Back to Basics: Annual Leave

3. Annual Leave Hours

Introduction

Sometimes it can be tricky to navigate the world of annual leave hours, to work out how much should be taken each day, and why the system is assigning a certain figure. This guide will outline the basics of where this is set up, and how the system works when assigning annual leave hours in periods of unavailability.

1. Unavailability Hours

As someone who manages annual leave, you may already know that the way to see how many hours of annual leave have been assigned to a period of leave is to navigate to the period of leave. This can be viewed in a few different places.

- **View Rosters**

  Navigate to Rostering> View Rosters and View Rosters, you will need the feature access *Roster Tools: View Roster* and the unit applied to the 'Visible Units' in the user account, as well as *Person Details: Unavailabilities* and *Unavailability Actions: Edit*. If you navigate to the appropriate date you will see the period of leave. You can right click and choose Edit Unavailability.
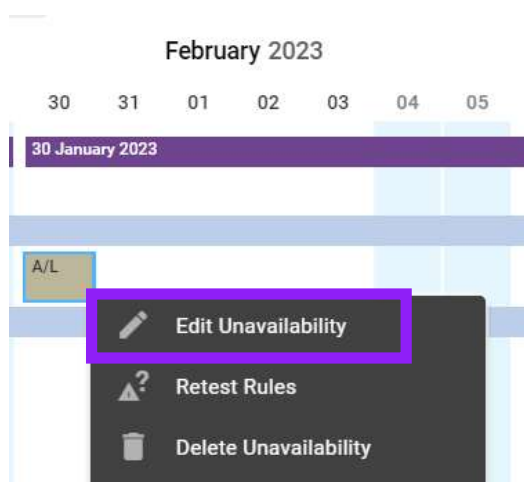
- **Person Record**

  Navigate to Personnel> Person Search> Person Search, you will need *Person Tools: Person Search, Person Details: Unavailabilities,* and *Unavailability Actions: Edit* as well as the unit applied to the 'Visible Units' in the user account. Locate the user that you require, click on the name and a new window will open on the right. Select the Unavailabilities Tab and here you can edit the unavailability by single clicking on the period you wish to alter.

- **Unavailability List**

  Navigate to Rostering> Unavailability> Unavailability List and will require the feature access *Roster Tools: Unavailability List* and the unit applied to the Visible Units in the User Account, as well as *Person Details: Unavailabilities* and *Unavailability Actions: Edit.* Select Annual Leave in the Group and Reason dropdown, and the required dates which will provide the periods of leave in a list format. You can right click and Edit Unavailability, or left click which will open a new window on the right, and you can select Edit Unavailability here too.

Once you are in the Edit Unavailability window you will see the details of this unavailability, and in the Work Time section you can see the hours assigned per day of leave.

The system will generate a figure based on the set up of the unavailability reason which will be discussed a little later on, but it is true that this can also be altered manually.

To do this, you simply click on the figure, and type in the new figure as needed:

When this has been manually altered, it will display in a bold yellow text until it is saved, at which point it will then display in a bold black text.

If you then hover over the figure, you can see that the default work time was 07:30 hours, and that it has been changed to 06:00 hours manually.

This hover feature is also a useful tool for understanding whether the leave is impacted by any assignments, and will also display if it has been capped from the weekly hours in the contract.

Perhaps the most important piece of information on this hover tooltip though, is that under 'Default Work Time Source' it displays where this information is being pulled from in line with the settings in the Unavailability Reason.


2. Unavailability Reason Settings

So we understand where we can see what hours have been assigned, but often the hardest thing to understand is why the system assigns those hours. This is configured in the Unavailability Reason Settings in Reference Data> Unavailability > Unavailability Reasons, and you will need the feature accesses *Ref Data Tools: Unavailability* and *Ref Data Actions: Unavailability*.

If you choose the Annual Leave unavailability reason, it will open a new window on the right displaying the settings for this reason.

The key sections to consider are the '**When Duties Exist in Week Create Timesheets Based On**' and '**When Duties Do Not Exist in Week Create Timesheets Based On**' sections.
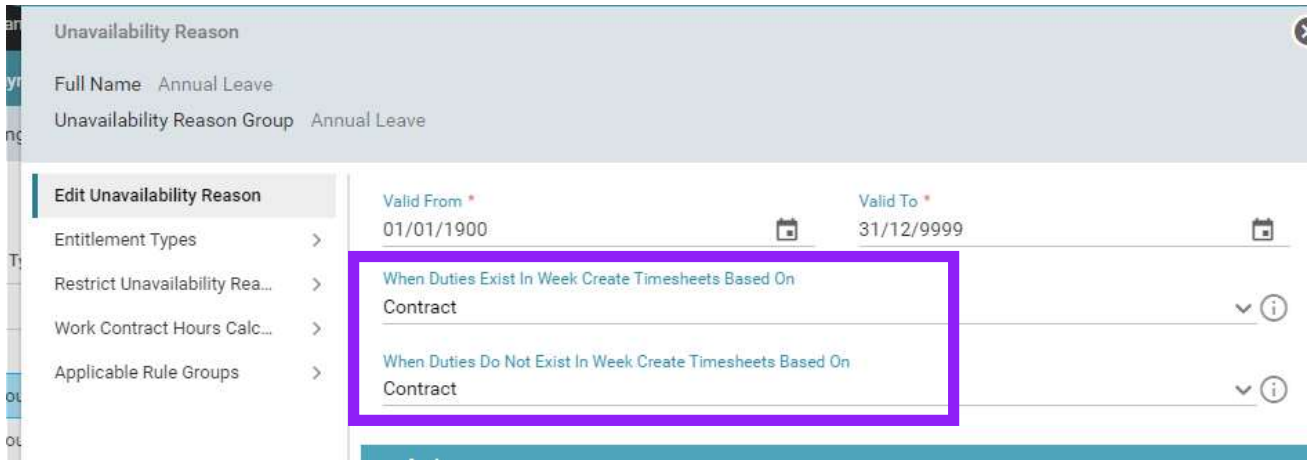
Here you can see there is a dropdown of options you can choose from.
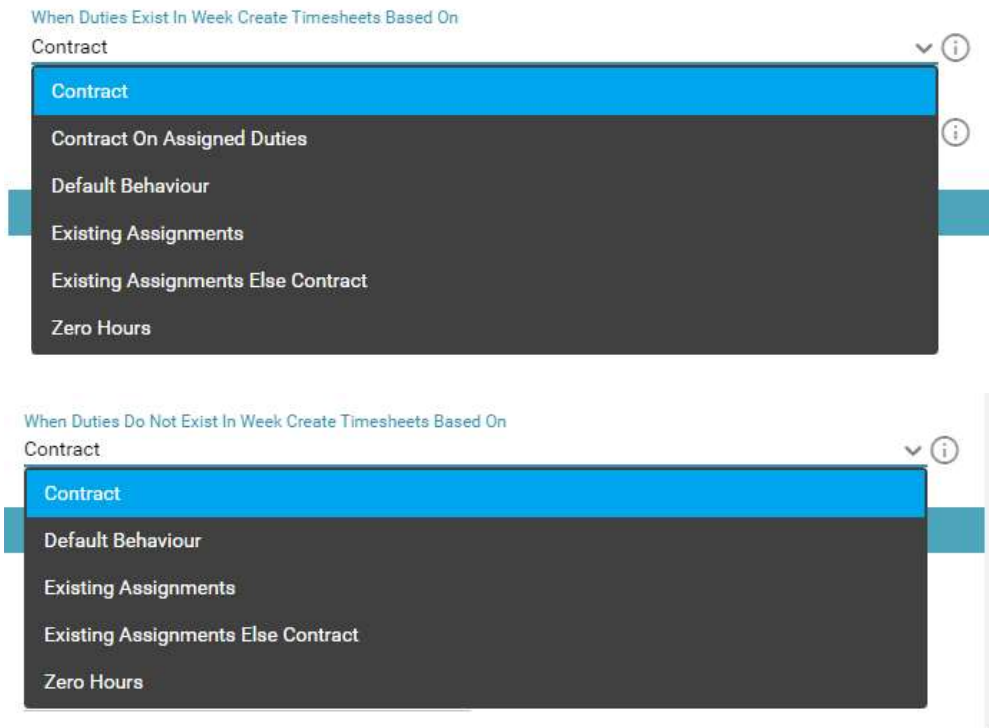
The different options will dictate how the system behaves, and the ⓘ symbol outlines this behaviour when you hover over it. Bear in mind these behaviours can be different for the 'Do' and 'Do Not' dropdowns and also for the different unavailability reasons.

▪ Contract

When Duties Exist In Week Create Timesheets Based On
Contract

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

- When you hover over the 'i' icon it will display the below
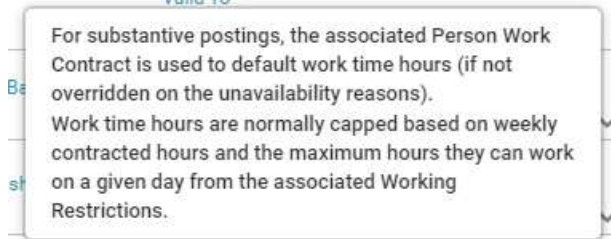
> For substantive postings, the associated Person Work
> Contract is used to default work time hours (if not
> overridden on the unavailability reasons).
> Work time hours are normally capped based on weekly
> contracted hours and the maximum hours they can work
> on a given day from the associated Working
> Restrictions.

- This will create a hover tooltip with Default Work Time Source: Contract

	Tu	7/12 We	8/12 Th	9/12 Fr	1
	0	07:30	07:30	07:30	0

Default Work Time Source : Contract
Default Work Time : 07:30
Impacted Assignments :
Comments :

- For staff members with substantive postings, their Person Work Contract is used to calculate the default work time hours. If you navigate to the person record, open up their Person Contract and locate the Default Unavailability (Hours Per Day) section you can see what this would be for the staff member. You will need *Person Details: Work Contracts* and *Person Tools: Person Search* to view this.

Substantive Contract Details

Staff Group	Nursing
Enterprise Work Contract	Agenda for Change
Grade Type	HCA
Grade	Band 2 HCA
Payroll	Substantive Monthly
Contract Type	Normal
Valid From	01/06/2022
Valid To	-
Contracted For (Hours Per Week)	37:30
Default Unavailability (Hours Per Day)	07:30

- So for this staff member, they would be automatically assigned 7.5 hours a day for their annual leave periods.

- However, this behaviour can be overridden on the unavailability reason in Reference Data> Unavailability> Unavailability Reasons.

  If they are to be overridden on the unavailability reason, this would be done so in the Default Times section of the reason in Reference Data, screenshotted below:

Note
As a general rule it is advised to keep the Default Timesheet Hours blank to allow for flexibility, and the Default Start and End times in line with when you would want the leave to be applied.

- If for example, we change this figure to 6:

The period of leave, even if their contract dictates 7.5 hours default hours, will be overridden to 6 hours:

- With this setting, the work time will usually be capped to the weekly contracted hours, and also the maximum work hours per day in the restrictions, preventing the staff member being assigned more than this figure.

You can view their **weekly contracted hours** in their Person Record> Work Contracts with feature access *Person Details: Work Contracts* and can be changed with *Person Action: Change Contract.*

If capping from contracted weekly hours, you may see fewer or zero hours on the other days:

This will also display in the 'Comments' section of the hover tooltip

You can view their **person restrictions** in their Person Record> Restrictions with *Person Details: Working Restrictions* and can change it with *Person Actions: Change Working Restrictions*.

This worker is restricted to 5 hours on Wednesdays, so the system will cap to this figure when booking leave:

And this displays in the 'Comments' section on the hover tooltip:

Note

This can be overridden in the Enterprise Work Contract in Reference Data>Organisation>Work Contracts by changing the 'Contracted Hours Cap' to 'Ignore Cap'. This will set all days to default unavailability hours and will ignore weekly contracted hours and person working restrictions. If setting this, ensure this is in line with your internal policies and staff contracts. As standard this is usually set to 'Capped to Working Week'.

▪ Default Behaviour

The behaviour of the 'Default Behaviour' option differs between whether there are duties assigned in the week or not, it can also display on the hover tooltip in a multitude of ways.

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'

It is important to note that the below behaviour will occur if there are any duties assigned in the _entire_ week, and will apply even if the leave is on a day that has no duties assigned, as long as one duty in the 7 day week is assigned.

- If hover over the 'i' symbol in the Unavailability Reason, you will see the below:

> 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.

- This dictates that for substantive postings, the system will first of all look at the **'Calculate Annual Leave Hours From Assigned Duties'** tick box on the work contract in Reference Data> Organisation> Work Contracts. You will need _Ref Data Tools: Work Contracts_ and _Ref Data Actions: Organisation_ to see this.

- If this is ticked the system will use the hours in the existing active duties to assign unavailability hours.

Here you can see that Marshall was assigned three 7.5 hour duties:

The system assigns this to the hours on the leave, and placed 0 hours onto the dates that had no duties assigned. For these days with 0 hours, if this needs changing, you can either manually alter this, or consider a different setting.

In the hover tooltip you can see a few details, such as the fact that it is sourced from the Existing Assignments, and also the impacted assignments:

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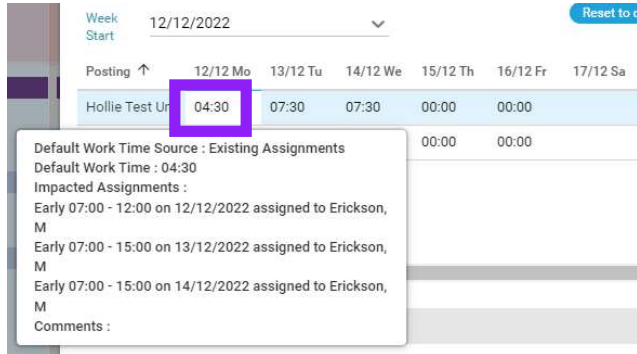
- If 'Calculate Annual Leave Hours From Assigned Duties' is **not** ticked

the system will next refer to the Default Timesheet Hours on the unavailability reason, this is generally advised to be kept blank to allow for flexibility.
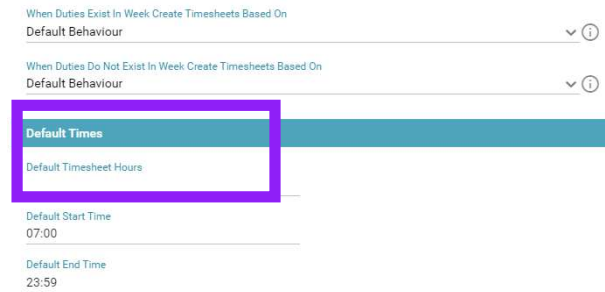
- If this is empty, which is often the case, then the system will take the figure from the **Default Leave Hours** on the person's **restrictions**. This is the most common way for this behaviour to work. This can be seen by navigating to the person record, and selecting the 'Restrictions' section.
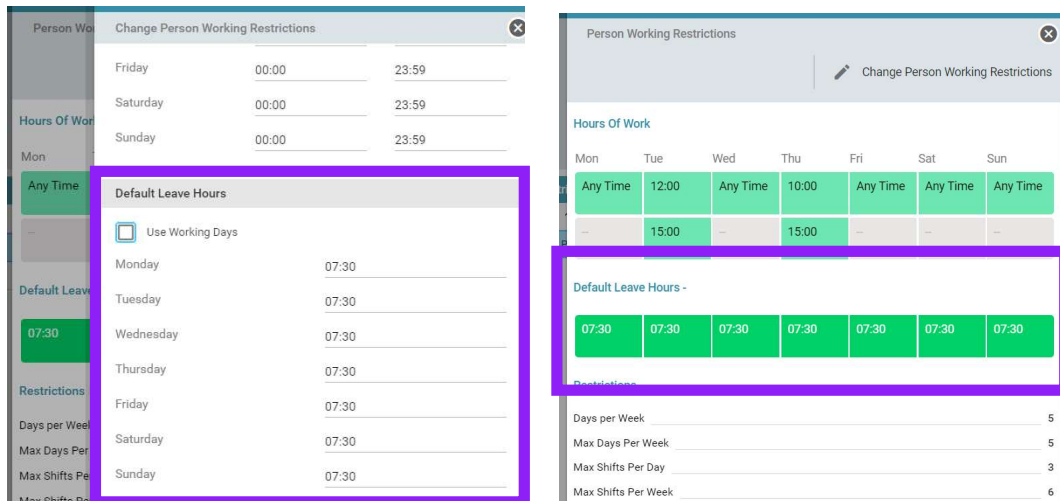
If the 'Use Working Days' box is ticked this will instead use the **Working** Restrictions in the **Hours of Work** section, and not the Leave Restrictions in the Default Leave Hours section.

You can see here that on Tuesday they work 12:00 - 15:00. If we assign leave on the Tuesday, any leave assigned on this day takes the three hours as outlined in the Hours of Work, and it is outlined in the comments that this is capped due to the restrictions.

If in the 'Hours of Work' panel the person can work all day, i.e. 00:00 - 23:59, the hours will be set based on the person's Default Unavailability (Hours Per Day) in the contract.

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

The Default Unavailability (Hours Per Day) in the contract are also the maximum that the system will take for one day. For example, if we change the Hours of Work to 12 hours on Wednesdays:

Hours Of Work

	From	To
Monday	00:00	23:59
Tuesday	00:00	23:59
Wednesday	11:00	23:00
Thursday	00:00	23:59
Friday	00:00	23:59
Saturday	00:00	23:59
Sunday	11:00	23:00

Default Leave Hours

☑ Use Working Days

The system will still only put 7:30:

Mon 20/03	Tue 21/03	Wed 22/03
07:30	07:30	07:30

- If the only duties in the week are the type **Rest** or **On Call**, then the system will **not** take from existing duties if 'Calculate Annual Leave Hours From Assigned Duties' is ticked. It will default to the hours in the Default Timesheet Hours on the unavailability reason if entered:

Default Times

Default Timesheet Hours

Default Start Time
07:00

Default End Time
23:59

If not entered, it will take it from the Default Leave Hours on the Person Working Restrictions as outlined previously.

- As with some of the other settings, the work time will usually be capped to the weekly contracted hours, and also the maximum work hours per day in the restrictions, preventing the staff member being assigned more than this figure.

You can view their total contracted hours in their Person Record> Work Contracts and their restrictions in their Person Record> Restrictions.

It will place 0 hours for any days where this is capped and this will display in the 'Comments' section of the hover tooltip

Note
This can be overridden in the Enterprise Work Contract in Reference Data>Organisation>Work Contracts by changing the 'Contracted Hours Cap' to 'Ignore Cap'. This will set all days to default unavailability hours and will ignore weekly contracted hours and person working restrictions. If setting this, ensure this is in line with your internal policies and staff contracts. As standard this is usually set to 'Capped to Working Week'.

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

The description for Default Behaviour is slightly different if duties do not exist in the week. This refers to a whole week where no duties have been assigned at all; You can see the description when you hover over the 'i' icon.

- For substantive postings, the system will first refer to the Default Timesheet Hours in the Unavailability Reason if entered.

Default Times

Default Timesheet Hours

Default Start Time
07:00

Default End Time
23:59

- If not entered, as is most common, the system will use the Default Unavailability figure from the **Person Work Contract**. Here you can see Marshall has no duties assigned in the week of the 26th so it takes the figure from his Default Unavailability (Hours Per Day) on his contract:

    This may differ from weeks when he does have duties in the week depending on the set up.

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

- As with the other settings, the work time will usually be capped to the weekly contracted hours, and also the maximum work hours per day in the restrictions, preventing the staff member being assigned more than this figure. This will display in the 'Comments' section of the hover tooltip as outlined previously.

Note
This can be overridden in the Enterprise Work Contract in Reference Data>Organisation>Work Contracts by changing the 'Contracted Hours Cap' to 'Ignore Cap'. This will set all days to default unavailability hours and will ignore weekly contracted hours and person working restrictions. If setting this, ensure this is in line with your internal policies and staff contracts. As standard this is usually set to 'Capped to Working Week'. Contracted Hours Cap * Ignore Cap   ⌄

▪ **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   ⌄ ⓘ

- If you hover over the 'i' icon you will see the below for both with and without duties in the week

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

- As outlined in the other segments where this is the case, with this setting the system will refer to the existing duties when assigning annual leave hours.

Here you can see that Marshall was assigned three 7.5 hour duties:

RN						
Erickson, Marshal	E	E	E			

and the system has assigned this to the hours on the leave, and placed 0 hours onto the dates that had no duties assigned. For these days with 0 hours, if this needs changing, you can either manually alter this, or consider a different setting.

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

- In the hover tooltip you can see the impacted assignments:

- If you choose the Existing Assignments for the setting for when duties **do not** exist in week

then as you can imagine, if there are no duties to pull information from, the system will put 0 hours in for that week. This might be useful if there is a certain agreement that you have, but otherwise may want to be avoided.

Zero Hours

- When you hover over the 'i' symbol it displays the below:

- With this setting every period of annual leave will be assigned zero hours, no matter the contract, restrictions or assigned duties. This is not a very widely used setting for the Annual Leave unavailability reason, and is generally not advised to be used unless you have a particular internal policy or agreement.

- As you can see below, the tooltip will display the default work time source as 'Zero Hours' in line with the setting:

Existing Assignments Else Contract

If on 11.2.3 or later you will see a fifth option in the drop down for the unavailability reason called Existing Assignments Else Contract and this behaves the same way with both duties in the week, and duties not in the week. This was introduced for non-UK customers but can be used within the UK&I if it falls in line with your policies, but do this with caution as **this setting does not cap at the weekly contracted hours** and could therefore lead to staff members being overpaid, or unnecessarily over-taking their entitlement hours if assigned too many hours.

- When you hover over the 'i' symbol, you will see the below:

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.

- This unavailability behaviour is different depending 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.

Here you can see a duty was assigned on the 20th for 5.5 hours. The system has taken this 5.5 hours for the unavailability and notes on the hover tooltip that the default work time source is Existing Assignments Else Contract.

- On a **day** where no duties have been assigned, it will behave differently depending on the 'Timesheet Entries Populated Based On Contracted Hours Per Week' checkbox on the Enterprise Work Contract' tick box:

If **not ticked**, which is the most common way to see this setting, then on a day with no duties assigned, it takes the hours from the Default Timesheet Hours on the unavailability reason if entered:
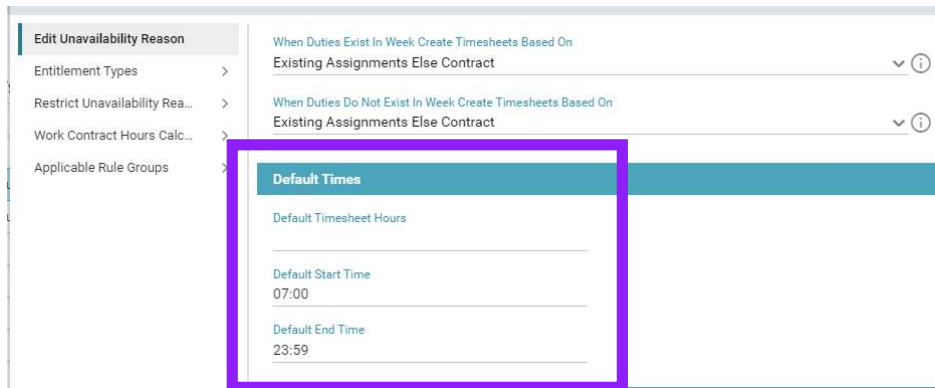
If left blank, then this will take the hours from the Default Unavailability Hours in their contract.

Contracted For (Hours Per Week)	37:30
Default Unavailability (Hours Per Day)	07:30
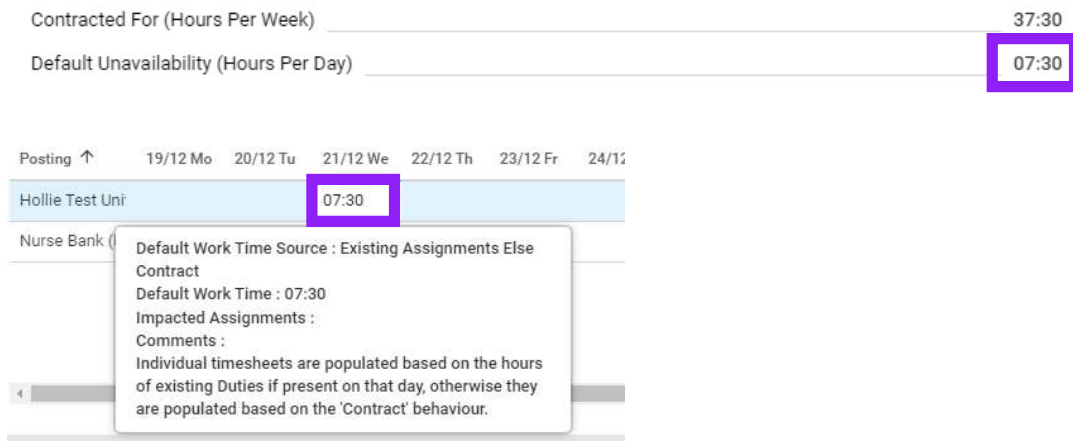
For example, you can see on the days where no duties are assigned, the default leave hours of 7.5 is used. On the days where there are duties assigned, Tuesday and Thursday, it is mirroring the amount of hours that are assigned in the duty. You can also see how this has not capped to weekly contracted hours.

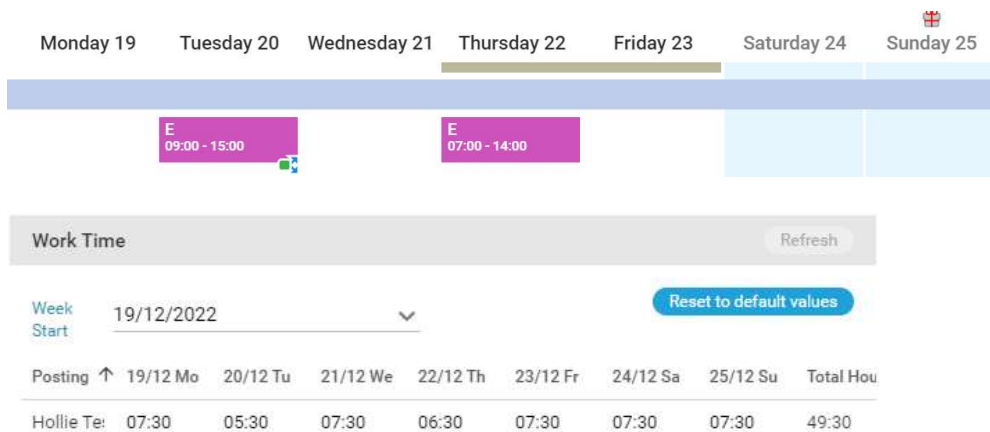- However, if 'Timesheet Entries Populated Based On Contracted Hours Per Week' checkbox on the Enterprise Work Contract' is **ticked** then the days with no duties will behave differently.
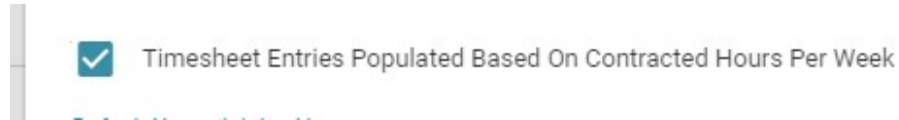
On days with no duties assigned, this will instead take the hours from the Hours Per Day set up in the Enterprise Work Contract in Reference Data>Organisation>Work Contracts. This figure is auto generated from the Contracted Time- Hours Per Week set up in the contract, and divides it by 5. If set to 40 per week, as screenshotted below, this auto generates the Hours Per Day figure to 8 and cannot be altered.

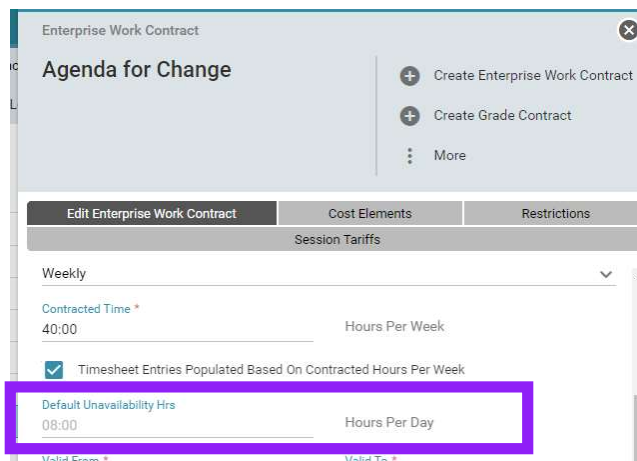| Note |
| --- |
| It is generally not common to tick this, as this will force the system to apply the set hours of leave even if this is not their Default Unavailability Hours in their contract. |

Here you can see 8 hours is assigned, although the staff member's default unavailability per day is 7.5:
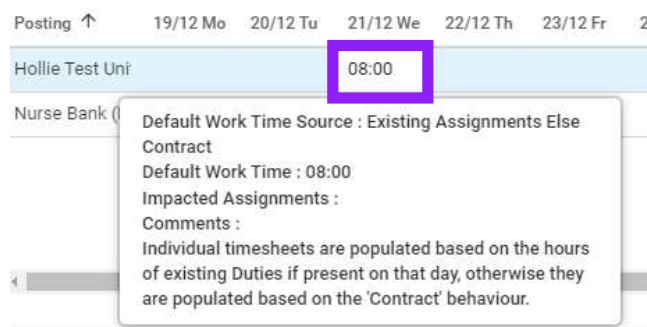
Contracted For (Hours Per Week)	37:30
Default Unavailability (Hours Per Day)	07:30

- It is important to note that this setting **does not cap to the weekly contracted hours.** This could lead to too many hours being assigned, and could result in the staff members taking more hours of leave than necessary and also could result in overpayment.
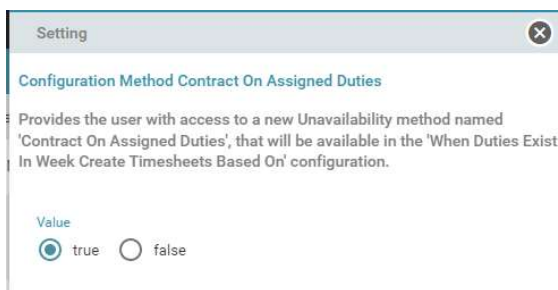
▪ Contract On Assigned Duties

In 11.2.1 or later you will see the option Contract On Assigned Duties. This is an option that can only be selected for 'When Duties Exist in Week Create Timesheets Based On'. This was also developed for a non-UK customer, and **does not cap at the weekly contracted hours,** it should therefore be used with care in the UK&I to ensure it is aligned with your internal policies.

When Duties Exist In Week Create Timesheets Based On

Contract On Assigned Duties   ∨ ⓘ

In line with the behaviour, this setting is usually paired with the setting Zero Hours, for the 'When Duties Do Not Exist in Week Create Timesheets Based On' drop down.

When Duties Do Not Exist In Week Create Timesheets Based On

Zero Hours   ∨ ⓘ

This will only appear in your system if you have the setting Unavailability: **Configuration Method Contract On Assigned Duties** set to True.

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

- Within the week, on **days** where duties are assigned, it will apply a figure using the calculation of Person Work Contracted Hours ÷ 5, and on days where there are no duties, this will apply zero hours.

- This example shows Marshall is working a shift on the Monday and Wednesday. On the Tuesday there are no shifts assigned.

- The system has assigned the Person Work Contract Hours (37.5) ÷ 5 which is 7.5 hours.

- On days when there is **no** shift assigned, it applies 0 hours.

- As you can see, if you were to add this over multiple days of duties, this does not cap to 37.5 hours.

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

Note
It is advised to use this unavailability behaviour setting with great care due to the fact that it ignores the cap, and only use this if in line with internal policies and agreements.

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