

Frequently asked questions

1st March 2017

Implementation – general

1. Why is this change being made?

We are making this change as part of NHSBT's move towards digitisation. It removes the manual calculation of annual leave entitlements and duplication of entry, ensuring all records are consistent and pay is correct.

2. Is this change being made for everyone?

Yes, apart from medical staff who have different entitlements this will be for all other staff, including those on non-standard leave years. We will be working with medical colleagues to extend this during 2017/18.

3. When will this start if I have a non-standard leave year?

The EASY process for those with a non-standard leave year will start from the beginning of their next individual leave year, after 1st April 2017.

4. Can EASY manage non-standard leave years?

Yes, these will be set up as identified by managers when data is requested. The EASY process for those with a non-standard leave year will start from the beginning of their next individual leave year.

5. What will happen to the carry forward leave from 2016/17?

Once your department/team is live you will be able to add your carry forward from 2016/17, this will then be added to your entitlement for 2017/18 when approved by your manager.

6. When will I be able to check my record and enter any carried forward leave from 2016/17?

Your manager will be told when the records for your department are ready. We expect this to be in March 2017.

7. Can EASY manage multiple managers?

Yes.

8. What support will be available?

Managers will have access to a drop in session at each main site or can request a call, via HR Direct, if they wish to discuss any matter in detail. GoTo sessions may be arranged for BD and other remote managers on request.

Guidance will be available in March covering both the requesting and approving annual leave processes.

Implementation – data population and validation (for managers)

9. Why am I being asked to confirm information and data?

Managers are being asked to confirm approval requirements for their team(s), if the leave entitlements for each of their team include or exclude bank holidays and to identify if any of their team has any other arrangements we need to build in before the start of the leave year (e.g. a non-standard leave year or previous service not recorded).

10. Do I have to include carry forward in the entitlements?

No, these will be entered (requested) in EASY by each individual for you to approve at go-live in March/April 2017.

General – bookers/requesters

11. How does EASY know what my leave entitlement is?

The system holds the annual leave 'scheme' details and your hours and length of service from ESR. From this it automatically calculates the annual hours leave you are due. If you work standard (7.5 hour) shifts your entitlement will not include bank holidays (as you will take or work a standard day for each bank holiday).

12. When will I be able to make a request for annual leave?

Each new leave year is made available in EASY at the beginning of the previous leave year. For example the annual leave year 2018/2019 will be available from 1st April 2017.

Select the correct leave year start date from the drop down (top right) before making your request.

Leave Year Start	1st April 2017 ▼
	1st April 2017
	1st April 2016
	1st April 2015

Your department may have some local arrangements specifically for your team. This might mean that although you can make a request in EASY it would not be considered for approval until a set point in time.

Examples (not exclusive) of this could be at Christmas or for school holidays and would allow all requests to be available before any are considered/approved. This is up to your local manager to determine.

13. Can I check my leave entitlement in EASY?

EASY holds the annual leave 'scheme' details and your hours and length of service from ESR. From this it automatically calculates the annual hours leave you are due. If you work standard (7.5 hour) shifts your entitlement will not include bank holidays (as you will take or work a standard day for each bank holiday).

If you work part-time or non-standard shifts then your entitlement will include bank holidays and you must book time off when you are taking a bank holiday off (other than if it is a normal non-working day)

To see the calculation of your annual leave hours click on the  icon next to your base entitlement.

Base Entitlement  307.50 Hours

If you think there is something wrong then speak to your manager who will check and ask for your record to be amended if necessary.

14. Will EASY automatically increase my annual leave entitlement when I achieve 5 or 10 years' service?

Yes.

15. How will I know if my request has been approved?

The leave will move from **Submitted Requests** to **Authorised Requests**.

16. How will I know if my request has been rejected?

The leave will move from **Submitted Requests** to **Rejected Requests**.

17. How does my approved leave get transferred to ESR to generate any pay due?

Once the approved leave dates have passed the leave will move from

Authorised Requests to **Taken Leave**.

This is then extracted to ESR at the end of the leave period.

18. How do I record/request a few hours or half a day annual leave?

Input the same date for the start and end of the annual leave and input the required number of hours required.

19. Can I cancel a request for leave once it has been made?

Yes. You will be able to **Withdraw** your request. You should advise your manager that you are withdrawing a request.

20. Who will authorise my annual leave?

Usually your line manager will approve or reject leave requests. Approvers are set up as identified by managers.

21. How will I know how much leave I have taken/got left?

The section at the top of the screen summarises the position for the leave year selected.

		Leave Year Start	1st April 2016	View Calendar
Joined NHS	26th November 1979	Assignment Start	24th September 2001	
Base Entitlement	292.50 Hours	Leave Requested (not authorised)	0.00 Hours	
Bank Holidays	Included in entitlement	Leave Authorised (not taken)	41.67 Hours	
Leave Bought Forward	0.22 Hours	Leave Already Taken	241.67 Hours	
Total Entitlement	292.72 Hours	Leave Carried Forward	0.00 Hours	
Remaining Leave	9.38 Hours	Overall total this year (including planned)	283.34 Hours	

22. When do I have to request/record carry forward?

This should be agreed with your manager before the end of the annual leave year. In EASY requests for carry forward annual leave can be entered during the year, but must be entered and approved by the end of April of the 'carry forward to' year.

When requesting carry forward please check that the correct leave year has been selected.

In the example below the carry forward is from leave year commencing April 2016 (i.e. 2016/17) to leave year 2017/18. You may wish to leave a comment, particularly if the carry forward is exceptional.

Carry Leave Forwards				
Take From	Days	Hours	Comment	
01 Apr 2016		37.50		

23. Can I see who else has leave booked in my department?

Individuals can only view their own EASY record; this is for security and data protection reasons. Managers may choose to periodically print a calendar view (for annual leave **only**), or alternatively maintain a diary or other local record.

24. Can I view the annual leave I have taken?

Yes. On the top right-hand side – click the  button to scroll through a monthly calendar view of leave taken.

25. If I buy additional annual leave when will my record be updated?

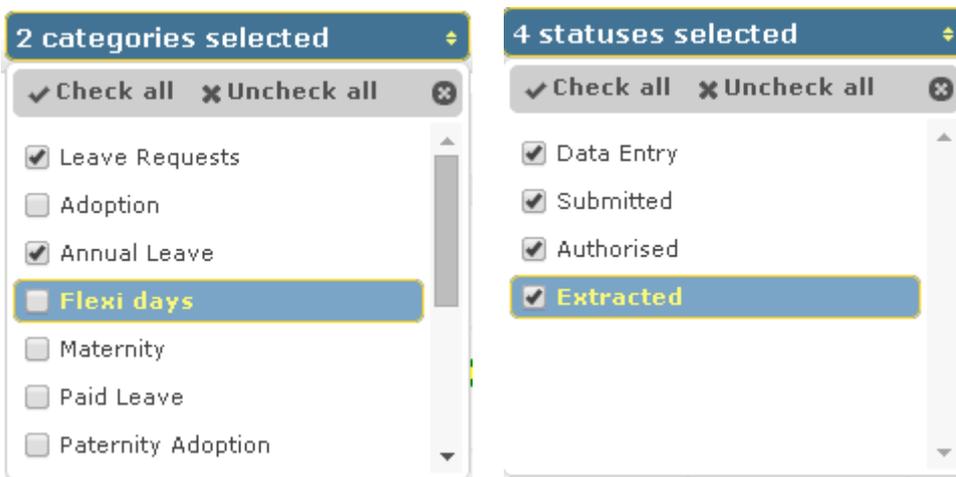
Your record will be updated when the payroll deductions commence, this is usually in June each year if you have a standard leave year.

26. What do I do if I make a late/emergency request for annual leave, which means that it isn't requested or approved until after I have taken the time off?

You will have agreed this with your manager at the time and can then make the annual leave request in EASY up to 1 month after the date(s) have passed, once approved these will then flow through the system in the normal way.

27. Can I view my other absences?

Yes. In the calendar view you can use the 'categories' and 'statuses' to view your own leave and absences (including sickness). You won't be able to see those absence types which are not recorded in EASY – for example Maternity, Adoption, Paternity, Flexi days and Shared Parental leave.

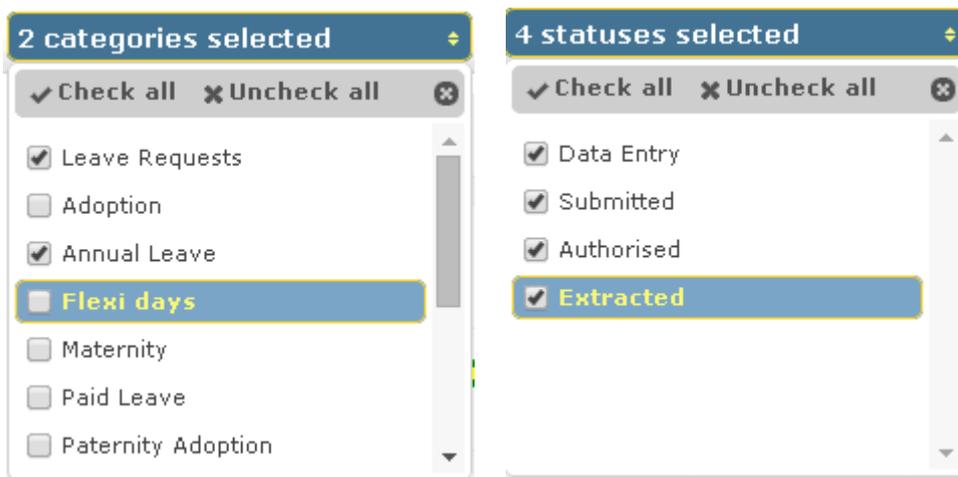


General – approvers

28. Can I view the leave booked/requested by my team?

Yes, you can see an individual record and also see a calendar overview, which you can filter by type of absence and which people you want to include.

In the calendar view use the 'categories' and 'statuses' to filter by type of absence. You won't be able to see those absence types which are not recorded in EASY – these are Maternity, Adoption, Paternity and Shared Parental leave.



Select the people you want to include by clicking on the 'assignments selected' box.



29. Will I be able to tell when a request is made, or who made their request first?

Yes, each request is time and date stamped, so you can tell which request was made first.

Requested At
17th October 2016 21:38
12th October 2016 09:52
16th October 2016 20:36

30. Will this stop me setting specific arrangements for my team’s leave requests, such as not considering leave requests for Christmas until a certain date?

No. You may have specific arrangements to suit your department’s needs, however as these are different depending on each department’s needs; the system does not have any restrictions once a leave year is open. This would allow you, for example, to set a date at which you will consider requests for certain leave periods.

This would allow you to consider, for example, previous leave taken at Christmas before approving any requests for the coming year.

You should ensure all your team are aware of any local arrangements. Then it is simply a case of not considering/approving any requests made until the date you have set is reached.

31. Can I see other absences including sickness in the calendar as well as annual leave?

Yes - you can select the absences you wish to see in the calendar.

32. When do I have to approve carry forward of annual leave?

This should be agreed with you before the end of the annual leave year. In EASY requests for carry forward annual leave can be entered at any point during the year, but must be entered and approved by the end of April of the 'carry forward to' year. When approving carry forward please check that the correct leave year has been selected.

33. Do I also need to record annual leave taken in EASY once we are using the request and approve process?

No. Once the dates of approved annual leave have passed then the annual leave will move from approved to leave taken and will be transferred to ESR. This will generate any payment due.