![West Lothian Council logo]

People Manager

Annual Leave User guide

- [Authorise / Reject employees Annual leave requests](#)
- [View employees Holiday entitlement and remaining balance](#)
- [Amend /Delete employees Annual leave requests](#)
- [Adjust employee's entitlement](#)
- [View All Staff Calendar](#)

Annual Leave

Employees annual leave is calculated using their contracted hours, working patterns and their length of service. This information can be found in the Employment and Personal tabs in People Manager.

Employees who are sessional are not entitled to Annual leave entitlement in the system i.e. work less than 52.14 weeks per year.

Employees have been advised in the myHR guide on annual leave, that if they think their annual leave entitlement is incorrect, they should check the information held for them is correct and if not to contact their reporting manager.

- ❖ **if any of this information is incorrect you will need to complete a**
  Contractual Change form
  Notification of Working Pattern Change form – (change to working pattern only)
  Completed forms should be emailed to hrchanges@westlothian.gov.uk

- ❖ **If you require any further information please contact hrsupport@westlothian.gov.uk**

- ❖ **If an employee is not one of your reportees please email myhr@westlothian.gov.uk with employee's name and number and who the correct reporting manager should be**

Contract start date

Employees annual leave entitlement is linked to their start date (which excludes any supply work) or reckonable service date if they have previous service when they joined the council. Reporting managers can check this date in People manager

Personal information – Key date details

- ❖ **Start date**
- ❖ **Reckonable service date**

If employees start date is incorrect please contact hrsupport@westlothian.gov.uk

If employees reckonable service date is incorrect or is not recorded, employees are required to provide evidence of these dates and email hrsupport@westlothian.gov.uk

View employee's entitlement

You can view employees holiday entitlement and balance remaining on the employee summary screen.
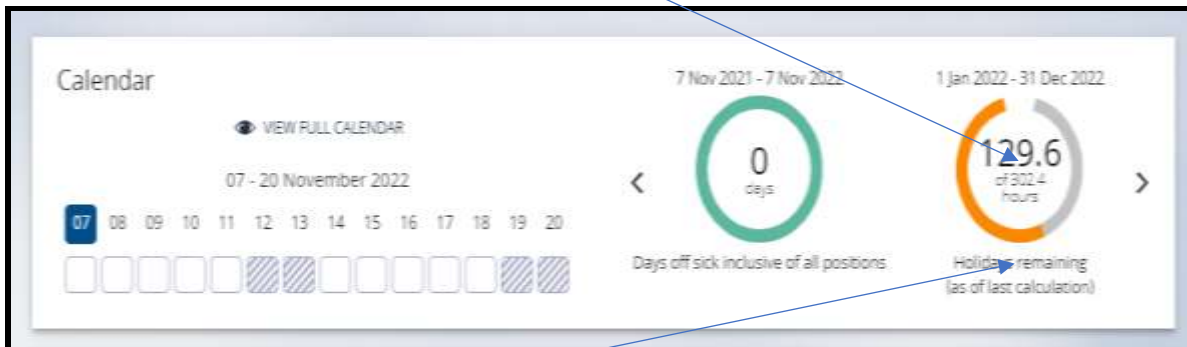
Click on Holidays remaining and you can see all details of employee's holiday entitlement summary.

In this example the employee's full entitlement for year is 302.40 hours (Works 36 hours per week less than 5 years' service and Working pattern is Mon – Friday (7.20 hours per day) = 180 hours due

7 x 7.2 public holidays = 50.40

Carry forward leave due for previous tear = 72 hours

Total hours due to employee = 302.40

Data Label: Public

Public holidays for year have already been deducted

03/01/2022 Public Holiday

04/01/2022 Public Holiday

15/04/2022 Public Holiday

18/04/2022 Public Holiday

02/05/2022 Public Holiday

26/12/2022 Public Holiday

27/12/2022 Public Holiday

(If a public holiday falls on a day employee is not contracted to work no deduction is made from their entitlement.)

Annual leave scheduled or taken

09/03/2022

01/04/2022

19/05/2022

20/05/2022 – 23/05/2022

02/06/2022

21/07/2022-05/08/2022

Employee's remaining holiday balance after all above are deducted.

Data Label: Public

Public Holidays

Calculation of Public Holiday Entitlement

- **A full-time employee working 5 days per week, 7.2 hours per day is entitled to 7 public holidays. This entitlement translated into hours is 50.4 hours.**
- **A full-time employee working shifts (of whatever length) will also be allocated 50.4 hours.**
- **A full-time employee working condensed hours will also be allocated 50.4 hours.**
- **A part-time employee will be allocated a pro-rata entitlement in hours as per the following calculation: Weekly hours / 36 X 50.4 = pro-rata entitlement**

Employees in the employment groups stipulated below will be allocated their full entitlement to public holiday leave at the beginning of the leave year.

- ➤ **Employees working part-time**
- ➤ **Employees working condensed hours**
- ➤ **Employees working shifts**
- ➤ **Employees whose normal working days vary in length**
- ➤ **Employees whose normal working days are anything other than 7.2 per day**

However, the allocated hours will then be reduced each time a public holiday is taken. The allocated hours must be reduced by the number of hours the employee would have normally worked on the day on which the leave is taken.

Example:

If a designated public holiday falls on an 8-hour working day and the employee takes the holiday, then 8 hours would be deducted from their public holiday entitlement.

Similarly, if a public holiday falls on a 6-hour working day and the employee takes the holiday, then 6 hours would be deducted from their public holiday entitlement.
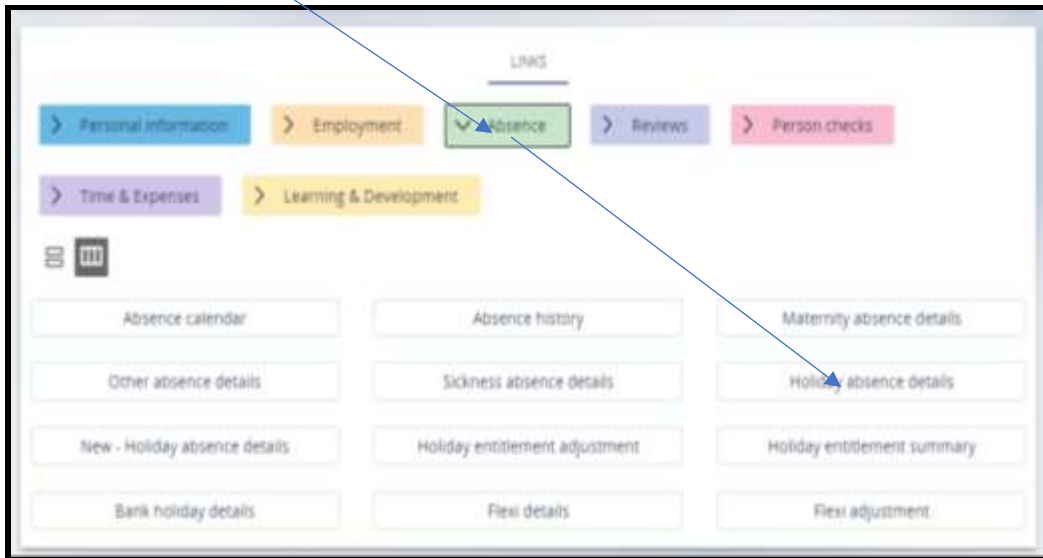
Differences:

Public holiday 7.2 – works 8 hours per day – 0.8 would be deducted from their annual leave entitlement to cover the difference.

Public holiday 7.2 – works 6 hours per day – only 6 hours would be deducted for the public holiday.

Data Label: Public

To access Annual Leave in People Manager

Click on Absence tab

To view all employee's holiday absences - click on Holiday absence details and all absences are displayed in the side panel.

You can widen the panel to view more information by clicking on white bar – scroll along to view more details

Data Label: Public

Holiday Adjustments

There are occasions when you may be required to adjust an employee's holiday balance

Examples:

❖ Employee has been authorised to carry over annual leave from previous leave year - The maximum carry over leave that an employee can carry forward to next leave year is 5 days with their managers authorisation – Reporting manager is required to do a + adjustment
❖ Carry over leave hours added to employee's annual leave entitlement in error. Reporting manager is required to do a minus adjustment e.g. – 20.00 hours
❖ An employee does not have enough entitlement to take a part day or full day holiday absence at the end of the previous leave year – Reporting manager is required to do a + adjustment

PLEASE DO NOT CHANGE THE DATE THAT AUTOMATICALLY UPDATES WHEN YOU ADD AN ADJUSTMENT

Please be aware when adding or negating an adjustment that you choose the correct (Current) holiday period from the drop-down list that adjustment is to be added to.
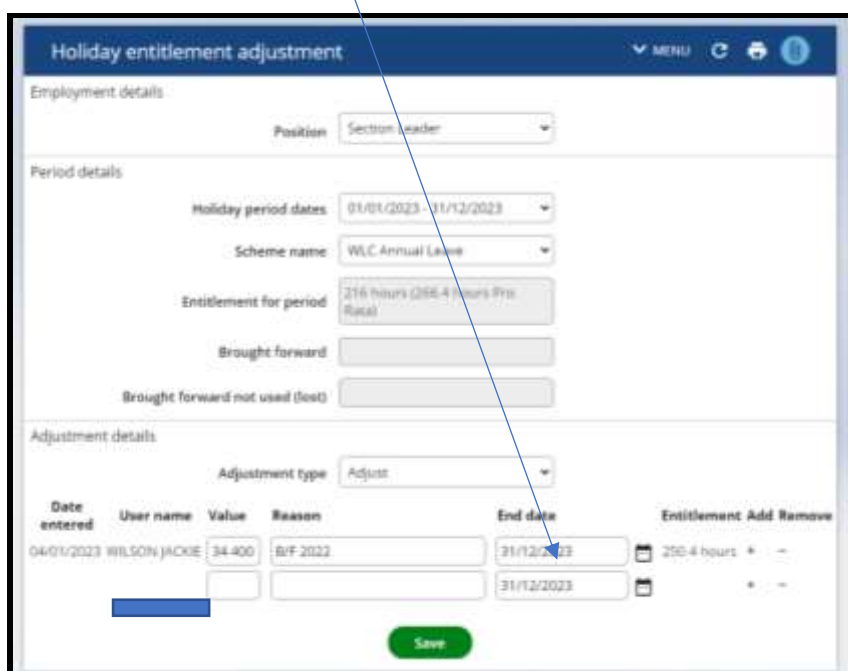
Never choose a previous or a future year

Example:

Adjustment added to Holiday period dates - 01/01/2023 – 31/12/2023 for carry over leave from 2022 with end date 31/12/2023

Data Label: Public

If the incorrect end date is added this corrupts the employees record, removes the Adjust button in the employees record.

Going forward the manager will need to manually monitor the adjusted hours for year as the record will not clear until the next leave year.

Data Label: Public

Carry Over Leave

Click on Holiday entitlement adjustment

Holiday entitlement adjustment

In this example : Add 10 days (72 hours) carry forward from previous leave year (2021)

- **Adjustment type – choose Adjust from drop down list**
- **Date entered – auto populates when entry saved**
- **User name – auto populates when entry saved**
- **Value - enter number of hours (72) – <u>decimilse minutes if applicable</u> e.g. 7.12 should be keyed as 7.20 (to decimilse / minutes by 60)**
- **Reason for adjustment e.g Carry forward**
- **End date - enter last day of current year e.g 31/12/2022**
- **Save**

Entitlement for 2022 is 230.40 Hours

Entitlement changes to 302.40 hours with the extra 72 hours added

Employee receives a email notification when this is done

Data Label: Public

To add more adjustments click on + under Add

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remov
3/02/2023		5.000	Carry forward	31/12/2023	📅 278.6 hours	+	−

To remove an entry

Minus out hours as per example below

| 03/02/2023 | | 5.000 | Carry forward | 31/12/2023 | 📅 278.6 hours | + | − |
| 08/02/2023 | | -5.000 | REmove | 31/12/2023 | 📅 273.6 hours | + | − |

Not enough annual leave hours left

Click on Holiday entitlement adjustment
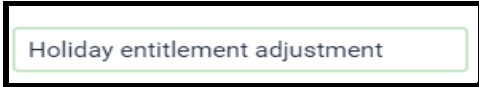
Holiday entitlement adjustment

If employee has a holiday balance remaining which is less than a half day absence (e.g. 1.25 hours) therefore they cannot request a holiday in current leave year, this remaining balance should be added to their next leave year's entitlement by their reporting manager.

Flexi users

At the reporting managers discretion employees can request to convert their remaining annual leave balance (if less than a Part day) to flexi credit. Reporting manager is required to do this adjustment in the flexi system.

Data Label: Public

To deduct hours from holiday entitlement

Click on Holiday entitlement adjustment

Holiday entitlement adjustment

Example: Carry forward hours incorrect – to many added - deduct 2 hours

- **Adjustment type – choose Adjust from drop down list**
- **Click + to get a new line**
- **Value - enter – 2.00 (if applicable e.g. 7.12 should be keyed as 7.20) (minutes should be calculated in decimals /minutes by 60)**
- **Reason for deduction**
- **End date – last day of current leave year**
- **Save**

How to add Bank Holiday (Public Holiday) hours to employees entitlement - <u>Current leave year only</u>

If employee has worked a public holiday in the current leave year and was paid plain time for this, they are due the hours back for the public holiday and the reporting manager is required to do this in People manager.

<u>Note: If employee has claimed double time payment, then an employee is not due hours back for working public holiday.</u>

Bank Holiday details   Bank holiday details

Click on Bank holiday details tab to add hours to employee who has worked a public holiday in current leave year and only claimed plain time payment.

In Show all – Choose Type – Bank Holiday

Data Label: Public

Click on relevant Public Holiday (e.g. 15/04/2021 from side panel)

- **Tick Not taken**
- **Click Save**
- **Refresh the summary page and you will see the holiday balance has been adjusted on the employee summary page**
- **If not, click Calculate button - this will update employee's entitlement**
- **Employee's holiday balance is adjusted to reflect the adjustment made by you**

Data Label: Public

How to add Bank Holiday (Public Holiday) hours to employees entitlement - <u>Previous leave year</u>

If employee has worked a public holiday in the previous leave year and was paid plain time for this, they are due the hours back for the public holiday and the reporting manager is required to do this in People manager.
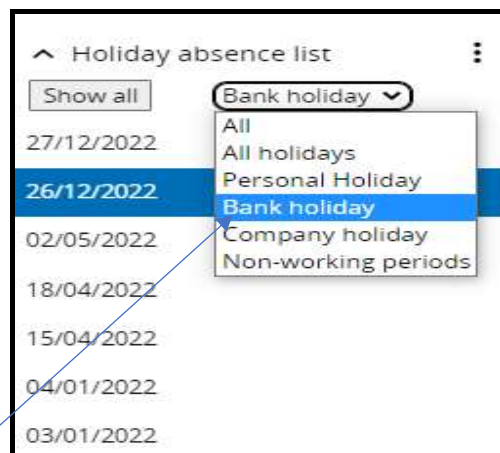
<u>Note: If employee has claimed double time payment, then an employee is not due hours back for working public holiday.</u>

Click on Holiday entitlement adjustment
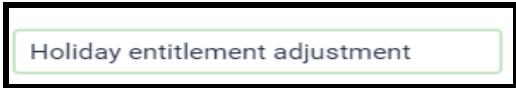
Holiday entitlement adjustment

Example: Current leave year 01/01/2022 – 31/12/22 employee is due hours for public holiday working on 28/12/2021- previous leave year

- **Adjustment type – choose Adjust from drop down list**
- **Date entered – auto populates when entry saved**
- **User name – auto populates when entry saved**
- **Value - enter number of hours due, decimilse minutes if applicable e.g. 7.12 should be keyed as 7.20 (to decimilse / minutes by 60)**
- **Reason for adjustment**
- **End date enter last day of current year e.g 31/12/2022**
- **Save**

One Public holiday have been added for this employee - 28/12/2021

Adjustment details

		Adjustment type	Adjust			
Date entered	User name	Value	Reason	End date	Entitlement	Add Remove
18/01/2022	SYSTEM ADMIN	40.980	Carry forward	31/12/2022	307.38 hours	+ –
16/02/2022		7.200	Standby 03/01/2022	31/12/2022	314.58 hours	+ –
16/02/2022		7.200	Standby 04/01/2022	31/12/2022	321.78 hours	+ –
08/11/2022		-2.000	Error in carry forward total	31/12/2022	319.78 hours	+ –
08/11/2022		7.200	Standby prev year 28/12/2021	31/12/2022	326.98 hours	+ –
				31/12/2022		+ –

Data Label: Public

Employee entitlement is now 326.98 – this is displayed on the employee summary screen

1 Jan 2022 - 31 Dec 2022

273.06
of 326.98 hours

Holidays remaining
(as of last calculation)

You may need to refresh the page for new balance to appear or log out and log back in again.

Employee receives an email advising this has been done.

Data Label: Public

Employee makes a holiday request in myHR

When one of your reportees make a request for annual leave in myHR you will receive an email advising there is a task for you to authorise in your To do list

Request in To do list
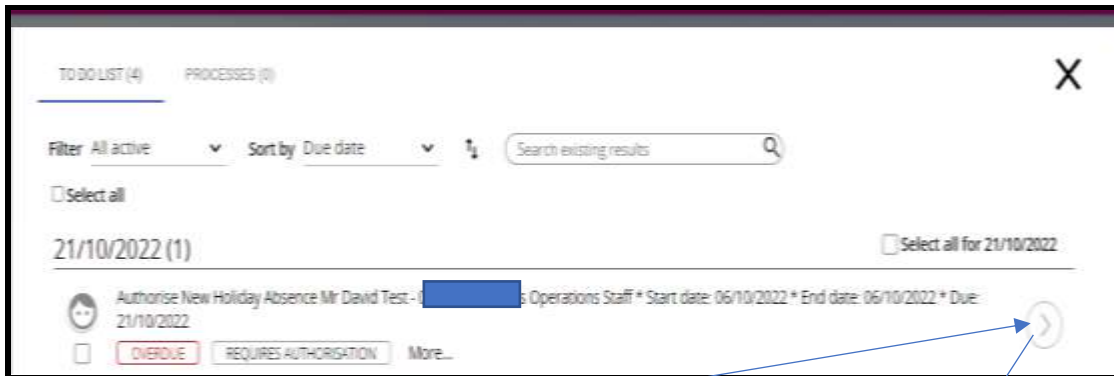
To view the request, click on the arrow
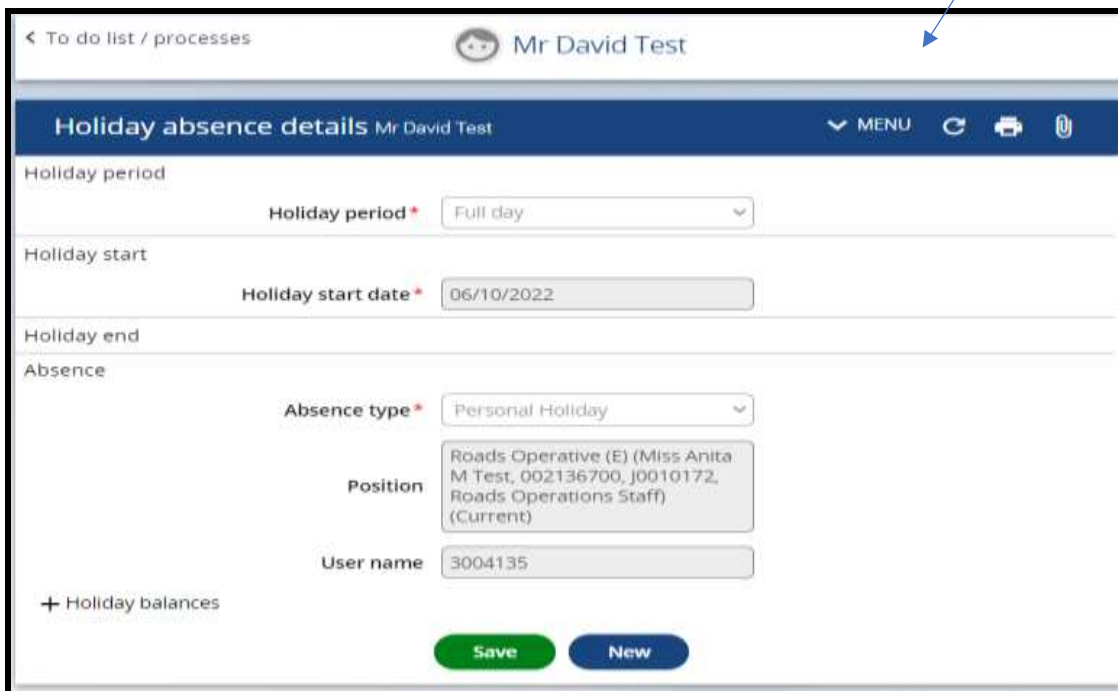
Request cannot be authorised from here – (Do not use the SAVE/NEW buttons here)

Data Label: Public

You can view employees holiday balance before you authorise request by clicking on + Holiday balances

— Holiday balances				
Roads Operative (E) - WLC Annual Leave				
Holiday period	**Entitlement**	**Taken**	**Scheduled**	**Balance**
01/01/2022 - 31/12/2022	326.98 H	40.749 H	13.166 H	273.065 H
01/01/2023 - 31/12/2023	216 H	0 H	0 H	216 H

Save   New

You must return to your To do list (top of page) click on this link to return to your To do list

< To do list / processes

Data Label: Public

Authorise/Not Authorise requests

To authorise or not authorise a request, tick the box beside task you wish to authorise/not authorise and CLICK ON ACTIONS   there are two options to choose from Authorised or Not authorised

When you click on Authorise/Not authorise the task is no longer displayed
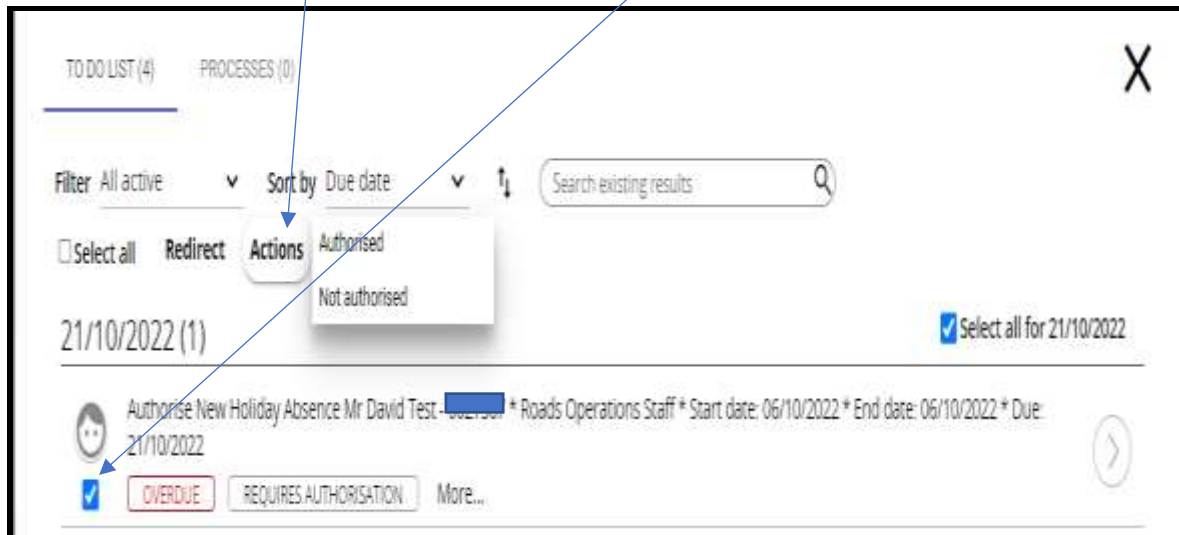
If you reject the request, an employee's holiday balance will be adjusted to reflect this.

When you authorise/reject the request, employee receives an email advising this has been done.

Employee has not enough annual leave remaining to request a holiday

If employee's remaining holiday balance is less than a half day absence (e.g. 1.25 hours left) they should not request a holiday.

The system will allow them to request it but the reporting manager will not be able to authorise it in their To do list in People manager.

Reporting manager should choose "Not authorise" to remove task from To do list

This remaining balance should be added to their next years entitlement by the reporting manager as a holiday adjustment.

Flexi users

At reporting managers discretion employees can request to convert their remaining annual leave balance (if less than a Part day) to flexi credit. Reporting manager is required to do this adjustment in the flexi system.

How to add a holiday request for employee in People Manager

New - Holiday absence details

Absence – New – Holiday absence details
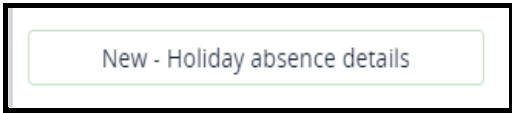
Before adding holiday, check the employees balance by clicking on the + Holiday balances on page to ensure they have enough entitlement left for the holiday absence requested.

- **Choose holiday period from drop down list**
- **Enter the mandatory fields – Red asterisks indicate a mandatory field**
    - ➢ **Holiday start date**
    - ➢ **Holiday end date**
    - ➢ **Absence type**
- **Save**

No emails will be sent, because the Reporting Manager has added the holiday in People Manager.

❖ **Delete or amend a holiday request for employee**

Employees can only delete or amend future dated authorised requests in myHR. When they do this, reporting manager will receive an email advising that this has been done.

❖ **Retrospective dated holiday requests**

Employees cannot amend or delete a retrospective dated holiday request in myHR. Only reporting manager can do this.

When this is done employee's holiday balance will automatically adjust to reflect the changes made and the employee will receive a notification email.

❖ **Sickness absence - Authorised holiday Request**

If employee has a pre-booked holiday request and they are absent on the same day due to sickness, reporting manager must delete or amend their holiday request.

When this is done employee's holiday balance will automatically adjust to reflect the changes made and the employee will receive a notification email.

❖ **Sickness absence – no end date**

If there is a sickness absence with no end date for employee but they have returned to work. The employee can request a holiday absence in myHR but a warning message is displayed:

This absence overlaps with the following existing absence 20/07/21(Sickness)

This does not stop the absence being submitted and the request will be sent to reporting managers To do list for authorisation. Reporting managers do not receive a warning message.

The employee has been advised in the myHR annual leave user guide to contact their reporting manager when this message is displayed who are required to add an end date to their sickness absence entry.

❖ **Maternity Leave – Employee returns from maternity leave**

Reporting manager is required to calculate any leave due during this period and add as an adjustment to the employee's entitlement.

❖ **Checking employee holiday calculation**

If your employee queries their entitlement, please use the calculator on my toolkit to calculate your employees holiday entitlement.

https://www.westlothian.gov.uk/media/51972/West-Lothian-Council-leave-calculator/excel/WLC_Leave_Calculator1.xlsx?m=637788978165930000

❖ **Guidance on how to use the annual leave calculator**

https://www.westlothian.gov.uk/media/12399/Annual-Leave-Calculation/pdf/2022-01-27_AnnualLeaveCalculationInHoursIncludingPartMonths.pdf?m=637793987207530000

Amending or deleting a holiday request

Absence - Holiday absence details

Holiday absence details

- **Choose employee from your People list**
- **All employees holiday absences will be displayed in side panel – you can widen panel to view more information**
- **Choose relevant holiday absence date from side panel**
- **Amend the date if applicable**
- **Delete the absence entry if applicable**   DELETE
- **Save**
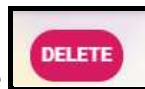
Data Label: Public

Employees with more than one post

- ❖ **If you have an employee with more than one post, their holiday entitlement balance that the employee sees in myHR is the total due for all of their posts.**

- ❖ **You will only see the holiday entitlement due for the post that you manage in People manager.**

- ❖ **When employee submits a holiday request in MyHR they are required to choose the post they wish to request a holiday for.**

- ❖ **You will only receive the holiday request for the post that you are the reporting manager for.**

Employees in a post that prohibits requesting annual leave in myHR

If any of your employees do not have any holiday entitlement in myHR this indicates that the post they are in prohibits them from requesting annual leave in myHR.

This has been agreed by your service that these posts are unsuitable for the annual leave process via myHR at the current time. In this instance annual leave should continue to be requested in the normal way.

Employee who were in a post that prohibits annual leave but move to a post that does allow access to annual leave in MyHR

- • **Annual leave entitlement for new post will calculate from the date employee moved into the new post**
- • **Any remaining Annual leave due from previous post should be requested from reporting manager for the previous post**
- • **The new reporting manager is required to add this remaining annual leave as a holiday adjustment in People manager.**

Fixed Term Contracts / Expected Occupancy End Dates

If employees are on a Fixed term contract – their holiday entitlement is calculated up to the <u>expected end date of their contract.</u>

If their contract is extended, their holiday entitlement will be automatically recalculated to the new expected occupancy end date.

Permanent staff who have an expected Occupancy end date (e.g. Secondments / Acting up posts) holiday entitlement is calculated up to the end date of the Secondment /Acting post.

- ❖ **Holiday entitlement is calculated up to the end of the Secondment/Acting up post**
- ❖ **A new holiday entitlement balance will be automatically recalculated when the Secondment / Acting up is extended or employee returns to their permanent post**

<u>**Permanent staff**</u> **requesting annual leave after expected Occupancy end date**

- ❖ **Employees can request annual leave after their expected Occupancy end date and it can be authorised by you if it does not result in a negative balance in their entitlement**

- ❖ **Employees can still request annual leave in myHR which may put them into a negative balance. The system will not allow you to authorise requests where the employee is in a negative balance**

- ❖ **In your To do list you can choose to "Not Authorise" and the request will be removed or you can leave the requests and authorise them when the employee's entitlement is recalculated and they are no longer in a negative balance situation**

Leavers

Ensure that the correct entitlement (if any) due to employee is recorded on the leavers from.

Please ensure employee has submitted any outstanding retrospective holiday requests prior to their leaving date. These requests should be authorised before employees leaving date.

If the employee requires an adjustment to be added to their annual prior to their leaving date, the end date should be the date of leaving, and any other adjustments for the current year will also need changing to the leaving date.

Record will not save if this is not changed

Example – Employee leaving date is 31/03/2023

Please check and delete any future entries for employees if applicable.

Employees have also been advised to check if they have any authorised future dated annual leave requests and delete them so that you will have the correct holiday balance up to their date of leaving.

When the leaving date is keyed to the system by HR Support this will recalculate employee's entitlement and you can check in People manager that the balances are the same as you recorded on the Leavers form.

Data Label: Public

TMS – Employees who are on Flexi

- ❖ **Flexi Leave will still have to applied for in TMS. Depending on the employees working arrangements, they may be required to record this leave in myHR also**

- ❖ **You will receive an email when an employee record this in myHR. This generates a task in your To do list and you will need to authorise/ reject this task in People manager**

- ❖ **Employee will receive an email when this is done but this is for recording purposes only**

- ❖ **You should continue with the current practice and authorise employees Flexi leave in TMS**

Council Recognition Day

This day must be booked by 31st March 2024 and taken by 31st December 2024.

Only employees who were in post on 19th April 2022 are eligible for this additional day of leave.

- ❖ **Employees are required to request this day as Other Absence in myHR**

- ❖ **You will receive an email when your employee requests this in myHR**

- ❖ **This generates a task in your To do list and you will need to authorise this task in People manager.**

Further information on this can be found on my toolkit.

https://www.westlothian.gov.uk/article/33191/Leave-and-Public-Holidays

Data Label: Public

Paid – Pay Award Additional Holiday 2022

This day must be used by 31ˢᵗ March 2023

- ❖ **Employees are required to request this day in myHR as Other Absence.**

- ❖ **You will receive an email when your employee requests this in myHR**

- ❖ **This generates a task in your To do list and you will need to authorise this task in People manager.**

Data Label: Public

<u>Paid – Pay Award Additional Holiday 2023</u>

This day must be used by 31st December 2023.

- ❖ **Employees are required to request this day in myHR as Other Absence.**

- ❖ **You will receive an email when your employee requests this in myHR**

- ❖ **This generates a task in your To do list and you will need to authorise this task in People manager.**

Please click on link to view guidance on pay award additional leave days 2022/2023

SJC & Craft Pay Award Additional Leave Day 2022 & 2023 Guidance (PDF) [98KB]

Data Label: Public

Paid – Coronation day 08-05-2023

- ❖ **Employees are required to request this day in myHR as Other Absence.**

- ❖ **You will receive an email when your employee requests this in myHR**

- ❖ **This generates a task in your To do list and you will need to authorise this task in People manager.**

Please click on link to view guidance

https://intranet.westlothian.gov.uk/article/33191/Leave-and-Public-Holidays

To check if a member of your staff is out of the office on a particular date

Click on the Out of Office box on the main screen in People Manager

This example is telling you that two of your staff are out of office today.
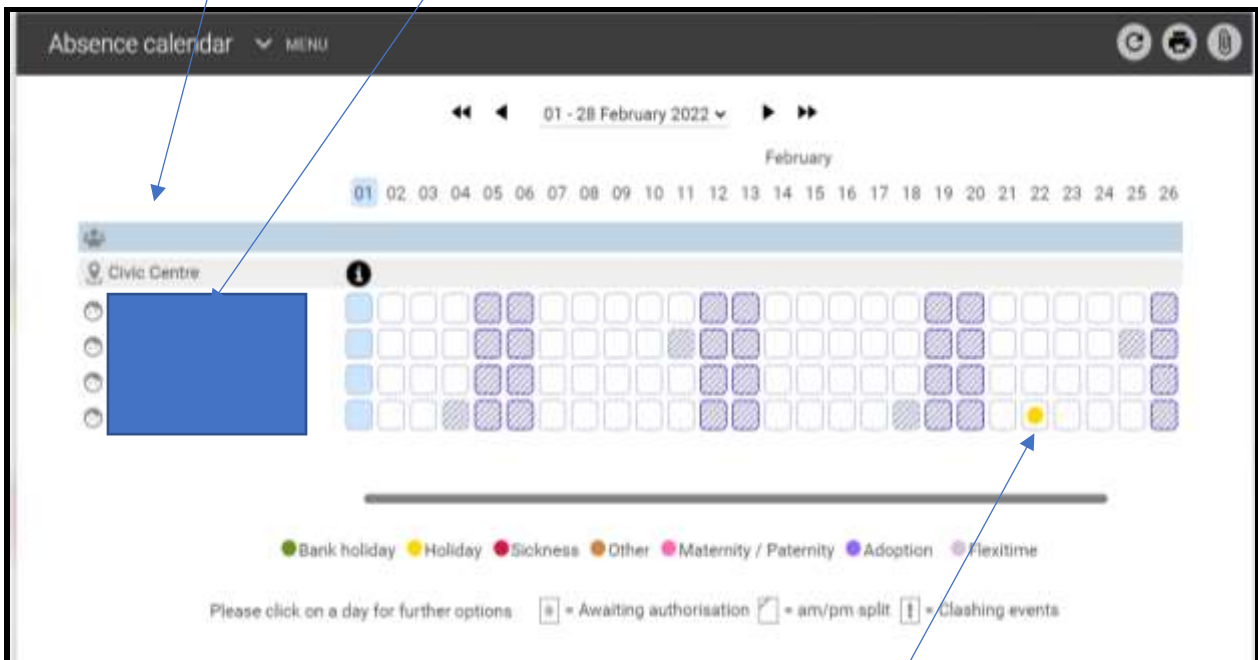
Click on box and a calendar is displayed with a list of your staff

When an absence is recorded for a member of staff it is displayed on this calendar and also their work location

To choose a specific period click on the arrows **and choose the dates required**

You can see that one member of staff has booked a holiday for 22 February (Yellow dot).

If employee is off sick on a public holiday this will be displayed as a conflict – icon! but is for information only.