

Back to Basics: Annual Leave

2. Entitlements



Introduction

There can be a lot to think about when it comes to entitlements. This document hopes to bring light to the different aspects of annual leave entitlements, and detail the different types of entitlements, the way that they can be set up in the system, and how best to manage them.

1. Create an Entitlement Type

While most users will consider entitlements to be exclusive to Annual Leave, it is true that these can be used for other periods of leave too, such as Bank Holidays or Study Leave. This is set up in Reference Data> Unavailability> Entitlement Types and you will require the feature accesses [Ref Data Tools: Entitlement Types](#) and [Ref Data Actions: Edit Entitlement Types](#). Here you can see the current set up of Entitlement Types in your system.

When you click on the Entitlement Type, it will open a new window on the right. Here you can see the Unavailability Reason that it is mapped to, so for the Annual Leave Entitlement Type, you can see this is linked to the Annual Leave unavailability reason, whereas the Study Leave, would be linked to a Study Leave unavailability reason. This ensures that when you add the period of leave with that reason, it takes from the correct pot of entitlement.

Name	Description	External Reference	Include Requested Leave	Is Obsolete	Default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

If you then navigate to the unavailability reason, in Reference Data> Unavailability> Unavailability Reasons with [Ref Data Tools: Unavailability](#) and [Ref Data Actions: Unavailability](#). You will see in the Entitlement Types tab, the Entitlement Type that is mapped to the unavailability reason. Which for this example is the Annual Leave entitlement type.

Name	Description	External Reference	Include Requested Leave	Is Obsolete	Default
Annual Leave	Annual Leave	-	Y	-	Y

2. Person and Posting Entitlements

There are two types of entitlement that you can create for a user, a **person** entitlement, or a **posting** entitlement. This will depend on what is required for the user in line with their postings and contracts.

A **person** entitlement applies to the staff member as a whole. This is generally the recommended method if possible, as they are the easiest to manage, and they move with the staff member if they change posting.

A **posting** entitlement applies only to the posting, and is used if the staff member has two or more substantive postings. This does not move with the staff member, so when a posting ends, so does the entitlement, and a new one will need to be set up for the new posting. Other things to consider with posting entitlements are:

- If there are multiple posting entitlements, the staff member will need to choose the correct one in EOL/ Loop / Allocate ME when booking leave.
- If multiple postings span across different units, the requests can be managed by either manager.

Note

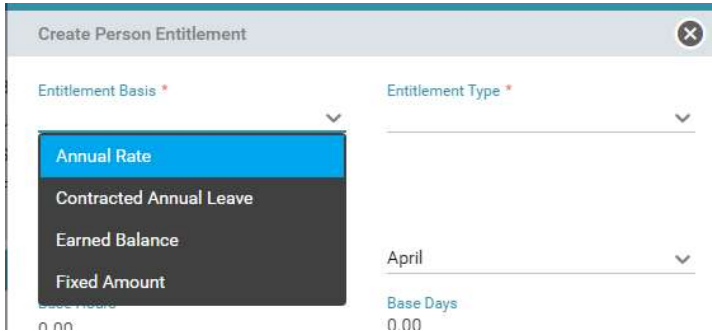
It is very important to remember that you can have one or the other, but not both types on a person record. A mixture of person or posting entitlements is invalid in the system and can cause a plethora of errors.

To create either a posting or person entitlement, navigate to the Person Record, and choose Entitlements. To do this you will need *Person Details: Entitlements* and *Person Actions: Change Entitlements*. Then select either Create Person Entitlement or Create Posting Entitlement. This will open a new window where you can input the required details that are outlined in the following sections.

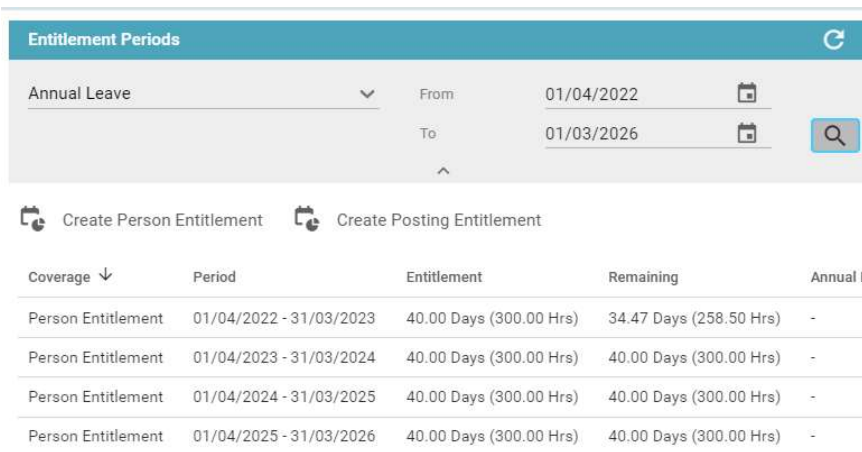
The screenshot shows the 'Person' record for Robin Scherbatsky, Band 2 HCA. The 'Entitlements' section is active, displaying 'Entitlement Periods' for 'Annual Leave' from 01/04/2022 to 31/03/2023. Below this, there are two buttons: 'Create Person Entitlement' and 'Create Posting Entitlement', both highlighted with a purple box. The interface also includes a sidebar with navigation options like Summary, Work Contracts, Unavailabilities, and Entitlements.

3. Annual or Fixed Rate

When creating an entitlement for a staff member there are two main entitlement basis that you will be wanting to consider, depending on the type of contract that the staff member has. There are **Annual Rate** and **Fixed Rate**. You will also see the options **Contracted Annual Leave** and **Earned Balance**, these are for non UK customers, and as such, are best not used in the UK.



- **Annual Rate:** This is an entitlement that when created, will roll over each year creating a new entitlement per year, and contains the total rate for each year. Most staff members will be set up with this.



Coverage	Period	Entitlement	Remaining	Annual L
Person Entitlement	01/04/2022 - 31/03/2023	40.00 Days (300.00 Hrs)	34.47 Days (258.50 Hrs)	-
Person Entitlement	01/04/2023 - 31/03/2024	40.00 Days (300.00 Hrs)	40.00 Days (300.00 Hrs)	-
Person Entitlement	01/04/2024 - 31/03/2025	40.00 Days (300.00 Hrs)	40.00 Days (300.00 Hrs)	-
Person Entitlement	01/04/2025 - 31/03/2026	40.00 Days (300.00 Hrs)	40.00 Days (300.00 Hrs)	-

Note

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:

Entitlement (*Base Hours*) / 365 (*Days*) x Days Active (*from start of entitlement to end date*)

To overcome this, you can change the Entitlement Hours so that the pro rata figure is the figure you require.

For example a user finishes half way through the entitlement year on 29th Sep:

$$\begin{matrix} \text{Entitlement} & / & 365 & \times & \text{Days Active} & & = & X \\ \mathbf{200} & / & \mathbf{365} & \times & \text{(1st April to 29 Sep) } \mathbf{182} & & = & \mathbf{99.7} \end{matrix}$$

Here the system will 'think' the user has only 99.7 hours, half of their entitlement. If you do not want it to

do this, you can alter the Base Hours of the Entitlement so that the pro-rata result is 200 hours. In this case, you would almost double the figure, but to be certain of the figure, you reverse the calculation:

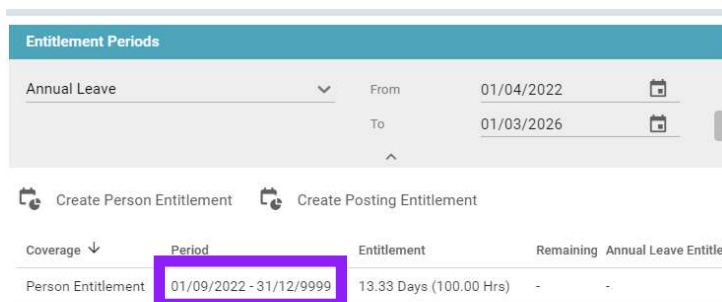
$$\begin{array}{rclclcl} \text{New Entitlement Figure} & / & 365 & \times & \text{Days Active} & = & X \text{ (the figure you require)} \\ Y & & / & 365 & \times & 182 & = 200 \end{array}$$

$$(Y/365) \times 182 = 200 \quad \text{so} \quad 200 / 182 \times 365 = Y$$

$$Y = 401.1$$

So you would need to change the Entitlement Base Hours to 398.9 to allow it to pro rata to 200.

- Fixed Rate:** This is a single entitlement that spans from the chosen start date to the chosen end date. This is not often used for long term substantive staff members, but it can be used for members of staff working in the post for less than a year, an example of this may be doctors.



Coverage ↓	Period	Entitlement	Remaining	Annual Leave Entitlement
Person Entitlement	01/09/2022 - 31/12/9999	13.33 Days (100.00 Hrs)	-	-

It is also true that if required, you can create multiple fix rate entitlements, although this is not necessarily a common practice, and can cause extra work as they would need to be made manually each year.

Note

The system will only allow you create either an Annual Rate entitlement, or a Fixed Rate entitlement. You won't see a mixture of the two, unless it is due to the entitlement starting part way through the entitlement year (see below).

Adding an Entitlement Part Way Through the Year

It is important to note that it is common to see a Fixed Rate Entitlement on the first period of an Annual Rate entitlement if the first period of entitlement will be less than a full year. This will be if when creating the entitlement, the 'Effective From' date is anything other than an annual period start day (and would therefore be less than a full year). The Annual Period Start date is when your Entitlement is due to reset, and is chosen when creating the entitlement. This can be April to March for some orgs, or January to December for others, or something completely different dependent on your requirements.

The 'Effective From' date is when the staff member's entitlement is due to begin:

As this first entitlement period would be less than a full year, the system requires you enter an initial balance, which will be a pro-rata of the full amount. This creates a fixed amount entitlement period from the 'Effective From' date, to the start of the next annual period. Any entitlement periods after this will be annual rate. For example:

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

- When you create this entitlement you will see the first period is for this first set period of 6 months, and is for 100 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)

- When you open this up you will see this displays as a Fixed Amount

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

Entitlement Basis
Fixed Amount

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 *
01/10/2022

Effective To *
31/03/2023

- Then 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
Continuous Service Hours 0.00	Continuous Service Days 0.00
Agreed Carry Forward Hours 0.00	Agreed Carry Forward Day 0.00
Lieu Hours 0.00	Lieu Days 0.00
Total Hours 200.00	Total Days 26.67

Effective From *
01/04/2023

- If you did not put the initial balance in when first creating this entitlement

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

This would assign the first Fixed Rate entitlement 0 hours so it is important to remember to fill this in in circumstances such as this:

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)

4. Entitlement Fields

When creating an entitlement, as well as the Entitlement Basis, you will notice there are a few more fields within which data can be entered.

- Entitlement Units

Entitlement Units *
Hours And Days ▼

- Days Only
- Hours And Days
- Hours Only

This defines how the entitlement is displayed and taken. Hours and Days tends to be a popular choice as this provides the most flexibility and clarity on the amount of leave taken.

Note

The decision of which entitlement unit to use will need to be in line with your internal policies and we recommend clarifying this with your local HR or ESR teams.

- 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)

Change Entitlement
Delete Entitlement

Details Episodes Notes Audit Trail

Breakdown

Taken 26.50 Hrs (3.53 Days)

Detailed description: This screenshot shows the 'Annual Leave' section in a user interface. The 'Entitlement' field is highlighted with a purple box and displays '300.00 Hrs (40.00 Days)'. The 'Remaining' field shows '258.50 Hrs (34.47 Days)'. On the right, there are two buttons: 'Change Entitlement' and 'Delete Entitlement'. Below the main information is a navigation bar with 'Details', 'Episodes', 'Notes', and 'Audit Trail'. Underneath, there is a 'Breakdown' section with a 'Taken' field showing '26.50 Hrs (3.53 Days)'.

- Days Only:

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

Change Entitlement
Delete Entitlement

Details Episodes Notes Audit Trail

Breakdown

Taken 4.00 Days

Detailed description: This screenshot shows the 'Annual Leave' section where the 'Entitlement' field is highlighted with a purple box and displays '40.00 Days'. The 'Remaining' field shows '34.00 Days'. The right-side buttons and navigation bar are identical to the previous screenshot. The 'Taken' field in the breakdown section shows '4.00 Days'.

- Hours Only:

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

Change Entitlement
Delete Entitlement

Details Episodes Notes Audit Trail

Breakdown

Taken 26.50 Hrs

Detailed description: This screenshot shows the 'Annual Leave' section where the 'Entitlement' field is highlighted with a purple box and displays '300.00 Hrs'. The 'Remaining' field shows '258.50 Hrs'. The right-side buttons and navigation bar are identical to the previous screenshots. The 'Taken' field in the breakdown section shows '26.50 Hrs'.

- The visibility of this in **Employee Online** is dictated instead by the feature access *Employee online: View Annual Leave in Days*.

Users with this access will see the leave in days:

Entitlement Balance as at November 3, 2022

Entitlement	13.33 days ⓘ
Remaining	9.33 days
Taken	0 days
Planned	2 days
Requested	2 days

and users without this will see it in hours:

Entitlement Balance as at November 3, 2022

Entitlement	100 hrs ⓘ
Remaining	70 hrs
Taken	0 hrs
Planned	15 hrs
Requested	15 hrs

When requesting leave though this will still be done in days. To request leave in hours, you can select the Partial Day option.

Request Leave Form

Full day(s) Partial day

From: 03 Nov 2022

Number of days: Set

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**

This refers to the full period of entitlement that they are entitled to. Whether this is in Hours or Days is dictated by the aforementioned Entitlement Units setup. With a Person Entitlement you will only need to enter this once.

Entitlement Units * Hours Only	Entitlement Units * Days Only
Annual Period Start 1	Annual Period Start 1
Base Hours 0.00	Base Days 0.00

▪ **Continuous Service Hours / Days**

This refers to hours that are accrued due to continuous service. These continue to

appear on the entitlements in the entitlement periods that continue after it was added.

Continuous Service Hours

0.00

- **Agreed Carry Forward Hours /Days**

This was designed to account for unused entitlement hours that are to be carried over from the previous entitlement, into the next one. As such, these do not roll over year after year.

Agreed Carry Forward Hours

0.00

- **Lieu Hours/ Days**

This field is designed to keep track of a staff member's lieu hours.

Lieu Hours

0.00

- **Effective From**

The date you would like the entitlement to start from.

Effective From *

01/04/2022



- **Initial Balance**

If the '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.

Effective From *

01/10/2022

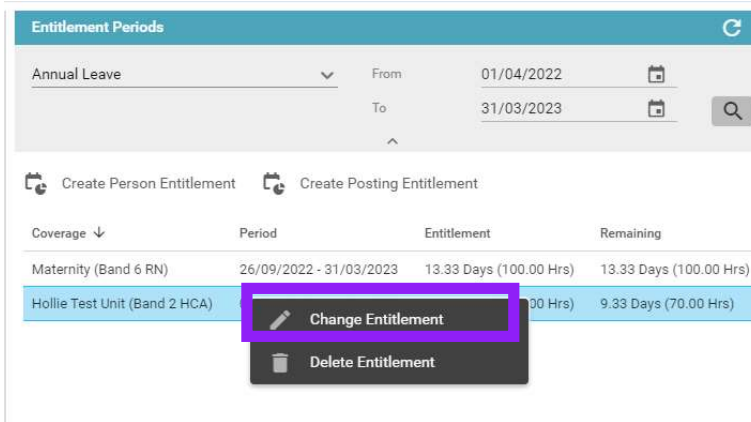


Initial Balance

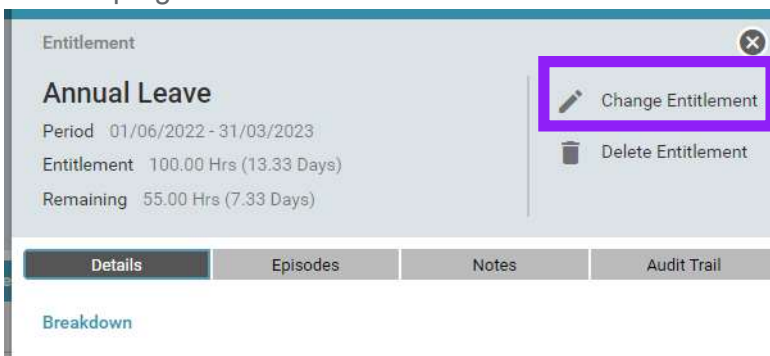
5. Making Changes to Existing Entitlements

Once an entitlement has been created, it is possible that due to changes in contracts and postings that this entitlement will need to be altered. Make sure that you consider the impact on existing periods of leave, and whether any changes will follow on to the later, existing entitlement periods. To do this you will need the feature access *Person Actions: Change Entitlements*.

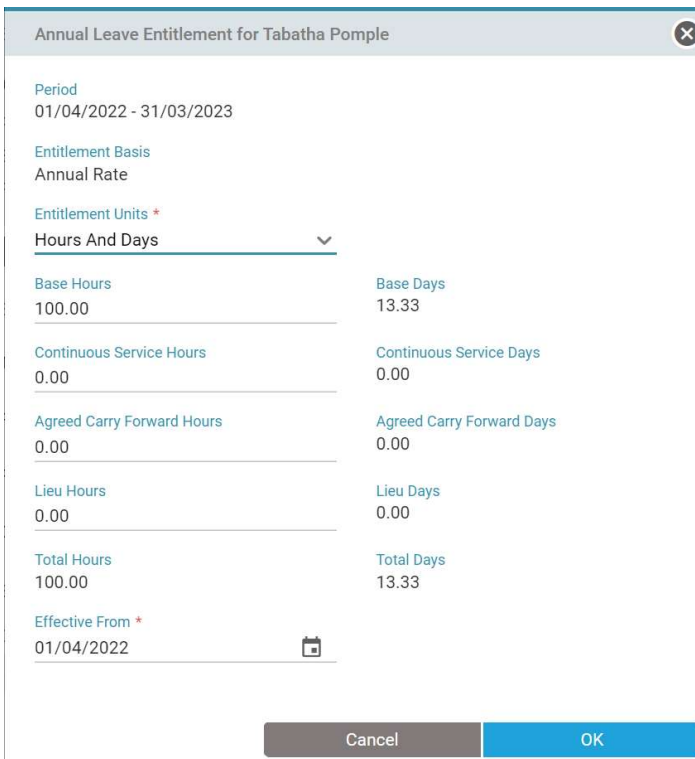
- To edit the entitlement, navigate to it, right click, and choose **Change Entitlement**.



- Or alternatively, you can open the entitlement, and choose the Change Entitlement button at the top right:



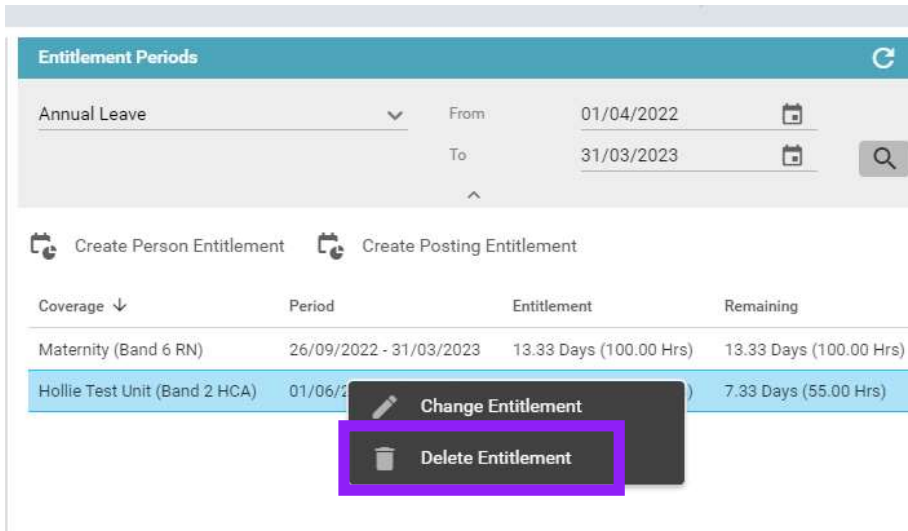
- This will open up the Entitlement window to allow you make the desired changes.



You can change the Unit type, the Base, Continuous Service, Agreed Carry Forward and Lieu Hours as well as the Effective From date. Once actioned, choose OK to save.

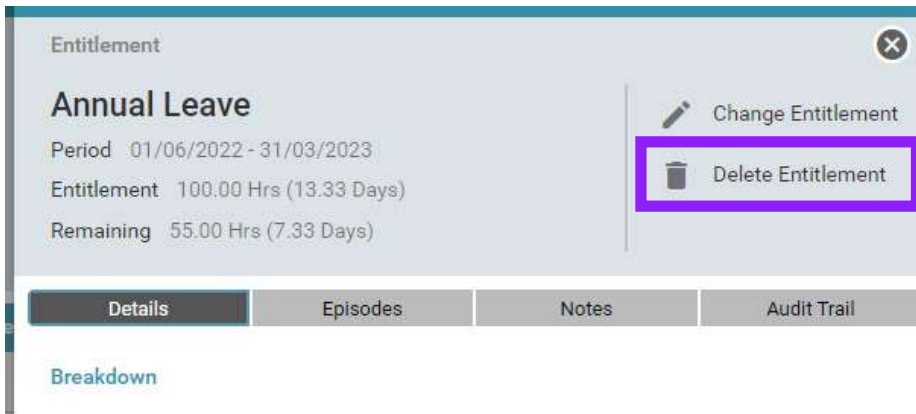
There are also a variety of reasons for which you would want to delete an entitlement, such as if this was input incorrectly, or if moving from Person to Posting entitlements (or vice versa). You will need *Person Actions: Delete Entitlements*

- To do this, as with changing the entitlement, you can right click the entitlement, or open the entitlement, and choose **Delete Entitlement**



The screenshot shows the 'Entitlement Periods' interface. At the top, there is a search bar with 'Annual Leave' selected, and date filters for 'From' (01/04/2022) and 'To' (31/03/2023). Below the search bar are two buttons: 'Create Person Entitlement' and 'Create Posting Entitlement'. The main table has columns for 'Coverage', 'Period', 'Entitlement', and 'Remaining'. The 'Hollie Test Unit (Band 2 HCA)' row is highlighted, and a context menu is open over it, showing 'Change Entitlement' and 'Delete Entitlement' options. The 'Delete Entitlement' option is highlighted with a purple 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	7.33 Days (55.00 Hrs)	7.33 Days (55.00 Hrs)



The screenshot shows the 'Entitlement' details page for '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'. The 'Delete Entitlement' button is highlighted with a purple box. Below the details are tabs for 'Details', 'Episodes', 'Notes', and 'Audit Trail', and a 'Breakdown' link.

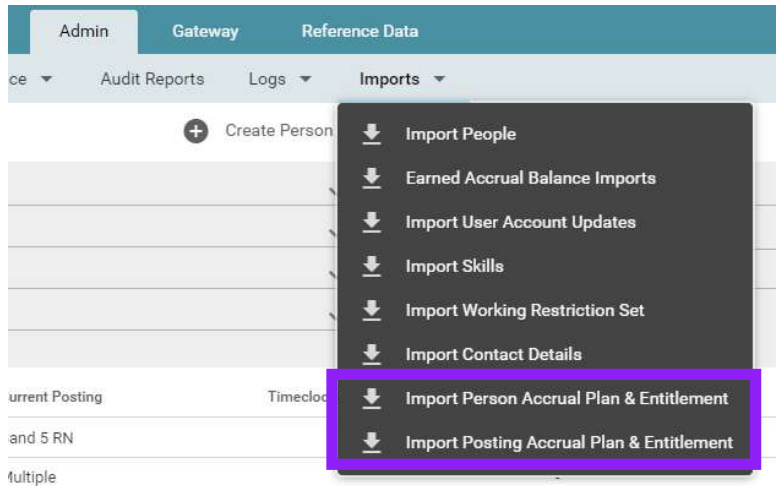
Note

Take care when deleting an Annual Rate Person Entitlement period. As the entitlement spans the entire person record, this will remove all of the entitlement periods. A warning will pop up to advise of this. However, this will not remove the periods of annual leave. Any entitlements added in retrospectively will inherit the periods of leave that fall within the date range.

6. Upload Entitlements

While it is simple to manually create an entitlement, if you have a large group of people to do this for, you may want to instead upload these in bulk. This is where the import function is useful. To access the imports section you will need *Gateway: Matching Tools Full Access* or *Gateway: Matching Tools My Unit Only Access*.

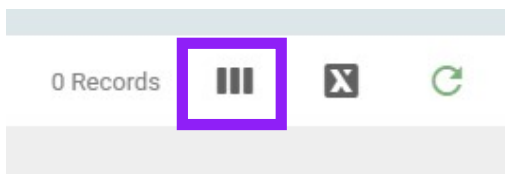
To do this navigate to Admin>Imports and choose either Import Person Accrual Plan and Entitlement, or Import Posting Accrual Plan and Entitlement depending on what type of entitlement you wish to upload.



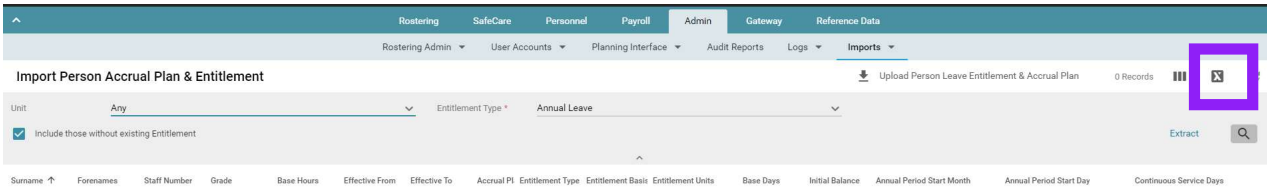
You will need a CSV file to upload, you can either use a blank template to enter the details in manually, or a template populated with data already in the system.

Blank Template

- You can obtain a blank template quite simply from the system, and this is useful for importing data that does not yet exist in the system. First of all you need to ensure all necessary columns are visible to ensure you capture them in your file.



- You then need to press the export button on the blank page.

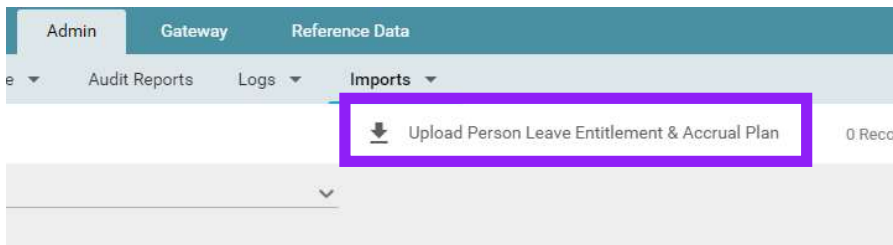


- This will provide a blank template that you can fill in with the details that you would like to upload. Ensure you save as a CSV.

	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	Continuo	Continuo	Carry Forv	Carry Forv	Lieu Days	Lieu Hours	
2																						
3																						
4																						

Note
The system will not allow you upload an Annual Rate Entitlement if there is a date entered in the 'Effective To' field, even if this is the end of time, so make sure this is blank.

- To upload this back in once it is populated, choose Upload Person Leave Entitlement & Accrual Plan



and choose the CSV file you would like to import.



- Once imported, you will see the new entitlement when you navigate to the person record.

Populated Template

- You may also want to use the import feature to update existing entitlements or to avoid putting the information into the document manually. You can also obtain this fairly simply from the system.
- In the appropriate Imports tab, select a unit from the unit dropdown, and this will provide a list of the entitlements of the selected type in this unit. That is to say, the Import Person Accrual Plan & Entitlements tab will show the users with Person Entitlements, and the Import Posting Accrual Plan & Entitlements tab will show the users with Posting Entitlements.

Surname ↑	Forenames	Staff Number	Grade	Base Hours	Effective From	Effective To	Accrual PI	Entitlement Type	Entitlement Basis	Entitlement Units	Base Days	Initials
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		

Note

You can include all users from the unit in this form if required by simply selecting the 'Include those without existing Entitlement' box

Include those without existing Entitlement

- Choose the export option which will download the report. Open the document, and alter the information within the file as required. You can also manually add in new lines if required too. Once all necessary changes have been made, ensure you save this as a CSV file.



- When you navigate to the Person Record, you should see the changes to the entitlement.

7. Other Annual Leave Entitlements

Sometimes in Employee Online / Allocate Me/ Loop you may come across an entitlement named Other Annual Leave. This will occur if someone has the feature access to view and request their own leave (*Employee Online: Annual Leave*), but no Entitlement set up in Allocate Optima (or as it was formerly known, Healthroster). The system has to generate something for those permissions so sets up a dummy entitlement, allowing them to view and request it.

The screenshot shows the MEDIC ONLINE interface. On the left is a navigation menu with options like 'View Rosters', 'Record Availability', 'Available Locum Duties', 'Locum Timesheets', 'Earned Accruals', 'Leave', and 'Request Duty'. The main area is titled 'Annual Leave' and shows 'Entitlement Periods' for the date range '01 Apr 2022 - 31 Mar 2023'. A table lists the entitlements:

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

Below the table, there is a section for 'Episodes (6)'.

This entitlement will only show in EOL, and not in Healthroster, and should be prevented by either not providing the access to the Leave section of Employee Online, or by ensuring you have assigned an Entitlement to the necessary staff members.

8. Entitlement Report

It is common for admins or managers to want to report on these Entitlements. The most common method to do this is the Entitlement Report in Rostering> Unavailability> Entitlement Report with the feature access *Roster Tools: Entitlement Report*.

This report shows active entitlements and the details of said entitlements, within the selected unit.

The screenshot shows the 'Entitlement Report' in the Rostering system. The report is filtered for 'Annual Leave' and 'Hollie Test Unit'. The 'Exclude Closed People' checkbox is checked. The table displays the following data:

Unit	Surname	Forenames	Staff Number	Remaining (Hrs)	Entitlement Used (Hrs)	Planned (Hrs)	Entitlement Used (%)	Base Entitlement Hours	Period	Total Entit	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

There are some really useful metrics that can be used to report on the entitlements and leave spread. For example, it can be useful to identify users that have not yet used or booked their

leave, and can help to avoid a lot of staff members booking this at once near the end of the leave period which could in theory increase bank spending.

Note

The Exclude Closed People tick box refers to closed person records, as opposed to close postings.

Exclude Closed People

Note

The report works in such a way that if at any point the staff member worked in the unit, it will display in the entitlement report, even if the posting is no longer within that unit.





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