🌴 Holiday Schemes and Settings

Set up one holiday scheme which will accurately calculate the holiday entitlements of employees, even if they are not working a full standard week

There are two steps to setting up holiday Schemes

1. Setting up Holiday Schemes
2. Assigning Holiday Schemes to Employees
3. Dealing with Part Time Employees
4. Dealing with Exceptional Employee's

1. Setting up Holiday Schemes

1.1 Opening the Company Holiday Schemes Screen

a) Click on **Company**

b) Click on **Holiday configuration**

c) Click on **Holiday Schemes**

Note: Click on the **Browse** tab to view all holiday schemes that have set up.

1.2 Adding A New Holiday Scheme

a) Click on the **Add** button (*sub screen toolbar*)

1.2.1 Assigning a Name to the Scheme

Key in a scheme name (*e.g. Part Time/Hourly Holiday Scheme*)

1.2.2   Selecting Options

1.2.2.1 Taking Leave in Hours or Days

Select whether the employee takes their holidays and absences in hours or days (*in the case below, the employees will take their holidays/absences in hours*).

1.2.2.2 Carrying Over Holidays

If an employee has not taken all of his/her leave entitlement during the year, they may carry over unused leave to the next year. In WizHR, it is also possible to cap the number of days an employee may carry forward to the next year.

Example:

For instance an employee may have leave entitlement of **20** days. That employee may have taken only **15** days annual leave. If you tick the carry over unused leave, WizHR will carry forward the **5** days, which the employee didn't taken. In which case the employees' leave entitlement for the next year will be **25**.

However, if you capped that employees leave entitlement to **3** days. Then WizHR will only carry over 3 of the 5 days, in which case the employees leave entitlement for the following year will be 23 and not 25. Effectively, the employee will have lost two days leave entitlement.

In the case below, employees are entitled to carry forward unused annual leave to the following year.

Effectively, there is no cap on the number of hours an employee may carry forward (*hence, the 1000 hours*)

1.2.2.3 Setting other variables

a) Weekends

Include Weekends on Holiday Calculations. In some situations it may be necessary to include Saturdays and Sundays when calculating leave entitlements.

> #### Example:
>
> For instance John is employed by a factory as a shift worker. He takes a Friday, Saturday and Sunday as annual leave, this will be calculated as **three** days of his holiday entitlement if the '**Include Weekends in Holiday Calculations**' is ticked.
>
> In the case below, weekends are not calculated. Therefore if any employee on this holiday scheme takes a Friday, Saturday, and Sunday, WizHR will calculate leave taken as **one** day.

b) Holiday Exceptions[1]

Include Holiday Exceptions in Holiday Calculations. In some situations it may be necessary to include Bank Holidays etc. when calculating leave entitlements.

> #### Example:
>
> For instance Mary is a Nurse. She takes the day before and after St. Patrick's day as annual leave, this will be calculated as **three** days of his holiday entitlement if the '**Include Holiday Exceptions in Holiday Calculations**' is ticked.
>
> In the case below, Holiday Exceptions is **not** ticked. Therefore, any employee on this holiday scheme who takes annual leave which spans public holidays, the public holiday days will not be included in the annual leave entitlement

☐ Include Weekends in Holiday Calculations

☐ Include Holiday Exceptions in Holiday Calculations

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[1] See Appendix I for Holiday Exceptions

1.2.3   First Year of Service

1.2.3.1 Pro Rata Calculations

If an employee joins the organisation at some point **other** than the beginning of the holiday year, that employee will not be entitled to the full annual leave entitlement for that year. WizHR will automatically calculate the pro rata allowance for that employee.

> **Example:**
>
> A company's holiday year spans from the 1st January to the 31st December. Barry joins the company on the 1st June. Barry is assigned a holiday scheme that entitles him to **20** days annual leave in a full year. Since Barry has joined the company half way through the year, he is only entitlement to half of that entitlement, 10 days (*pro rata calculation*)

1.2.3.2 Distribution of Annual Leave

An employee is entitled to an annual leave allowance. WizHR will allow you to specify how that leave allowance should be distributed through out the year. There are two options:

  a)   Take the leave allowance for the year, e.g. 20 day and divide it by 12 (*i.e. 1.66 days per month*)

  b)   Specify the number of days per month

In the example below, the leave allowance is divided by 12

It is possible to **manually** specify the number of days/hours an employee is entitled to per month.
• Uncheck this box
• Key in the number of Days/Hours they are entitled to here

1.2.3.3 First Month of Employment

WizHR gives you to option to indicate when during the first month an employee is entitled to their monthly leave allowance. The options available are:

• The employee must work all days in the month before they are entitled to their monthly allowance (**All Days**)

• The employee must be in the employment of the company a specified number of calendar days before they are entitled to their monthly allowance (e.g. 20 **calendar days**)

• The employee must be in the employment of the company a specified number of working days before they are entitled to their monthly allowance (e.g.15 **working days**)

In the case below, an employee who is assigned this holiday scheme must work out all days of the month before they can receive their annual leave entitlement for the month

NOTE:
Do NOT key in a number of days here if you select **ALL DAYS**

1.2.4   Assigning Allowances

Employees may gain service days/hours depending on how long they remain employed by the organisation. WizHR will automatically assign those days to the employee if they have worked for the organisation for a specified length of time.

Example:

Cormac has worked for Wiztec for 5 years. His current annual allowance is **20** days. On his **sixth** year with the company, he will be entitled to **1** extra days allowance. Giving him an overall allowance of **21** days

In the example below, the leave allowance is calculated in hours.

Note: It is not possible to combine hours and days when calculating leave entitlements. Therefore, when you are adding service days for employees who are on an Hourly Leave Scheme, the days must be converted into hours.

The number of hours will depend on what the organisations working day is. For instance, if your working week is 37.5 hours. Then your standard working day is **37.5 / 5 = 7.5** hours.

- From **0 to 5 years** an employee is entitled to **144 hours** annual leave.
- In the sixth year of employment, an employee is entitled to 144 hours plus an additional service day (*i.e. 7.5 hours*). Therefore, the employee is entitled to **144 + 7.5 hours = 151.5 or 144 hours + 1 service day**
- In the eleventh year of service, an employee is entitled to another additional days service (i.e. 7.5 hours). Therefore the employee is entitled to **151.5 + 7.5 = 159** hours or 144 hours + 2 service days.

Allowance	Service From (Years)	Service To (Years)
144	0	5
151.5	6	10
159	11	100

Basic 144 hours + additional service day of 7.5 hours

Additional Notes:

- When setting up a holiday scheme, the scheme will handle either hours or day and not a mixture of both
- An employee may only be assigned one holiday scheme
- In the Company Holiday Schemes screen, if you select that an employee must serve **All Days** for their first month, do NOT also key in a number of days.

2.   Assigning Holiday Schemes to Employees

The holiday scheme is a mandatory field that must be assigned to every employee in WizHR. Once an employee is set up with a holiday scheme, at any time it is possible to change the scheme the employee is assigned to

2.1   Changing Holiday Schemes

2.2.1   Changing from a Day Holiday Scheme to another Day Holiday Scheme

- Open the **Employee Details** Screen (Master Details)
- Click on **Edit** (Sub Screen toolbar)
- Click on the **Leave** tab
- Click on the drop down arrow to the right hand side of **Scheme**
- A list of Schemes appears (*these are the scheme which were set up in the Company Holiday Screen*)
- Select an alternative scheme for the employee
- Click on **Save** (Sub Screen toolbar)
- WizHR will automatically calculate the employees new leave entitlement based on the **Scheme Effective Date** (*this will usually be the employees Date of Join*).

2.2.2   Changing from a Day Holiday Scheme to an Hourly Holiday Scheme

- Open the **Employee Details** Screen (Master Details)
- Click on **Edit** (Sub Screen toolbar)
- Click on the **Leave** tab
- Click on the drop down arrow to the right hand side of **Scheme**
- A list of Schemes appears (*these are the scheme which were set up in the Company Holiday Screen*)
- Select an alternative hourly scheme for the employee
- Click on **Save** (Sub Screen toolbar)
- The Absence Units Change Wizard appears. Click on Next
- The Conversion Rules dialog box appears. Key in the number of hours there are in one standard day (e.g. 7.5 in a 37.5 hour working week)
- Click on Next
- Click on Finish
- WizHR will convert this employees Holiday and Absence days to hours based on data you have supplied.
- WizHR will automatically calculate the employees new leave entitlement based on the **Scheme Effective Date** (*this will usually be the employees Date of Join*).

3.   Dealing with Part Time Employees

WizHR deals effectively with part time employees when allocating annual leave entitlements.

a) Set up an hourly holiday scheme (see part 1 of this document). The scheme allowances (*leave entitlements*) should match those of an employee who works full hours (*e.g. 37.5*)

b) Assign this Holiday Scheme to the part time employee

c) Assign a Whole Time Equivalent[2] (WTE) to that employee

WizHR will automatically work out how many hours the part time worker is entitled to based on the WTE.

Example

- Jean is a part time worker with Wiztec.
- Wiztec's standard 5 day working week of 39 hours. This equates to 7.8 hours per day.
- Wiztec's annual leave entitlement for a full time hourly worker (39 hrs * 48 wks) / 100 * 8 =149.76 hours for the first 5 years. There after an employee is entitled the extra service days.
- It has been agreed between Jean and Management that Jean works a 3 day week.

Calculating Jean's Hours

- In total Jean will work (3 * 7.8) = 23.4 hours per week
- On average Jean will work 23.4/5 = 4.68 hours per day. This figure is important. If Jean takes a day's annual leave, her day is equivalent to 4.68 hours.

Calculating Jean's WTE

- Jean will have a WTE of 23.4 / 39 = 0.6 (*where a WTE of 1 is a full time worker*)

Assigning Jean's Holiday Scheme

- Jeans details are keyed into WizHR and she is assigned to the Hourly Holiday Scheme.
- If she were a full time worker (*i.e. with a WTE of 1*), she would be entitled to 149.76 hours annual leave per year. However, Jean is a part time worker, with a WTE of 0.6, this entitles her to 89.85 hours leave per *year (149.76 * 0.6)*. WizHR will automatically calculate this allowance.

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[2] A decimal representing the portion of a full working week, that the part time employee actually works. Example: If an organisation has a standard 40 hour working week and a part time employee in that organisation works 20 hours per week. That employee is working ½ a standard working week, therefore having a WTE of 0.5

4.   Assigning Holiday Schemes to Employees

A situation may occur where an employee does not conform to the organisations usual holiday schemes and allowances. For instance, it may be the case that the employee has negotiated additional holiday days at the interview stage.

Complete the following steps:

- Key in the employees' details to WizHR
- Click on the **Leave** tab
- Assigned the employee to a holiday scheme (*a daily scheme if he/she is a full time worker or an hourly scheme if he/she is a part time worker*). The holiday scheme you assign the employee is important where settings, other than the allowances (*leave entitlements*) apply (*e.g. whether to use weekends in calculations, etc.*)
- Click on the **Override Hol Allowance** check box
- The **Leave Allowance** field changes colour from yellow to white
- Click in the **Leave Allowance** field, delete the existing allowance and key in the new negotiated allowance
- Click on **Save** (*sub screen toolbar*).

4.   Assigning Holiday Schemes to Employees

Holiday Exceptions

To view holiday Exceptions:

- Click on **Company** (menu bar)

- Click on **Holiday Exceptions...**

- Click on the **Browse** tab. This will list all holiday exceptions (*roughly around 9*)

Roll Over Exceptions

Some holidays (*e.g. New Years Day*) will fall on the same day every year. In these cases, when the EOY[3] is run every year, these holiday exceptions will roll onto the next year. For instance 01/01/2002 becomes 01/01/2003.

Note: It is important if you use holiday exceptions in your holiday calculations that you manually key in all other exceptions (*e.g. Bank or public holidays*)

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[3] End of Year Maintenance. This program should be run on the 31st December every year to close absences and holidays for the previous year.