

Adding Annual Leave Entitlements

Go to Personnel.

Search for the member of staff.

Go to the Edit Person button.

On the right hand side at the top you will have a series of tabs. One of them says Entitlements. Click.

Click on Create Person Entitlement.

The screenshot shows a web application interface for managing staff entitlements. At the top, there are tabs for 'Details', 'Episodes', 'Notes', and 'Audit Trail'. Below these is a section titled 'Account' with a sub-section 'Person Entitlement'. This section contains fields for 'Period:', 'Entitlement:', and 'Remaining:'. Below that is a 'Breakdown' section with fields for 'Taken:', 'Planned:', and 'Requested:'. At the bottom of this section is a table titled 'Entitlement Taken Per Quarter' with columns for 'Qtr 1:', 'Qtr 2:', and 'Qtr 3:'. Below the table is a row of buttons: 'Create Person Entitlement' (circled in black), 'Create Posting Entitlement', and 'Add Note'. At the very bottom, there is a row of icons and labels: 'Assign Attribute', 'Add Note', 'Close Person', 'Change Person Working Restrictions', and 'Availability'.

Choose the items as shown in the image on the next page: Annual Rate, Annual Leave, Hours Only.

You do not need to change Annual Period Start unless they were not employees at the start of April 2018 in which case you add their start date.

Create Person Entitlement

Entitlement Basis: Annual Rate

Entitlement Type: Annual Leave

Entitlement Units: Hours Only

Annual Period Start: 1 April

Base Hours: 0.00

Continuous Service Hours: 0.00

Agreed Carry Forward Hours: 0.00

Lieu Hours: 0.00

Total Hours: 0.00

Effective From: 20/11/2018 Initial Balance:

Note: The carry forward and lieu time entered will only apply to the first entitlement period created. To add further entries, please open the individual entitlement once created.

OK Cancel

You need to put in their **Base Hours** (which are their entitlement plus any long service added together).

You would also need to add any **Agreed Carry Forward Hours**.

Click OK.

Afterwards, check their entitlement is correct and if the carry forward didn't add correctly then click on Edit Person again.

Click on Entitlements.

Click on their personal Entitlement line as it is shown. Then at the bottom click on Change Entitlement (the first option).



Re-add the carry forward and click OK.

To add leave you would do this in exactly the same way as you add sickness or study leave by Adding Unavailability.