

# ESS – Annual Leave Guide



## CONTENTS

Contents .....	1
Annual Leave Overview.....	2
How To - View My Work Pattern .....	3
How to - View My Annual Leave Balance .....	4
How To - View Holiday Absence .....	4
How To - View My Calendar .....	5
How To - New Annual Leave Request .....	6
More Than 1 Working Day Annual Leave Request .....	7
Full Working Day Annual Leave Request .....	7
Part Working Day Annual Leave Request .....	8
How To - Amend/Delete Annual Leave .....	8
How To – Apply To Purchase Leave .....	9

## ANNUAL LEAVE OVERVIEW

Annual Leave within iTrent has a planned go live date of 1<sup>st</sup> April 2022 and ALL ANNUAL LEAVE booked from this date MUST be processed within iTrent.

Annual leave entitlement is issued in hours for all employees, full or part time. Entitlement is pro-rata for employees who work part time or are only working for part of a leave year, for example fixed term, new starter, leaver. It makes the administration of the scheme simple and fair for everyone.

The entitlement and deductions are based on certain data within iTrent and employees should ensure this data is correct. Login to iTrent and review the following forms, report any errors to your manager.

View Profile >

- My Personal Details Section: Check Organisation Start (Bury Start Date) Reckonable service (if applicable)
- My Contact Details: Check User Email is your work email

View Profile > Employment Section > Current Job

- Check Reporting Manager
- Check Work Pattern Name and Contractual Hours

My Time > Calendar

- Check hours worked per day correct
- Check Bank Holidays display
- Check any Annual Leave already approved for the new leave year has been entered

My Time > Overview > View Balance

- Check Scheme name: if you pay for 3 days unpaid this is reflected in the scheme name
- Annual leave agreed to be carried forward from the previous leave year will be entered by your manager and added to your total entitlement – this part of the process will be automated from 1<sup>st</sup> April 2023
- Check Entitlement: Value is total of Annual leave, Bank holidays, and if applicable: Floating day, 3 days unpaid , Purchase leave and carry forward.

Employees can book Annual Leave in adhoc hours, half days/shifts (AM/PM) and whole days/shifts, this deducts from the entitlement in hours. Utilise the following 'Days to Hours Ready Reckoner' to convert days into hours.

FTE Hours	0.5 Day	1 Day	1.5 Days	2 Days	2.5 Days	3 Days	3.5 Days	4 Days	4.5 Days	5 Days
37	3.7	7.4	11.1	14.8	18.5	22.2	25.9	29.6	33.3	37
37.5	3.75	7.5	11.25	15	18.75	22.5	26.25	30	33.75	37.5

Bank Holidays and where applicable floating days are added to the annual leave entitlement and displayed as a total entitlement including the annual leave (including additional days for long service as per your terms and conditions of service), 3 days unpaid leave (if applicable), purchased leave (if applicable) and carry forward leave (if applicable). Your leave entitlement will be stated in your Statement of particulars.

The bank holiday scheme attached to an employee position auto deducts the bank holidays based on the work pattern assigned to the position, therefore from 1<sup>st</sup> April 2022 employees do not need to book bank holidays. If an employee works a bank holiday, the manager will need to record this as not taken to re-credit the balance.

iTrent will deduct from the annual leave balance the number of hours on the work pattern. If the deduction appears incorrect you should check the work pattern displayed. If the working pattern is incorrect you should inform your manager as they can make an override to the leave request and request from Transactional HR a permanent change to the work pattern.

When an employee requests annual leave via Employee Self Service (ESS), an automated email triggers to the Reporting Manager or designated Officer to review the Annual Leave request and authorise or reject via a task in their to do list.

An email will trigger to the employee to confirm or reject the request once the manager has reviewed the request and actioned.

Please direct queries regarding annual leave policy to your HR Business Partner.

Any annual leave entitlement queries should be sent to [HRTransactionalServices@bury.gov.uk](mailto:HRTransactionalServices@bury.gov.uk)

## HOW TO - VIEW MY WORK PATTERN

**View profile** Select View Profile

Period of employment	Position
01 Nov 2014 - present	Chief Assistant
01 Nov 2019 - present	Casual General Assistant(CV10)
22 Sep 2021 - present	Senior Systems Administrator

Select the Employment Tab

Select Current position

Current job details

Job details

Department: People Analytics

Position name: Senior Systems Administrator

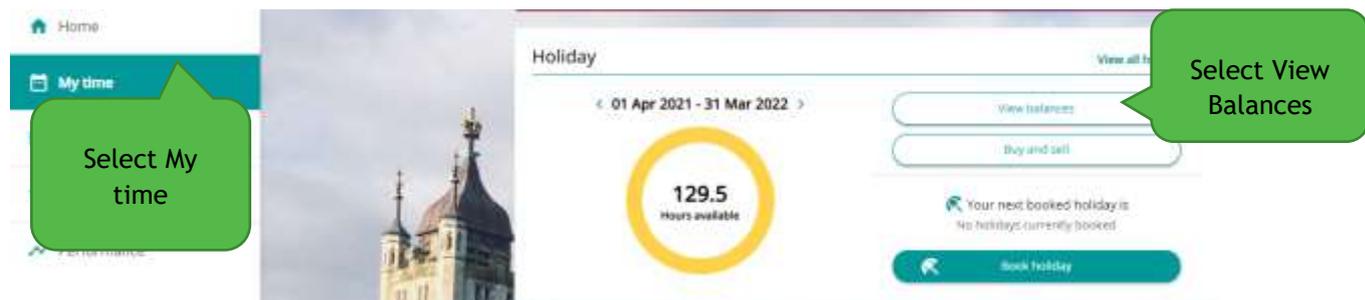
Start date (dd/mm/yyyy): 23/11/2020

Contractual hours: 37.00

Work pattern: 37-Standard Mon-Fri 7:24 Per day

Contractual hours and work pattern as of today's date display

## HOW TO - VIEW MY ANNUAL LEAVE BALANCE



[Back to Overview](#)

**Holiday balances**

**The balance takes account of all recorded holidays including any awaiting authorisation**

**Senior Systems Administrator**

Scheme name	Holiday - NJC	Holiday period	01 Apr 2020 - 31 Mar 2021
Entitlement	244.2 hours	Taken	233.1 hours
Scheduled	0 hours	Balance	11.1 hours
Scheme name	Holiday - NJC	Holiday period	01 Apr 2021 - 31 Mar 2022
Entitlement	240.5 hours	Taken	111 hours
Scheduled	0 hours	Balance	129.5 hours
Scheme name	Holiday - NJC	Holiday period	01 Apr 2022 - 31 Mar 2023
Entitlement	307 hours	Taken	0 hours
Scheduled		Balance	

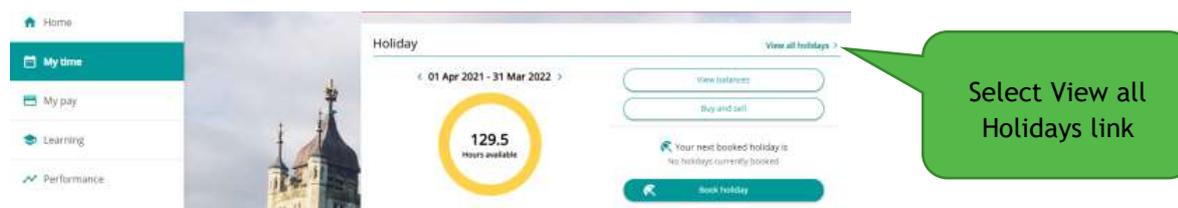
Holiday Scheme Attached

Total entitlement

Employees can view last year, this year and next years leave moving forward

## HOW TO - VIEW HOLIDAY ABSENCE

To view all dates processed to date 'View All holidays'



< Back to Dashboard

Absence records

Searching with neither Start date nor End date will return all absences.

All
  Holiday
  Sick leave
  Other
  Time off in lieu

Type: All | Status: Not refused

Start date (dd/mm/yyyy): 30/11/2021 | End date (dd/mm/yyyy):

Search

Start date	End Date	Duration	Type	Position	Status	Attachments
31 Dec 2021	31 Dec 2021	7.4	Annual Leave	Senior Systems Administrator	Awaiting authorisation	
13 Dec 2021 13:00	13 Dec 2021 16:45	3.75	Annual Leave	Senior Systems Administrator	Authorised	

Enter the start date in a format 01/01/1900 calendar icon

Enter the end date in format 01/01/1900 calendar icon

Search

Status

Status:

- Not applicable – this means the absence has been entered by the Manager, Absence Administrator or HR
- Awaiting authorisation – entered by employee and manager not yet authorised task
- Authorised – Manager authorised the annual leave request
- Not Authorised/Rejected – Manager not approved the annual leave request

## HOW TO - VIEW MY CALENDAR

Select the Bury Logo to return to the Home page



You can view the calendar from the home page Holiday Tab

Holiday [View all holidays](#)

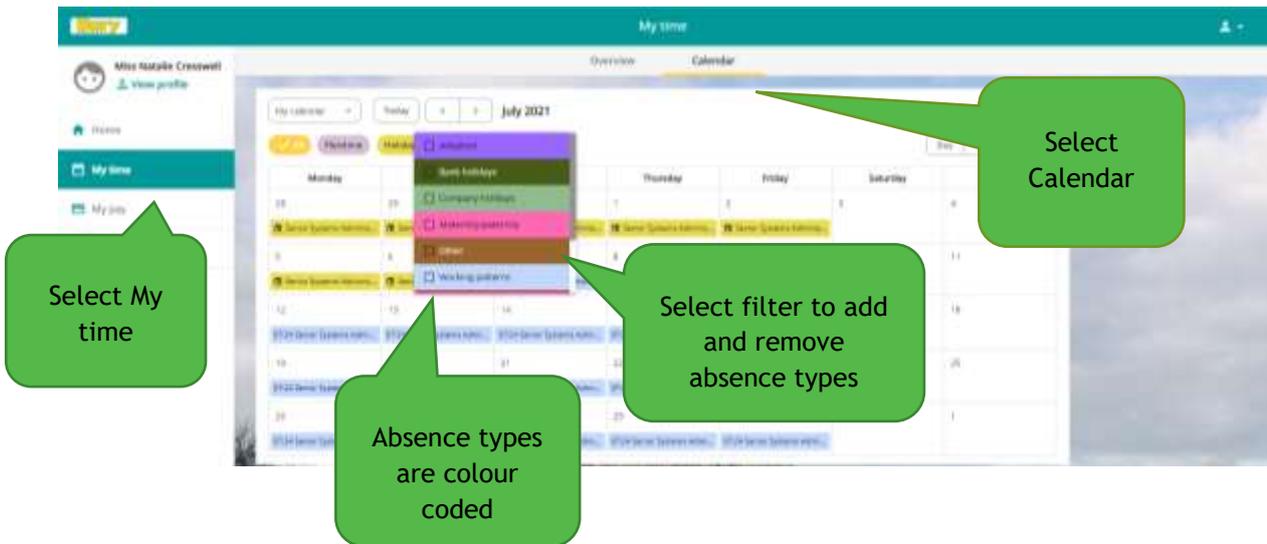
129.5 Hours available

back to Mylog

view holiday in calendar

Select View holiday in Calendar

Or view the calendar from the My Time and Select the holiday tab

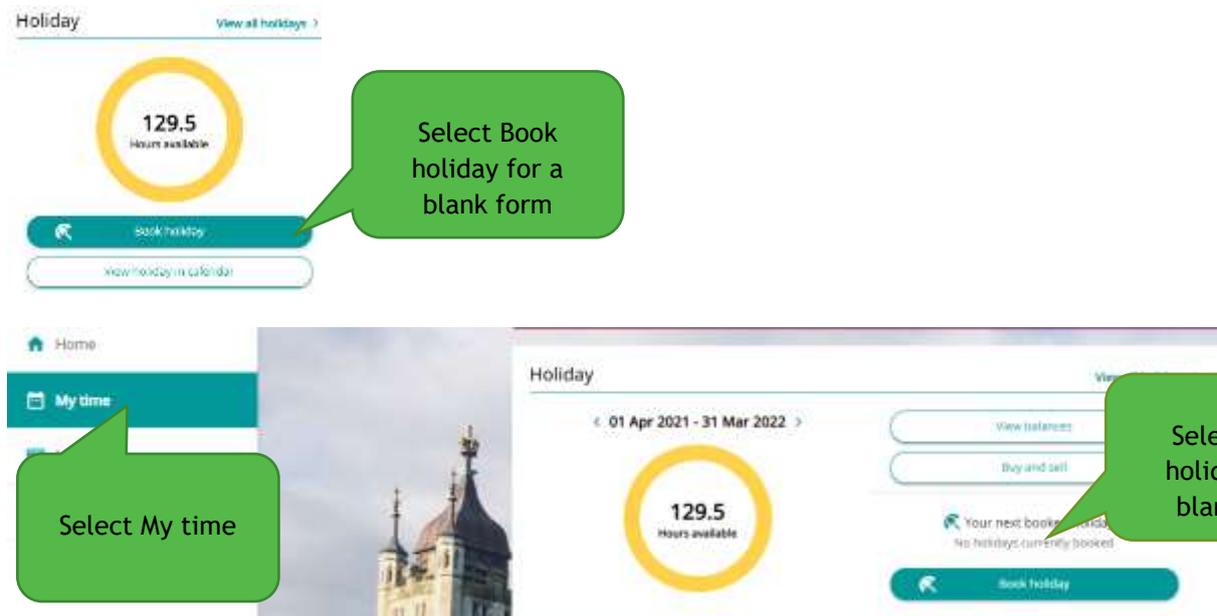


Company holidays are non-working periods, at Bury these are the School Holidays and are held against teaching and term time employees.

## HOW TO - NEW ANNUAL LEAVE REQUEST

Annual leave can be requested from the home page or the My Time holiday section.

Select the Bury Logo to return to the Home page



## MORE THAN 1 WORKING DAY ANNUAL LEAVE REQUEST

The screenshot shows a 'Holiday details' form with the following fields and callouts:

- Absence type (required):** Annual Leave
- Holiday period (required):** More than one day
- Start date (dd/mm/yyyy) (required):** [Empty] with a calendar icon. Callout: "Start date the first day of annual leave"
- Full or part day (required):** Full day
- End date (dd/mm/yyyy) (required):** [Empty] with a calendar icon. Callout: "End date the day before returning from leave"
- Full or part day (required):** Full day
- Position (required):** <All jobs>
- Notes:** [Empty text area]. Callout: "Add any notes if required SAVE the request"

Callout boxes provide additional instructions:

- "Select more than one day a" points to the 'Holiday period' dropdown.
- "On more than one day request you can request PM on day 1 and AM on the last day. Do not use specify time for more than period" points to the 'Holiday period' dropdown.
- "Select the position the leave request refers to" points to the 'Position' dropdown.

Buttons at the bottom: Save, Cancel

## FULL WORKING DAY ANNUAL LEAVE REQUEST

The screenshot shows a 'Holiday details' form with the following fields and callouts:

- Absence type (required):** Annual Leave
- Holiday period (required):** Full day
- Start date (dd/mm/yyyy) (required):** 13/12/2021 with a calendar icon. Callout: "Enter date 01011900 format or select the calendar icon"

## PART WORKING DAY ANNUAL LEAVE REQUEST

A part working day request allows for a Morning, Afternoon or to specify the time slot and hours. AM or PM or specify time must only be used if the employee is working for some of their standard shift/work pattern for the day.

The screenshot shows a form titled "Holiday details" with the following fields and callouts:

- Enter the date:** A callout pointing to the "Start date (dd/mm/yyyy) (required)" field, which contains "13/12/2021".
- Select Part Day:** A callout pointing to the "Absence type (required)" dropdown menu, which is set to "Annual Leave".
- Select the part day period:** A callout pointing to the "Morning or Afternoon (required)" dropdown menu, which is set to "Morning".

If the specify time option is selected the hours deducted from the annual leave balance are those entered in the Hours absent field – these should be entered in hours and minutes (HH:MM). NOTE: the start and end times do not calculate the hours to be deducted and a full days entitlement will be deducted if the hours absent are left blank.

This close-up shows the "Specify time" section of the form:

- Hours absent in Hours and Minutes:** A callout pointing to the "Hours absent" field, which contains "03:45".
- Start time (hh:mm):** A field containing "13:00".
- End time (hh:mm):** A field containing "16:45".

## HOW TO - AMEND/DELETE ANNUAL LEAVE

You can only amend or delete an annual leave request in the future. A hyperlink is accessible on Absence records to select the annual leave request that can be edited. Irrespective of the status if the absence is in the future it can be amended or deleted and balances will be adjusted.

The manager will receive an email to review and approve and amended leave. An employee can delete an annual leave request up to the start date, if the start date has passed the employee must ask a manager to delete any annual leave not taken. No authorisation is required, and email confirmation is sent to both the manager and employee.

[← Back to Dashboard](#)

**Absence records**

Searching with neither Start date nor End date will return all absences.

Type: All | Date: Not filtered

Start date (dd/mm/yyyy): 31/12/2021 | End date (dd/mm/yyyy):

Start date &	End Date	Duration	Type	Position	Status	Attachments
31 Dec 2021	31 Dec 2021	3.0	Annual leave	Senior Systems Administrator	Pending Authorisation	
13 Dec 2021	13 Dec 2021	1.0	Annual leave	Senior Systems Administrator	Authorised	

Select the future leave request

[← Back to Absence records](#)

**Holiday details**

\* Absence type (required): Annual Leave

\* Holiday period (required): Full day

\* Start date (dd/mm/yyyy) (required): 31/12/2021

\* Position (required): Senior Systems Administrator (23/11/2020) (Current)

Notes

Authorisation: Awaiting authorisation

To Amend - edit the period/dates as required and SAVE

Select Delete to remove the request

## HOW TO – APPLY TO PURCHASE LEAVE

If an employee terms and conditions allow for the purchase of annual leave this can be requested via iTrent. The window opens 90 days before the start of the new leave year. If an employee wishes to purchase leave outside of this window please refer to the intranet for off system process.

The manager will receive a request to approve or reject the request. Once the manager approves the request payroll are automatically notified to complete a national minimum wage check as per HMRC requirements.

The additional hours purchased will be credited to the holiday balance.

The image shows a screenshot of a web application interface for managing holiday buy/sell requests. The interface includes a navigation menu on the left with options like 'Home', 'My time', 'My info', 'Learning', and 'My Performance'. The main content area displays a 'Holiday' summary for the period '01 Apr 2022 - 31 Mar 2023', showing a balance of '118.35' and buttons for 'Buy and sell', 'Buy and sell', and 'Buy and sell'. Below this is a 'Holiday buy/sell' form with the following fields:

- Position name (required):** Senior Systems Administrator (23/11/2020) (Current)
- Scheme (required):** Holiday - NJC
- Holiday period dates (required):** 01/04/2022 - 31/03/2023
- Benefit window is open from:** 02/12/2021 to 01/03/2022
- Action (required):** Buy
- Min/Max allowed:** 0 / 74
- No of hours (required):** (empty field)
- Total value:** (empty field)

Callout boxes provide instructions for each step:

- Select My time:** Points to the 'My time' menu item.
- Select Buy and Sell:** Points to the 'Buy and sell' button.
- Select the position:** Points to the 'Position name' dropdown.
- Select holiday scheme:** Points to the 'Scheme' dropdown.
- Select Holiday period:** Points to the 'Holiday period dates' dropdown.
- Enter hours to Buy and SAVE:** Points to the 'No of hours' input field.

The Total value calculated on submission is based on the salary at the point of the request and deductions will be made in 12 monthly instalments. If you leave the Council any remaining balance will be automatically deducted from your final pay. The deduction will be amended based on pay awards.