-	-
Other Leave	-	-	Y	Y	-
Parental Leave	-	-	Y	Y	-
Rest and Recovery	Rest and Recovery	Rest and Recovery	-	Y	-
Sickness	Sickness	-	-	-	Y

Name *
Annual Leave

Description
Annual Leave

External Reference

Include Requested Leave

Is Default

Is Obsolete

Use Projected Balances

Link to
Unavailability Reason

Unavailability Reason Mapping
 Annual Leave: Annual Leave

Reference Data> Unavailability> Unavailability Reason

Ref Data Tools: Unavailability

Ref Data Actions: Unavailability

Allocate Optima Development

Organisation Payroll Person Unavailability Rostering

Unavailability Reasons

Full Name	Short Name	Is Sensitive	Export	Valid F
Annual Leave				
Annual Leave	A/L	-	Y	-
Bank Holiday	BH	-	-	-

Unavailability Reason

Full Name Annual Leave

Unavailability Reason Group Annual Leave

Edit Unavailability Reason >

Entitlement Types

1 Records

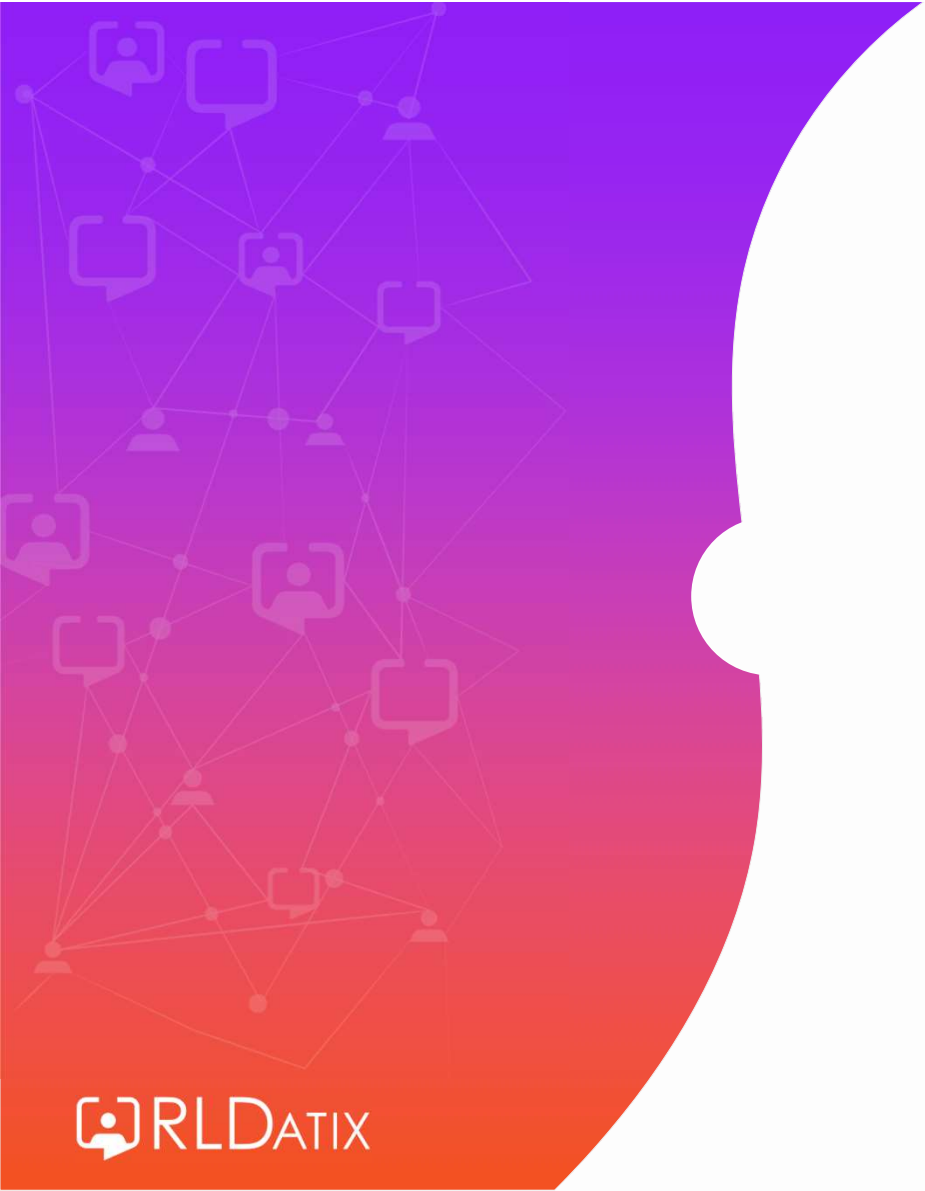
Create Entitlement Type

Name ↑	Description	External R	Include Re	Is Obsolete	Default
Annual Leave	Annual Leave	Y	-	-	Y

Restrict Unavailability Rea... >

Work Contract Hours Calc... >

Applicable Rule Groups >



Person and Posting Entitlements


Personnel > Person Search > Person Search > Entitlements

Person Actions: Change Entitlements




Person Tools: Person Search

Person Details: Entitlements

Person





 **Marshal Erickson**
Band 5 RN



Bank Yes
Unit Hollie Test Unit
Staff No Marshal1
From Manual

 Edit Person
 Change Contract
 More

Summary >
Work Contracts >
Unavailabilities >
Sickness >
Entitlements
Documents >


Entitlement Periods



Annual Leave  From: 01/04/2022 
To: 31/03/2023  



 Create Person Entitlement  Create Posting Entitlement



Person Entitlements

- Applies to the staff member as a whole

Entitlement Periods 

Annual Leave  From 01/04/2022 

To 31/03/2023  

 Create Person Entitlement  Create Posting Entitlement

Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2022 - 31/03/2023	40.00 Days (200.00 Hrs)	19.90 Days (99.50 Hrs)

Posting Entitlements

- Applies only to the posting, is used if staff member has two or more substantive postings
- If multiple postings span across different units, the requests can be managed by either manager.

Entitlement Periods

Annual Leave ▼ From 01/04/2022 📅
To 31/03/2023 📅 🔍

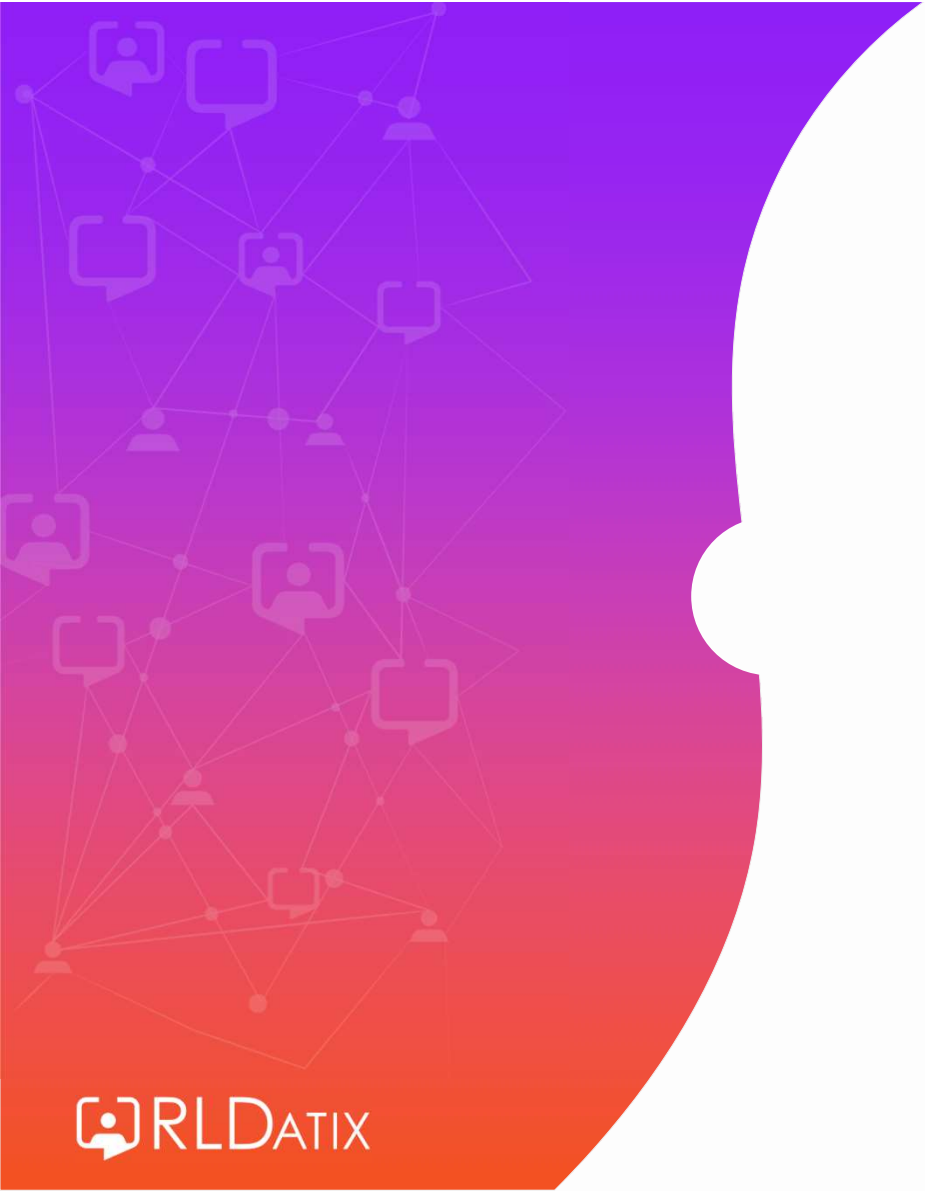
📅 Create Person Entitlement 📅 Create Posting Entitlement

Coverage	Period	Entitlement	Remaining
Hollie Test Unit (Band 2 HCA)	01/06/2022 - 31/03/2023	13.33 Days (100.00 Hrs)	4.20 Days (31.50 Hrs)
Maternity (Band 6 RN)	26/09/2022 - 31/03/2023	13.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)

- With multiple posting entitlements, the staff member will need to choose the correct one in EOL/ Loop / Allocate ME when booking leave.

The screenshot displays the RLDATIX user interface. On the left is a dark sidebar menu with the following items: 'View Rosters' (calendar icon), 'Record Availability' (checkmark icon), 'Available Locum Duties' (person icon), 'Earned Accruals' (piggy bank icon), 'Leave' (palm tree icon), and 'Request Duty' (heart icon). The 'Leave' item is highlighted. The main content area has three tabs: 'Annual Leave' (palm tree icon), 'Study Days' (graduation cap icon), and 'Other Leave' (calendar icon with 'x'). The 'Annual Leave' tab is active. Below the tabs is the section 'Entitlement Periods' with a date range '01 Apr 2022 - 31 Mar 2023' and navigation arrows. A table below shows the following data:

Entitlement Type	Coverage
Annual Leave	Cole Ward (Band 5 RN)
Annual Leave	Accident & Emergency (Agenda for change - Band 6 RN)



Annual or Fixed Rate

Personnel > Person Search > Person Search > Entitlements

The screenshot shows the 'Create Person Entitlement' form for Marshal Erickson, Band 5 RN. The form is divided into several sections. On the left, there is a navigation menu with options: Summary, Work Contracts, Unavailabilities, Sickness, Entitlements (selected), Documents, and Skills. The main content area is titled 'Entitlement Periods' and includes a 'Create Person Entitlement' button. The form fields are as follows:

Field	Value
Entitlement Basis *	Annual Rate
Entitlement Type *	
Month	April
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	
Lieu Days	

Annual Rate

- One entitlement that contains an amount of leave per year, that rolls over each year.

Entitlement Periods

Annual Leave From: 01/04/2023 To: 31/03/2026

Create Person Entitlement Create Posting Entitlement

Coverage	Period	Entitlement	Remaining
Person Entitlement	01/04/2023 - 31/03/2024	40.00 Days (200.00 Hrs)	40.00 Days (200.00 Hrs)
Person Entitlement	01/04/2024 - 31/03/2025	40.00 Days (200.00 Hrs)	40.00 Days (200.00 Hrs)
Person Entitlement	01/04/2025 - 31/03/2026	40.00 Days (200.00 Hrs)	40.00 Days (200.00 Hrs)

Entitlement Periods

Annual Leave From: 01/04/2023 To: 31/03/2026

Create Person Entitlement Create Posting Entitlement

Coverage	Period	Entitlement	Remaining
Hollie Test Unit (Band 2 HCA	01/04/2023 - 31/03/2024	3.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)
Hollie Test Unit (Band 2 HCA	01/04/2024 - 31/03/2025	3.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)
Hollie Test Unit (Band 2 HCA	01/04/2025 - 31/03/2026	3.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)
Maternity (Band 6 RN)	01/04/2023 - 31/03/2024	3.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)
Maternity (Band 6 RN)	01/04/2024 - 31/03/2025	3.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)
Maternity (Band 6 RN)	01/04/2025 - 31/03/2026	3.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)


Pro-Rata Annual Rate



If a worker's person record with an annual rate entitlement is end dated part way through the year, this will force the system to pro-rata the leave in their final year's entitlement. It uses the calculation to give you the figure of the pro-rata entitlement:



$$\begin{array}{l} \text{Entitlement} \quad / \quad 365 \quad \times \quad \text{Days Active} \\ \text{(Base Hours)} \quad \quad \text{(Days)} \quad \quad \quad \text{(from start of entitlement to end date)} \end{array}$$

Fixed Rate


- A single entitlement that spans from the selected start and end date, with no future entitlements being automatically created.
- Does not rollover
- Does not pro-rata




Entitlement Periods 



Annual Leave From 01/04/2021 
To 31/03/2026 

 Create Person Entitlement  Create Posting Entitlement

Coverage	Period	Entitlement	Remaining ↓
Person Entitlement	01/01/2023 - 31/12/9999	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)

Entitlement Periods 

Annual Leave From 01/04/2021 
To 31/03/2026  

 Create Person Entitlement  Create Posting Entitlement

Coverage	Period	Entitlement	Remaining
Stam Test (RN)	05/04/2022 - 31/12/9999	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)
Hollie Test Unit (Band 6 RN)	01/10/2022 - 31/12/9999	26.67 Days (200.00 Hrs)	20.47 Days (153.50 Hrs)

Adding Annual Rate Entitlement Part Way Through the Year

Create Person Entitlement ✕

Entitlement Basis *
Annual Rate ▼

Entitlement Type *
Annual Leave ▼

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 *
01/10/2022 📅

Initial Balance

Example

Create Person Entitlement ✕

Entitlement Basis *	Entitlement Type *
Annual Rate <input type="text" value="200.00"/>	Annual Leave <input type="text" value="26.67"/>
Entitlement Units *	
Hours And Days <input type="text" value="1"/>	
Annual Period Start	April
Base Hours	Base Days
200.00	26.67
Continuous Service Hours	Continuous Service Days
0.00	0.00
Agreed Carry Forward Hours	Agreed Carry Forward Days
0.00	0.00
Lieu Hours	Lieu Days
0.00	0.00
Total Hours	Total Days
200.00	26.67
Effective From *	Initial Balance
01/10/2022 <input type="text" value="01/10/2022"/>	<input type="text" value="100.00"/>

- Annual Rate Entitlement
- The entitlement period is April 1st to March 31st
- Entitlement starts on October 1st as this is when the staff member starts in post.
- Their entitlement will be 200 hours for a full year.
- This first period October – March 31st will require half of this amount.
- You would therefore need to enter in an initial balance of 100 hours.

The first period spans 6 months, and the basis is Fixed Amount

Person Entitlement	01/10/2022 - 31/03/2023	13.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)
Person Entitlement	01/04/2023 - 31/03/2024	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)
Person Entitlement	01/04/2024 - 31/03/2025	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)

Period
01/10/2022 - 31/03/2023

Entitlement Basis
Fixed Amount

Entitlement Units *
Hours And Days

Base Hours
100.00

Base Days
13.33

The following periods display as Annual Rate, and have the full 200 hours

Person Entitlement	01/10/2022 - 31/03/2023	13.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)	-
Person Entitlement	01/04/2023 - 31/03/2024	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)	-
Person Entitlement	01/04/2024 - 31/03/2025	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)	-

Period
01/04/2023 - 31/03/2024

Entitlement Basis
Annual Rate

Entitlement Units *
Hours And Days

Base Hours
200.00

Base Days
26.67

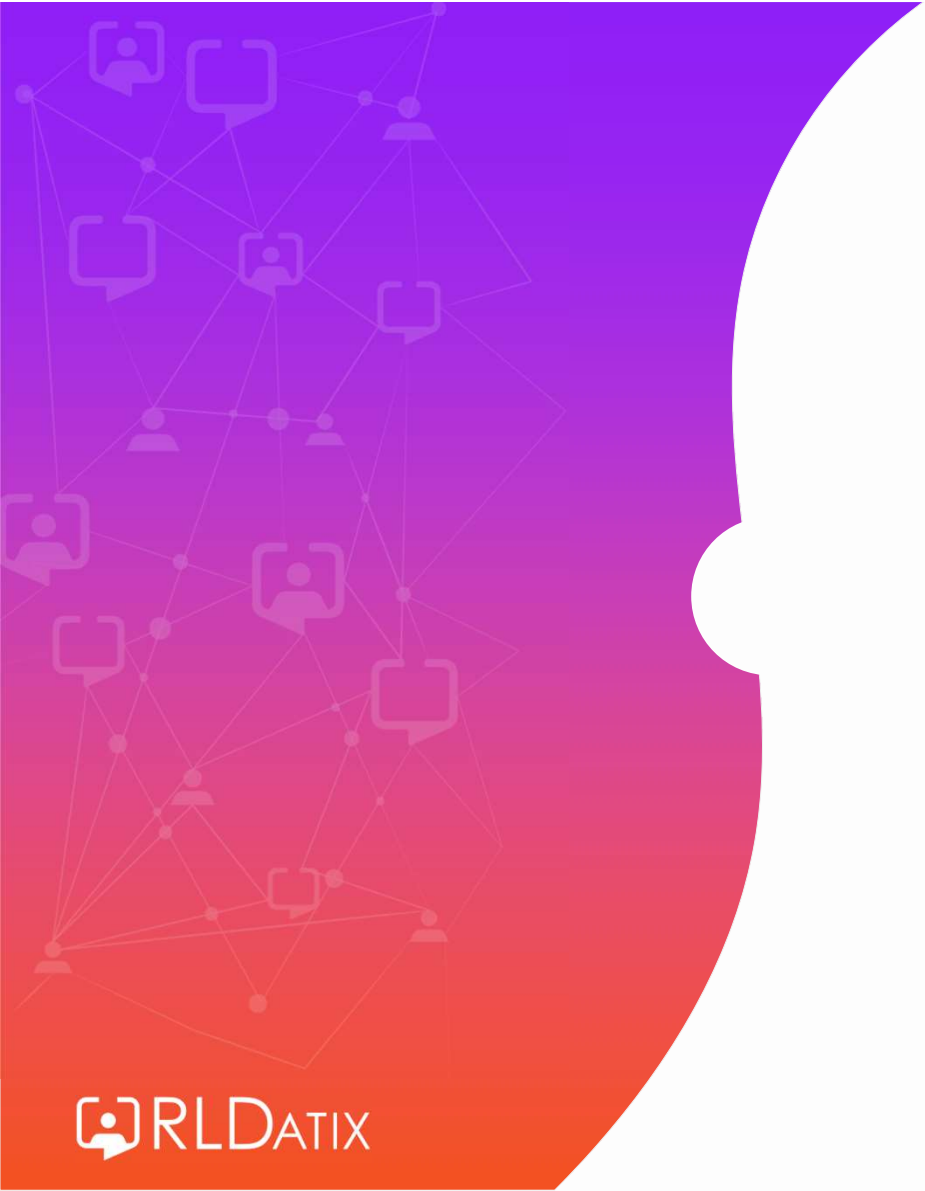
Remember

If you don't enter the initial balance:

Create Person Entitlement ✕

Entitlement Basis * Annual Rate ▼	Entitlement Type * Annual Leave ▼
Entitlement Units * Hours And Days ▼	
Annual Period Start 1 − +	April ▼
Base Hours 200.00	Base Days 26.67
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 200.00	Total Days 26.67
Effective From * 01/10/2022 📅	Initial Balance <input type="text"/>

Person Entitlement	01/10/2022 - 31/03/2023	0.00 Days (0.00 Hrs)	0.00 Days (0.00 Hrs)
Person Entitlement	01/04/2023 - 31/03/2024	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)
Person Entitlement	01/04/2024 - 31/03/2025	26.67 Days (200.00 Hrs)	26.67 Days (200.00 Hrs)



Entitlement Fields

- Entitlement Units



Entitlement Basis *
Annual Rate

Entitlement Type *
Annual Leave

- Base Hours/Days



Entitlement Units *
Hours And Days

Annual Period Start
1

April

- Continuous Service Hours/Days



Base Hours
0.00

Base Days
0.00

- Agreed Carry Forward Hours/Days



Continuous Service Hours
0.00

Continuous Service Days
0.00

- Lieu Hours/Days



Agreed Carry Forward Hours
0.00

Agreed Carry Forward Days
0.00

- Initial Balance



Lieu Hours
0.00

Lieu Days
0.00

Total Hours
0.00

Total Days
0.00

Effective From *
01/10/2022

Initial Balance

Entitlement Units

Entitlement Units *

Hours And Days

Days Only

Hours And Days

Hours Only

Entitlement Basis *

Annual Rate

Entitlement Units *

Hours And Days

Annual Period Start

1

Base Hours

0.00

Continuous Service Hours

0.00

Agreed Carry Forward Hours

0.00

Lieu Hours

0.00

Total Hours

0.00

Effective From *

01/10/2022

Entitlement Type *

Annual Leave

April

Base Days

0.00

Continuous Service Days

0.00

Agreed Carry Forward Days

0.00

Lieu Days

0.00

Total Days

0.00

Initial Balance

Hours and Days

Annual Leave

Period 01/04/2022 - 31/03/2023
Entitlement 300.00 Hrs (40.00 Days)
Remaining 258.50 Hrs (34.47 Days)

Details

Episodes

Breakdown

Taken _____

Hours Only

Annual Leave

Period 01/04/2022 - 31/03/2023
Entitlement 300.00 Hrs
Remaining 258.50 Hrs

Details

Episodes

Breakdown

Taken _____

Days Only

Annual Leave

Period 01/04/2022 - 31/03/2023
Entitlement 40.00 Days
Remaining 34.00 Days

Details

Episodes

Breakdown

Taken _____

How does the entitlement know what one day is?

- Default Unavailability (Hours Per Day) in the Work Contract in Person Record

Contracted For (Hours Per Week) _____ 37:30

Default Unavailability (Hours Per Day) _____ 07:30

Group	State	Episodes	Working Hours	Working Days
Annual Le	Taken	08/08/2022 - 08/08/2022	8.00	1.07
Annual Le	Taken	09/08/2022 - 21/08/2022	67.00	8.93
Annual Le	Requested	06/09/2022 - 06/09/2022	7.50	1.00

- Worktime assigned by system for these periods can differ depending on what is set in the Unavailability Settings (session 3)

- **Feature Access**

Employee online: View Leave in Days

> Annual Leave Calendar

Request Leave

Cole Ward (Band 5 RN)

Entitlement 26.67 days ⓘ

Taken 0 days
Planned 3.07 days
Requested 0 days

Request Leave Form

Full day(s) Partial day

From 01 Mar 2023 📅

> Annual Leave Calendar

Request Leave

Entitlement Taken Per Quarter

Quarterly Thresholds Lower Entitlement Threshold: 15%
Upper Entitlement Threshold: 35%

Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
0%	0%	0%	12%	12%

Without the feature access it will display in hours

Cole Ward (Band 5 RN)

Entitlement 26.67 days ⓘ

Remaining 23.60 days
Taken 0 days
Planned 3.07 days
Requested 0 days

Request Leave Form

Full day(s) Partial day

From 01 Mar 2023 📅

Notes

Entitlement Taken

Quarterly Thresholds
Upper Entitlement T

Qtr 1
0%

Request Leave

Cole Ward (Band 5 RN)

Entitlement
Remaining
Taken
Planned
Requested

200 hrs ⓘ
177 hrs
0 hrs
23 hrs
0 hrs

Cole Ward (Band 5 RN)

Entitlement 200 hrs ⓘ
Remaining
Taken
Planned
Requested


Breakdown
Base 200 hrs
Carry Forward 0 hrs
In Lieu 0 hrs
Continuous Service 0 hrs

Requesting In EOL

- Requesting leave is be done in days without a feature access
- To request in hours choose 'Partial Day'

Request Leave Form

Full day(s) Partial day


From
03 Nov 2022 

Number of days

End date

Request Leave Form

Full day(s) Partial day

From
03 Nov 2022 

Partial Day: Start Time

Hrs/Min (HH:MM)

Base Hours/Days

- Entitlement allowance
- Rolls over to following entitlements

Entitlement Basis * Annual Rate	▼	Entitlement Type * Annual Leave	▼
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 * 01/10/2022	📅	Initial Balance	

Continuous Service Hours / Days

- Hours that are accrued due to continuous service
- Roll over to following entitlements

Entitlement Basis * Annual Rate	▼	Entitlement Type * Annual Leave	▼
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 * 01/10/2022	📅	Initial Balance	

Agreed Carry Forward Hours /Days

- Unused entitlement hours that are to be carried over from the previous entitlement, into the next one
- Does not roll over

Entitlement Basis * Annual Rate	▼	Entitlement Type * Annual Leave	▼
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 * 01/10/2022	📅	Initial Balance	

Lieu Hours/ Days

- Keep track of Lieu Hours

Entitlement Basis * Annual Rate	▼	Entitlement Type * Annual Leave	▼
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 * 01/10/2022	📅	Initial Balance	

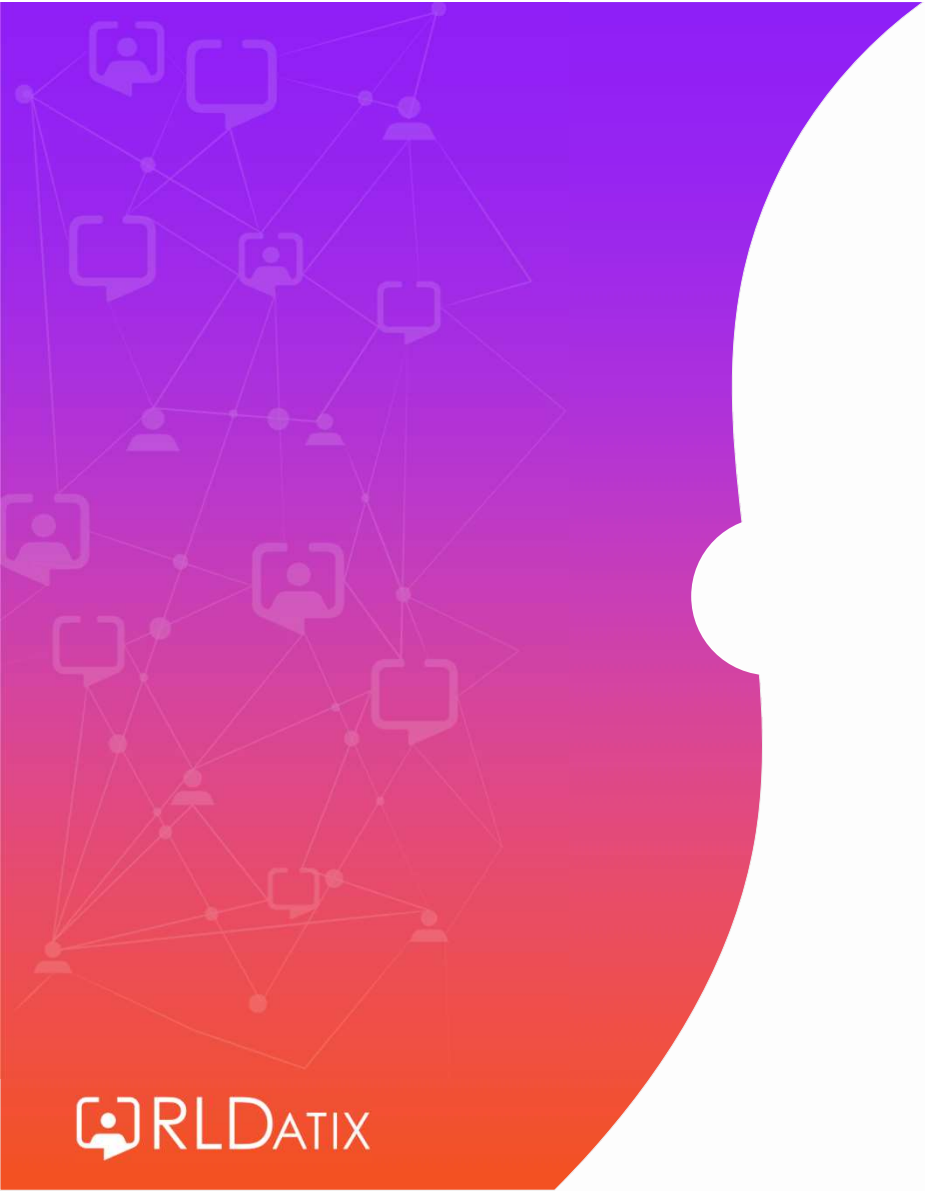
Effective From

- Start date of entitlement

Initial Balance

- If 'Effective From' date is not aligned with Annual Period Start of entitlements, this pro-rata figure will need to be inputted to ensure there are hours for their first period.

Entitlement Basis * Annual Rate	Entitlement Type * Annual Leave
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 * 01/10/2022	Initial Balance



Changes to Existing Entitlements

Personnel > Person Search > Person Search > Entitlements

Person Actions: Change Entitlements

Person Tools: Person Search

Person Details: Entitlements

The screenshot displays the 'Entitlement Periods' section of the RLDATIX system. At the top, there is a search filter for 'Annual Leave' with a date range from '01/04/2022' to '31/03/2023'. Below this, there are two buttons: 'Create Person Entitlement' and 'Create Posting Entitlement'. A table lists entitlements with columns for 'Coverage', 'Period', and 'Entitlement'. The row for 'Hollie Test Unit (Band 2 HCA)' is highlighted, and a context menu is open over it, showing 'Change Entitlement' and 'Delete Entitlement' options. To the right, a detailed view of the 'Annual Leave' entitlement is shown, including its period (01/06/2022 - 31/03/2023), total entitlement (100.00 Hrs), and remaining balance (55.00 Hrs). A sidebar on the right contains 'Change Entitlement' and 'Delete Entitlement' buttons, with the 'Change Entitlement' button highlighted by a red box. At the bottom, there are tabs for 'Details', 'Episodes', 'Notes', and 'Audit Trail', and a 'Breakdown' link.

Coverage	Period	Entitlement
Maternity (Band 6 RN)	26/09/2022 - 31/03/2023	13.33 Days (100.00 Hrs)
Hollie Test Unit (Band 2 HCA)	01/06/2022 - 31/03/2023	100.00 Hrs (13.33 Days)

Entitlement Details:
Annual Leave
Period: 01/06/2022 - 31/03/2023
Entitlement: 100.00 Hrs (13.33 Days)
Remaining: 55.00 Hrs (7.33 Days)

Annual Leave Entitlement for Tabatha Pemple

Period
01/04/2022 - 31/03/2023

Entitlement Basis
Annual Rate

Entitlement Units *
Hours And Days

Base Hours 100.00	Base Days 13.33
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 100.00	Total Days 13.33

Effective From *
01/04/2022

Cancel OK



Deleting an Entitlement

Personnel > Person Search > Person Search > Entitlements

Person Actions: Delete Entitlements

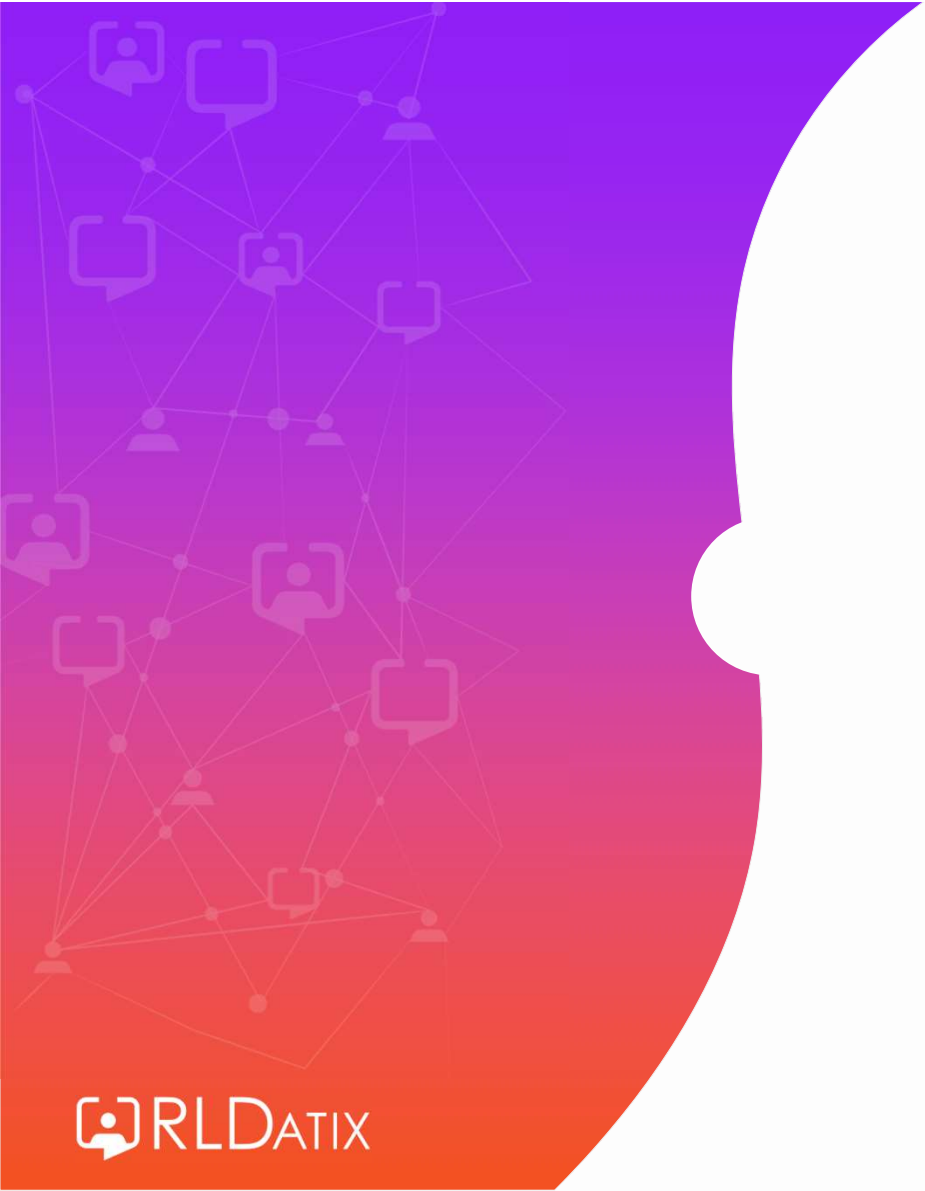
Person Details: Entitlements

Person Tools: Person Search

The screenshot shows the 'Entitlement Periods' section of the software. At the top, there is a filter for 'Annual Leave' with a date range from '01/04/2022' to '31/03/2023'. Below this, there are two buttons: 'Create Person Entitlement' and 'Create Posting Entitlement'. A table lists entitlements with columns for 'Coverage', 'Period', 'Entitlement', and 'Remaining'. The table contains three rows: 'Maternity (Band 6 RN)', 'Hollie Test Unit (Band 2 HCA)', and another row partially visible. A context menu is open over the 'Hollie Test Unit' row, showing 'Change Entitlement' and 'Delete Entitlement' options, with the latter highlighted by a red box.

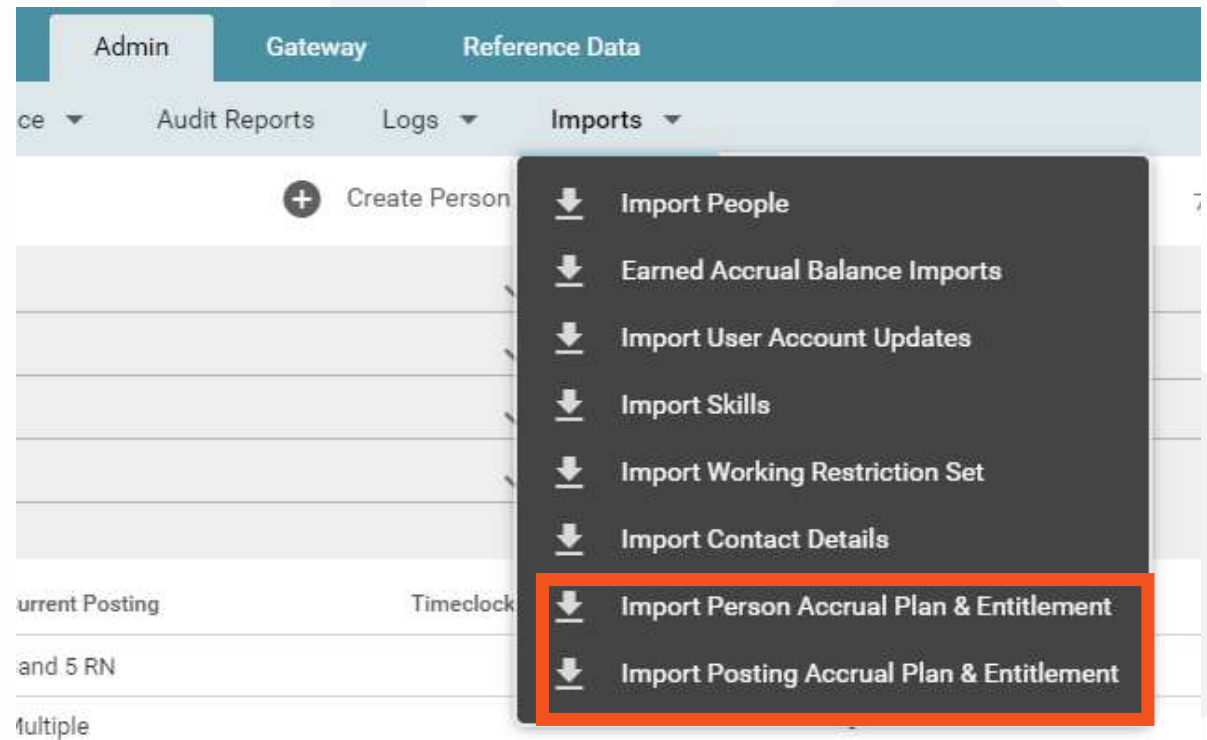
Coverage	Period	Entitlement	Remaining
Maternity (Band 6 RN)	26/09/2022 - 31/03/2023	13.33 Days (100.00 Hrs)	13.33 Days (100.00 Hrs)
Hollie Test Unit (Band 2 HCA)	01/06/2022 - 31/03/2023	100.00 Hrs (13.33 Days)	7.33 Days (55.00 Hrs)

The screenshot shows the 'Entitlement' details modal window. The title is 'Entitlement' and the main heading is 'Annual Leave'. The 'Period' is '01/06/2022 - 31/03/2023'. The 'Entitlement' is '100.00 Hrs (13.33 Days)' and the 'Remaining' is '55.00 Hrs (7.33 Days)'. On the right side, there are two buttons: 'Change Entitlement' and 'Delete Entitlement', with the latter highlighted by a red box. At the bottom, there are tabs for 'Details', 'Episodes', 'Notes', and 'Audit Trail'. Below the tabs, there is a 'Breakdown' section.



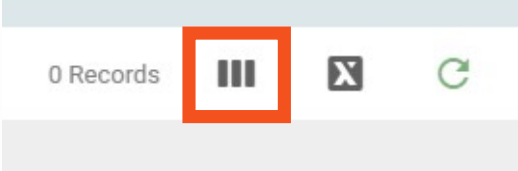
Upload Entitlements

- Admin>Imports>Import Person/Posting Accrual Plan & Entitlement
- *Gateway: Matching Tools Full Access*
- *Gateway: Matching Tools My Unit Only Access*
- .CSV File



Blank CSV Template

- Ensure all necessary columns are visible



- Export button



- Downloads a blank template that you can populate with the required data

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	Surname	Forenames	Staff Num	Grade	Base Hours	Effective From	Effective To	Accrual Plan	Entitlement Type	Entitlement Basis	Entitlement Units	Base Days	Initial Balance	Annual Pe	Annual Pe	Continuou	Continuou	Carry Forv	Carry Forv	Lieu Days	Lieu Hours	
2																						
3																						
4																						

- Save as CSV

Populated CSV Template

- Select Unit and Entitlement Type in Imports tab

Import Person Accrual Plan & Entitlement

Unit: Hollie Test Unit Entitlement Type: Annual Leave

Include those without existing Entitlement

Surname ↑	Forenames	Staff Number	Grade	Base Hours	Effective From	Effective To	Accrual PI	Entitlement Type	Entitlement Basis	Entitlement Units	Base Days	Initi
Erickson	Marshal	Marshal1	Band 5 RN	200.00	01/09/2021	-		Annual Leave	FixedAmount	Hours And Days		
Jones	Ted	22323423	Band 2 HCA	100.00	30/09/2022	31/03/2023		Annual Leave	FixedAmount	Hours And Days		
Pomple	Tabatha	999999999	Band 5 RN	100.00	01/04/2020	-		Annual Leave	AnnualRate	Hours And Days		
Scherbatsky	Robin	robin	Band 2 HCA	100.00	01/06/2022	31/03/2023		Annual Leave	FixedAmount	Hours And Days		

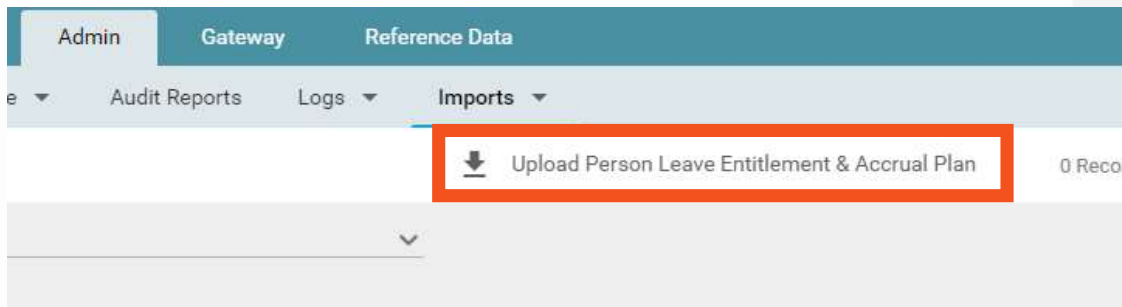
- Export

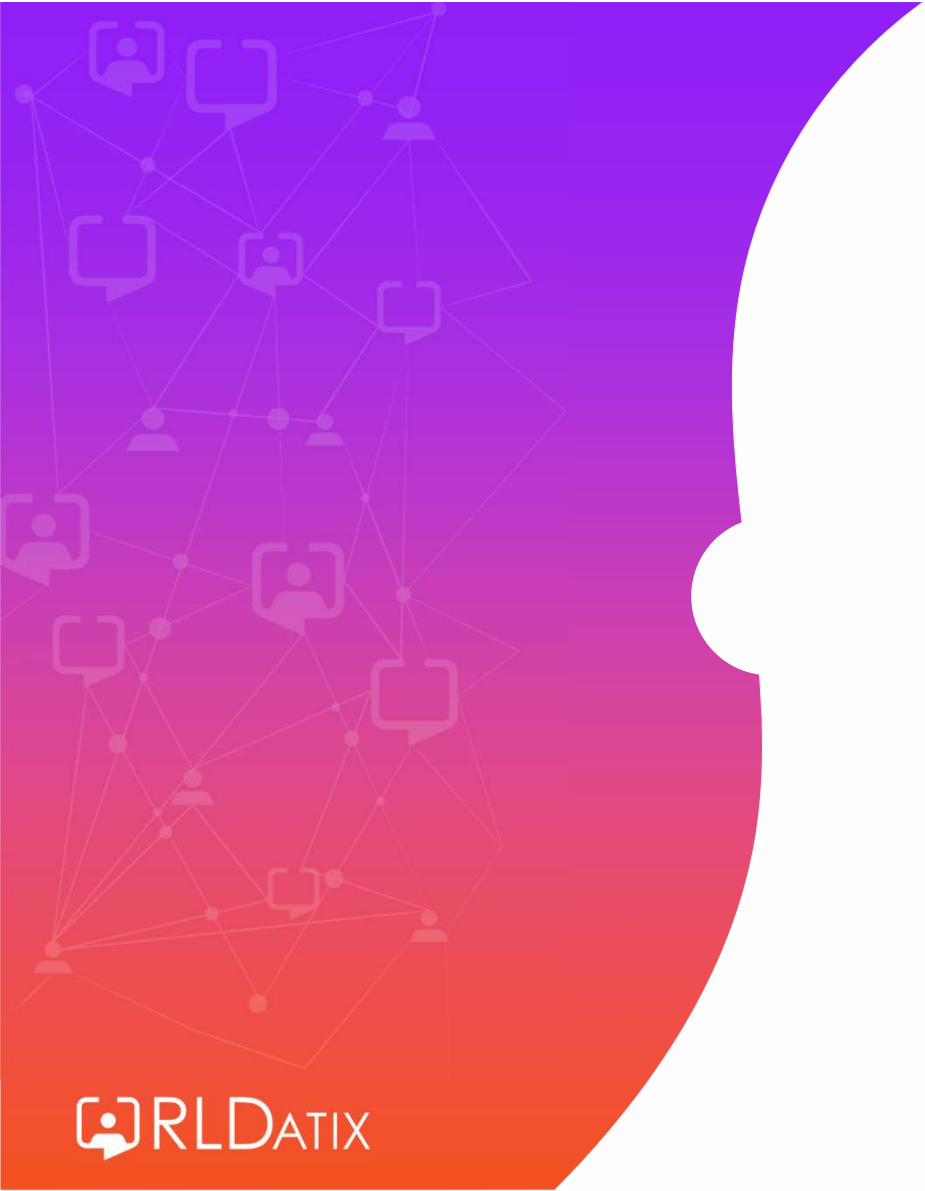


- Save as CSV

Import CSV Template

- Upload Person Leave Entitlement & Accrual Plan





Other Annual Leave

- Feature access to view Annual Leave, but no Entitlement in Allocate Optima (HealthRoster)
Employee Online: Annual Leave

MEDIC ONLINE

Rostering My Profile Timesheets

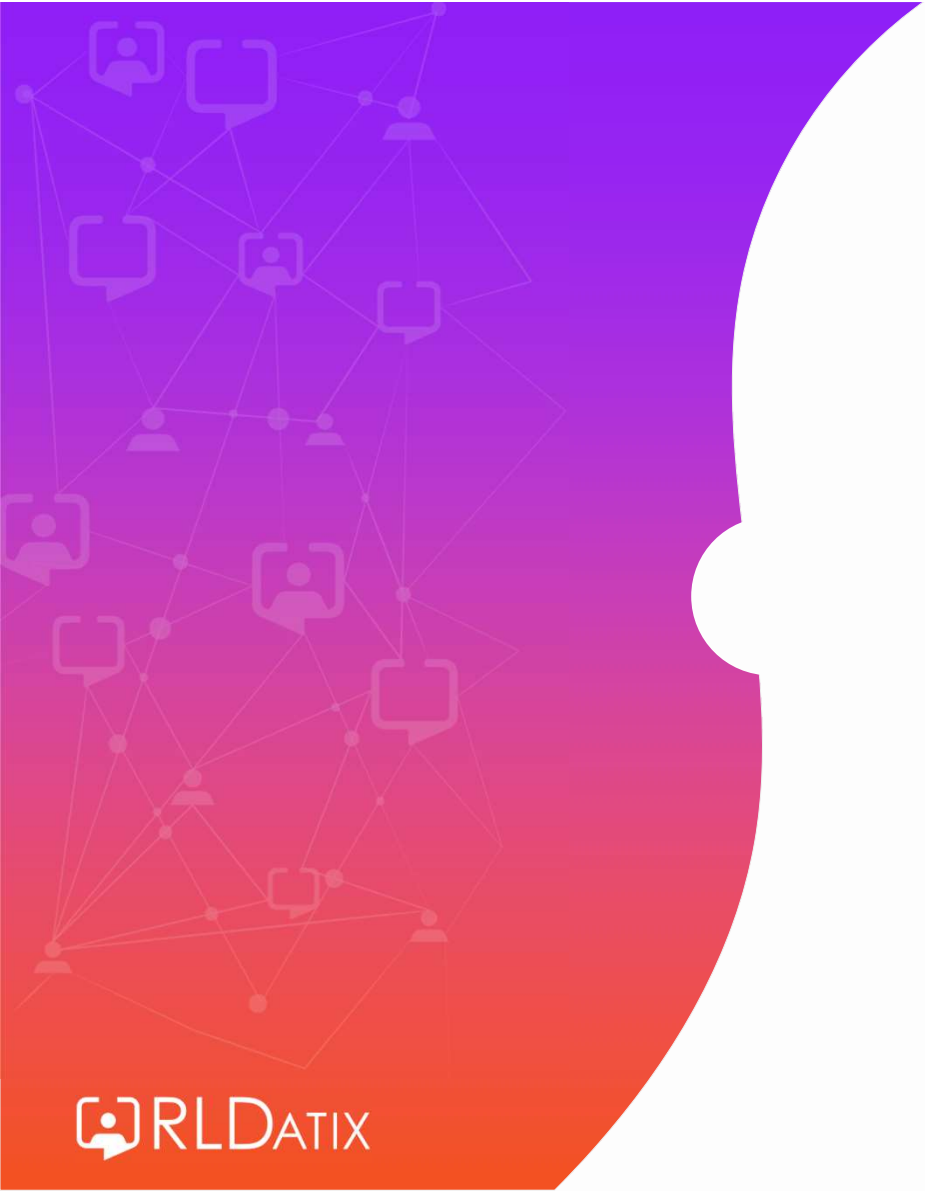
Annual Leave Study Days Other Leave

Entitlement Periods

< > 01 Apr 2022 - 31 Mar 2023

Entitlement Type	Coverage	Period
Other Annual Leave		1 Apr 2022 - 31 Mar 2023

Episodes (6)



Entitlement Report

- Rostering> Unavailability> Entitlement Report
- *Roster Tools: Entitlement Report*
- Changes with View Date
- Shows active entitlements for all members that have worked in the unit at any point during the period
- **'Exclude Closed People'** refers to closed person records, not ended postings

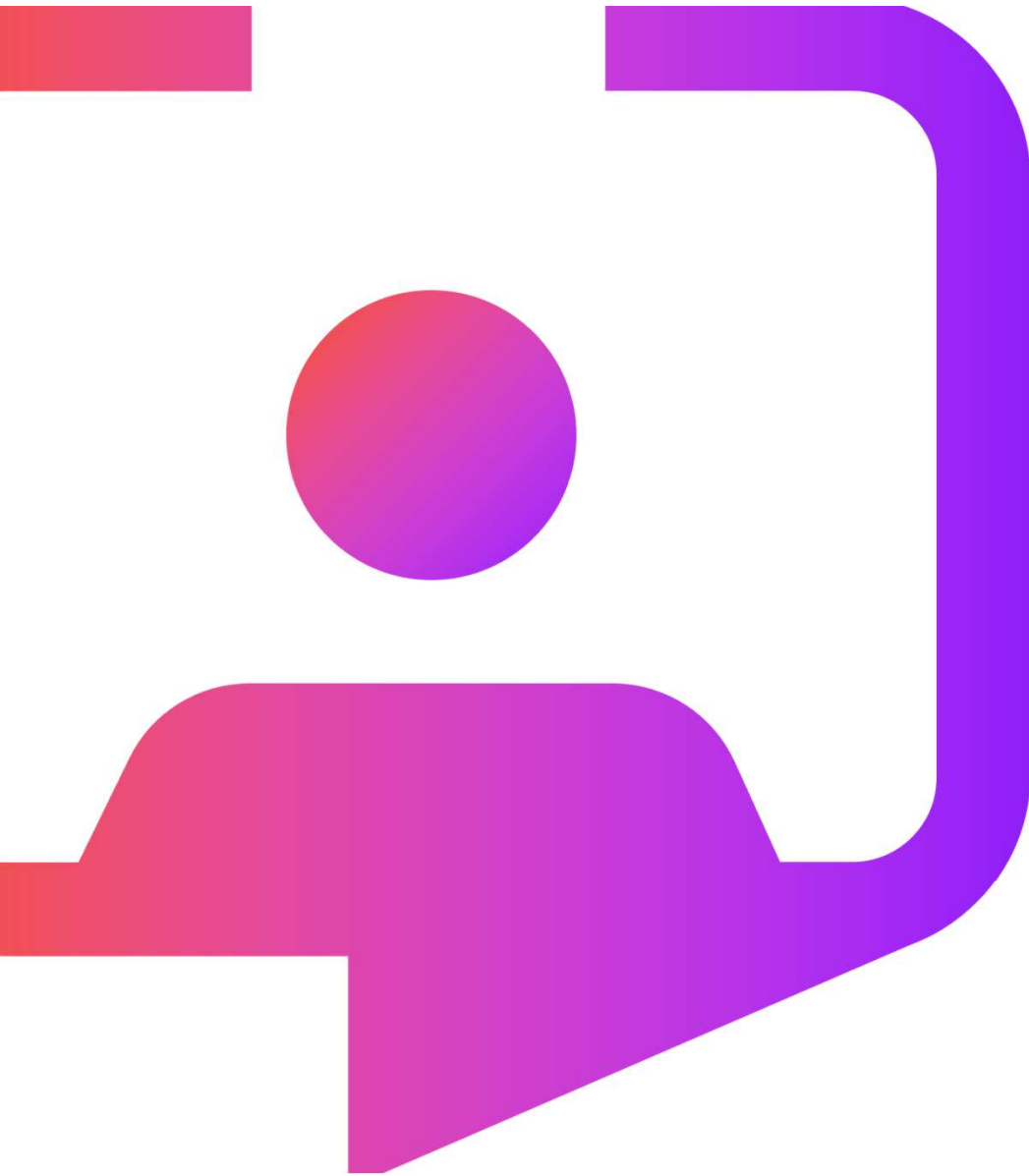
Navigation: Rostering | SafeCare | Personnel | Payroll | Admin | Gateway | Reference Data

Sub-navigation: View Rosters | Bank Requests | Daily Staffing | **Unavailability** | Assigned Hours | Roster Stats | Attendance Exceptions | Timesheet Exceptions | Swap Requests

Entitlement Report

Entitlement Type * Annual Leave | Unit * Hollie Test Unit | Exclude Closed People

Unit	Surname	Forenames	Staff Number	Remaining (Hrs)	Entitlement Used (Hrs)	Planned (Hrs)	Entitlement Used (%)	Base Entitlement Hours	Period ↓	Total Entitl	Total Entitlement (Days)
Hollie Test Unit	Jones	Ted	22323423	96.0	4.0	4.0	4.00	100.0	30/09/2022	100.0	8.70
Hollie Test Unit	Jones	Ted	22323423	0.0	0.0	0.0	-	0.0	04/05/2020	0.0	0.00
Hollie Test Unit	Erickson	Marshal	Marshal1	185.0	15.0	0.0	7.50	200.0	01/09/2021	200.0	26.67
Hollie Test Unit	Scherbat	Robin	robin	55.0	45.0	30.0	45.00	100.0	01/06/2022	100.0	13.33
Hollie Test Unit	Tester	Test	7890	307.5	0.0	0.0	-	307.5	01/04/2022	307.5	41.00



**Thank you for
your time!**



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@AllocateS