

# Back to Basics: Annual Leave

## 3. Annual Leave Hours

Hollie Archibald

# Back to Basics Sessions

Managing Annual Leave Requests

Annual Leave Entitlements

**Annual Leave Hours**

Annual Leave Notifications

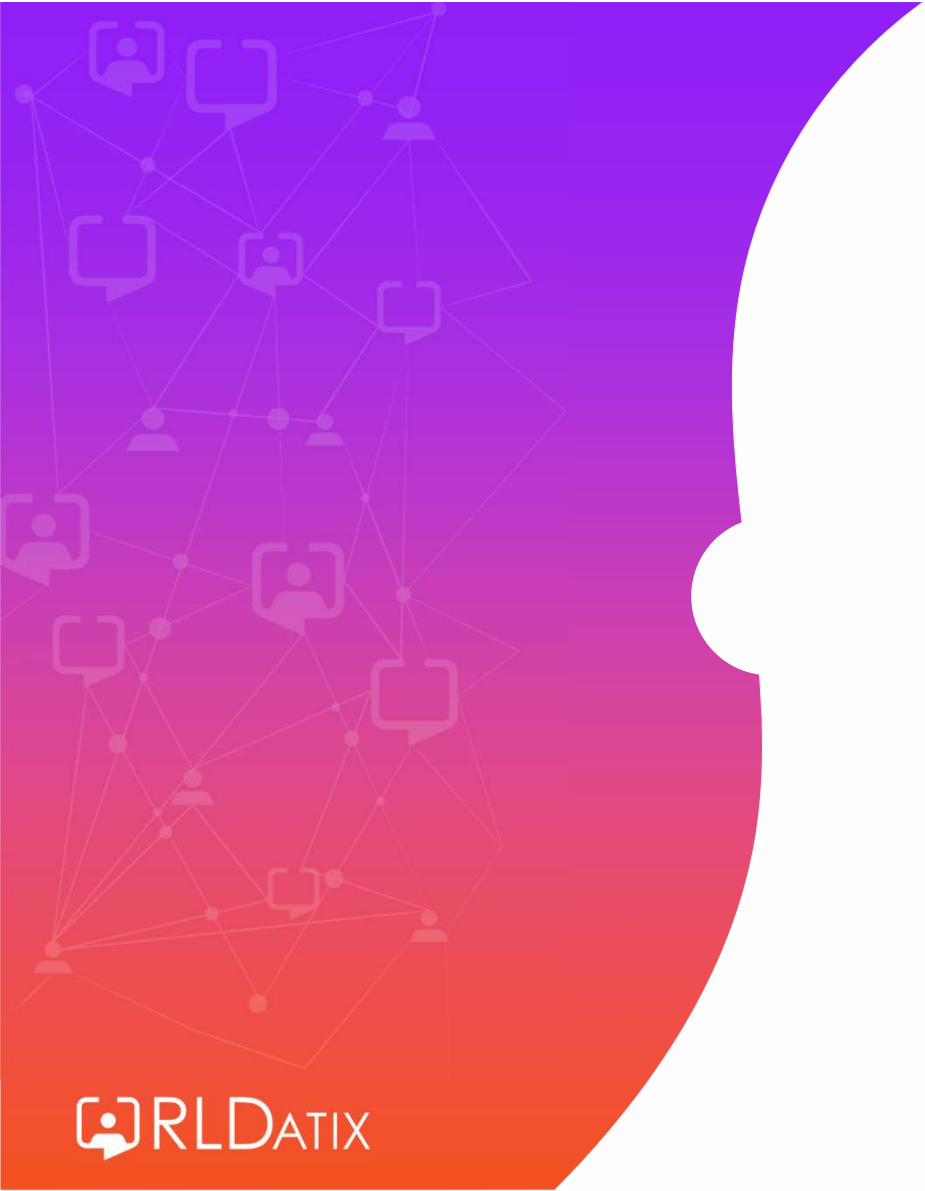
Annual Leave Rules

# Objective

To understand the basics of how the system works when assigning annual leave hours in periods of unavailability, and where this is set up.

# Agenda

- Unavailability Hours Management
- Unavailability Reason Settings
  - Contract
  - Default Behaviour
  - Existing Assignments
  - Zero Hours
  - Existing Assignments Else Contract
  - Contract On Assigned Duties



# Unavailability Hours Management

## View Rosters

Rostering>View Rosters> View Rosters

## Unavailability List

Rostering> Unavailability> Unavailability List

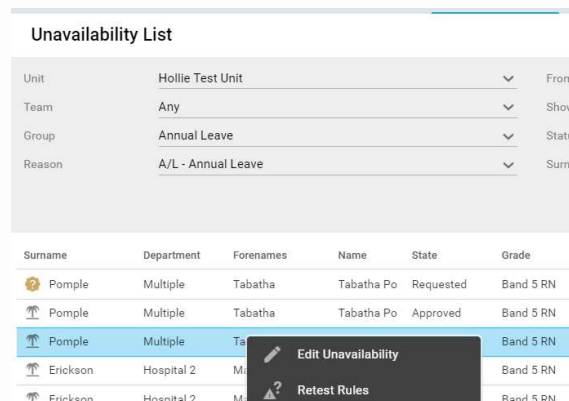
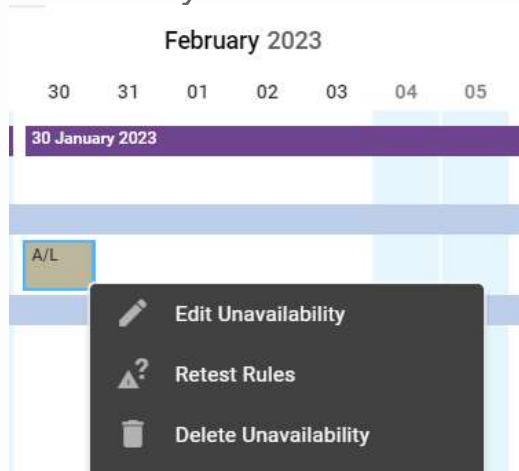
## Person Record

Personnel> Person Search> Person Search

*Roster Tools: View Roster*  
*Person Details: Unavailabilities*  
*Unavailability Actions: Edit*

*Roster Tools: Unavailability List*  
*Person Details: Unavailabilities*  
*Unavailability Actions: Edit*

*Person Tools: Person Search*  
*Person Details: Unavailabilities*  
*Unavailability Actions: Edit*



| Surname  | Department | Forenames | Name       | State     | Grade     |
|----------|------------|-----------|------------|-----------|-----------|
| Pomple   | Multiple   | Tabatha   | Tabatha Po | Requested | Band 5 RN |
| Pomple   | Multiple   | Tabatha   | Tabatha Po | Approved  | Band 5 RN |
| Pomple   | Multiple   | Tabatha   | Tabatha Po | Requested | Band 5 RN |
| Erickson | Hospital 2 | M         |            |           | Band 5 RN |
| Erickson | Hospital 2 | M         |            |           | Band 5 RN |



| Reason    | State     | Period  | Working Hours | Working Days |
|-----------|-----------|---------|---------------|--------------|
| Annual Le | Requested | 15/07/2 | 0.00          | -            |
| Annual Le | Taken     | 11/08/2 | 15.00         | 7.50         |
| Annual Le | Taken     | 19/08/2 | 7.50          | 3.75         |

# Manually alter the hours

**Annual Leave Details for Robin Scherbatsky (robin)**

Group \* Annual Leave State \* Approved Reason \* A/L - Annual Leave

Start \* 05/12/2022 07:00 Duration \* 3 End \* 07/12/2022 23:59

**Work Time** Refresh

Week Start 05/12/2022 Reset to default values

| Posting ↑       | 5/12 Mo | 6/12 Tu | 7/12 We | 8/12 Th | 9/12 Fr | 10/12 Sa | 11/12 Su | Total Hours |
|-----------------|---------|---------|---------|---------|---------|----------|----------|-------------|
| Hollie Test Uni | 07:30   | 07:30   | 07:30   |         |         |          |          | 22:30       |
| Maternity (Ban  | 00:00   | 00:00   | 00:00   |         |         |          |          | 00:00       |

Week Start 05/12/2022

Posting ↑ 5/12 Mo 6/12 Tu 7/12 We 8/12 T

|                 |       |       |       |
|-----------------|-------|-------|-------|
| Hollie Test Uni | 07:30 | 07:30 | 07:30 |
| Maternity (Ban  | 00:00 | 00:00 | 00:00 |

Posting ↑ 5/12 Mo 6/12 Tu 7/12 We 8/12

|                 |       |       |       |
|-----------------|-------|-------|-------|
| Hollie Test Uni | 07:30 | 06:00 | 07:30 |
|-----------------|-------|-------|-------|

Posting ↑ 5/12 Mo 6/12 Tu 7/12 We 8/1

|                 |       |       |       |
|-----------------|-------|-------|-------|
| Hollie Test Uni | 07:30 | 06:00 | 07:30 |
|-----------------|-------|-------|-------|

Posting ↑ 5/12 Mo 6/12 Tu 7/12 We 8/12 Th

|                 |       |       |       |
|-----------------|-------|-------|-------|
| Hollie Test Uni | 07:30 | 06:00 | 07:30 |
| Maternity (     |       |       |       |

Default Work Time : 07:30

Original Work Time : 06:00

Impacted Assignments :

Comments :

# Hover Tooltip

| Posting ↑       | 5/12 Mo | 6/12 Tu | 7/12 We | 8/12 Th |
|-----------------|---------|---------|---------|---------|
| Hollie Test Uni | 07:30   | 06:00   | 07:30   |         |
| Maternity (     |         |         |         |         |

**Default Work Time Source : Contract**

Default Work Time : 07:30

Original Work Time : 06:00

Impacted Assignments :

Comments :

| Ve | 8/12 Th | 9/12 Fr | 10/12 Sa | 11/12 Su | Total Hours |
|----|---------|---------|----------|----------|-------------|
|    | 07:30   | 07:30   | 00:00    | 00:00    | 36:00       |

Default Work Time Source : Contract

Default Work Time : 00:00

Impacted Assignments :

**Comments :**

Default hours capped from weekly hours on Person Work Contract.

| Posting ↑       | 5/12 Mo | 6/12 Tu | 7/12 We | 8/12 Th |
|-----------------|---------|---------|---------|---------|
| Hollie Test Uni | 07:30   | 06:00   | 07:30   |         |
| Maternity (     |         |         |         |         |

Default Work Time Source : Contract

**Default Work Time : 07:30**

**Original Work Time : 06:00**

Impacted Assignments :

Comments :

| Posting ↑       | 5/12 Mo | 6/12 Tu | 7/12 We | 8/12 Th |
|-----------------|---------|---------|---------|---------|
| Hollie Test Uni | 07:30   | 06:00   | 07:30   |         |
| Maternity (     |         |         |         |         |

Default Work Time Source : Contract

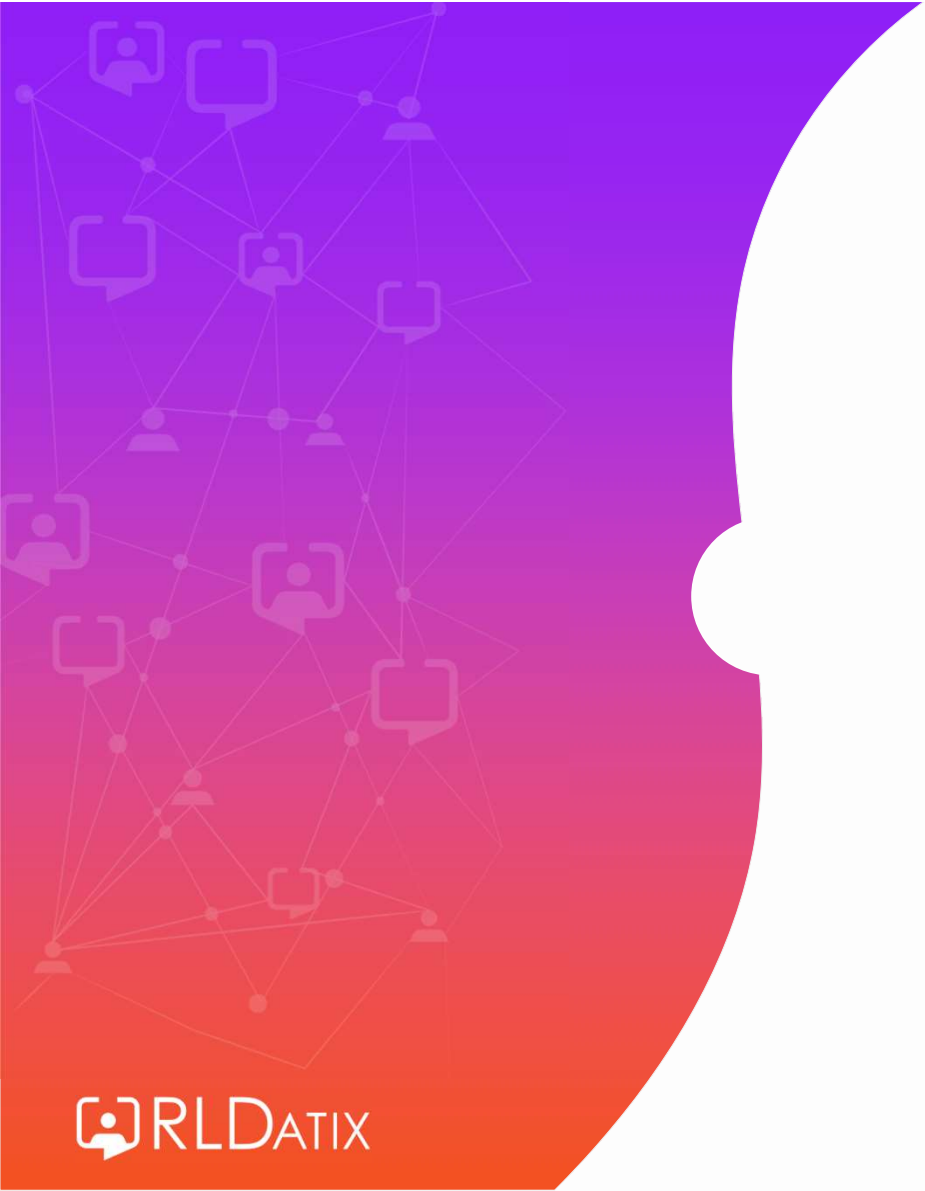
Default Work Time : 07:30

Original Work Time : 06:00

**Impacted Assignments :**

Comments :





# Unavailability Reason Settings

Reference Data > Unavailability > Unavailability Reasons

Ref Data Tools: Unavailability

Ref Data Actions: Unavailability

The screenshot displays the 'Unavailability Reasons' configuration page in the Rostering software. The left sidebar shows a list of reasons, with 'Annual Leave' selected. The main area shows the configuration for the selected reason, including 'Valid From' and 'Valid To' dates, and a section for 'When Duties Exist In Week Create Timesheets Based On' with a red box highlighting the 'Default Behaviour' options.

**Unavailability Reasons Table:**

| Full Name ↑            | Short Nam | Is Sensitiv | Export | Valid From | Valid To   |
|------------------------|-----------|-------------|--------|------------|------------|
| Annual Leave           | A/L       | -           | -      | -          | -          |
| Annual Leave allocated | AL        | -           | -      | -          | 10/05/2011 |
| Bank Holiday           | BH        | -           | -      | -          | -          |
| Old Annual Leave       | Old Leav  | -           | -      | -          | -          |

**Edit Unavailability Reason Configuration:**

- Can Be Single Employment:
- Valid From \*: 01/01/1900
- Valid To \*: 31/12/9999
- When Duties Exist In Week Create Timesheets Based On: Default Behaviour
- When Duties Do Not Exist In Week Create Timesheets Based On: Default Behaviour

**Default Times Section:**

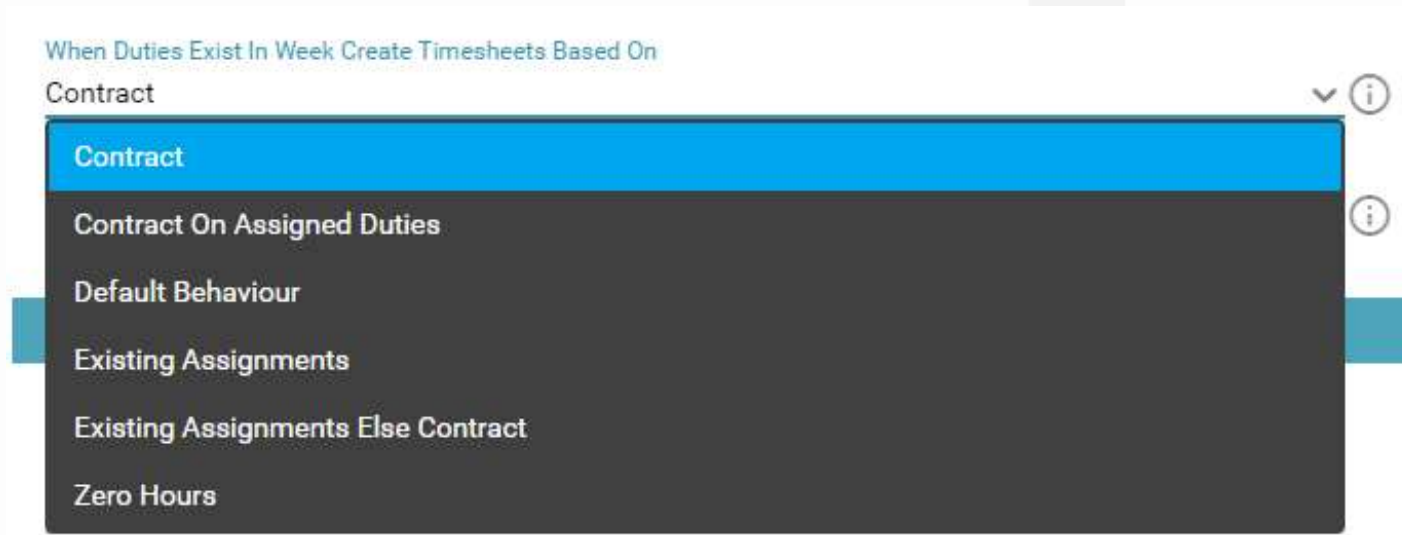
- Default Timesheet Hours: \_\_\_\_\_
- Default Start Time: \_\_\_\_\_

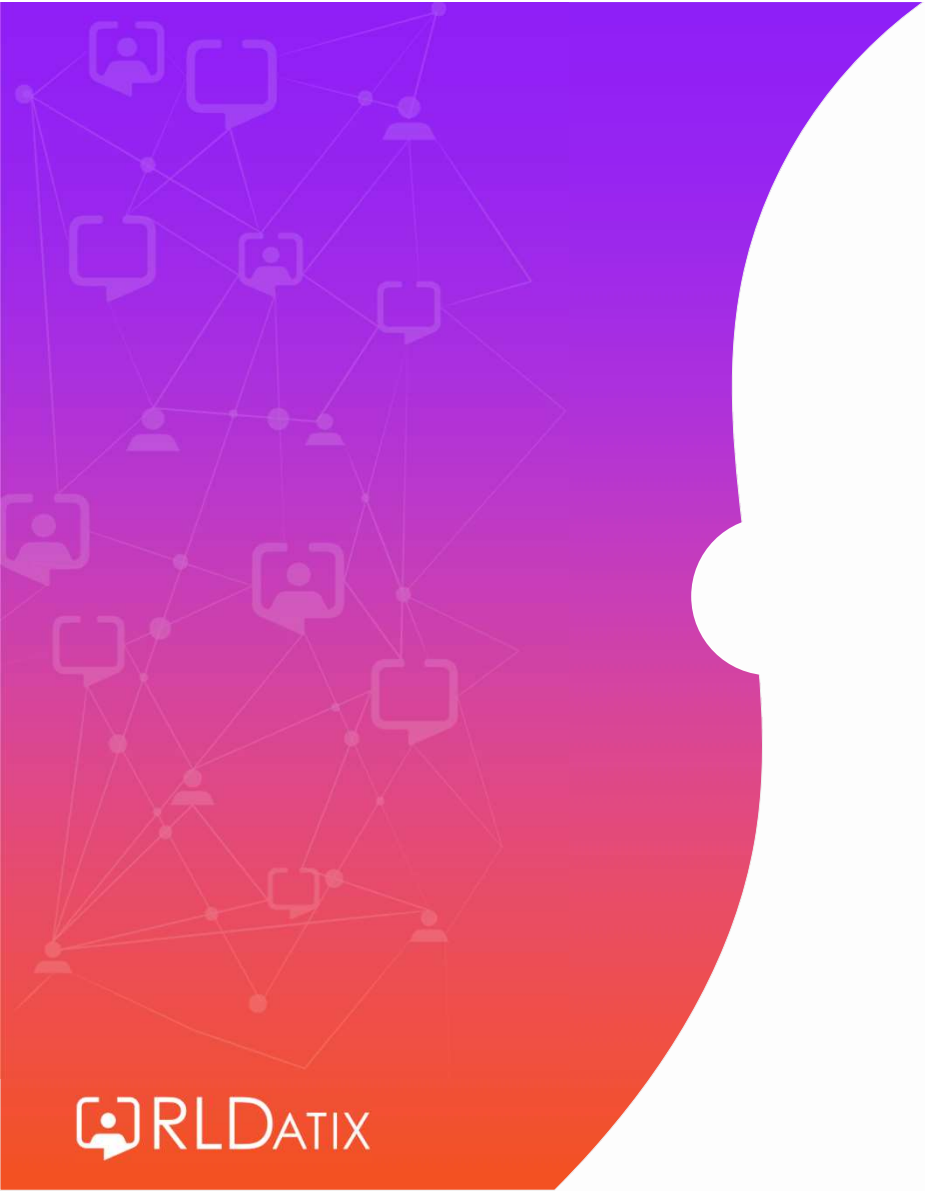
For these two options you can open the dropdown to see the available behaviours:

When Duties Exist In Week Create Timesheets Based On

Contract ▼ i

- Contract
- Contract On Assigned Duties i
- Default Behaviour
- Existing Assignments
- Existing Assignments Else Contract
- Zero Hours





# Unavailability Reason Settings: **Contract**

Unavailability Reason

Full Name Annual Leave

Unavailability Reason Group Annual Leave

**Edit Unavailability Reason**

Valid From \* 01/01/1900 Valid To \* 31/12/9999

Entitlement Types >

Restrict Unavailability Rea... >

Work Contract Hours Calc... >

Applicable Rule Groups >

When Duties Exist In Week Create Timesheets Based On Contract

When Duties Do Not Exist In Week Create Timesheets Based On Contract

Default Times

Valid To \*

For substantive postings, the associated Person Work Contract is used to default work time hours (if not overridden on the unavailability reasons). Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

|   | Tu | 7/12 We | 8/12 Th | 9/12 Fr | 10/12 Sa |
|---|----|---------|---------|---------|----------|
| 0 |    | 07:30   | 07:30   | 07:30   | 0        |
| 0 |    |         |         |         |          |

Default Work Time Source : Contract

Default Work Time : 07:30

Impacted Assignments :

Comments :

For substantive postings, the Person Work Contract is used to calculate the default work time hours.

*Person Details: Work Contracts*  
*Person Tools: Person Search*

Person Work Contract

**Band 5 RN**

Change Contract  
 Change Basic Rate  
 More

Summary >  
**Work Contracts**  
 Unavailabilities >  
 Sickness >  
 Entitlements >  
 Documents >  
 Skills >  
 Specialties >  
 Salary Uplifts >  
 Attributes >  
 Contacts >  
 Restrictions >  
 Patterns >  
 Notes >

**Contract Details** | Contracted Activities | Basic Salary Rate

Contracted Hours Patterns

**Substantive Contract Details**

Staff Group: Nursing  
 Enterprise Work Contract: Agenda for change  
 Grade Type: RN  
 Grade: Band 5 RN  
 Payroll: Substantive Monthly  
 Contract Type: Normal  
 Valid From: 01/12/2010  
 Valid To: -

Contracted For (Hours Per Week): 37:30  
**Default Unavailability (Hours Per Day): 07:30**

WTF 1 nn

Valid To \*

For substantive postings, the associated Person Work Contract is used to default work time hours (if not overridden on the unavailability reasons).

Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

**Work Time** Refresh

Week Start: 23/01/2023 Reset to default values

| Posting ↑           | 23/1 Mo | 24/1 Tu | 25/1 We | 26/1 Th | 27/1 Fr | 28/1 Sa | 29/1 Su |
|---------------------|---------|---------|---------|---------|---------|---------|---------|
| Hollie Test Unit (t | 07:30   | 07:30   | 07:30   | 07:30   | 07:30   |         |         |
| Maternity (Band t   | 00:00   | 00:00   | 00:00   | 00:00   | 00:00   |         |         |

This behaviour can be overridden on the unavailability reason

Reference Data > Unavailability > Unavailability Reasons

Unavailability Reason

Full Name Annual Leave

Unavailability Reason Group Annual Leave



**Edit Unavailability Reason**



Entitlement Types >



Restrict Unavailability Rea... >

Work Contract Hours Calc... >

Applicable Rule Groups >

Valid From \* 01/01/1900  Valid To \* 31/12/9999 

When Duties Exist In Week Create Timesheets Based On Contract  

When Duties Do Not Exist In Week Create Timesheets Based On Contract  

**Default Times**

Default Timesheet Hours

Default Start Time 07:00

Default End Time 23:59

Valid To \*

For substantive postings, the associated Person Work Contract is used to default work time hours (if not overridden on the unavailability reasons).

Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

# Example

**Default Times**

Default Timesheet Hours  
06:00

Default Start Time  
07:00

Default End Time  
23:59

**Work Time** Refresh

Week Start: 23/01/2023 Reset to default values

| Posting ↑       | 23/1 Mo | 24/1 Tu | 25/1 We | 26/1 Th | 27/1 Fr | 28/1 Sa | 29/1 Su |
|-----------------|---------|---------|---------|---------|---------|---------|---------|
| Hollie Test Uni | 06:00   | 06:00   | 06:00   | 06:00   | 06:00   |         |         |
| Maternity (Ban  | 00:00   | 00:00   | 00:00   | 00:00   | 00:00   |         |         |

Contracted For (Hours Per Week) **37:30**

Default Unavailability (Hours Per Day) **07:30**



# Capped to Contracted Hours

Work time usually capped to weekly contracted hours, and maximum work hours per day in the restrictions.

Person Record > Work Contracts

*Person Details: Work Contracts*

*Person Action: Change Contract*

| Work Time   |            | Refresh                 |         |         |         |         |         |             |
|-------------|------------|-------------------------|---------|---------|---------|---------|---------|-------------|
| Week Start  | 23/01/2023 | Reset to default values |         |         |         |         |         |             |
| Posting ↑   | 23/1 Mo    | 24/1 Tu                 | 25/1 We | 26/1 Th | 27/1 Fr | 28/1 Sa | 29/1 Su | Total Hours |
| Hollie Test | 07:30      | 07:30                   | 07:30   | 07:30   | 07:30   | 00:00   | 00:00   | 37:30       |

Valid To \*

For substantive postings, the associated Person Work Contract is used to default work time hours (if not overridden on the availability reasons).

Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

| e | 8/12 Th | 9/12 Fr | 10/12 Sa | 11/12 Su | Total Hours |
|---|---------|---------|----------|----------|-------------|
|   | 07:30   | 07:30   | 00:00    | 00:00    | 37:30       |

Default Work Time Source : Contract  
Default Work Time : 00:00  
Impacted Assignments :  
Comments :  
Default hours capped from weekly hours on Person Work Contract.

# Capped to Working Restrictions

Person Record > Restrictions

*Person Details: Working Restrictions*

*Person Actions: Change Working Restrictions*

Band 5 RN

Summary > Restrictions  
Work Contracts >  
Unavailabilities >  
Sickness >  
Entitlements >  
Documents >  
Skills >  
Specialties >  
Salary Uplifts >  
Attributes >  
Contacts >  
Restrictions

Restrictions  
Type ↑  
Person

Hours Of Work

| Mon      | Tue      | Wed   | Thu      | Fri      | Sat      | Sun      |
|----------|----------|-------|----------|----------|----------|----------|
| Any Time | Any Time | 10:00 | Any Time | Any Time | Any Time | Any Time |
| -        | -        | 15:00 | -        | -        | -        | -        |

Default Leave Hours -

| Mon   | Tue   | Wed   | Thu   | Fri   | Sat   | Sun   |
|-------|-------|-------|-------|-------|-------|-------|
| 07:30 | 07:30 | 07:30 | 07:30 | 07:30 | 07:30 | 07:30 |

Restrictions

Days per Week \_\_\_\_\_ 5  
Max Days Per Week \_\_\_\_\_ 5  
Max Shifts Per Day \_\_\_\_\_ 3  
Max Shifts Per Week \_\_\_\_\_ 6

Valid To \*

For substantive postings, the associated Person Work Contract is used to default work time hours (if not overridden on the unavailability reasons)

Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

| 12/12 Mo | 13/12 Tu | 14/12 We | 15/12 Th | 16/12 Fr | 17/12 Sa |
|----------|----------|----------|----------|----------|----------|
|          | 07:30    | 05:00    | 07:30    |          |          |

Default Work Time Source : Contract  
Default Work Time : 05:00  
Impacted Assignments :  
Early 07:00 - 15:00 on 13/12/2022 assigned to Erickson, M

Comments :  
Default hours capped from Working Restrictions.

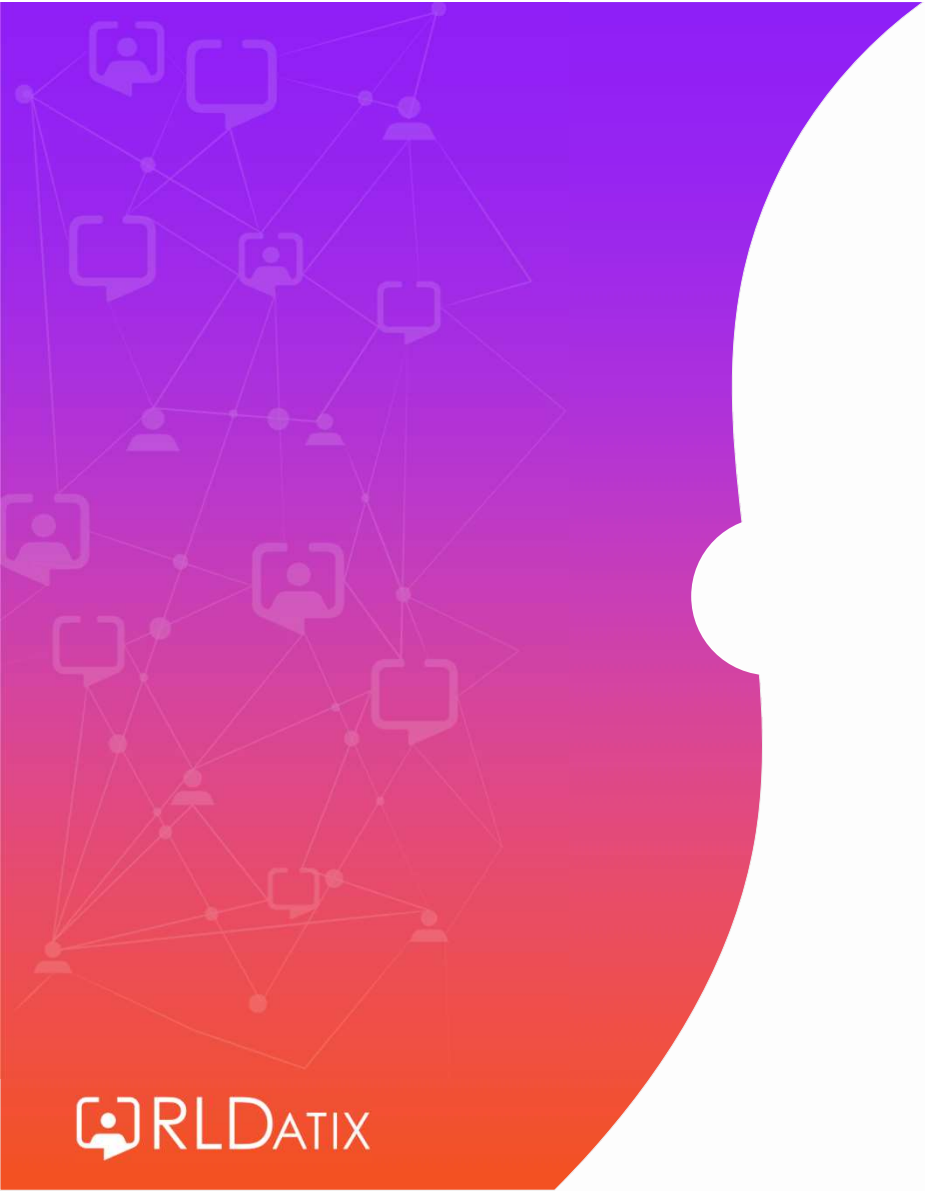
Capping be overridden in the Enterprise Work Contract.

Reference Data> Organisation>Work Contracts

*Ref Data Tools: Work Contracts*

*Ref Data Actions: Organisation*

The screenshot displays the Rostering software interface. On the left, a navigation pane shows a hierarchy: Organisation > Payroll > Person > Unavailable. Under 'Work Contracts', there is a '+ Create Enterprise Work Contract' button and a list of items including '2016 Junior Contract', 'Agency', and 'Agenda for change' (which is selected and expanded). The 'Agenda for change' sub-menu lists roles like Accountant, Activities, Admin, Administration Ma, and Administrator - Ma. On the right, a modal window titled 'Agenda for change' is open, showing options to '+ Create Enterprise Work Contract', '+ Create Grade Contract', and 'More'. Below this, there are tabs for 'Edit Enterprise Work Contract', 'Cost Elements', and 'Restrictions'. The 'Edit Enterprise Work Contract' tab is active, showing a 'Session Tariffs' section with a checked box for 'Calculate Annual Leave Hours From Assigned Duties'. Under 'Contracted Hours Cap \*', the dropdown menu is open, showing options: 'Capped To Any Seven Days', 'Capped To The Working Week' (which is highlighted in blue), and 'Ignore Cap'.



Unavailability  
Reason Settings:  
**Existing  
Assignments**

When Duties Exist In Week Create Timesheets Based On  
Existing Assignments



When Duties Do Not Exist In Week Create Timesheets Based On  
Existing Assignments



For substantive postings, existing active duties are used to default work times.

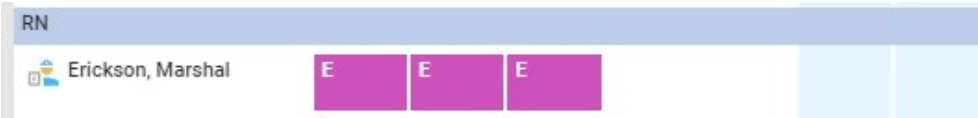


Week Start 12/12/2022

| Posting ↑        | 12/12 Mo | 13/12 Tu | 14/12 We | 15/12 Th |
|------------------|----------|----------|----------|----------|
| Hollie Test Unit | 04:30    | 07:30    | 07:30    | 00:00    |

Default Work Time Source : Existing Assignments  
Default Work Time : 04:30  
Impacted Assignments :  
Early 07:00 - 12:00 on 12/12/2022 assigned to Erickson, M

## Assigned three 7.5 hours duties



Week Start 12/12/2022

| Posting ↑       | 12/12 Mo | 13/12 Tu | 14/12 We | 15/12 Th | 16/12 Fr |
|-----------------|----------|----------|----------|----------|----------|
| Hollie Test Uni | 07:30    | 07:30    | 07:30    | 00:00    | 00:00    |

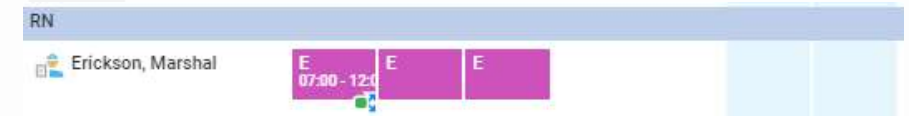
Default Work Time Source : Existing Assignments  
Default Work Time : 07:30

**Impacted Assignments :**

- Early 07:00 - 15:00 on 12/12/2022 assigned to Erickson, M
- Early 07:00 - 15:00 on 13/12/2022 assigned to Erickson, M
- Early 07:00 - 15:00 on 21/12/2022 assigned to Erickson, M
- Annual Leave 17/12/2022 - 17/12/2022 assigned to Erickson, Marshal
- Early 07:00 - 15:00 on 14/12/2022 assigned to Erickson, M

Comments :

## If we change the time of one duty to 4.5 hours:



You can see the hours assigned to the leave on this day changes to 4.5 too:

Week Start 12/12/2022 Reset to d

| Posting ↑       | 12/12 Mo | 13/12 Tu | 14/12 We | 15/12 Th | 16/12 Fr | 17/12 Sa |
|-----------------|----------|----------|----------|----------|----------|----------|
| Hollie Test Uni | 04:30    | 07:30    | 07:30    | 00:00    | 00:00    |          |

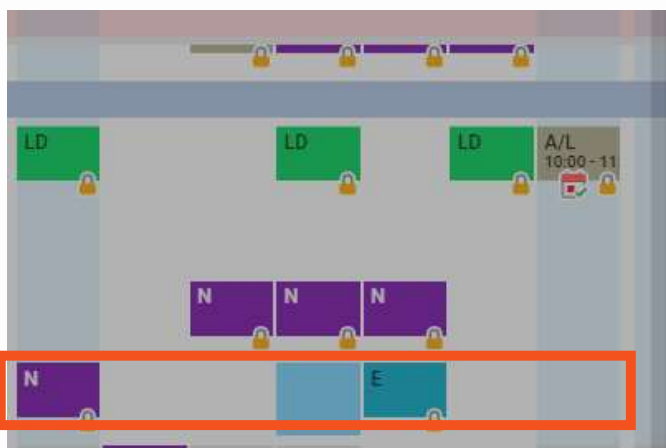
Default Work Time Source : Existing Assignments  
Default Work Time : 04:30

**Impacted Assignments :**

- Early 07:00 - 12:00 on 12/12/2022 assigned to Erickson, M
- Early 07:00 - 15:00 on 13/12/2022 assigned to Erickson, M
- Early 07:00 - 15:00 on 14/12/2022 assigned to Erickson, M

Comments :

On days where there are no duties, it will default to 0 hours:



Week Start 19/03/2023 Reset to de

Posting ↑ Sun 19/03 Mon 20/03 Tue 21/03 Wed 22/03 Thu 23/03 Fri 24/03

|                |       |       |       |       |       |       |
|----------------|-------|-------|-------|-------|-------|-------|
| Cole Ward (Bar | 11:00 | 00:00 | 00:00 | 00:00 | 07:30 | 00:00 |
|----------------|-------|-------|-------|-------|-------|-------|

Default Work Time Source : Existing Assignments  
Default Work Time : 00:00  
Impacted Assignments :  
Comments :

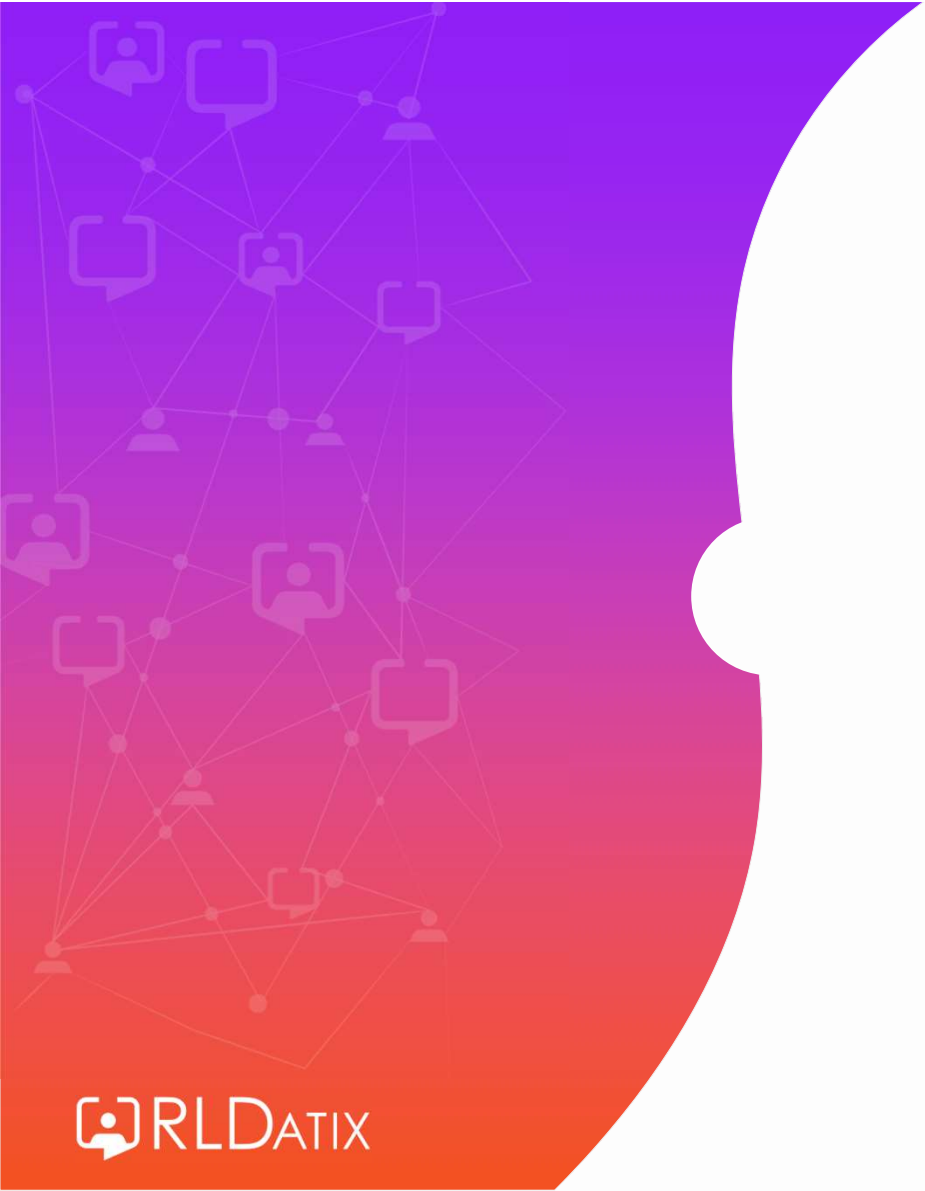
# When Duties Do Not Exist in Week

When Duties Do Not Exist In Week Create Timesheets Based On Existing Assignments

The screenshot displays a software interface for managing timesheets. On the left, a calendar for January shows dates 26 through 01. The calendar cells contain codes like 'OCx1' and 'On Calbx1'. A red box highlights a cell on the 26th. On the right, a timesheet table is shown for the week starting 26/12/2022. The table has columns for days of the week and rows for different units. A dropdown menu is open over the 'Existing Assignments' column, showing options for 'Default Work Time Source', 'Default Work Time : 00:00', 'Impacted Assignments', and 'Comments'.

| Posting ↑       | 26/12 Mo | 27/12 Tu | 28/12 We | 29/12 Th | 30/12 Fr | 31/12 Sa | 1/1 Su |
|-----------------|----------|----------|----------|----------|----------|----------|--------|
| Hollie Test Uni | 00:00    | 00:00    | 00:00    | 00:00    | 00:00    | 00:00    |        |
| Nurs            |          |          |          |          | 00:00    | 00:00    |        |





# Unavailability Reason Settings: **Default Behaviour**

**Edit Unavailability Reason**

Can Be Single Employment

Valid From \* 01/01/1900 Valid To \* 31/12/9999

When Duties Exist In Week Create Timesheets Based On  
Default Behaviour

When Duties Do Not Exist In Week Create Timesheets Based On  
Default Behaviour

## When Duties Exist in Week Create Timesheets Based On

## When Duties Do Not Exist in Week Create Timesheets Based On

For substantive postings, existing active duties are used to default work times except where the 'Calculate Annual Leave Hours From Assigned Duties' checkbox on the Enterprise Work Contract is NOT ticked. In which case the hours will be calculated from the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions. If the only duties in the week are of type Rest or On-Call, the timesheets will be based on the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions. Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

For substantive postings, the associated Person Work Contract is used to default work time hours (if not overridden on the unavailability reasons). Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

# When Duties Exist in Week Create Timesheets Based On

For Substantive Postings, the system will first look at the 'Calculate Annual Leave Hours From Assigned Duties'

Reference Data > Organisation > Work Contracts

*Ref Data Tools: Work Contracts*

*Ref Data Actions: Organisation*

The screenshot shows the 'Enterprise Work Contract' configuration page in the HEALTHROSTER11 system. The page is titled 'Enterprise Work Contract' and has a sub-header 'Agenda for Change'. On the left, there is a list of work contracts, with 'Agenda for Change' selected. The right side of the page shows the configuration details for the selected contract. The 'Calculate Annual Leave Hours From Assigned Duties' checkbox is checked and highlighted with a red box. Other configuration options include 'Default Unavailability Hrs' (07:30), 'Valid From' (01/01/1900), 'Valid To' (31/12/9999), 'Include Break Time in Contracted Time' (unchecked), 'TOIL Split Percentage' (0.00), 'Can Record Contracted Activities' (unchecked), 'Annual Leave Finalisation Check Rule' (No Checking), and 'All Other Unavailability Finalisation Check Rule' (No Checking).

For substantive postings, existing active duties are used to default work times except where the 'Calculate Annual Leave Hours From Assigned Duties' checkbox on the Enterprise Work Contract is NOT ticked. In which case the hours will be calculated from the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions. If the only duties in the week are of type Rest or On-Call, the timesheets will be based on the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions. Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

# Example

Marshall is assigned three 7.5 hour duties

Week: 12/12/2022

Posting ↑

|                | 12/12 Mo | 13/12 Tu | 14/12 We | 15/12 Th | 16/12 Fr |
|----------------|----------|----------|----------|----------|----------|
| Hollie Test Un | 07:30    | 07:30    | 07:30    | 00:00    | 00:00    |

Default Work Time Source : Existing Assignments  
Default Work Time : 07:30  
Impacted Assignments :  
Early 07:00 - 15:00 on 12/12/2022 assigned to Erickson, M  
Early 07:00 - 15:00 on 13/12/2022 assigned to Erickson, M  
Early 07:00 - 15:00 on 21/12/2022 assigned to Erickson, M  
Annual Leave 17/12/2022 - 17/12/2022 assigned to Erickson, Marshal  
Early 07:00 - 15:00 on 14/12/2022 assigned to Erickson, M  
Comments :

If we change the time of one duty to 4.5 hours

Week: 12/12/2022

Posting ↑

|                | 12/12 Mo | 13/12 Tu | 14/12 We | 15/12 Th | 16/12 Fr | 17/12 Sa |
|----------------|----------|----------|----------|----------|----------|----------|
| Hollie Test Un | 04:30    | 07:30    | 07:30    | 00:00    | 00:00    |          |

Default Work Time Source : Existing Assignments  
Default Work Time : 04:30  
Impacted Assignments :  
Early 07:00 - 12:00 on 12/12/2022 assigned to Erickson, M  
Early 07:00 - 15:00 on 13/12/2022 assigned to Erickson, M  
Early 07:00 - 15:00 on 14/12/2022 assigned to Erickson, M  
Comments :

## If 'Calculate Annual Leave Hours From Assigned Duties' is not ticked:

Calculate Annual Leave Hours From Assigned Duties

### Default Timesheet Hours on the unavailability reason if entered

When Duties Exist In Week Create Timesheets Based On

Default Behaviour



When Duties Do Not Exist In Week Create Timesheets Based On

Default Behaviour



#### Default Times

Default Timesheet Hours

Default Start Time

07:00

Default End Time

23:59

For substantive postings, existing active duties are used to default work times except where the 'Calculate Annual Leave Hours From Assigned Duties' checkbox on the Enterprise Work Contract is NOT ticked. In which case the hours will be calculated from the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions.

If the only duties in the week are of type Rest or On-Call, the timesheets will be based on the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions.

Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

# Otherwise:

Person

**Hermione Granger**  
Band 5 RN

- Summary >
- Work Contracts >
- Unavailabilities >
- Sickness >
- Entitlements >
- Documents >
- Skills >
- Specialties >
- Salary Uplifts >
- Attributes >
- Contacts >
- Restrictions**

### Person Working Restrictions

Change Person Working Restrictions

#### Hours Of Work

| Mon      | Tue   | Wed      | Thu   | Fri      | Sat      | Sun      |
|----------|-------|----------|-------|----------|----------|----------|
| Any Time | 12:00 | Any Time | 10:00 | Any Time | Any Time | Any Time |
| --       | 15:00 | --       | 15:00 | --       | --       | --       |

#### Default Leave Hours -

|       |       |       |       |       |       |          |
|-------|-------|-------|-------|-------|-------|----------|
| 07:30 | 07:30 | 07:30 | 07:30 | 07:30 | 07:30 | Any Time |
|-------|-------|-------|-------|-------|-------|----------|

#### Restrictions

Days per Week \_\_\_\_\_

Max Days Per Week \_\_\_\_\_

Max Shifts Per Day \_\_\_\_\_

Max Shifts Per Week \_\_\_\_\_

For substantive postings, existing active duties are used to default work times except where the 'Calculate Annual Leave Hours From Assigned Duties' checkbox on the Enterprise Work Contract is NOT ticked. In which case the hours will be calculated from the 'Default Timesheet Hours' on the unavailability reason if entered otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions. If the only duties in the week are of type Rest or On-Call, the timesheets will be based on the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions. Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

#### Default Leave Hours

Use Working Days

|           |       |
|-----------|-------|
| Monday    | 07:30 |
| Tuesday   | 07:30 |
| Wednesday | 07:30 |
| Thursday  | 07:30 |
| Friday    | 07:30 |
| Saturday  | 07:30 |
| Sunday    | 07:30 |

# Example:

**Hours Of Work**

| Mon      | Tue      | Wed      | Thu      | Fri      | Sat      | Sun      |
|----------|----------|----------|----------|----------|----------|----------|
| Any Time | Any Time | Any Time | Any Time | Any Time | Any Time | Any Time |
| -        | -        | -        | -        | -        | -        | -        |

**Default Leave Hours -**

|       |       |       |       |       |       |       |
|-------|-------|-------|-------|-------|-------|-------|
| 07:30 | 06:00 | 07:30 | 07:30 | 07:30 | 07:30 | 07:30 |
|-------|-------|-------|-------|-------|-------|-------|

**Default Leave Hours**

Use Working Days

|           |       |
|-----------|-------|
| Monday    | 07:30 |
| Tuesday   | 06:00 |
| Wednesday | 07:30 |
| Thursday  | 07:30 |
| Friday    | 07:30 |
| Saturday  | 07:30 |
| Sunday    | 07:30 |

**Work Time** Refresh

Week Start: 12/03/2023 Reset to default values

|        | Sun 12/03 | Mon 13/03 | Tue 14/03 | Wed 15/03 | Thu 16/03 | Fri 17/03 | Sat 18/03 | Total Hours |
|--------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------------|
| rd (Ag |           | 07:30     | 06:00     | 07:30     | 07:30     | 07:30     | 01:30     | 37:30       |

Default Work Time Source : Contract  
 Default Work Time : 06:00  
 Impacted Assignments :  
 Comments :  
 Default hours capped from Working Restrictions.

# Use Working Days

Person: Hermione Granger, Band 5 RN

Restrictions Type: Person

**Change Person Working Restrictions**

| Hours Of Work | From  | To    |
|---------------|-------|-------|
| Monday        | 00:00 | 23:59 |
| Tuesday       | 12:00 | 15:00 |
| Wednesday     | 00:00 | 23:59 |
| Thursday      | 10:00 | 15:00 |
| Friday        | 00:00 | 23:59 |
| Saturday      | 00:00 | 23:59 |
| Sunday        | 00:00 | 23:59 |

Default Leave Hours: 07:30

Restrictions: Any Time

Use Working Days

| Default Leave Hours | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|---------------------|--------|---------|-----------|----------|--------|----------|--------|
| Max Shifts Per Week | 07:30  | 03:00   | 07:30     | 05:00    | 07:30  | 07:30    | 07:30  |

Person: Hermione Granger, Band 5 RN

Person Working Restrictions

**Change Person Working Restrictions**

| Hours Of Work | Mon      | Tue   | Wed      | Thu   | Fri      | Sat      | Sun      |
|---------------|----------|-------|----------|-------|----------|----------|----------|
| Any Time      | Any Time | 12:00 | Any Time | 10:00 | Any Time | Any Time | Any Time |
|               | --       | 15:00 | --       | 15:00 | --       | --       | --       |

Default Leave Hours -

|       |       |       |       |       |       |       |
|-------|-------|-------|-------|-------|-------|-------|
| 07:30 | 07:30 | 07:30 | 07:30 | 07:30 | 07:30 | 07:30 |
|-------|-------|-------|-------|-------|-------|-------|

Restrictions

- Days per Week: 5
- Max Days Per Week: 5
- Max Shifts Per Day: 3
- Max Shifts Per Week: 6



## Example:

- Tuesday capped to 3 hours
- 00:00 - 23:59 days will refer to Default Unavailability (Hours Per Day) in contract
- Capped to Default Unavailability (Hours Per Day) (so 7.5 hours in this example)

Posting ↑ 12/12 Mo 13/12 Tu 14/12 We 15/12 Th 16/12

Hollie Test Uni 07:30 03:00

Default Work Time Source : Contract  
 Default Work Time : 03:00  
 Impacted Assignments :  
 Early 07:00 - 15:00 on 12/12/2022 assigned to Erickson, M  
 Early 07:00 - 15:00 on 13/12/2022 assigned to Erickson, M  
 Comments :  
 Default hours capped from Working Restrictions.

Hours Of Work

| Mon      | Tue   | Wed      | Thu   | Fri      | Sat      | Sun      |
|----------|-------|----------|-------|----------|----------|----------|
| Any Time | 12:00 | Any Time | 10:00 | Any Time | Any Time | Any Time |
| -        | 15:00 | -        | 15:00 | -        | -        | -        |

Default Leave Hours

Contracted For (Hours Per Week) 37:30

Default Unavailability (Hours Per Day) 07:30

# Capped to Working Week/ Restrictions

| e | 8/12 Th | 9/12 Fr | 10/12 Sa | 11/12 Su | Total Hours |
|---|---------|---------|----------|----------|-------------|
|   | 07:30   | 07:30   | 00:00    | 00:00    | 37:30       |

Default Work Time Source : Contract  
 Default Work Time : 00:00  
 Impacted Assignments :

Comments :  
 Default hours capped from weekly hours on Person Work Contract.

|     | 12/12 Mo | 13/12 Tu | 14/12 We | 15/12 Th | 16/12 Fr | 17/12 Sa |
|-----|----------|----------|----------|----------|----------|----------|
| Jni |          | 07:30    | 05:00    | 07:30    |          |          |

Default Work Time Source : Contract  
 Default Work Time : 05:00  
 Impacted Assignments :  
 Early 07:00 - 15:00 on 13/12/2022 assigned to Erickson, M

Comments :  
 Default hours capped from Working Restrictions.

For substantive postings, existing active duties are used to default work times except where the 'Calculate Annual Leave Hours From Assigned Duties' checkbox on the Enterprise Work Contract is NOT ticked. In which case the hours will be calculated from the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions. If the only duties in the week are of type Rest or On-Call, the timesheets will be based on the 'Default Timesheet Hours' on the unavailability reason if entered, otherwise they will be taken from the 'Default Leave Hours' on the persons working restrictions.

Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

# When Duties Do Not Exist in Week

When Duties Exist In Week Create Timesheets Based On

Default Behaviour

When Duties Do Not Exist In Week Create

Default Behaviour

Default Times

For substantive postings, the associated Person Work Contract is used to default work time hours (if not overridden on the unavailability reasons). Work time hours are normally capped based on weekly contracted hours and the maximum hours they can work on a given day from the associated Working Restrictions.

Work Time Refresh

Week Start: 26/12/2022 Reset to default values

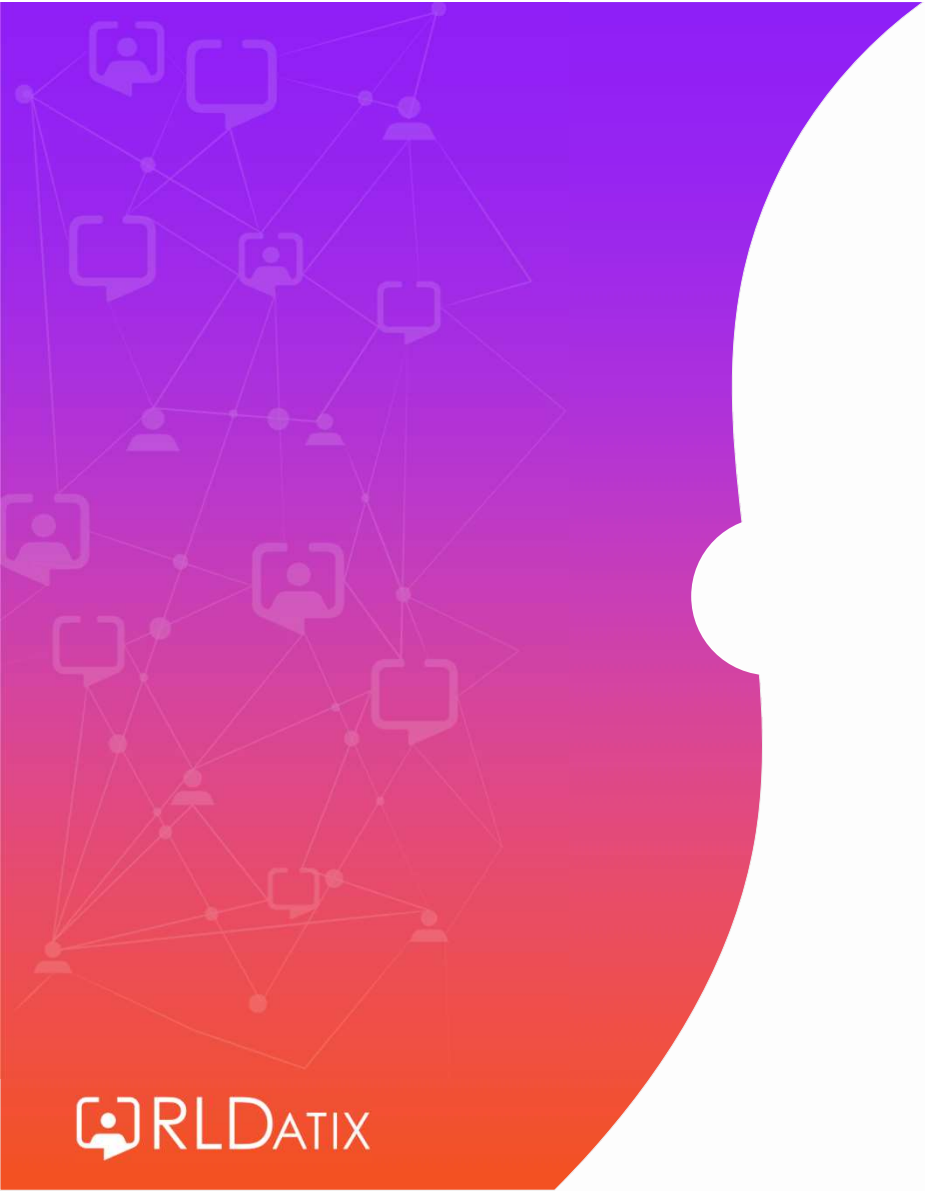
| Posting ↑       | 26/12 Mo | 27/12 Tu | 28/12 We | 29/12 Th | 30/12 Fr | 31/12 Sa | 1/1 Su | Tot   |
|-----------------|----------|----------|----------|----------|----------|----------|--------|-------|
| Hollie Test Uni | 07:30    | 07:30    | 07:30    | 07:30    | 07:30    | 00:00    |        | 37:30 |
| Nurse Bank (B)  | 00:00    | 00:00    | 00:00    | 00:00    | 00:00    | 00:00    |        | 00:00 |

Next Steps

No Action  Cancel Demand  Send To Bank

Contracted For (Hours Per Week) 37:30

Default Unavailability (Hours Per Day) 07:30



# Unavailability Reason Settings: **Zero Hours**

When Duties Exist In Week Create Timesheets Based On

Zero Hours



When Duties Do Not Exist In Week Create Timesheets Based On

Zero Hours

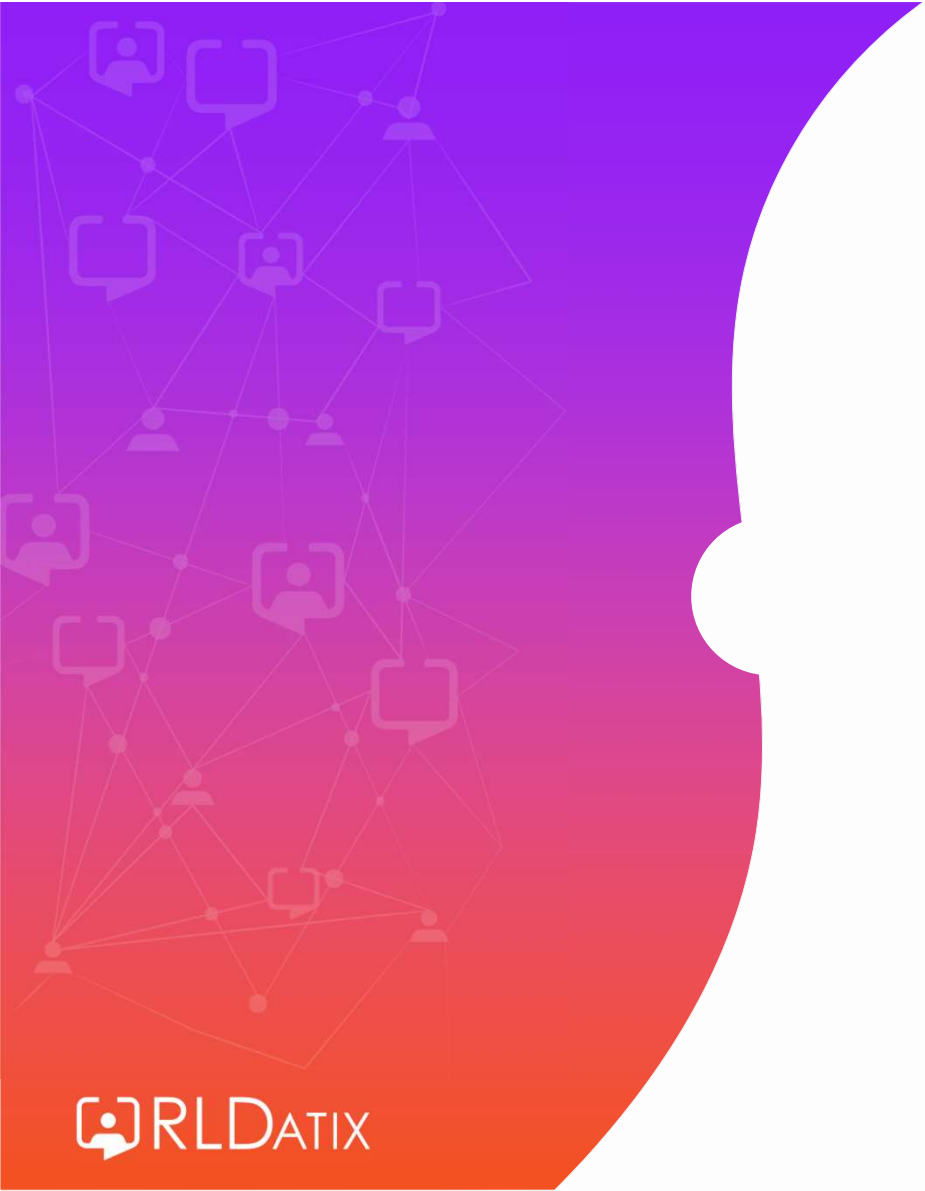


Work time will always be 0.



| Posting ↑       | 19/12 Mo | 20/12 Tu | 21/12 We   | 22/12 Th | 23/12 Fr | 24/12 Sa |
|-----------------|----------|----------|------------|----------|----------|----------|
| Hollie Test Uni | 00:00    | 00:00    | 00:00      | 00:00    | 00:00    |          |
| Nurse Bar       |          |          | Zero Hours | 00:00    | 00:00    |          |
| Stam Test       |          |          |            | 00:00    | 00:00    |          |

Default Work Time Source  
Default Work Time : 00:00  
Impacted Assignments :  
Comments :



Unavailability Reason  
Settings:  
**Existing Assignments  
Else Contract**

When Duties Exist In Week Create Timesheets Based On

Existing Assignments Else Contract



When Duties Do Not Exist In Week Create Timesheets Based On

Existing Assignments Else Contract



- From 11.2.3
- Non-UK Functionality
- Does not cap

For substantive postings, if a Duty Assignment exists on the day where the Unavailability is added then the timesheet work time is created based on the 'Existing Assignments' behaviour - using the hours from the employee's existing active duty.

Otherwise, if no Duties exist on the day where the Unavailability is added then the timesheet work time is created based on the 'Contract' behaviour: if the 'Timesheet Entries Populated Based On Contracted Hours Per Week' checkbox is ticked on the Enterprise Work Contract then the timesheet work time is populated using the daily contracted hours. If this is not ticked, the timesheet work time is populated using the value in the 'Default Timesheet Hours' field on the Unavailability Reason. If this is not set, the hours from the 'Default Unavailability Hours' field on the employee's associated Person Work Contract are used to populate the timesheet work time.

These hours in the week are not capped to the person's contracted weekly hours.

Week Start 19/12/2022

Posting ↑ 19/12 Mo 20/12 Tu 21/12 We 22/12 Th :

Hollie Test Uni 05:30

Default Work Time Source : Existing Assignments Else Contract

Default Work Time : 05:30

Impacted Assignments :

Early 09:00 - 15:00 on 20/12/2022 assigned to Erickson, M

Comments :

Individual timesheets are populated based on the hours of existing Duties if present on that day, otherwise they are populated based on the 'Contract' behaviour.

- Different behaviour dependant on whether there are duties assigned on each **day**.
- For substantive postings, on a **day** when a duty has been assigned, it will take the hours from the assigned duty, as it does for the Existing Assignments behaviour

The screenshot displays a user interface for managing duty assignments. On the left, a sidebar contains sections for 'Attributes', 'Warnings', 'Duty Notes', and 'Assigned St'. The main area shows a calendar for the week starting 19/12/2022. A specific assignment for 'Hollie Test Uni' is shown for 20/12/2022 at 05:30. A tooltip provides detailed information about this assignment, including the source of the work time (Existing Assignments Else Contract), the default work time (05:30), and impacted assignments (Early 09:00 - 15:00 on 20/12/2022 assigned to Erickson, M). The tooltip also includes a comment explaining that timesheets are populated based on existing duties if present, otherwise based on the 'Contract' behaviour.



# On a day where no duties have been assigned

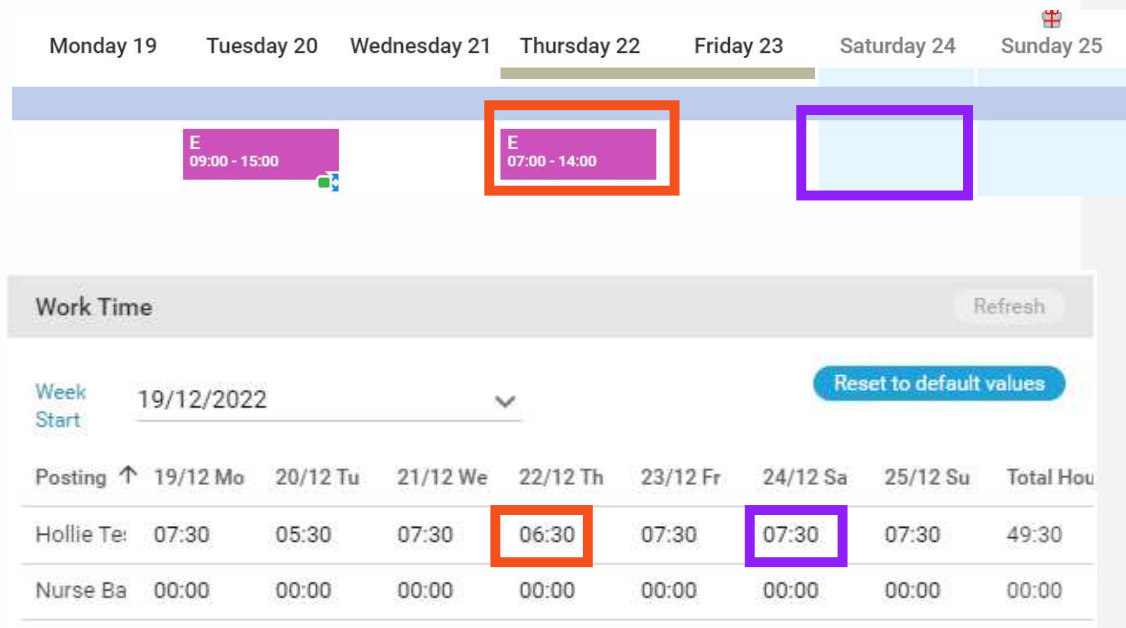
Will behave like the 'Contract' behaviour.

Contracted For (Hours Per Week) \_\_\_\_\_ 37:30  
Default Unavailability (Hours Per Day) \_\_\_\_\_ 07:30

The screenshot shows a calendar interface with a header for 'Posting' and dates from 19/12 Mo to 24/12. A row for 'Hollie Test Uni' is highlighted, with '07:30' shown for 21/12 We. A tooltip for 'Nurse Bank' is open, displaying the following text:

Default Work Time Source : Existing Assignments Else Contract  
Default Work Time : 07:30  
Impacted Assignments :  
Comments :  
Individual timesheets are populated based on the hours of existing Duties if present on that day, otherwise they are populated based on the 'Contract' behaviour.

# Example



- On all days with no duties default leave hours (7.5) is assigned
- On the days where there are duties assigned, mirrors amount in the duty
- **Does not cap**

# Unless

- If overridden on Enterprise Work Contract (Ref Data>Organisation> Work Contract)

Timesheet Entries Populated Based On Contracted Hours Per Week

- If ticked, on days with no duties takes from the Default Unavailability Hours Per Day (not generally recommended)

- Figure auto generated from the 'Contracted Time: Hours Per Week' in enterprise contract, and divides by 5 (example below is  $40 \div 5 = 8$ )

Enterprise Work Contract

Agenda for Change

- + Create Enterprise Work Contract
- + Create Grade Contract
- More

Edit Enterprise Work Contract | Cost Elements | Restrictions

Session Tariffs

Weekly

Contracted Time \*  
40:00 Hours Per Week

Timesheet Entries Populated Based On Contracted Hours Per Week

**Default Unavailability Hrs**  
08:00 Hours Per Day

Valid From \* | Valid To \*

| Posting ↑       | 19/12 Mo | 20/12 Tu | 21/12 We | 22/12 Th | 23/12 Fr | 24/12 Sa |
|-----------------|----------|----------|----------|----------|----------|----------|
| Hollie Test Uni |          |          | 08:00    |          |          |          |
| Nurse Bank (    |          |          |          |          |          |          |

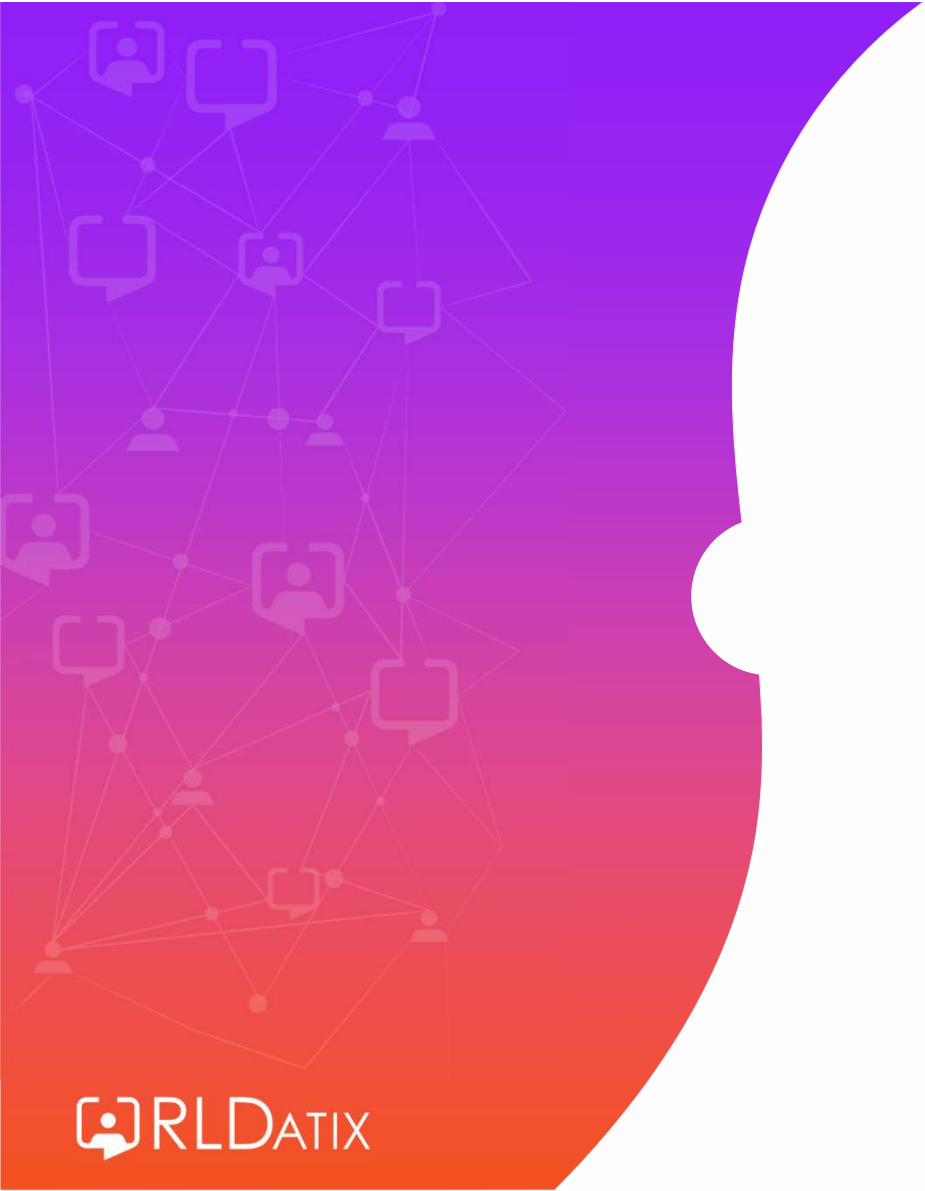
Default Work Time Source : Existing Assignments Else Contract  
Default Work Time : 08:00  
Impacted Assignments :  
Comments :  
Individual timesheets are populated based on the hours of existing Duties if present on that day, otherwise they are populated based on the 'Contract' behaviour.

## Can be overridden on Unavailability Reason

- If 'Timesheet Entries Populated Based On Contracted Hours Per Week' is not ticked
- And if Default Timesheet Hours is populated, on days with no duties will take this figure instead (generally not recommended)



| Default Times           |       |
|-------------------------|-------|
| Default Timesheet Hours | 06:00 |
| Default Start Time      | 07:00 |
| Default End Time        | 23:59 |



Unavailability  
Reason Settings:  
**Contract On  
Assigned Duties**

When Duties Exist In Week Create Timesheets Based On  
Contract On Assigned Duties



- From 11.2.1
  - Non-UK Functionality
  - Does not cap
  - Only appears with setting set to True
- Configuration Method Contract On Assigned Duties**

Setting ✕

**Configuration Method Contract On Assigned Duties**

Provides the user with access to a new Unavailability method named 'Contract On Assigned Duties', that will be available in the 'When Duties Exist In Week Create Timesheets Based On' configuration.

Value

true  false

| Posting ↑       | 14/2 Mo | 15/2 Tu | 16/2 We | 17/2 |
|-----------------|---------|---------|---------|------|
| Hollie Test Uni | 07:30   | 00:00   | 07:30   |      |

**Default Work Time Source : Contract On Assigned Duties**

Default Work Time : 07:30

Impacted Assignments :

Early 07:00 - 15:00 on 14/02/2022 assigned to Erickson, M

Late 15:00 - 23:00 on 16/02/2022 assigned to Erickson, M

Comments :

Default hours populated based on Person Work Contract divided by 5, only if there is an overlapping Duty Assignment with work time or an On Call.

# When Duties Exist in Week

- Only applies when one or more duty exists in week
- Different behaviour dependent on whether there are duties assigned on each **day**
- **Days** with duties assigned, applies from calculation  
Person Work Contracted Hours  $\div$  5
- **Days** no duties assigned, applies 0 hours

| Posting ↑       | 14/2 Mo | 15/2 Tu | 16/2 We | 17/2 |
|-----------------|---------|---------|---------|------|
| Hollie Test Uni | 07:30   | 00:00   | 07:30   |      |

Default Work Time Source : Contract On Assigned  
Duties  
Default Work Time : 07:30  
Impacted Assignments :  
Early 07:00 - 15:00 on 14/02/2022 assigned to Erickson, M  
Late 15:00 - 23:00 on 16/02/2022 assigned to Erickson, M  
Comments :  
Default hours populated based on Person Work Contract divided by 5, only if there is an overlapping Duty Assignment with work time or an On Call.

| Posting ↑       | 13/2 Mo | 14/2 Tu | 15/2 We | 16/2 Th | 17 |
|-----------------|---------|---------|---------|---------|----|
| Hollie Test Uni | 07:30   | 00:00   | 07:30   |         |    |

Default Work Time Source : Contract On Assigned  
Duties  
Default Work Time : 00:00  
Impacted Assignments :  
Early 07:00 - 15:00 on 13/02/2023 assigned to Erickson, M  
Late 15:00 - 23:00 on 15/02/2023 assigned to Erickson, M  
Comments :  
Default hours populated based on Person Work Contract divided by 5, only if there is an overlapping Duty Assignment with work time or an On Call.

## Does not cap

| Posting ↑       | 13/2 Mo | 14/2 Tu | 15/2 We | 16/2 Th | 17/2 Fr | 18/2 Sa | 19/2 Su | Total Hou |
|-----------------|---------|---------|---------|---------|---------|---------|---------|-----------|
| Hollie Test Uni | 07:30   | 07:30   | 07:30   | 07:30   | 07:30   | 07:30   | 07:30   | 52:30     |



# Summary

- 6 different options, but three are recommended for UK&I
  - **Contract**
  - **Existing Assignments**
  - **Default Behaviour**
  - Zero Hours
  - Existing Assignments Else Contract
  - Contract On Assigned Duties
- Will need to choose what is best for you in line with internal policies



**Questions?**



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