

## How to Calculate an Employee's Leave Entitlement

The guidance below will assist with checking the annual leave entitlement for an employee leaving the Council's employment and the completion of the leaver form on MyView.

If the employee currently has a period of sickness absence exceeding 3 continuous months, or is currently on Maternity / Parental Leave, please email the MyView team at [myview@pkc.gov.uk](mailto:myview@pkc.gov.uk) to request a revised annual leave calculation.

**A worksheet is included to assist with the calculation of employees' leave entitlement and remaining balance.**

### Step 1 - Revised Annual Leave Entitlement.

Employees and Managers should check the Annual Leave Calculator on eric to calculate an employee's revised leave entitlement up to their last day of paid employment. The termination date should include any annual leave the employee is taking beyond their last working day.

- To do this, you will need to know the employees **Current Contractual Hours** and **Original Start Date**. You can find this information on MyView by clicking on the employee's name on your **Team Selector**, and a new pop up will appear as shown below. Go to the **Current Post** tab and take a note of the required information.



Terry Rayburn PKC Manager (TRTEST)			
Title	MISS		
Forename	Terry		
Surname	Rayburn		
Personal Details			
Current Post			
Forenames	Terry	Surname	Rayburn
Original Start Date	01/01/2022	Current Start Date	01/01/2022
Pay Group	GENERAL	Current Post	PKC Manager
Post Start Date	01/01/2023	Current Contractual Hours	36
Current Occupancy Type	Full Time Permanent	Current Location	Pullar House
Current Pay Grade	TASS		
Additional Post Information			

- Go to the relevant [Annual Leave Calculator](#) on eric.
- The annual leave calculator will open in Excel and the pink areas of the spreadsheet requires information to be entered by the manager/employee.
- Find the employee's "**Year of Start Date**" on the spreadsheet and enter their weekly contracted hours against this year.
- Enter the date "01/01/2018" into the "**Start Date of Contract**" field of the Annual Leave Calculator unless the employee started part way through the year.
- Enter the employee's last day of paid employment into the "**End of Contract**" field.
- "**Leave Entitlement (hours) for part leave year**" will then display the revised leave entitlement.
- Record the entitlement figure (hours) generated on Step 1 of your worksheet.

In the example below, the employee started in 2015, works 30 hours per week and has confirmed their end date as 30/09/2018. The employees revised leave entitlement is 157.07 hours.

Year of start date	Annual Leave Days plus 7 Public Holiday Days	Hours worked as per your contract (eg 36 hours for full-time, 18 hours part-time)	Annual leave & Public Holiday (hours) for a complete leave year	Start Date of Contract (DD/MM/YYYY) - No date before 01/01/2018	End Date of Contract (DD/MM/YYYY) - No date beyond 31/12/2018	Number of calendar days (including weekends) in period of employment	Leave Entitlement (hours) for part leave year
Example - 2018	32	36	230.40	01/01/2018	31/12/2018	365.00	230.40
2018	32		0.00			1.00	0.00
2017	33		0.00			1.00	0.00
2016	34		0.00			1.00	0.00
2015	35	30	210.00	01/01/2018	30/09/2018	273.00	157.07
2014	36		0.00			1.00	0.00
2013	37		0.00			1.00	0.00

### Step 2 - Carry forward.

If your employee is due to leave prior to the 31 March, you will need to include any applicable carry forward leave from the previous leave year into the calculations. To do this:

- Login into MyView and go to your **MyPeople tab**.
- Click on **“MyTeam’s Leave Balance”**
- Click on **“Time Management – Calendar View”**
- Select the employee, scroll to the bottom of the screen and click on **“View Entitlement Details”**.
- If the employee had any leave carry forward from the previous leave year, it will be displayed as below.

Post	: CDS HR Assistant
As at Date	: 30/01/2018
Unit Type	: Hours
Entitlement	: 252
Carry Forward	: 14.4
Carry Forward Used	: 14.4
Carry Forward Use By Date	: 31/03/2018
Taken	: 14.4
Booked	: 201.6
Current Balance	: 252
Outstanding Balance	: 50.4

To include the correct amount of carry forward to your calculations, there are some scenarios you may need to consider:

- Employee leaving by 31<sup>st</sup> March – the carry forward total should be added to the entitlement calculated at step 1.
- Employee leaving after 31<sup>st</sup> March – if carry forward total and carry forward used are the same amount, then add the carry forward total to entitlement calculated in step 1.
- Employee leaving after 31<sup>st</sup> March – add the carry forward **used** amount to entitlement calculated at step 1. e.g. if the employee has a carry forward amount of 36 hours and

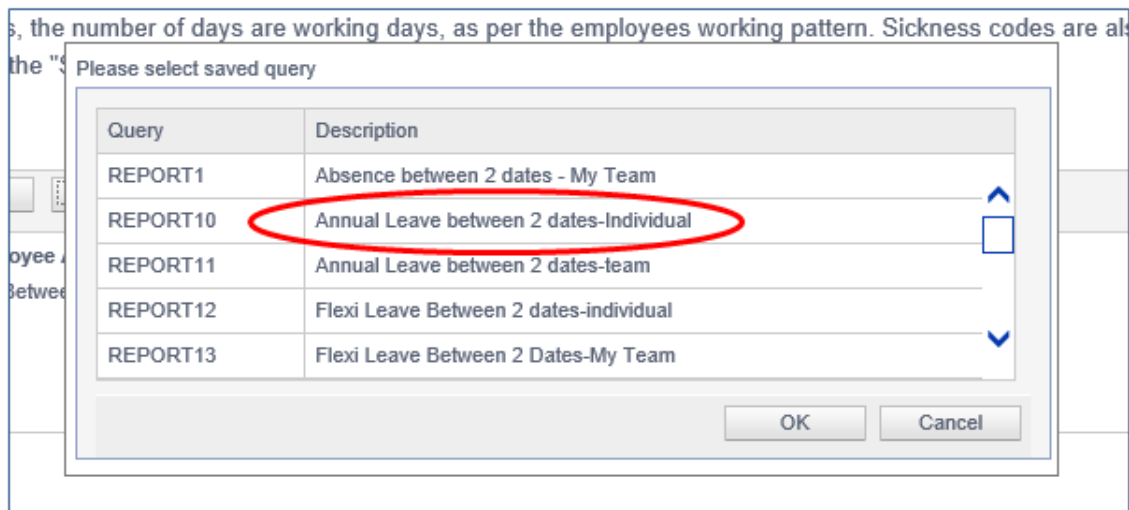
has used 21.60 hours, record this amount on the worksheet as the employee will have lost 14.40 hours.

Please note, MyView will not show the correct annual leave entitlement and balance until the date of termination has been approved by Payroll. Only use this area of MyView for checking the employees Carry Forward figures.

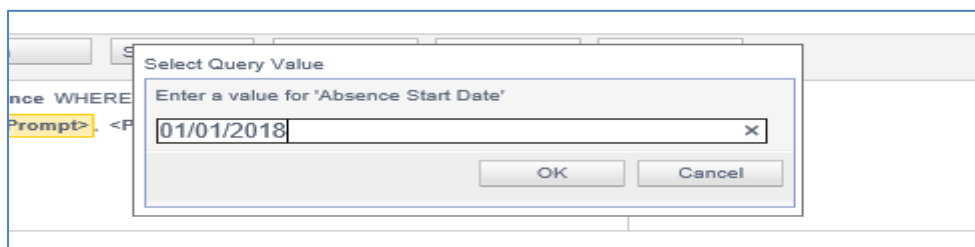
### **Step 3 – Leave already taken and booked**

To calculate the employee's balance, you will need to check leave already taken/to be taken. To do this:

- Go to the **MyPeople** tab.
- Find the relevant employee on your Team Selector and take a note of their Employee Number.
- Go to **Query Tool** and click on **"Open"**
- Click on the report titled **"Annual Leave between 2 dates – Individual"**.



- Click **"OK"** and then click on **"Execute"**.
- Enter the **"Employee Number"**.
- Enter the date **"01/01/2018"** into the **"Absence Start Date"** field unless the employee started part way through the year, then enter their start date.



- Click **"OK"** and the **"Absence Start Date"** field will appear again.
- Enter the employees last day of employment and click on **"OK"**
- The report will show the **"Total Hours Taken"** for each period of leave authorised. Total all the hours against each period of leave and record the figure on Step 3 of your worksheet. You can **"Export"** the report into Excel if required.

## **Step 4 – Revised Annual Leave Balance**

The final step is to calculate how many hours the employee has left to take prior to their termination date. To do this:

- Add the total hours recorded at Step 1 and Step 2 (if applicable) to give the employee a revised Annual Leave Entitlement.
- Deduct the total hours recorded at Step 3, from the employee’s revised Annual Leave Entitlement.
- The calculated figure will be the employee’s outstanding leave that they should take prior to their termination date. Only in exceptional circumstances should the outstanding leave be paid in lieu.
- If the employee has taken more leave than accrued, specify this on the termination form to authorise payroll to make the relevant deductions from the employee’s final payment.

If you have any leave queries when completing the leaver form, please email the MyView Team at [myview@pkc.gov.uk](mailto:myview@pkc.gov.uk) or telephone on 01738 4(75555), selecting option 5.

### **Annual Leave Calculation Worksheet**

If the employee has a current sickness absence exceeding 3 months, is on Maternity / Parental Leave or has Banked Leave, please email [myview@pkc.gov.uk](mailto:myview@pkc.gov.uk) to request a revised calculation.

<b>Calculating Leave</b>	<b>Tools to use</b>	<b>Total Hours</b>
<b>Step 1.</b> Revised Annual Leave Entitlement	<a href="#">Annual Leave Calculator</a>	
<b>Step 2.</b> Carry Forward Leave (if applicable)	<a href="#">MyView</a> –MyTeam’s Balance – “View Entitlement Details”	
<b>Step 3.</b> Total Annual Leave already taken / booked	<a href="#">MyView</a> – Query Tool Report – “Annual Leave between 2 dates (Individual)”	
<b>Step 4.</b> Revised Annual Leave Balance	Total Hours recorded on Worksheet Step 1 + Step 2 (if applicable) – Step 3 = revised annual leave balance	