

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.

		Februa	ary 202	23		
30	31	01	02	03	04	05
30 Janu	ary 2023					
* **						
A/L						
	1	Edit U	navaila	bility		
	▲ ?	Retes	t Rules			
	Î	Delete	e Unava	ilability		

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.



Person											8
Lily Aldri Band 2 H	n ICA		 	Bank No Unit Multiple Staff No Lily1 From Manual						L Vi	ew Person
Summary	>	Unavailabilit	lies			9	Records	2	- 111	X	С
Unavailabilities		From *	03/01	/2022	Ġ	То *		03/01/20	024		
											Q
		Reason	uu: 20070	State	Period	Working Hours	Working) Days			
		0	Annual Le	Requested	15/07/2	0.00	iā.				ĺ
		Ť	Annual Le	Taken	11/08/2	15.00	7.50			_	
		Ť	Annual Le	Taken	19/08/2	7.50	3.75				
		-	12. 2021	10 E	01201-0100	100020	10.000				

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.

^					Ros	stering	Sa	feCare	Personn	nel Pay	roll	Admin	Gateway	Refe	erence Da	ıta			
< Vie	ew Rosters 💌	Bank Re	quests 💌	Daily Staffing	• Unavai	lability 👻	A	ssigned Hour	s 🔻	Roster Stats	▼ At	ttendance Ex	ceptions	Timeshee	et Correct	ions 🔻	Swap Requests	Reports -	Ŧ
Unav	ailability Lis	st																1	0 Rei
Unit	I	Hollie Test U	Jnit			~	From *		05/12	2/2022				Ċ,	To *		04/01/2023		
Team	1	Any				~	Show		All					~	Staff N	0			
Group	1	Annual Leav	e			~	Status		Active	e				~	Assign	ment No			
Reason	1	A/L - Annual	l Leave			~	Surnan	10											
											^								
Surname	Dep	partment	Forenames	Name	State	Grade		Team	Assigr	nment N Fully Su	ubmitted 🛧	Submitted U	pto Date	Unloc	ked	Grade Type	Group	Reason	R
e Pom	nple Mul	ltiple	Tabatha	Tabatha Po	Requested	Band 5	RN	RN								RN	Annual Leave	Annual Leave	
T Pom	nple Mul	Itiple	Tabatha	Tabatha Po	Approved	Band 5	RN	RN								RN	Annual Leave	Annual Leave	
T Pom	nple Mul	ltiple	Та	Edit Upavailability		Band 5	RN	RN								RN	Annual Leave	Annual Leave	
T Erick	kson Hos	spital 2	м			Band 5	RN	RN								RN	Annual Leave	Annual Leave	
T Erick	kson Hos	spital 2	M; ≜ ?	Retest Rules		Band 5	RN	RN								RN	Annual Leave	Annual Leave	

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.



Group *				State	*			
Annual Leave			~	Appr	oved			~
Reason * A/L - Annual Le	eave							~
Start *				Durat	ion *			
05/12/2022		07:00		3	6	0		
End * 07/12/2022		23:59						
Work Time								Refresh
Week 05/12 Start	2/2022		~				leset to defai	ult values
Posting 个	5/12 Mo	6/12 Tu	7/12 We	8/12 Th	9/12 Fr	10/12 Sa	11/12 Su	Total Hou
Hollie Test Uni	07:30	07:30	07:30					22:30
Maternity (Ban	00:00	00:00	00:00					00:00

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:

Week 05/1 Start	2/2022		~		
Posting 个	5/12 Mo	6/12 Tu	7/12 We	8/12 T	
Hollie Test Uni	07:30	07:30	7:30		
Maternity (Ban	00:00	00:00	00:00		

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.

Posting 个	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	

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.



Posting 个	5/12 Mo	6/12 Tu	7/12 We	8/12 Th
Hollie Test U	ni 07:30	06:00	07:30	
Maternity (Default Work	Time Sourc	e : Contract]
	Default Work Original Work			
	Impacted Ass Comments :	signments :		

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.



an yr nç	Unavailability Reason Full Name Annual Leave Unavailability Reason Group	o Anni	ual Leave			¢
	Edit Unavailability Reason	>	Valid From * 01/01/1900	Ē	Valid To • 31/12/9999	Ċ
T:	Restrict Unavailability Rea Work Contract Hours Calc	>	When Duties Exist In Week Create Contract	Timesheets Based On		~ (j)
OE	Applicable Rule Groups	>	When Duties Do Not Exist In Week Contract	Create Timesheets Based	On	~ (i)
οι						

Here you can see there is a dropdown of options you can choose from.

Contract	
Contract On Assigned Duties	
Default Behaviour	
Existing Assignments	
Existing Assignments Else Contract	
Zero Hours	
Zero Hours en Duties Do Not Exist In Week Create Timesheets Based On ntract Contract	~.(;
Zero Hours en Duties Do Not Exist In Week Create Timesheets Based On htract Contract Default Behaviour	~ (
Zero Hours en Duties Do Not Exist In Week Create Timesheets Based On Intract Contract Default Behaviour Existing Assignments	~ (
Zero Hours en Duties Do Not Exist In Week Create Timesheets Based On Intract Contract Default Behaviour Existing Assignments Existing Assignments Else Contract	~ (

The different options will dictate how the system behaves, and the 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 you hover over the 'i' icon it will display the below



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



- 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.

Work Time							Refresh
Week 23/01/2 Start	2023		~			Reset to de	fault 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 (f	07:30	07:30	07:30	07:30	07:30		
Maternity (Band (00:00	00:00	00:00	00:00	00:00		

- 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:

ull Name Annual Leave					
Inavailability Reason Group	p Annu	ial Leave			
dit Unavailability Reason		Valid From *		Valid To *	
ntitlement Types	>	01/01/1900	Ċ.	31/12/9999	Ē
estrict Unavailability Rea	>	When Duties Exist In Week Create 7	imesheets Based On		
Vork Contract Hours Calc	>	Contract			~ (
oplicable Rule Groups	>	When Duties Do Not Exist In Week	Create Timesheets Based	On	
		Contract			~ (
		Dofault Times			
		Delaut Times	_		
		Default Timesheet Hours			
		Default Start Time			
		07:00			
		Default End Time			
		23:59			

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:

Delault Times	
Default Timesheet Hours	
06:00	
Default Start Time	
17:00	

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

Work Time							Refresh
Week 23/01 Start	1/2023		~			Reset to	default values
Posting 个	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		

- 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.*

Pers	son Work Co	ontracts	2 Records	III X	C	
Grade E		Enterprise Work Contract	Posting 个	Contracted Hours	Valid From	Valid To
Ð	Band 5 RN	Agenda for Change	·	37:30	01/01/2020	8
P	Band 5 RN	Bank Monthly	Nurse Bank (Band 5 RN W	00:00	01/02/2022	2

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

Work Time							R	efresh
Week 2 Start -	3/01/2023		v			Res	et to default v	values
Posting 个	23/1 Mo	24/1 Tu	25/1 We	26/1 Th	27/1 Fr	28/1 Sa	29/1 Su	Total Ho
Hollie Test	07:30	07:30	07:30	07:30	07:30	00:00	00:00	37:30



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:

Person W	orking Restric	tions				8
			1	🖍 Change F	erson Workir	ig Restrictions
Hours Of Wo	ork					
Mon	Tue	Wed	Thu	Fri	Sat	Sun
Any Time	Any Time	10:00	Any Time	Any Time	Any Time	Any Time
12	-	15:00	-	-	-	-

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'.

Contracted Hours Cap * Ignore Cap

~



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	√ (i)
When Duties Do Not Exist In Week Create Timesheets Based On	
Default Behaviour	~ (i)

'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 <u>entire</u> week, and will apply <u>even if the leave is on a day that has no duties assigned</u>, 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:



- 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.



(А) н	EALTH ROSTER 11	Development					12 Dec 2022		Enterprise Work Contract			Ø
^				Rostering	SafeCare	Personnel	Payroll	Admin	Agenda for Change		0	Create Enterprise Work Contract
< (Organisation 💌	Payroll 🔻	Person 💌	Unavailability 🔻	Rostering	 Tempor 	ary Staffing 🔻	SafeCare			0	Create Grade Contract
Wo	rk Contracts					🕒 Cre	ate Enterprise Wor	k Contract			:	More
^		Payeoa	le Point External Pa	faranca							•	
> 🗈	Agency	rayaca	ie i oliti External Re	lerence				-	Edit Enterprise Work Contract	Cost Elemer	nts	Restrictions
× R	Agenda for Chang	A							Se	ssion Tariffs		
	Admin & Cleri	cal 3							Default Unavailability Hrs 07:30	Hours P	er Day	
	S Administration	n Manaç							Valid From *	Valid To *	8	
	Administrator	- Materi							01/01/1900	31/12/9	999	
	😔 Assistant Gen	eral Ma							Include Break Time In Contracted Time			
	B2 Maternity \	Ward As										
	Band 1 HCA							_	TOIL Split Percentage			
	Band 1 house	keeper						_	0.00			
	📴 Band 1 House	keeper						_	Can Record Contracted Activities			
	Band 1 Mick V	Varman							Annual Leave Finalisation Check Rule *			
	Band 2 Driver							_	No Checking			~
	Band 2 HCA							_	All Other Unavailability Finalisation Check Rule *			~
	Band 2 House	keeper										· · ·
	Band 2 House	keeping							Calculate Annual Leave Hours From Ass	gned Duties		
		20 R						- T	Contracted Hours Can *			

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



Calculate Annual Leave Hours From Assigned Duties

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.

When Duties Exist In Week Create Timesheets Based On Default Behaviour	v (j)
When Duties Do Not Exist In Week Create Timesheets Based On Default Behaviour	v (j)
Default Times	
Default Timesheet Hours	
Default Start Time	
07:00 Default End Time	
23:59	

- 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.

Person Wo	Change Person Workin	g Restrictions		8	Person W	orking Rest	rictions				6	3
	Friday	00:00	23:59					1.	Change Pe	erson Workin	g Restriction	**
Hause Of Was	Saturday	00:00	23:59									
Hours Of Won	Sunday	00:00	23:59		Hours Of Wo	ork						
Mon					Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Any Time	Default Leave Hours				n Any Time	12:00	Any Time	10:00	Any Time	Any Time	Any Time	
-	Use Working Days				-	15:00	-	15:00	-	-		1
	Monday	07:30		_				-				
Default Leave	Tuesday	07:30			Default Leav	e Hours -						
07:30	Wednesday	07:30		_	07:30	07:30	07:30	07:30	07:30	07:30		
	Thursday	07:30			Postrictions							'
Restrictions	Friday	07:30			Dave per Wee	ú.						-
Days per Weel	Saturday	07:30			Max Days Per	Week						5
Max Days Per	Sunday	07-90			Max Shifts Pe	er Day						3
Max Shifts Pa	ounday	07:30			Max Shifts Pe	er Week						6



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.

Default Lea	ave Hours									
🖌 Use V	Vorking Days									
Change Person We	orking Restrictions		8	Person W	orking Rest	ictions				(
Effective From * 31/01/2022			<u> </u>					/ Change P	erson Workin	g Restrictio
lours Of Work				Hours Of Wo	ork					
	From	То		Mon	Tue	Wed	Thu	Fri	Sat	Sun
londay	00:00	23:59		Any Time	12:00	Any Time	10:00	Any Time	Any Time	Any Time
uesday	12:00	15:00		-	15:00		15:00	-	_	-
ednesday	00:00	23:59								
nursday	10:00	15:00		Deraure Bear	enourse					
iday	00:00	23:59		07:30	07:30	07:30	07:30	07:30	07:30	07:30
turday	00:00	23:59								
inday	00:00	23:59		Restrictions						
				Days per Wee	:k					
efault Leave Hou	irs			Max Days Pe	Week					
🔽 Use Working I	Davs			Max Shifts Pe	er Day					

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.

Posting 个	12/12 Mo	13/12 Tu	14/12 We	15/12 Th	16/12
Hollie Test Uni	07:30	03:00			



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:

	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 Hou	rs	

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

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

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

'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 associated Person Work	v ()
contract is used to default work time hours (if not overridden on the unavailability reasons)	
Work time hours are normally capped based on weekly	~ (i
contracted hours and the maximum hours they can work	
on a given day from the associated Working	
	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

- 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.

** 26	# 27	28	29	30	31	January 01	Start * 26/12/2022		07:00		Duration * 6	00			
Ex3	Ex3	Ex2	Ex3	Ex3	Ex3	Ex3	End * 31/12/2022		23:59						
							Work Time							Refr	esh
Lx3	Lx3	Lx3	Lx3	Lt3	Lx3	Lx3	Week 26/1 Start	2/2022		~			Reset to	default val	Jes
Nx2 23-00 03	NX2	Nx2	Nx2	Nx2	Nx2	NX2	Posting 个	26/12 Mo	27/12 Tu	28/12 We	29/12 Th	30/12 Fr	31/12 Sa	1/1 Su	Т
							Hollie Test Uni	07:30	07:30	07:30	07:30	07:30	00:00		3
							Nurse Bank (B	00:00	00:00	00:00	00:00	00:00	00:00		0
			_	_			Next Steps	-	_	_	_	_	_		
ontrac	ted Fo	r (Hou	urs Per	Week)		No Action	n () ca	ancel Demano	d 🔘 Ser	nd To Bank			37	7:30
efault	Unava	ilabilit	y (Hou	irs 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	∨ (i)
When Duties Do Not Exist In Week Create Timesheets Based On	
Existing Assignments	<u>~</u> (i)

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

1	For substantive postings, existing active duties are used	6
÷	to default work times.	-0

- 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:

1414				
💼 Erick	kson, 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 个	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.

æ						January	26/12	2/2022	Ē	07:00		6	00		
26 0Cx1	27 0Cx1	28 00x1	29 0Cx1	30 0Cx1	31 OCx1	01 OCx1	End * 31/12	2/2022		23:59					
On Calls	1 On Calix1	On Calix1	On Callx1	On Callx1	On Callx1	On Calix1	Work	Time							Refresh
							Week Start	26/1	12/2022		~			Reset to def	ault values
			_	-			Postin	g 个	26/12 N	lo 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	Nurs Default Work Time Sourc Default Work Time : 00:0 Impacted Assignments : Comments :					00:00	00:00	
							4		-						
							Next	Steps							



Zero Hours

Zero Hours	<u>~</u> (i)
When Duties Do Not Exist In Week Create Timesheets Based On	

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

Work time will always be 0.	~ (i)
	_

- 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:

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	Default Work T	ime Sourc	: Zero Hours	:00	00:00	
Stam Test	Default Work T Impacted Assig	ime : 00:0 <mark>0</mark> gnments :	0	10:00	00:00	
	Comments :					

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 Duties Exist In Week Create Timesheets Based On	
Existing Assignments Else Contract	<u> </u>
When Duties Do Not Exist In Week Create Timesheets Based On	
Existing Assignments Else Contract	~ (i

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





- 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.

	Attributes	Week 19/ Start	12/2022		~		(Reset to defe	ault values
	Duty r	Posting ↑	19/12 Mo	20/12 Tu	21/12 We	22/12 Th	23/12 Fr	24/12 Sa	25/12 Su
A	Warnings	Hollie Test Uni	t.	05:30					
	Duty Notes	N Default Wo Contract	ork Time Sour	ce : Existing	ı Assignmen	ts Else			
99:00 = 15:1	Assigned St	Impacted Early 09:00 M	Assignments 0 - 15:00 on 2	30 : 0/12/2022 ;	assigned to I	Frickson,			
_		Comments Individual of existing	s : timesheets a Duties if pres ted based on	e populated sent on that the 'Contra	l based on th day, otherwi	e hours se they			

- 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:

Edit Enterprise Work Contract	Cost Elements	Restrictions
51 ⁰	Session Tariffs	
40.00	HOARD F CE HOOK	
	On Operated Linux Dec Work	
Timesheet Entries Populated Based	On Contracted Hours Per Week	
Timesheet Entries Populated Based	On Contracted Hours Per Week	



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:

Edit Unavailability Reason	When Duties Exist In Week Create Timesheets Based On Existing Assignments Else Contract	~ (i
Restrict Unavailability Rea >	When Duties Do Not Exist In Week Create Timesheets Based On	0
Work Contract Hours Calc >	Existing Assignments Else Contract	<u>~(i</u>
Applicable Rule Groups >	Default Times	
	Default Timesheet Hours	
	Default Start Time	
	Default End Time	
	23:59	

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

Posting ↑	19/12 Mo	20/12 Tu	21/12 We	22/12 Th	23/12 Fr	24/12
Hollie Test Un	ř		07:30			
Nurse Bank (Default Wor Contract Default Wor Impacted A Comments Individual ti of existing I are populate	k Time Sou k Time : 07: ssignments : mesheets a Duties if pre ed based on	rce : Existing 30 : re populated sent on that 1 the 'Contrac	Assignmen based on th day, otherwi t' behaviour	ts Else ne hours ise they	

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.

Monday	19 Tue	sday 20	Wednesday 2	21 Thur	sday 22	Friday 23	Satur	day 24	unday 25
	E 09:00 -	15:00		E 07:00 - 1	4:00				
		đ							
Work Tim	e						R	lefresh	
Week - Start -	19/12/202:	2	~			Res	set to default	values	
Posting 个	19/12 Mo	20/12 Tu	21/12 We	22/12 Th	23/12 Fr	24/12 Sa	25/12 Su	Total Hou	
Hollie Te:	07:30	05:30	07:30	06:30	07:30	07:30	07:30	49:30	





- 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.

Timesheet Entries Populated Based On Contracted Hours Per Week

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.

Enterprise Work Contract		8
Agenda for Change	Create	Enterprise Work Contract
	Create	Grade Contract
	\$ More	
Edit Enterprise Work Contract	Cost Elements	Restrictions
	Session Tariffs	
Weekly		<u> </u>
Contracted Time *		
40:00	Hours Per Week	
Timesheet Entries Populated Based	l On Contracted Hours Per Week	
Default Unavailability Hrs		
08:00	Hours Per Day	_
Valid From *	Valid To *	

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:

Posting 个	19/12 Mo	20/12 Tu	21/12 We	22/12 Th	23/12 Fr	2
Hollie Test Un	Î		08:00			
Nurse Bank (Default Wor Contract Default Wor Impacted A Comments Individual ti of existing I are populate	k Time Sour k Time : 08: ssignments mesheets a Duties if pre ed based on	rce : Existing 00 : re populated sent on that 1 the 'Contrac	Assignmen based on tł day, otherwi t' behaviour	ts Else ne hours se they	



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	~ (i)

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 × (i)

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

Setting	0
Configuration Method Contract On Assigned Duties	
Provides the user with access to a new Unavailability 'Contract On Assigned Duties', that will be available in In Week Create Timesheets Based On' configuration.	y method named n the 'When Duties Exist
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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