

Reference Number: UHB 166 Version Number: 2	Date of Next Review: 10 th May 2020 Previous Trust/LHB Reference Number: T/172
Annual Leave Procedure	
Introduction and Aim Cardiff and Vale University Health Board (the UHB) is committed to developing and maintaining arrangements which make it a great place to work and learn. The UHB will seek to ensure that members of staff are able to take the Annual Leave to which they are entitled, the purpose of which is to provide a break from work. The aim of this Procedure is to set out employee entitlements to Annual Leave, recognising that there needs to be consistent service cover in order to be able to deliver an effective and safe service to our patients.	
Objectives • To support a positive and healthy work-life balance for staff • To ensure that service needs are balanced with individual needs • To provide comprehensive information to employees and managers on their Annual Leave entitlements • To ensure the fair, consistent and effective application of Annual Leave provisions	
Scope This procedure applies to all staff employed by the UHB on Agenda for Change Terms and Conditions, Executive Directors and Very Senior Managers (VSMs) Consultants and Career Grade Medical Staff should refer to the Annual Leave Policy for Career Grade Medical and Dental Staff. Doctors in training should refer to the appropriate Deanery policies regarding Annual Leave entitlement.	
Equality and Health Impact Assessment	An Equality and Health Impact Assessment has been completed and found there to be a positive impact.
Documents to read alongside this Procedure	Flexible Working Policy Maternity , Adoption , Paternity and Shared Parental Leave Policies and Procedures Sickness Absence Policy Special Leave Policy Reserve Forces Training and Mobilisation

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	Policy Payroll Underpayment/Overpayment Policy Partnership and Recognition Agreement (for Time Off for trade union duties) Equality, Diversity and Human Rights Policy
Groups Consulted	Clinical Boards, Executive Directors, Workforce and OD, Staff Representatives,
Outcome of Consultation	No changes
Accountable Executive or Clinical Board Director	Executive Director of Workforce and OD
Author(s)	Workforce Governance Manager, UNISON/BAOT
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Summary of reviews/amendments			
Version Number	Date Review Approved	Date Published	Summary of Amendments
1	29/01/2013	08/03/2013	Reformatted in UHB style. Supersedes Trust document ref. No: 172
2	10/05/2017	17/05/2017	Replaces previous Annual Leave Guidelines. Processes updated to reflect ESR self service No significant changes

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1	RESPONSIBILITIES
	The Executive Director of Workforce and Organisational Development (OD) is responsible for the implementation of this Procedure Managers are responsible for: • Calculating a staff member's entitlement to Annual Leave and Public Holidays, taking into account length of service • Recording and monitoring Annual Leave to ensure the appropriate leave entitlement is taken within each leave year • Maintaining appropriate staffing levels when authorising leave to ensure that service needs continue to be safely met within budgetary constraints • Ensuring each application is managed equitably, balancing the needs of the service with the needs of the individual • Ensuring all staff are aware of this Procedure and the processes for requesting and booking leave Employees are responsible for: • Providing evidence of their total NHS service to support their manager in calculating Annual Leave entitlement, and ensuring their manager is aware when they reach 5 and 10 years service • Using their Annual Leave entitlement within each relevant year • Following the UHB Procedure and locally agreed practices (e.g. notice required) when requesting and booking Annual Leave • Seeking their line manager's agreement and authorisation for each period of Annual Leave, giving as much notice as possible to allow managers to plan absences across a department • Not making any bookings or payments for holidays until their request for Annual Leave has been granted • Keeping an accurate record of their Annual Leave status • Co-operating with other team members when requesting leave for critical holiday periods • Giving appropriate notice should they need to cancel Annual Leave already booked. The Human Resources Advisory Team (HRAT) is responsible for advising all parties on the application of this Procedure and for providing specific management and staff guidance as required. Advice can also be sought from Trade Union representatives.
2	ANNUAL LEAVE YEAR
	The leave year runs from 1 April to 31 March.

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3	ENTITLEMENT																																			
3.1	Entitlements to Annual Leave are set out in the employee’s contract of employment, as determined by the NHS Terms and Conditions of Service. For staff who work full time (i.e. 37½ hours) the leave entitlement per leave year is as follows: <table><tr><td></td><td colspan="3">Days</td><td colspan="3">Hours</td></tr><tr><td>Length of service</td><td>AL</td><td>PH</td><td>Total</td><td>AL</td><td>PH</td><td>Total</td></tr><tr><td>On appointment</td><td>27</td><td>8</td><td>35</td><td>202.5</td><td>60</td><td>262..5</td></tr><tr><td>After 5 years service</td><td>29</td><td>8</td><td>37</td><td>217.5</td><td>60</td><td>277.5</td></tr><tr><td>After 10 years service</td><td>33</td><td>8</td><td>41</td><td>247.5</td><td>60</td><td>307.5</td></tr></table> Part time staff are entitled to a pro-rata entitlement based on their contracted hours.		Days			Hours			Length of service	AL	PH	Total	AL	PH	Total	On appointment	27	8	35	202.5	60	262..5	After 5 years service	29	8	37	217.5	60	277.5	After 10 years service	33	8	41	247.5	60	307.5
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3.2	Calculation of reckonable Service Length of service is determined by total NHS Service (i.e UHB Service plus previous NHS service regardless of whether or not there has been a break). For new staff, all previous NHS Service will be regarded as reckonable for the purposes of Annual Leave only if documentary evidence is provided by the member of staff or an ESR Inter-Authority Transfer is completed. There is also discretion to take into account any other period or periods of employment with employers outside the NHS where these are judged to be relevant to NHS employment. Bank and Locum/Agency service will not count towards reckonable service for the purposes of Annual Leave. For nursing staff, anyone who started Nurse training prior to September 1992. would have been paid as an NHS employee for the duration of their training, so this time will be counted. Nurse training after September 2002 will not be counted as service for the purposes of Annual Leave. Falsification of previous service and/or leave entitlement is considered misconduct under the UHB Disciplinary Policy and counter-fraud processes.																																			
4	PROCEDURE																																			
4.1	All staff should record their Annual Leave entitlement in hours to ensure that the individual entitlement is accurate and equitable regardless of whether they are full or part time or the length/number of shifts worked in a particular week.																																			

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	When any leave is taken (whether annual or public holiday) the contracted hours normally worked on that day should be deducted from the total leave entitlement. This applies in all cases, including where flexible working arrangements (e.g. compressed hours) are in place.	
4.2	Calculating Annual Leave The calculation of Annual Leave entitlement is the responsibility of the Line Manager. Managers should refer to Human Resources for advice on term time, annualised hours or other unusual contracts. To calculate an employee's total leave entitlement in hours (inclusive of General Public (Bank) Holidays, the figures in Appendices A and B should be added together. Hours are to be rounded up or down to the nearest ¼ hour.	
4.3	Part Years Service	
	4.3.1	Entitlement on Joining The Annual Leave entitlement of new starters is accrued and calculated from the first day of employment using the following calculation: full-year A/L entitlement X $\frac{\text{number of calendar days (from start date)}}{365}$ n.b. ESR calculates Annual Leave for new starters from the first day of the next complete month. Managers are therefore asked to contact the Workforce Information team to arrange for the ESR record to be amended as appropriate.
	4.3.2	Entitlement on Leaving Staff who leave the UHB is entitled to be paid for any Annual Leave accrued and not taken. The following formula should be used to calculate the Annual Leave entitlement up to the termination date: full-year A/L entitlement X $\frac{\text{number of calendar days (to leaving date)}}{365}$ Where Annual Leave taken exceeds the entitlement, payment will be deducted from the final salary.
	4.3.3	Where the leave entitlement changes during the leave year because of an increase or decrease in hours, or because the employee reaches 5 or 10 years service, the entitlement for each period should be calculated and added together.

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4.4	Requests for Annual Leave	
	4.4.1	Where the Electronic Staff Record (ESR) has been rolled out and staff have Employee Self Service, this must be used to request and approve Annual Leave. If ESR self service has not been rolled out to a department, all Annual Leave requests must be submitted on the appropriate form (attached as Appendix C). Any local recording systems used must be in addition to the standard form/ESR, not instead of it.
	4.4.2	As far as is reasonably practicable, staff should be able to take their Annual Leave when they wish to do so. However, this may not always be achievable and will be dependent upon service needs.
	4.4.3	The UHB is committed to providing a consistent and high standard of service for our patients and customers. This can only be achieved by maintaining adequate staffing levels. In order to facilitate this, each ward or department should have a detailed local procedure in place which addresses the service needs of that particular work area. This should include issues such as how many staff at which grade can be away at any one time on planned leave, how many weeks can be taken during peak period, and what the authorisation procedure is. Local procedures must be developed in consultation with staff representatives and subject to an Equality Impact Assessment. Annual Leave should be planned to minimise the need for Bank and Agency cover, and to prevent a peak in Annual Leave at year end.
	4.4.4	Where an Annual Leave request is refused, and this decision is not in accordance with the departmental procedure, employees may ask for the reasons for refusal to be put into writing. On these occasions managers/supervisors will be expected to supply this information.
	4.4.5	Staff should be able to request Annual Leave as part of a day/shift/week (in hours). This flexibility is to enable staff to use Annual Leave to meet their own individual needs where possible, especially where they fall outside of the Flexible Working or Special Leave Policies
5	PAYMENT	
5.1	Pay during Annual Leave will include regularly paid supplements including any recruitment and retention premia, payments for work outside normal hours and high	

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	cost area supplements. Pay is calculated on the basis of what the individual would have received had he/she been at work.									
5.2	In lieu of the fact that pay during Annual Leave is calculated on what the individual would have received had they been in work, within the UHB staff who work unsocial hours or On-Call receive a monthly working time directive payment based on their unsocial hours or On-Call earnings. The percentage payment is paid throughout the year and is based on each individual's actual full time Annual Leave entitlements. These are as follows: <table><tr><td>For staff with less than 5 years NHS service</td><td>27 days</td><td>11.59%</td></tr><tr><td>For staff with more than 5 years but less than 10 years NHS service</td><td>29 days</td><td>12.55%</td></tr><tr><td>For staff with more than 10 years service</td><td>33 days</td><td>14.53%</td></tr></table> As the additional % payment is made throughout the year, when individual staff take Annual Leave they are paid basic pay on the days in question.	For staff with less than 5 years NHS service	27 days	11.59%	For staff with more than 5 years but less than 10 years NHS service	29 days	12.55%	For staff with more than 10 years service	33 days	14.53%
For staff with less than 5 years NHS service	27 days	11.59%								
For staff with more than 5 years but less than 10 years NHS service	29 days	12.55%								
For staff with more than 10 years service	33 days	14.53%								
6	PUBLIC (BANK) HOLIDAYS									
6.1	In addition to Annual Leave entitlement, staff are entitled to paid statutory Public Holidays. There are 8 Public (Bank) Holidays in a normal leave year, although depending on the placement of Easter this can vary between 6 and 10. Public Holidays are as follows: • Good Friday • Easter Monday • May Day • Late Spring Bank Holiday • Late Summer Bank Holiday • Christmas Day • Boxing Day • New Year's Day Where Public Holidays during the Christmas and New Year period fall at weekends, alternative days will be re-designated as if they were Public Holidays and the appropriate payments applied. Staff will not receive additional payments for both the alternate days and the days which would otherwise have been Public Holidays									
6.1	For pay purposes, a Public Holiday starts and ends at midnight. Public Holiday payments will be made in accordance with the number of hours worked during this period.									
6.3	Full time employees are entitled to all Public Holidays which fall within that leave									

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	year. Part-time employees' entitlement is calculated on a pro rata basis. Appendix B contains the Public Holiday entitlement for all staff, both as hours per Public Holiday and in total for a full leave year. N.B. Appendix B shows the accrual of Public Holiday entitlement only. When recording leave taken on a Public Holiday, the hours that would have ordinarily been worked on that day should be deducted from the total leave entitlement, i.e. the length of a standard working 'day'. If staff are not rostered to work on the Public Holiday or the Public Holiday falls on their usual day off, no hours will be deducted, and the commensurate time off can be taken on another occasion.
6.4	Members of staff may be required to work on Public Holidays in accordance with their working pattern or rota. Staff required to work or to be 'on call' on a Public Holiday are entitled to the appropriate enhanced payments and to take the equivalent time off at a later date (by booking it as Annual Leave).
6.5	In departments that normally close on Public Holidays, members of staff must either take that time as paid holiday (booked in the normal way and making appropriate deduction of their normal working hours for that day from their leave entitlement) or, with prior agreement from their manager, work these hours at an alternative time or place. Staff who work in departments that normally close on a Public Holiday may find it helpful to deduct the appropriate number of hours from their total leave balance (i.e. Annual Leave and Public Holidays) at the start of the year rather than as and when Public Holidays occur. In departments that normally work on Public Holidays, members of staff wishing to take leave must make the appropriate deduction of their normal working hours for that day from their leave entitlement. The normal booking rules for the department will apply.
7	SPECIAL CASES
7.1	Staff away from the workplace Staff who are away from the workplace should refer to the relevant policy or guidelines for information relating to their Annual Leave e.g. Maternity, Paternity and Adoption Guidelines, Secondment Policy, Sickness and Absence Policy. Employees will not be entitled to an additional day off if they are sick on a General Public (Bank) Holiday which they would otherwise have been required to work as

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	part of their working week. These hours will therefore be deducted from their total Annual Leave and General Public (Bank) Holiday entitlement the usual way.
7.2	Carrying Over of Annual Leave There is an expectation that employees should take all their Annual Leave entitlement in the relevant leave year. Managers have the responsibility to authorise leave in accordance with service needs and the needs of the individual. Employees have a responsibility to plan and schedule their Annual Leave throughout the leave year. The One Wales Contract states that there is no entitlement to holidays or holiday pay being carried forward to the next holiday year. Members of staff may apply in writing to carry over Annual Leave up to a maximum of 5 days (pro-rata for part time staff). However, staff should be aware that it is not usual practice for the UHB to approve such requests and they would have to be agreed at a Directorate level. There may be exceptional circumstances in which an employee is unable to use all their Annual Leave within the leave year because of service demands. In such circumstances, the Directorate Manager or equivalent may authorise the carry over of up to 5 days into the following leave year (a pro rata entitlement of the 5 days for part-time employees). n.b. carry over provisions for vary while on Maternity Leave, Adoption Leave and Sickness Absence. Please refer to the relevant policy for guidance.
7.3	Staff Moving Within the UHB Where staff move to other posts / departments / sites within the UHB they transfer their Annual Leave entitlement for the remainder of the Annual Leave year. Any holidays already booked will be honoured. Staff should notify their new manager of these dates prior to commencement in the new post.
7.4	Death in Service Where an employee dies in service, an allowance equivalent to the balance of the Annual Leave entitlement at the date of death, calculated on a proportionate basis, shall be paid to the employee's personal representative. No deduction from the final salary payment should be made in respect of Annual Leave taken in excess of entitlement at the date of death.
7.5	Restricted Services Some departments may reduce their services for the period between Christmas and New Year, and staff are therefore expected to allocate the necessary Annual Leave for those days which are not General Public (Bank) Holidays. Staff will be notified of

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	this arrangement when they join such a department. Where this takes place ad hoc and at short notice, support will be provided by the Workforce and OD function and staff representatives.
7.6	Employment Break Staff on an unpaid Employment break do not accrue Annual Leave since the contract of employment is suspended for the duration of the break and that period does not count as service with the UHB.
7.7	Unpaid Leave Unpaid Annual Leave is not an entitlement, but may be granted in exceptional circumstances at the discretion of the Line Manager when the paid Annual Leave entitlement has been exhausted. Where Annual Leave has already been booked and unforeseen circumstances subsequently arise, which mean that the employee needs to take time off work, paid leave should be used up first, and unpaid leave given for the pre-booked period.
7.8	Other Types of Authorised Absence Managers should ensure they are aware of other Policies and Procedures dealing with time away from the workplace such as the Special Leave Policy, Sickness Absence Policy and local Time Off in Lieu procedures, and ensure that each is used in appropriate circumstances.
7.9	Extended periods of Annual Leave Managers should be mindful of the fact that there may be times when individual employees wish to take Annual Leave for a longer period than would usually be approved e.g. around the time of their wedding/honeymoon, for a 'once in a lifetime' opportunity, to visit family living overseas. These requests should be given consideration and accommodated where possible, as long as the service needs can also be met.
7.10	Annual Leave Purchase Scheme The Annual Leave Purchase Scheme means that staff can apply to 'buy' up to two weeks additional Annual Leave and spread the reductions in their salary over a 3, 6, or 12 month period. Staff will be asked to confirm in advance the dates on which they would like to use the additional Annual Leave, so that managers can plan for this absence. This will ensure that there is no negative impact on the quality of patient care we deliver and that there are no additional costs to the UHB. The UHB, however, reserves the right to reject a member of staff's application to buy

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	additional Annual Leave if the absence will have a negative effect on the day to day delivery of services or adversely affect the team.
7.11	Religious Festivals
	Managers should consider favourably any request by staff to take paid leave for religious festivals. Such requests should take priority where possible, although managers will need to balance the needs of the service. Employees should inform managers at the earliest possible time of these dates, so that appropriate arrangements can be made. Further information relating to accommodating religion or belief requests can be found in the ACAS guide for Religion or Belief in the workplace – A guide for employers and employees http://www.acas.org.uk/media/pdf/f/l/religion_1.pdf

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**APPENDIX A - Agenda For Change: Annual Leave Entitlement For
Complete Years Exclusive Of General Public (Bank) Holidays**

Formula: Weekly contracted hours/5 x no. of annual leave days' entitlement.

WEEKLY BASIC CONTRACTED HOURS	ON APPOINTMENT	AFTER 5 YEARS' SERVICE	AFTER 10 YEARS' SERVICE
	27 DAYS	29 DAYS	33 DAYS
	HOURS EQUIVALENT:		
37.5	202.5	217.5	247.5
37.0	200.0	214.5	244.0
36.5	197.0	211.5	241.0
36.0	194.5	209.0	237.5
35.5	191.5	206.0	234.5
35.0	189.0	203.0	231.0
34.5	186.5	200.0	227.5
34.0	183.5	197.0	224.5
33.5	181.0	194.5	221.0
33.0	178.0	191.5	218.0
32.5	175.5	188.5	214.5
32.0	173.0	185.5	211.0
31.5	170.0	182.5	208.0
31.0	167.5	180.0	204.5
30.5	164.5	177.0	201.5
30.0	162.0	174.0	198.0
29.5	159.5	171.0	194.5
29.0	156.5	168.0	191.5
28.5	154.0	165.5	188.0
28.0	151.0	162.5	185.0
27.5	148.5	159.5	181.5
27.0	146.0	156.5	178.0
26.5	143.0	153.5	175.0
26.0	140.5	151.0	171.5
25.5	137.5	148.0	168.5
25.0	135.0	145.0	165.0
24.5	132.5	142.0	161.5
24.0	129.5	139.0	158.5
23.5	127.0	136.5	155.0
23.0	124.0	133.5	152.0
22.5	121.5	130.5	148.5
22.0	119.0	127.5	145.0
21.5	116.0	124.5	142.0
21.0	113.5	122.0	138.5
20.5	110.5	119.0	135.5
20.0	108.0	116.0	132.0

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WEEKLY BASIC CONTRACTED HOURS	ON APPOINTMENT	AFTER 5 YEARS SERVICE	AFTER 10 YEARS SERVICE
	27 DAYS	29 DAYS	33 DAYS
	HOURS EQUIVALENT:		
19.5	105.5	113.0	128.5
19.0	102.5	110.0	125.5
18.5	100.0	107.5	122.0
18.0	97.0	104.5	119.0
17.5	94.5	101.5	115.5
17.0	92.0	98.5	112.0
16.5	89.0	95.5	109.0
16.0	86.5	93.0	105.5
15.5	83.5	90.0	102.5
15.0	81.0	87.0	99.0
14.5	78.5	84.0	95.5
14.0	75.5	81.0	92.5
13.5	73.0	78.5	89.0
13.0	70.0	75.5	86.0
12.5	67.5	72.5	82.5
12.0	65.0	69.5	79.0
11.5	62.0	66.5	76.0
11.0	59.5	64.0	72.5
10.5	56.5	61.0	69.5
10.0	54.0	58.0	66.0
9.5	51.5	55.0	62.5
9.0	48.5	52.0	59.5
8.5	46.0	49.5	56.0
8.0	43.0	46.5	53.0
7.5	40.5	43.5	49.5
7.0	38.0	40.5	46.0
6.5	35.0	37.5	43.0
6.0	32.5	35.0	39.5
5.5	29.5	32.0	36.5
5.0	27.0	29.0	33.0
4.5	24.5	26.0	29.5
4.0	21.5	23.0	26.5
3.5	19.0	20.5	23.0
3.0	16.0	17.5	20.0
2.5	13.5	14.5	16.5
2.0	11.0	11.5	13.0
1.5	8.0	8.5	10.0
1.0	5.5	6.0	6.5
0.5	2.5	3.0	3.5

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APPENDIX B - Agenda For Change: Calculation Of General Public (Bank) Holiday Entitlement

Formula: Weekly contracted hours/5 x no. of Bank Holidays in year 1st April – 31st March

WEEKLY BASIC CONTRACTED HOURS	HOURLY ENTITLEMENT FOR FULL LEAVE YEAR	HOURLY ENTITLEMENT ON EACH BANK HOLIDAY AS IT OCCURS
	(8 BANK HOLIDAYS)	
37.5	60.0	7.5
37.0	59.0	7.4
36.5	58.5	7.3
36.0	57.5	7.2
35.5	57.0	7.1
35.0	56.0	7.0
34.5	55.0	6.9
34.0	54.5	6.8
33.5	53.5	6.7
33.0	53.0	6.6
32.5	52.0	6.5
32.0	51.0	6.4
31.5	50.5	6.3
31.0	49.5	6.2
30.5	49.0	6.1
30.0	48.0	6.0
29.5	47.0	5.9
29.0	46.5	5.8
28.5	45.5	5.7
28.0	45.0	5.6
27.5	44.0	5.5
27.0	43.0	5.4
26.5	42.5	5.3
26.0	41.5	5.2
25.5	41.0	5.1
25.0	40.0	5.0
24.5	39.0	4.9
24.0	38.5	4.8
23.5	37.5	4.7
23.0	37.0	4.6
22.5	36.0	4.5
22.0	35.0	4.4
21.5	34.5	4.3
21.0	33.5	4.2
20.5	33.0	4.1
20.0	32.0	4.0

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WEEKLY BASIC CONTRACTED HOURS	HOURLY ENTITLEMENT FOR FULL LEAVE YEAR	HOURLY ENTITLEMENT ON EACH BANK HOLIDAY AS IT OCCURS
	(8 BANK HOLIDAYS)	
19.5	31.0	3.9
19.0	30.5	3.8
18.5	29.5	3.7
18.0	29.0	3.6
17.5	28.0	3.5
17.0	27.0	3.4
16.5	26.5	3.3
16.0	25.5	3.2
15.5	25.0	3.1
15.0	24.0	3.0
14.5	23.0	2.9
14.0	22.5	2.8
13.5	21.5	2.7
13.0	21.0	2.6
12.5	20.0	2.5
12.0	19.0	2.4
11.5	18.5	2.3
11.0	17.5	2.2
10.5	17.0	2.1
10.0	16.0	2.0
9.5	15.0	1.9
9.0	14.5	1.8
8.5	13.5	1.7
8.0	13.0	1.6
7.5	12.0	1.5
7.0	11.0	1.4
6.5	10.5	1.3
6.0	9.5	1.2
5.5	9.0	1.1
5.0	8.0	1.0
4.5	7.0	0.9
4.0	6.5	0.8
3.5	5.5	0.7
3.0	5.0	0.6
2.5	4.0	0.5
2.0	3.0	0.4
1.5	2.5	0.3
1.0	1.5	0.2
0.5	1.0	0.1

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Appendix C – Mechanisms for Applying for Annual Leave

Where the Electronic Staff Record (ESR) Employee and Managers Self Service facility has been introduced, this should be used for to request and authorise Annual Leave. [Guidance on recording Annual Leave on ESR](#) has been developed to support managers and staff.

In all other areas the standard [Annual Leave request form](#) should be used. This form can be located on the [Annual Leave Toolkit](#) on the UHB internet site.