

NHS Electronic Staff Record

Annual Leave Guidance

Creation Date: 31 August 2014

Last Updated:

Version: 1.0

Contents

CONTENTS.....	2
INTRODUCTION.....	3
INTRODUCTION.....	3
ACCRUAL PLANS.....	3
ACCRUAL PLAN TYPES.....	5
ANNUAL LEAVE HOURS N PLANS.....	5
<i>Entitlement Based on Years of Service.....</i>	<i>5</i>
<i>Annual Leave Hours n Plans Rules.....</i>	<i>6</i>
<i>Setting up the Plan.....</i>	<i>6</i>
<i>Key points:.....</i>	<i>7</i>
<i>Overriding the Entitlement.....</i>	<i>8</i>
ANNUAL LEAVE ACCRUAL N NHS	10
<i>Annual Leave Accrual n Plans Rules.....</i>	<i>11</i>
<i>Setting up the Plan.....</i>	<i>11</i>
<i>Key points:.....</i>	<i>13</i>
<i>Overriding the Entitlement.....</i>	<i>14</i>
BANK ANNUAL LEAVE HOURS N PLANS.....	15
PAYMENT OF ACCRUED ANNUAL LEAVE TO BANK STAFF.....	15
CREATING A LOCAL ACCRUAL PLAN	16
ATTACHING ACCRUAL PLANS TO MULTIPLE EMPLOYEES – CONCURRENT PROCESSES.....	16
ATTACHING THE HOURS BASED PLANS	16
<i>Key Notes:.....</i>	<i>17</i>
ATTACHING THE DAYS BASED PLANS	18
<i>Key Notes:.....</i>	<i>18</i>
APPENDIX 1 – AFC ANNUAL LEAVE ENTITLEMENTS	19
1. <i>Excluding Bank Holidays.....</i>	<i>19</i>
2. <i>Including Bank Holidays.....</i>	<i>23</i>

INTRODUCTION

Introduction

Annual leave can be recorded using either Core or Self Service functionality in ESR. Core functionality can be used where the annual leave process is managed centrally and an organisation's Absence Administrator can enter dates related to all annual leave episodes for employees. However, the full benefits of absence recording are achieved when both the employee and their supervisor/manager use ESR self service functionality to the process in real time.

This Guide provides details on how:

- To attach the appropriate accrual plan for the employee based on their T&Cs
- Each Accrual plan works, including their calculations and 'rules'
- To override the default calculations to suit local rules
- To Create a Local Accrual Plan
- To attach Accrual Plans en masse using the Concurrent Processes available

Accrual Plans

An accrual plan holds information about the annual leave entitlement based on national rules per year of service. The details are held on the corresponding Generic Rate Retrieval Table.

An accrual plan must be attached to each assignment for the employee and this has to be in existence on the employee record prior to annual leave being entered.

ESR will display the entitlement together with the start and end dates used in the calculation of the entitlement on the Accruals form, available through the Absence module. It will also display the Net and Gross entitlement and whether or not the value includes Bank Holidays (hours based plans) or Statutory Days (days based plans).

View accruals in Core:

The screenshot shows the 'Accruals(MKAL 01, Mr. Mark)' window. It contains the following fields and sections:

- Name:** Annual Leave Accrual 2 NHS
- Accrual Category:** Vacation
- Dates:**
 - Entitlement Calculation:** 01-APR-2014 - 31-MAR-2015
 - Last Accrual:** 31-MAR-2015
- Net Entitlement:** 32
- Include Bank Holidays:** (empty field)
- Add 2 Statutory Days:** Yes
- Entitlement Details:** A table with 5 columns: Element Name, Input Value Name, Total Entitlements, Units, and Effect On Net.

Element Name	Input Value Name	Total Entitlements	Units	Effect On Net
Annual Leave Accrual 2 NHS	Accrual Plan	32	Days	Add
Annual Leave Accrual 2 NHS Ca	Plan Days	0	Days	Add
Annual Leave NHS	Annual 2	0	Days	Subtract

Plans are based on national terms and conditions of service for staff groups and any local variation and or agreement will require either an override of the national plans to be attached or the creation of a local accrual plan. These are described below.

View in Employee Self Service

View when hours based plan is attached.

The screenshot shows the 'Absence Summary' page for Employee Name **McFly, Marty** and Employee Number **20000413**. The page has tabs for 'Absence Summary' and 'Entitlement Balances'. Under 'Absence Summary', there is a section for 'Annual Leave Hours 1 RHS' with the following details:

Annual Leave Hours 1 RHS	
Gross Accrual	140.75
Net Accrual	118.25
Include Bank Holidays	Yes (As they fall)

A red box highlights the 'Annual Leave Hours 1 RHS' section. A text box next to it states: 'Days based plan will state 'Add 2 Statutory Days' instead of the Include 'Bank holidays' detail'.

Below the table, there is a section for 'Effective Date' with a date picker and a 'Go' button. The page footer includes 'About this Page', 'Diagnostics Home Logout Preferences Help', and 'Copyright (c) 2006, Oracle. All rights reserved.'

Accrual Plan Types

Staff Group	Accrual Plan
Agenda for Change	Annual Leave Hours n NHS
Bank Staff	Bank Annual Leave Hours n NHS
Medical & Dental	Annual Leave Accrual n NHS
Very Senior Managers	Annual Leave Accrual n NHS

Annual Leave Hours n Plans

These are 'Hours Based' plans and are for use with AfC staff only. Separate (but similar) plans are available for Bank Staff. There are 5 separate plans but each is a replica of the others except for the name, where *n* is either 1, 2, 3, 4 or 5. Plan '1' should be used for the employee's primary assignment, with the other numbered plans being used in numerical order in cases where the employee has additional assignments.

Entitlement Based on Years of Service

In order to ensure that the employee's entitlement takes account of their aggregate years of previous service, you must ensure that the correct values are populated on the relevant person DFF fields shown opposite for an employee that has previous NHS or other approved Service.

Enter the Aggregate Service Years and Aggregate Service Days information, where appropriate. Entries will only be required where an employee has previous periods of NHS or other reckonable service, including any previous service with the current employer. This is required so that the leave entitlement can be increased automatically at the appropriate time for AfC and M&D staff

Note: The Inter Authority Transfer process will populate these fields at the Portable Copy Dataset process where they are blank. Ensure that you agree with the values entered.

Certain Accrual Plans (such as the Annual Leave Accrual *n* plan) has a continuous service date field available on the entry vales itself. This can be used as an alternative date for entitlement calculation.

Where the employee has no previous NHS service then annual leave entitlement is based on their latest start date.

The screenshot shows a form titled 'Additional Personal Details'. It contains numerous fields for employee information. The 'Proj New Starter NTF Sent Date' field is highlighted with a red box and contains the value '01-JAN-2000'. Other visible fields include 'Recruitment Source', 'NHS Organisation', 'Date of Birth Verified', 'CSD 1 Week', 'CSD 3 Months', 'CSD 12 Months', 'NHS Entry Date', 'Loss of Office Payment Date', 'Loss of Office Reckonable Service Date', 'NHS Pensioner', 'Date NHS Pension Benefits Paid To', 'Maiden Name', 'NHS CRS Preferred Smartcard Display Name', 'WTR Opt Out', 'WTR Opt Out Date', 'NHS OSP Scheme', 'NHS OMP Scheme', 'Legacy Employee Number', 'Legacy Payroll Number', 'Pension ID Number', 'Latest Hire NTF Sent Date', 'Monitor Changes', 'Aggregate Service Years', and 'Aggregate Service Days'.

Annual Leave Hours n Plans Rules

- They run from 1st April to 31st March
- Entitlement is based on hours and is calculated using the employee's FTE. See Appendix 1 here for full list of calculations including/excluding bank holidays
- The full entitlement for the leave year is shown up front and does not require the user to date track to the last day of the leave year e.g. 31st March to establish entitlement.
- Gross and net values will be shown in both the core application and self service
- The plan will indicate whether or not the entitlement includes bank holidays
- Entitlement is based on complete calendar months only. Any allowance for starting or leaving part way through a month can be catered for using the Annual Leave Hours Override Element (see below).
- Values are rounded up to the nearest 15 minutes where calculations change mid year due to:
 - Increase in entitlement at 5 or 10 year anniversary
 - Starting/leaving or reducing/increasing contractual hours either mid month or mid year

Setting up the Plan

Accrual Plans can only be set up in ESR Professional Forms and not Self Service.

An accrual plan is required for each assignment the employee has. When setting up the plan, the following fields should be completed, where appropriate.

Scheme

Unless you have created a local plan with different entitlements, you should always select 'NHS' as the scheme.

Include Bank Holidays

This has the option to include Bank Holidays into the entitlement, which is compulsory for part time staff as follows:

No

Does not add Bank holidays

Yes

Bank Holidays are prorated across the whole 12 months of the leave year

Yes (As they fall)

Adds Bank holiday entitlement based on the calendar month in which the bank holiday occurs, so that bank holidays can be allocated when they occur

The 'As they fall' figure is calculated as follows:

- Counts only the Bank Holidays that fall into the entitlement period for the assignment.
- Ignores Bank Holidays in any part month at the start of the entitlement period for a new starter
- Ignores Bank Holidays in any part month at the end of the entitlement period for a leaver.
- Counts each Bank Holiday at the FTE in place for the assignment for the calendar month where the holiday falls (a change in FTE mid-month does not apply till the first day of the next month).

Once 'Scheme' and the 'Include Bank Holidays' options have been completed, then the entitlements (on appointment, at 5 and 10 years) will be automatically populated. The element will need to be queried back (Ctrl F11) before this can be seen.

The screenshot displays two windows from a software application. The left window, titled 'Element Entries: 01-APR-2014(Craddock01, Mr. Stuart)', shows a list of elements. The right window, titled 'Entry Values: 01-APR-2014(Craddock01, Mr. Stuart)', shows the configuration for the selected element, 'Annual Leave Hours 1 NHS'.

Element Entries Window:

- Period: 1 2014 Calend
- Classification:
- Element Name:
 - Basic Contracted NHS
 - NI
 - Negative Net Pay NHS
 - PAYE Details
 - SSP SMP Calculator NHS
 - Standard Costing NHS
 - Overtime Multipliers NHS
 - Pension NHS
 - Pensions Information
 - Enhanced Multipliers NHS
 - Annual Leave Hours 1 NHS**
- Buttons: Entry Values, Balan

Entry Values Window:

- Scheme: NHS
- Include Bank Holidays: Yes (As they fall)
- On Appointment Rate: 262.5
- After 5 Years Rate: 277.5
- After 10 Years Rate: 307.5
- Carry Forward Rate: 37.5
- Further Entry Information:
- Date Earned:
- Original Date Earned:
- Payee Details:
- Processing Priority: 500

Key points:

From Bank to Substantive

If your organisation does not give credit for bank employment only, then you must use the 'NHS Annual Leave Hours Override' element to amend the entitlement until such time that they reach their 5 and 10 year anniversary. Otherwise it will use their latest start date and Aggregate Years/Days Service values to determine their anniversary dates as per substantive staff.

Previous Service at the Organisation

If the employee worked for you previously then you must add their previous aggregate service with your organisation (subject to local policy) into the Aggregate Service Years and Days fields. If you do not then their entitlement will be based on their latest start date with the organisation.

Carry Forward

Only a maximum of 37.5 hours (pro rata for part time staff) is allowed to be carried forward. The PTO process must be run to ensure that values from previous leave years are accounted for.

Absence Accrual Start Date (Assignment DFF)

this field should be left blank for AfC staff whose leave year runs from 1st April. Neither does it need to be completed for staff who commence employment mid year, but whose 'full' annual leave year starts from 1 April. The system will adjust the entitlement automatically for part years. Only populate this field with a different date if their leave year is not 1st April annually.

Changing FTE part way through the year

The calculation of entitlement in the Annual Leave Hours plans is representative of any FTE changes that have taken place during the entitlement period. For example, if an assignment changed from full time to part time mid-year then the entitlement figure would be pro-rated using the number of months at full time and the number of months at part-time.

NOTE: this calculation does not count an FTE change that happens after the 1st of the month until the 1st of the next calendar month.

This change utilises the FTE stored against the assignment and displayed on the assignment form banner. Assignments must have a valid FTE in place for the leave period to receive the correct accrual for Annual Leave Hours plans.

Overriding the Entitlement

If the national rules for the plan need to be amended temporarily, for example you wish to give a new starter who commences later than the 1st of the month, full or partial entitlement for their first month, then the national values can be overridden by attaching the 'Annual Leave Hours Override NHS' element.

The value entered in Override Entitlement will replace all the foregoing calculations. Therefore the override value entered should represent the leave entitlement for the whole year. The override value will automatically feed through to the 'View Accruals' screen.

The screenshot shows the 'Entry Values(Smith, Mr. Roger John)' window. On the left, there is a list of elements with columns 'Element Name' and 'Proc Type'. The 'Annual Leave Hours Override NHS' element is highlighted. The main area of the window is titled 'Override Entitlement' and contains a table with columns 'From' and 'To'. The 'From' column is populated with 'APR.2012' for multiple rows. The 'To' column is empty. Below the table, there is a section for 'Further Entry Information' with fields for 'Date Earned', 'Original Date Earned', and 'Payee Details'. At the bottom left, there are buttons for 'Entry Values' and 'Balance Gross'.

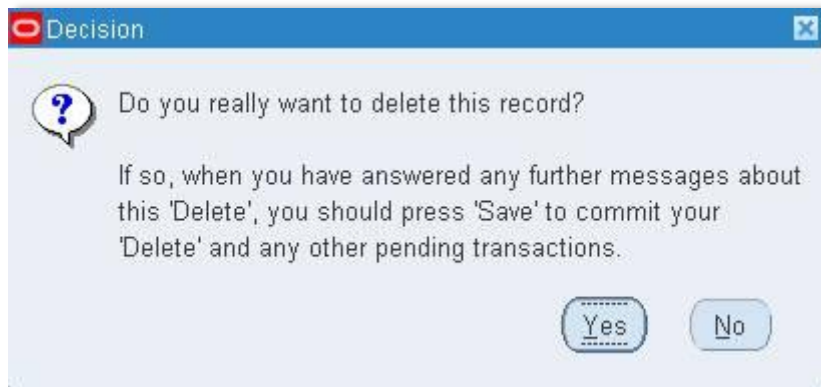
The override element should ideally be used for the current year only so should be entered with an appropriate end date.

To do this, date track to the required end date for example, if the element is added on 01-Apr-2014 the end date would be 31-Mar-2015.

Please note that if date tracking in the Entries form, press CTRL and F11 to refresh the element list.

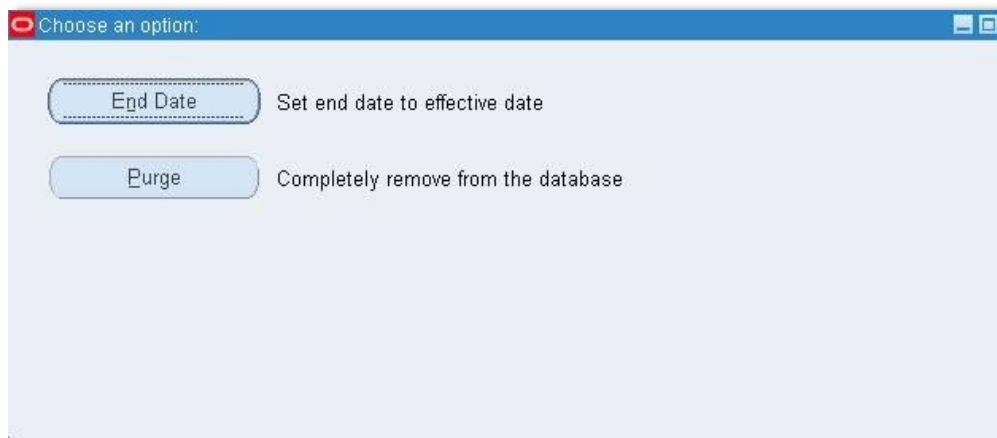
Click in the row containing the **Annual Leave Hours Override NHS** element and click the  Delete icon.

The following decision message will be displayed:



Click **Yes** to continue.

The Choose an Option window will open:



Click **End Date** to end date the selected element with effect from the date tracked date.
Please note that the Purge option should only ever be used where an element has been attached to the record in error and has not been processed in the Payroll.

Click the  Save icon.

Press CTRL F11 to refresh the element list.

Element Entries: 31-MAR-2013(Smith, Mr. Roger John)

Period: 12 2013 Calendar Month (01-MAR-2013)

Classification:

Processing Types: ☐ Recurring, ☐ Nonrecurring, ☒ Both

Override: ☐ Additional, ☐ Processed, ☐ Retroactive

Element Name	Processing Type	Costing	Reason		Effective Dates	From	To
Annual Leave Hours 1 NHS	Recurring			57		01-APR-2012	
Annual Leave Hours Override NHS	Recurring					01-APR-2012	31-MAR-2013
Basic Contracted NHS	Recurring					01-APR-2012	
Enhanced Multipliers NHS	Recurring			47		01-APR-2012	
NI	Recurring	(NHS999999)(NH-				01-APR-2012	
Negative Net Pay NHS	Recurring					01-APR-2012	
Overtime Multipliers NHS	Recurring			47		01-APR-2012	
PAYE Details	Recurring	(NHS999999)(NH-				01-APR-2012	
Pension NHS	Recurring	(NHS999999)(NH-		57		01-APR-2012	
SSP SMP Calculator NHS	Recurring					01-APR-2012	
Standard Costing NHS	Recurring					01-APR-2012	

Entry Values: Balance Grossup

The Annual Leave Hours Override NHS element will be displayed with the end date in the Effective To date field.

Both are recurring elements and should have a start and end date to match the leave year being overridden. If an end date is not entered then the annual leave accrual is overridden for all subsequent leave years until an end date is entered.

The elements have a single mandatory Input Value called 'Override Element'. The value entered is the total entitlement in days or hours accordingly that the employee will have. This amount is not affected by changes to FTE or the employees start or end date.

Note: The override is not affected by any changes to FTE, or the employee's start or end date. Care should be taken when terminating an employee to check whether the annual leave entitlement has been overridden. If an entitlement has been overridden then the entitlement will still show the full override amount even when the employee has been terminated mid year.

Refer to the ESR User Manual [here](#) for more details

Annual Leave Accrual *n* NHS

These accrual plans are 'Days Based' and are for use with Medical and Dental & Dental staff. There are 5 separate plans but each is a replica of the others except for the name, where *n* is either 1, 2, 3, 4 or 5. Plan '1' should be used for the employee's primary assignment, with the other numbered plans being used in numerical order in cases where the employee has additional assignments.

These plans include an additional two statutory days to be added to the entitlement. There is an option to remove these additional days when setting up the element details on the plan for the first time depending on local agreements.

Very Senior Managers whose entitlement mirrors the M&D staff may also have these plans attached to them.

Annual Leave Accrual n Plans Rules

- They run from 1st April to 31st March. This date can be overridden by putting in a different Leave year start date on the 'Absence Accrual Start Date' field on the (Assignment DFF)
- The full entitlement for the leave year is shown up front and does not require the user to date track to the last day of the leave year e.g. 31st March to establish entitlement.
- Gross and net values will be shown in both the core application and self service
- The plan will indicate whether or not the entitlement includes the 2 statutory days.
- Entitlement is based on days and is calculated using the employee's working pattern defined on the Accrual Plan.
- Entitlement is based on complete calendar months only. Any allowance for starting or leaving part way through a month can be catered for using the Annual Leave Hours Override Element (see below).
- Values are rounded up to the nearest ¼ day where calculations change mid year due to:
 - Increase in entitlement
 - Starting/leaving or reducing/increasing contractual hours either mid month or mid year

Setting up the Plan

An accrual plan is required for each assignment the employee has. When choosing the Annual Leave Accrual n plans ensure the Work Pattern is selected appropriate to that assignment as this will determine entitlement.

The screenshot shows the 'Entry Values' window for a specific employee and date. The main window has a list of fields on the left, including 'Scheme' (NHS), 'Work Pattern' (5 days a week), and various 'Days Year' rates. A 'Lookups' dialog box is open, showing a list of work patterns with '1 day a week' selected. The 'Lookups' dialog has a search bar and buttons for 'Find', 'OK', and 'Cancel'.

On attaching Annual Leave Accrual n plan, the Flexfield below will be displayed.

Element Entries/McFly, Mr. Mary

Period: 5 2014 Calendar Month (01-AUG-2014)

Classification:

Processing Types: ☐ Recurring ☐ Nonrecurring ☒ Both

Override: ☐ Additional ☐ Processed ☐ Retroactive

Element Name	Processing Type	Costing	Reason	[]	Effective Dates From	To
Basic Contracted NHS	Recurring				01 JAN 2014	
Enhanced Multipliers NHS	Recurring			47	01 JAN 2014	
NI	Recurring	NHS999999 NH-			01 JAN 2014	
Negative Net Pay NHS	Recurring				01 JAN 2014	
Overtime Multipliers NHS	Recurring			47	01 JAN 2014	
PAYE Details	Recurring	NHS999999 NH-			01 JAN 2014	
Pensions Information	Recurring				01 JAN 2014	
SSP SMP Calculator NHS	Recurring				01 JAN 2014	
Standard Costing NHS	Recurring				01 JAN 2014	
Pension NHS	Recurring	NHS999999 NH-			01 JAN 2014	
Annual Leave Accrual 1 NHS	Recurring	N			01 JAN 2014	

Entry Values Balance Grossup

Note: The value for 'Add 2 Statutory Days' on the DFF of the accrual plan element has been defaulted to 'Yes'.

Condition ID:

Source ID:

Element ID:

File ID:

Absence Start Date:

EWC Date:

Scheme Name:

A/C Override Hours:

PW ID:

Pay During Sickness:

NI Adjustment Date:

Update for Retro:

Non Date Change:

Add 2 Statutory Days: Yes

Add 2 Statutory Days:

Find %:

Add 2 Statutory Days: No Yes

End OK Cancel

OK Cancel Clear Help

Include Statutory Days – this adds the two statutory days that M&D staff can have in addition to their annual leave (subject to local policy). The default is 'Yes'. If your organisation does not give these additional days then select 'No'.

The 2 statutory days are prorated according to the work pattern in place as follows:

Work pattern	Annual Entitlement to Stat Days
10.5 days fortnight	2
6 days per week	2
5 days per week	2
4 days per week	1.6 days (rounded up to the nearest ¼ day)
3 days per week	1.2 days (rounded up to the nearest ¼ day)
2 days per week	0.8 days (rounded to the nearest ¼ day)
1 day per week	0.4 days (rounded up to the nearest ¼ day)

The work patterns for P/T Nurse 1-5 days inc pub holiday is excluded as these plans are no longer relevant for Nursing staff. The Hours Based plans described above should be used.

Note: All rounding will be done at the end where other changes occur such as increased entitlement and or leaving/starting part way through the year

The other fields on the flex field can be left as is.

Click OK and you will be taken out of the flexfield.

Click the 'entry values' button to open up the plan and enter relevant values.

Key points:

Previous Service at the Organisation

If the employee worked for you previously then you must add their previous aggregate service with your organisation (subject to local policy) into the Aggregate Service Years and Days fields. If you do not then their entitlement will be based on their latest start date with the organisation.

Carry Forward

Only a maximum of 5 days is allowed to be carried forward.

Absence Accrual Start Date (Assignment DFF)

This field should be left blank for staff whose leave year runs from 1st April. Neither does it need to be completed for staff who commence employment mid year, but whose 'full' annual leave year starts from 1 April. The system will adjust the entitlement automatically for part years. Only populate this field with a different date if their leave year is not 1st April annually.

Changing working pattern part way through the year

The calculation of entitlement in the Annual Leave plans is linked to the work pattern selected on the accrual plan. If an employee increases or decreases the number of days they work then their work pattern must be manually amended at the correct date.

Note: Where this scenario occurs then the entitlement balances in both core and self service will only be able to display the full entitlement for the two separate time periods. Alternatively, the work-around would be to not change the working pattern mid-year on the element entry, instead change it at the start of the next leave year and use an override for the year in which the change happens.

Overriding the Entitlement

If the national rules for the plan need to be amended temporarily, for example you wish to give a new starter who commences later than the 1st of the month, full or partial entitlement for their first month, then the national values can be overridden by attaching the 'Annual Leave Days Override NHS' element.

The value entered in Override Entitlement will replace all the foregoing calculations. Therefore the override value entered should represent the leave entitlement for the whole year.

The override value will automatically feed through to the 'View Accruals' screen.

The override element should ideally be used for the current year only so should be entered with an appropriate end date.

Note: The override is not affected by any changes to FTE, or the employee's start or end date. Care should be taken when terminating an employee to check whether the annual leave entitlement has been overridden. If an entitlement has been overridden then the entitlement will still show the full override amount even when the employee has been terminated mid year.

Refer to the ESR User Manual [here](#) for more details

The screenshot displays the ESR software interface. The main window is titled 'Element Entries(Lane01, Mr. Chris)'. It features a table with columns: Element Name, Processing Type, Costing, Reason, and Effective From. The 'Annual Leave Days Override NHS' element is highlighted in blue. Below the table, there are buttons for 'Entry Values' and 'Balance Grossup'. A secondary window titled 'Entry Values(Lane01, Mr. Chris)' is open, showing the 'Override Entitlement' set to 32. The 'Processing Types' are set to 'Recurring'. The 'Further Entry Information' section includes fields for 'Date Earned', 'Original Date Earned', 'Payee Details', and 'Processing Priority' (set to 500).

Element Name	Processing Type	Costing	Reason	Effective From
NI	Recurring	[NHS999999]NF		01-JAN-20
Negative Net Pay NHS	Recurring			01-JAN-20
Overtime Multipliers NHS	Recurring			01-JAN-20
PAYE Details	Recurring	[NHS999999]NF		01-JAN-20
SSP SMP Calculator NHS	Recurring			01-JAN-20
Standard Costing NHS	Recurring			01-JAN-20
Pension NHS	Recurring			01-JAN-20
Pensions Information	Recurring			01-JAN-20
Enhanced Multipliers NHS	Recurring			01-JAN-20
Annual Leave Accrual 1 NHS	Recurring			01-JAN-20
Annual Leave Days Override NHS	Recurring			01-JAN-20

Bank Annual Leave Hours n Plans

These accrual plans are for use with Bank Staff. There are 5 separate plans but each is a replica of the others except for the name, where n is either 1, 2, 3, 4 or 5. Plan '1' should be used for the employee's primary assignment, with the other numbered plans being used in numerical order in those cases where the employee has additional assignments.

Payment of Accrued Annual Leave to Bank Staff

Bank staff are entitled to statutory annual leave in the same way as any other employee. However, under the WTD Regulations, they cannot be paid 'rolled up' holiday pay, this having been ruled illegal by the ECJ, neither can they be paid in lieu (except on termination).

Bank Staff should apply for annual leave in the same way as other employees. Payment of accrued annual leave to Bank Staff will be effected by the Users making an element entry on the employee assignment using the Bank Annual Leave NR NHS element. The element will make payment at the current hourly rate of the assignment up to the limit of leave so far accrued in the current year. Entitlement will be calculated as the Percentage Rate (12.07%) held on the GRR multiplied by the total Bank Staff hours worked in the year to date.

Users may establish a local GRR where a rate other than 12.07% is required.

Creating a Local Accrual Plan

If the current national accrual plans cannot cater for local arrangements then it is possible to set up a local accrual plan for an individual, a staff group or an organisation using the Payroll Super Administration URP.

Refer to the User Manual [here](#) on how to set up a local accrual plan

Attaching Accrual Plans to Multiple Employees – Concurrent Processes

An accrual plan should be attached to an employee at the point of hire. If you need to attach an accrual plan to multiple employees e.g. when moving from one of the other plans to the hours or days based plans, then use one of the relevant concurrent processes in place to do this as follows:

Attaching the Hours Based Plans

Navigate to Payroll Super Administration URP > Requests > Select – NHS Attach Annual Leave Hours Accrual Plan.

Select the appropriate values for each parameter

The Effective date defaults to 1st April of the next leave year

The screenshot shows the 'Submit Request' dialog box with the following fields and values:

- Name:** NHS Attach Annual Leave Hours Accrual Plan
- Operating Unit:** (empty)
- Parameters:** (empty)
- Language:** American English
- At these Times...:** Run the Job: As Soon as Possible
- Upon Completion...:** ☒ Save all O...
- Layout:** (empty)
- Notify:** (empty)
- Print to:** noprint

The 'Parameters' dialog box is open, showing the following values:

- Staff Group:** Add Prof Scientific and Technic
- Scheme:** NHS
- Include Bank Holidays:** No
- Part-time or Full-time:** Full Time
- Effective Date:** 01-APR-2015

The 'Staff Group' dialog box is open, showing a list of staff groups with 'Add Prof Scientific and Technic' selected.

Key Notes:

- If the process is run in April, a check is made to establish if the monthly payroll has been processed. If the monthly payroll has been run, the NHS Attach Annual Leave Hours Accrual Plan process will fail. This is necessary to limit the impact on retro pay processing, by stopping the creation of redundant retro pay actions.
- If the process is run in a month after April, the Annual Leave accrual plans will be attached with a start date of 1st April for the following leave year.

Examples:

The following examples assume a payroll has been processed on the 15th April 2015 and explains the different outcomes:

Example 1

- NHS Attach Annual Leave Hours Accrual Plan Process run between 3-14th April 2015
- Payroll processing completed on 15th April 2015
- Annual Leave Accrual Plans allocated with start date of 1st April 2015

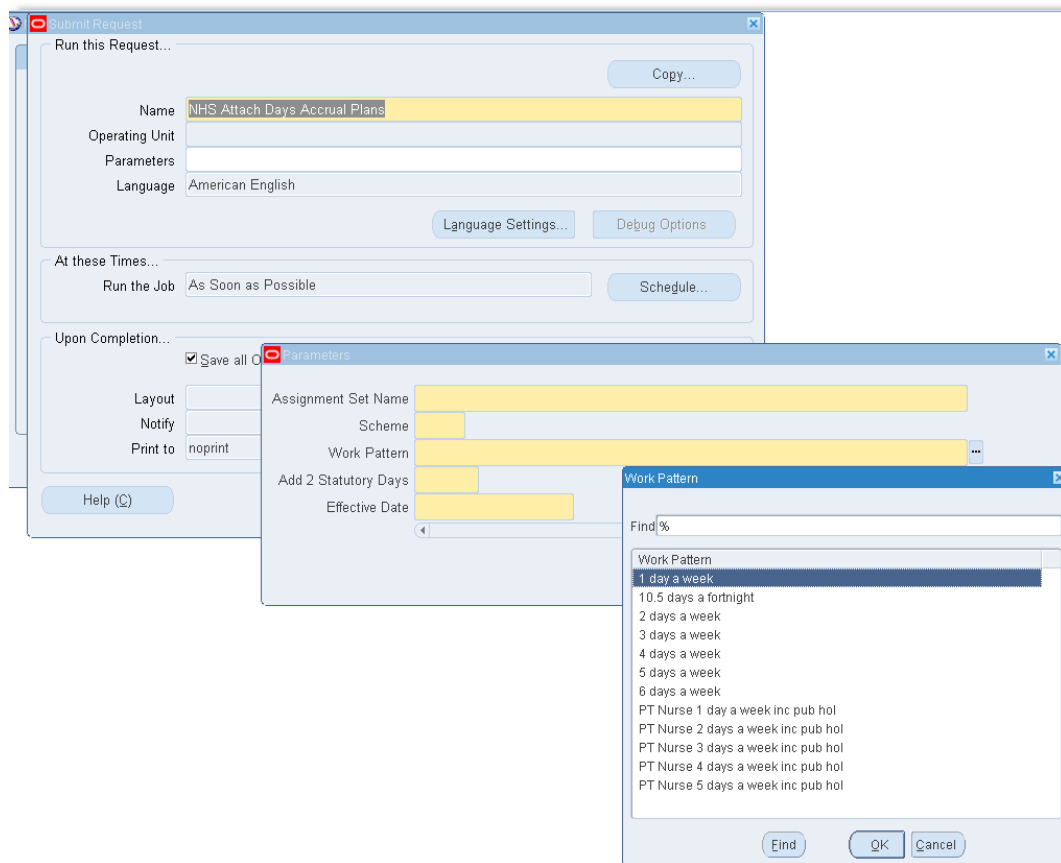
Example 2

- NHS Attach Annual Leave Hours Accrual Plan Process run between 15th – 30th April 2015
- Payroll Processing completed on 15th April 2015
- NHS Attach Annual Leave Hours Accrual Plan Process fails
- Alternative allocation method required – e.g. Batch Element Entry

Example 3

- NHS Attach Annual Leave Hours Accrual Plan Process run 1st May 2015
- Annual Leave Accrual Plans allocated with start date of 1st April 2016

Attaching the Days based plans



- Before running the concurrent process for the days based plans, assignment sets will need to be created so that users can divide the employee assignments by the required work patterns as this is a mandatory field. Ensure that only relevant staff, entitled to have a day based plan are selected.
- The process will also allow the 'Add 2 Statutory Days' to be set to 'Yes' or 'No' if selected. If left as null then this will be interpreted as 'No' until a value is set manually.
- Navigate to Payroll super Administration URP > Requests > Select – NHS Attach Annual Leave Days Accrual Plan.
- Select the appropriate values for each parameter
- The Effective date defaults to 1st April of the next leave year

Key Notes:

- The concurrent process will attach the days based plans and end date any other accrual plan in place
- The process will also allow the 'Add 2 Statutory Days' to be set to 'Yes' or 'No' if selected. If left as null then this will be interpreted as 'No' until a value is set manually.
- Navigate to Payroll super Administration URP > Requests > Select – NHS Attach Annual Leave Days Accrual Plan.
- Select the appropriate values for each parameter
- The Effective date defaults to 1st April of the next leave year

Appendix 1 – AfC Annual Leave Entitlements

1. Excluding Bank Holidays

Agenda for Change Annual Leave Entitlements

Excluding Public Holidays (rounded up to the nearest 15 minutes)

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	5.4	5.8	6.6
Hours Worked per Week	Hours Equivalent		
37.50	202.50	217.50	247.50
37.25	201.25	216.00	245.75
37.00	199.75	214.50	244.25
36.75	198.50	213.25	242.50
36.50	197.00	211.75	241.00
36.25	195.75	210.25	239.25
36.00	194.50	208.75	237.50
35.75	193.00	207.25	236.00
35.50	191.75	206.00	234.25
35.25	190.25	204.50	232.75
35.00	189.00	203.00	231.00
34.75	187.75	201.50	229.25
34.50	186.25	200.00	227.75
34.25	185.00	198.75	226.00
34.00	183.50	197.25	224.50
33.75	182.25	195.75	222.75
33.50	181.00	194.25	221.00
33.25	179.50	192.75	219.50
33.00	178.25	191.50	217.75
32.75	176.75	190.00	216.25
32.50	175.50	188.50	214.50
32.25	174.25	187.00	212.75
32.00	172.75	185.50	211.25
31.75	171.50	184.25	209.50
31.50	170.00	182.75	208.00
31.25	168.75	181.25	206.25
31.00	167.50	179.75	204.50
30.75	166.00	178.25	203.00
30.50	164.75	177.00	201.25
30.25	163.25	175.50	199.75
30.00	162.00	174.00	198.00
29.75	160.75	172.50	196.25
29.50	159.25	171.00	194.75
29.25	158.00	169.75	193.00
29.00	156.50	168.25	191.50
28.75	155.25	166.75	189.75
28.50	154.00	165.25	188.00
28.25	152.50	163.75	186.50
28.00	151.25	162.50	184.75
27.75	149.75	161.00	183.25
27.50	148.50	159.50	181.50
27.25	147.25	158.00	179.75

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	5.4	5.8	6.6
Hours Worked per Week	Hours Equivalent		
27.00	145.75	156.50	178.25
26.75	144.50	155.25	176.50
26.50	143.00	153.75	175.00
26.25	141.75	152.25	173.25
26.00	140.50	150.75	171.50
25.75	139.00	149.25	170.00
25.50	137.75	148.00	168.25
25.25	136.25	146.50	166.75
25.00	135.00	145.00	165.00
24.75	133.75	143.50	163.25
24.50	132.25	142.00	161.75
24.25	131.00	140.75	160.00
24.00	129.50	139.25	158.50
23.75	128.25	137.75	156.75
23.50	127.00	136.25	155.00
23.25	125.50	134.75	153.50
23.00	124.25	133.50	151.75
22.75	122.75	132.00	150.25
22.50	121.50	130.50	148.50
22.25	120.25	129.00	146.75
22.00	118.75	127.50	145.25
21.75	117.50	126.25	143.50
21.50	116.00	124.75	142.00
21.25	114.75	123.25	140.25
21.00	113.50	121.75	138.50
20.75	112.00	120.25	137.00
20.50	110.75	119.00	135.25
20.25	109.25	117.50	133.75
20.00	108.00	116.00	132.00
19.75	106.75	114.50	130.25
19.50	105.25	113.00	128.75
19.25	104.00	111.75	127.00
19.00	102.50	110.25	125.50
18.75	101.25	108.75	123.75
18.50	100.00	107.25	122.00
18.25	98.50	105.75	120.50
18.00	97.25	104.50	118.75
17.75	95.75	103.00	117.25
17.50	94.50	101.50	115.50
17.25	93.25	100.00	113.75
17.00	91.75	98.50	112.25
16.75	90.50	97.25	110.50
16.50	89.00	95.75	109.00
16.25	87.75	94.25	107.25
16.00	86.50	92.75	105.50
15.75	85.00	91.25	104.00
15.50	83.75	90.00	102.25
15.25	82.25	88.50	100.75
15.00	81.00	87.00	99.00

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	5.4	5.8	6.6
Hours Worked per Week	Hours Equivalent		
14.75	79.75	85.50	97.25
14.50	78.25	84.00	95.75
14.25	77.00	82.75	94.00
14.00	75.50	81.25	92.50
13.75	74.25	79.75	90.75
13.50	73.00	78.25	89.00
13.25	71.50	76.75	87.50
13.00	70.25	75.50	85.75
12.75	68.75	74.00	84.25
12.50	67.50	72.50	82.50
12.25	66.25	71.00	80.75
12.00	64.75	69.50	79.25
11.75	63.50	68.25	77.50
11.50	62.00	66.75	76.00
11.25	60.75	65.25	74.25
11.00	59.50	63.75	72.50
10.75	58.00	62.25	71.00
10.50	56.75	61.00	69.25
10.25	55.25	59.50	67.75
10.00	54.00	58.00	66.00
9.75	52.75	56.50	64.25
9.50	51.25	55.00	62.75
9.25	50.00	53.75	61.00
9.00	48.50	52.25	59.50
8.75	47.25	50.75	57.75
8.50	46.00	49.25	56.00
8.25	44.50	47.75	54.50
8.00	43.25	46.50	52.75
7.75	41.75	45.00	51.25
7.50	40.50	43.50	49.50
7.25	39.25	42.00	47.75
7.00	37.75	40.50	46.25
6.75	36.50	39.25	44.50
6.50	35.00	37.75	43.00
6.25	33.75	36.25	41.25
6.00	32.50	34.75	39.50
5.75	31.00	33.25	38.00
5.50	29.75	32.00	36.25
5.25	28.25	30.50	34.75
5.00	27.00	29.00	33.00
4.75	25.75	27.50	31.25
4.50	24.25	26.00	29.75
4.25	23.00	24.75	28.00
4.00	21.50	23.25	26.50
3.75	20.25	21.75	24.75
3.50	19.00	20.25	23.00
3.25	17.50	18.75	21.50
3.00	16.25	17.50	19.75
2.75	14.75	16.00	18.25

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	5.4	5.8	6.6
Hours Worked per Week	Hours Equivalent		
2.50	13.50	14.50	16.50
2.25	12.25	13.00	14.75
2.00	10.75	11.50	13.25
1.75	9.50	10.25	11.50
1.50	8.00	8.75	10.00
1.25	6.75	7.25	8.25
1.00	5.50	5.75	6.50
0.75	4.00	4.25	5.00
0.50	2.75	3.00	3.25
0.25	1.25	1.50	1.75

2. Including Bank Holidays

Agenda for Change Annual Leave Entitlements Including Public Holidays (rounded up to the nearest 15 minutes)

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	7	7.4	8.2
Hours Worked per Week	Hours Equivalent		
37.50	262.50	277.50	307.50
37.25	260.75	275.75	305.50
37.00	259.00	273.75	303.50
36.75	257.25	272.00	301.25
36.50	255.50	270.00	299.25
36.25	253.75	268.25	297.25
36.00	252.00	266.50	295.25
35.75	250.25	264.50	293.25
35.50	248.50	262.75	291.00
35.25	246.75	260.75	289.00
35.00	245.00	259.00	287.00
34.75	243.25	257.25	285.00
34.50	241.50	255.25	283.00
34.25	239.75	253.50	280.75
34.00	238.00	251.50	278.75
33.75	236.25	249.75	276.75
33.50	234.50	248.00	274.75
33.25	232.75	246.00	272.75
33.00	231.00	244.25	270.50
32.75	229.25	242.25	268.50
32.50	227.50	240.50	266.50
32.25	225.75	238.75	264.50
32.00	224.00	236.75	262.50
31.75	222.25	235.00	260.25
31.50	220.50	233.00	258.25
31.25	218.75	231.25	256.25
31.00	217.00	229.50	254.25
30.75	215.25	227.50	252.25
30.50	213.50	225.75	250.00
30.25	211.75	223.75	248.00
30.00	210.00	222.00	246.00
29.75	208.25	220.25	244.00
29.50	206.50	218.25	242.00
29.25	204.75	216.50	239.75
29.00	203.00	214.50	237.75
28.75	201.25	212.75	235.75
28.50	199.50	211.00	233.75
28.25	197.75	209.00	231.75
28.00	196.00	207.25	229.50
27.75	194.25	205.25	227.50
27.50	192.50	203.50	225.50
27.25	190.75	201.75	223.50
27.00	189.00	199.75	221.50

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	7	7.4	8.2
Hours Worked per Week	Hours Equivalent		
26.75	187.25	198.00	219.25
26.50	185.50	196.00	217.25
26.25	183.75	194.25	215.25
26.00	182.00	192.50	213.25
25.75	180.25	190.50	211.25
25.50	178.50	188.75	209.00
25.25	176.75	186.75	207.00
25.00	175.00	185.00	205.00
24.75	173.25	183.25	203.00
24.50	171.50	181.25	201.00
24.25	169.75	179.50	198.75
24.00	168.00	177.50	196.75
23.75	166.25	175.75	194.75
23.50	164.50	174.00	192.75
23.25	162.75	172.00	190.75
23.00	161.00	170.25	188.50
22.75	159.25	168.25	186.50
22.50	157.50	166.50	184.50
22.25	155.75	164.75	182.50
22.00	154.00	162.75	180.50
21.75	152.25	161.00	178.25
21.50	150.50	159.00	176.25
21.25	148.75	157.25	174.25
21.00	147.00	155.50	172.25
20.75	145.25	153.50	170.25
20.50	143.50	151.75	168.00
20.25	141.75	149.75	166.00
20.00	140.00	148.00	164.00
19.75	138.25	146.25	162.00
19.50	136.50	144.25	160.00
19.25	134.75	142.50	157.75
19.00	133.00	140.50	155.75
18.75	131.25	138.75	153.75
18.50	129.50	137.00	151.75
18.25	127.75	135.00	149.75
18.00	126.00	133.25	147.50
17.75	124.25	131.25	145.50
17.50	122.50	129.50	143.50
17.25	120.75	127.75	141.50
17.00	119.00	125.75	139.50
16.75	117.25	124.00	137.25
16.50	115.50	122.00	135.25
16.25	113.75	120.25	133.25
16.00	112.00	118.50	131.25
15.75	110.25	116.50	129.25
15.50	108.50	114.75	127.00
15.25	106.75	112.75	125.00
15.00	105.00	111.00	123.00
14.75	103.25	109.25	121.00

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	7	7.4	8.2
Hours Worked per Week	Hours Equivalent		
14.50	101.50	107.25	119.00
14.25	99.75	105.50	116.75
14.00	98.00	103.50	114.75
13.75	96.25	101.75	112.75
13.50	94.50	100.00	110.75
13.25	92.75	98.00	108.75
13.00	91.00	96.25	106.50
12.75	89.25	94.25	104.50
12.50	87.50	92.50	102.50
12.25	85.75	90.75	100.50
12.00	84.00	88.75	98.50
11.75	82.25	87.00	96.25
11.50	80.50	85.00	94.25
11.25	78.75	83.25	92.25
11.00	77.00	81.50	90.25
10.75	75.25	79.50	88.25
10.50	73.50	77.75	86.00
10.25	71.75	75.75	84.00
10.00	70.00	74.00	82.00
9.75	68.25	72.25	80.00
9.50	66.50	70.25	78.00
9.25	64.75	68.50	75.75
9.00	63.00	66.50	73.75
8.75	61.25	64.75	71.75
8.50	59.50	63.00	69.75
8.25	57.75	61.00	67.75
8.00	56.00	59.25	65.50
7.75	54.25	57.25	63.50
7.50	52.50	55.50	61.50
7.25	50.75	53.75	59.50
7.00	49.00	51.75	57.50
6.75	47.25	50.00	55.25
6.50	45.50	48.00	53.25
6.25	43.75	46.25	51.25
6.00	42.00	44.50	49.25
5.75	40.25	42.50	47.25
5.50	38.50	40.75	45.00
5.25	36.75	38.75	43.00
5.00	35.00	37.00	41.00
4.75	33.25	35.25	39.00
4.50	31.50	33.25	37.00
4.25	29.75	31.50	34.75
4.00	28.00	29.50	32.75
3.75	26.25	27.75	30.75
3.50	24.50	26.00	28.75
3.25	22.75	24.00	26.75
3.00	21.00	22.25	24.50
2.75	19.25	20.25	22.50
2.50	17.50	18.50	20.50

	On Appointment	After Five Years	After 10 Years
Entitlement in Weeks	7	7.4	8.2
Hours Worked per Week	Hours Equivalent		
2.25	15.75	16.75	18.50
2.00	14.00	14.75	16.50
1.75	12.25	13.00	14.25
1.50	10.50	11.00	12.25
1.25	8.75	9.25	10.25
1.00	7.00	7.50	8.25
0.75	5.25	5.50	6.25
0.50	3.50	3.75	4.00
0.25	1.75	1.75	2.00