

0845 094 1995

These instructions take you through the process of using the built in leave function.

OmniRota includes a very useful leave function which includes the option to track sessions taken against an annual entitlement. Leave can be added:

- Manually by the rota administrator
- By individual staff members, who can apply for leave when logged in with their login ID, which must then be authorised by the rota administrator

Once leave has been added to the rota, staff who are on leave will not be selected to work.

Types of Leave

You can set the different types of leave that you wish to use on your rota. From the 'Settings' tab select 'Leave Type' to access the page below:

Leave type							
Name	Short Code	Icon	Order	Display Balance ?	Display ?	Active ?	Action
Annual Leave		х.	10	Yes	Yes	Yes	P O
Study Leave		.	20	Yes	Yes	Yes	🤨 \Theta
Sick Leave		۲	30	Yes	Yes	Yes	9 O
Special Leave		*	40	Yes	Yes	Yes	🤨 🕒
Maternity		*	50	Yes	Yes	Yes	9 0
Other		•	60	Yes	Yes	Yes	20

There are a number of leave types included as standard but should you wish to add further leave types then click on the '+' icon to do so.

Clicking on any of the types of leave opens the dialogue box below from which you can change many settings relating to how that leave type is managed and how it is displayed in the staff file.



The features available within this dialogue box are:

Name: Name of leave type

Page 2 of 9



Short Code: not currently in use but will be used in future release

Icon: Allows you to select an icon (palm tree, red cross etc.) to represent that leave type within the iPhone app.

Order: Selects the order in which leave types will be displayed. Note that is usual to number in tens (10, 20, 30...) in order to allow later entries to be inserted at any location within the list.

Display Balance: This determines whether the balance of this leave type will be displayed in the staff file. If set to 'Yes', and the leave allowance is greater than 0 then it will be displayed with a progress bar as below:

Annual Leave



If set to No, then it will be displayed without the progress bar

Display: Determines whether this leave type will be displayed at all.

Follow Accrual Period Quota: If set to 'Yes', the leave quota for each staff member will be taken from that set via the 'Accrual Period and Quota' option accessed via the 'Settings' tab. The total leave quota will be the sum of this year's leave quota plus any leave carried over. If not it will be derived from the Fixed Allowance set below.

Fixed Allowance: The allowance for any leave type which has a consistent allowance for all staff can set the number here. Please note that this field will be in use only if the 'Follow Accrual Period Quota' (above) is set to 'No'.

Allowance Shared with and Allowance From: It is possible to link two leave types such that sessions taken from one leave type count against another type of leave also.

Exclude from Overall: Allows you to exclude this leave type from the overall leave total. **Active:** Currently in use.

Annual Entitlement

The rota administrator can allocate all staff an annual leave entitlement including sessions carried over from previous years or TOIL. Entitlement is entered as a whole number of sessions where typically 1 session = half a day. As leave is authorised, the remaining entitlement is reduced.

Begin by setting details of your accrual period or holiday year.

<u>www.omnihrs.co.uk</u> 0845 094 1995



Page 3 of 9

From the 'Settings' tab select 'Accrual Period and Quota' to access the page below:

ې 🌒		S	Logged in	as : Andrew Bern	ind Logout			DE45 094 1995
Home	Staff List 👻	Session Type List	Rota 🕶	Reports 👻	Administrator 👻	Help 👻	Support 2	
Manage Ar	ccrual Period							
Edit Accru	al Period :	 Add New 						
			© OmniHR 201	4 - 2016 Terms	of use Privacy			

Click 'Add New' to enter the details of the holiday year on the screen below:

V L					Log	iged in	an : And	Irew De	mard Logost		Rote software	COME DB45 094 15 I thef's feet, fee and fe
Home	Staff List +	Session 1	ype List		Rota	• •	Rep	orts •	Settings •	Administrator	- Help	Support
Accrual Peri	iod Details											
From Date		_		-					To Date			
								_	to pace			
Default		0		Aug	ust 20	016			to Date			
Default Save	Cancel	0 Su	Mo	Aug Tu	ust 20 We	016 Th	Fr	D Sa	to Date			
Default Save	Cancel	O Su	Mo 1	Aug Tu 2	ust 20 We 3	016 Th 4	Fr 5	Sa 6	to bate			
Default Save	Cancel	Su	Mo 1 8	Aug Tu 2 9	ust 20 We 3 10	016 Th 4 11	Fr :	5a 6 13	ms of use Privacy			
Default Save	Cancel	0 Su 7 14	Mo 1 8 15	Aug Tu 2 9 16	ust 20 We 3 10 17	016 Th 4 11	Fr 5	5a 6 13 20	ms of use Privacy			
Default Sava	Cancel	0 Su 7 14 21	Mo 1 8 15 22	Aug Tu 2 9 16 23	ust 20 We 3 10 17 24	016 Th 4 11 18 25	Fr 5 12 19 26	5a 6 13 20 27	ms of use Privacy cersion:5.97			

Click 'Save' once complete to open the screen below:

Manage Accrual Period			
Edit Accrual Period : Jan 17	- Dec 17 • Add New		
Accrual Period Details			
From Date	01/01/2017	To Date	31/12/2017
Default	© Yes ⊛ No		
Created By	Andrew Bernard	Created Date	23/Aug/2016 12:36
Last Modified By	Andrew Bernard	Last Modified Date	23/Aug/2016 12:36
Accrual Period Quota for	Annual Leave	Last modified bate	2.37743572010 12.30
Accrual Period Quota for J	Annual Leave Quota Carried Over		LO Page Loro (L. De
Accrual Period Quota for Accrual Period Quota for Accruate Accruat	Annual Leave Quota Carried Over		Lorrog Loro 11.00
Accrual Period Quota for (Staff Name Leave Arthur Able Bryan Browne	Annual Leave		Lo ragi koro ki so
Accrual Period Quota for [Staff Name Leave Arthur Able Bryan Browne Doris Duke	Annual Leave		
Accrual Period Quota for [7 Staff Name Leave Arthur Able Bryan Browne Doris Duke Charles Campese Charles Campese Charles Cha	Quota Carried Over		
Accrual Period Quota for [7 Staff Name Leave Arthur Able Bryan Browne Doris Duke Charles Campese Edith Everage	Quote Carried Over		
Accrual Period Quota for [Staff Name Leave Arthur Able Bryan Browne Daris Duke Charles Campese Edith Everage Greg Garrett	Quote Carried Over		

This screen allows you to set the annual leave quota for each staff member and also add any leave carried over from a previous year.

Note that it is possible to create different holiday years for each staff member. We won't include a guide to that feature here as it is not likely to be used by the majority of clients. However, should you wish to access that feature then please contact us directly using the support system and we will explain how it works.



Page 4 of 9



Once you have entered details of leave quotas and sessions carried over entitlements for each staff member, click 'Save'. Note that different entitlements can be set for each category of leave using the drop down menu. This feature is useful if staff have separate entitlements to study leave and annual leave. This can then be added and tracked separately.

Note that although you can use the rota without using the leave tracker, leave must still be entered so that the system knows which staff are available to work.

Leave added manually by the rota administrator

If you have already authorised staff leave then this can be added manually to the rota.

From the 'Staff List', select the staff member for whom you wish to allocate leave.

From the screen that opens, click on the '+' icon:

Title Type [*] Max Sessions/Week	Dr Partner 6	Shift Group [®] Location Default Room	Doctors	
Email	cc@nhs.net	Print Order	4	- Leave
Phone(H)	01234 567890	Phone(M)		
Start Date		Finish Date		SI Add leave From : 26/11/2015 Show
Address				Leave ust is empty.
City		County		Leave Summary
Postcode		Gender	● Male ○ Female ○ Others	Overall
Display Text		Archived ?	◎ Yes ● No	0 sessions booked out of , Remaining :

From the dialogue box that opens, select the appropriate type of leave from the drop down menu:

Leave Details		۲
Leave Type	Annual Leave	
From Date	Annual Leave	To Date
	Sick Leave	
Session	Special Leave	Sessions
	Other	
	Maternity	
	Annual Leave	Save and Add New Cancel
	Study Leave	Leave

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0845 094 1995

Page 5 of 9



0845 094 1995

Now select the start date and then the end date of the leave period:

Leave Details									×
	A	-11							
Leave Type	Annu	ai Leav	e						
From Date							To D	ate	
Session	٥		Aug	ust 2(016		D	ons 0	^
	Su	Мо	Tu	We	Th	Fr	Sa		
		1	2	3	4	5	6		
	- 7	8	9	10	11	12	13	dd New	Cancel
	14	15	16	17	18	19	20		Leave
	-21	22	23	24	-25	26	27		
	28	29	30	31					Leave S

If the leave period is only a part of a day then select the appropriate sessions only. By default, all are selected:

Leave Details				
Leave Type	Annual Leave			
From Date	01/08/2016		To Date 05/08	8/2016
Session	Early AM, AM, PM, Evening	•	Sessions 0	•
	Check all X Uncheck all	8		v
	✓ Early AM	^	e and Add New	Cancel
	☑ AM			Leavel
	☑ Five I Evening			
				Leave Su
		-) Others	

If you are using the leave tracker then you must enter the number of sessions taken in the 'Sessions' box. A full week of leave equates to the total number of weekly sessions worked. In this case Dr. Campese usually works 6 sessions in a week so we enter '6' in the box:

Leave Details					3
Leave Type	Annual Leave]			
From Date	01/08/2016		To Date	05/08/2016	
Session	Early AM, AM, PM, Evening	٥	Sessions	6	
	Save and Close	Sav	ve and Add	New Cancel	

Now save and close.

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Page 6 of 9



0845 094 1995

Note that his remaining entitlement has been reduced to 33 sessions and his leave is now shown as approved.

Phone(H)	01234 567890	Phone(N)		Show leave From : 26/11/2015 Show
Start Date		Finish D	ate]	01/Aug/2016- 05/Aug/2016 Annual Leave, 6 session(s)
Address					
City		County			Leave Summary
Postcode		Gender	● Male ○ Fem	ale 🔍 Others	Overall
Display Text		Archived	Yes No		0 sessions booked out of 36, Remaining : 39
Notes					Login Details
					Create Login 🔥 Not created yet.
eave Details					🕂 Max Session
Accrual Date		01/01/2016	Annual Allowance	36.00	Max Session list is empty.
Rolled Over / Lie	u Accrued	3.00	Remaining	33	

Staff Members Applying for Leave

All staff members can apply for leave using their login ID. Note that if you are trying this as an administrator as part of a demo, you will need to logout and log back in again as one of the staff members as only rotaed staff members can apply for leave.

From the staff member home screen click on 'Staff List' and select 'Apply Leave':

Home	Staff List	- Session T	ype List	Rota 🔻	Help 👻				
05/Jan/	-> Apply Lea	ave				06/Jan/20	016(Tomo	rrow)	
o 8	:30 - 13:00 A	AM Surgery	Room 5			08:3	30 - 13:00	AM Dut	y Room 5
🥑 13	:00 - 18:00 P	PM				13:0	00 - 18:00	PM	
🥑 18	:00 - 20:00 E	Evening							
Previou	ıs Next								
Rota Sum	mary								



Page 7 of 9

The screen below will open showing your annual and remaining entitlement and any leave booked to date. Click on the '+' icon to apply for new leave:

						Rola software that's tast, tay and flexible,
Home Sta	aff List 🔹 Ses	sion Type List	Rota 👻	Reports 👻	Settings 🔹	Help 🔹
Apply for leave	ve				Leave From :	: 14/07/2016 To : 23/08/2017 Show
Leave Type	From Date +	To Date	Sessions	Status	View	Leave summary Jan 16 - Dec 16 •
Annual Leave	05 Sep 2016	16 Sep 2016	14	Approved	0	Overall
1 records found.						35 sessions booked out of 42, Remaining : 7
						Annual Leave
						21 sessions booked out of 42, Remaining : 21
		0	OmniHR 2014 -	2016 Terms of	use Privacy	

The box that opens is completed in exactly the same way as for administrator added leave so a completed box will look like this:

Leave Details				
Leave Type From Date	Annual Leave 04/04/2016		To Date	08/04/2016
Session	Early AM, AM, PM, Evening	٠	Sessions	7
				Apply Close

Note that the number of sessions can be left blank for the administrator to complete once approved.

Click 'Apply' and the screen below opens which now shows the new leave applied for:

Leave and	ied successfully.					
Apply for I	eave				Leave From :	14/07/2016 To : 23/08/2017 Show
Leave Type	From Da	te + To Date	Sessions	Status	View	Leave summary Jan 16 - Dec 16 •
Annual Leave	03 Oct 2	016 07 Oct 2016	6	Applied	0	Overall
Annual Leave	05 Sep 2	016 16 Sep 2016	14	Approved	0	35 sessions booked out of 42, Remaining : 7
2 records four	ıd.					Annual Leave

www.omnihrs.co.uk 0845 094 1995



Page 8 of 9

The next time the administrator logs in they will see the following screen showing them that they have leave to approve. Click on the link to approve the application.

Home	Staff List 🔻	Session Type List	Rota 👻	Reports 👻	Settings 🝷	Administrator 👻	Help 👻	Support 2
a Appl	ied Leave							
You have	1 leave waiting for you	ır approval.						
Pota Sun	mary							

6. From the new screen, tick the box and click 'Approve Selected' in order to accept the leave request.

Н	lome	Staff List 🔻	Session Type List	Rota 🔻	Reports 👻	Settings 👻	Administrator 👻	Help 👻	Support 2
Ap	plied l	eave list							
	Staff Name		Leave Type	From	n Date	To Date	Applied 😽		View
6	1	Bryan Browne	Annual Leave	30 Au	30 Aug 2016	30 Aug 2016	06 Jan 2016	10:33	0
1 1	records Approv	found. e selected							

Leave Planner

The leave planner is useful for both staff and administrators to plan leave whilst avoiding a clash with other staff members.

Click on 'Reports', 'Leave Planner'

From the screen that opens select the appropriate start date and time period for which you wish to see a report then click 'Show Report'

Home	Staff List 👻	Session Type List	Rota 👻	Reports 👻	Settings 👻	Administrator 👻	Help 👻	Support 2
Staff	8 selected					•		
Starting	Jan • 2016 •	For months 6	🔹 🖉 Shov	w Public Holiday	Show Label	Show Leave Type		
Show Re	port Down	load as PDF						
Leave Plan	ner							



Page 9 of 9



The report that opens shows a calendar view of all staff members and any leave that has been authorised:

Jan 2016	1	4	5	6	7	8	11	12	13	14	15	18	19	20	21	22	2	25	26	27	28	29
	Fri	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	М	on	Tue	Wed	Thu	Fri
Arthur Able																						
Bryan Browne	вн																					
Doris Duke	вн																					
Charles Campese	вн																					
Edith Everage																						
Greg Garrett	вн		1											1								
Florence Foobles	вн																					
Locum	вн																					
Feb 2016	1	2	3	4	5	8	9	10	-11	12	15	16	17	18	19	22	2	23	24	25	26	29
	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	Mor	T	ue	Wed	Thu	Fri	Mon
Arthur Able																						
Bryan Browne																						
Doris Duke																						
Charles Campese																						
Edith Everage																						
Greg Garrett																						
Florence Foobles																						
Locum																						
Mar 2016	1	2	3	4	7	8	9 1	0 11	14	15	16	17	18	21	22	23	24	25	28	29	30	31
	_		-						Man	Tue	Wed	Thu		Man	-		Thu		Man		Mad	

A further planner is available which shows leave balances for each staff member. This can be viewed by selecting 'Leave Balance' from the 'Reports' tab and appears as below:

Home	Stat	f List 👻	Session	Type List	Ro	ta +	Reports	Sett	ings •	Administ	rator 👻	Help	• Si	apport <mark>2</mark>	
eave Bala	Ince (For	period : Nov 15	- Oct 16, Cre	ated : 23/Aug/2	216 19:58)							I	Downlo	ad/Print	
or Period: Staff/Leave Type	V/Leave Annual Leave		• Stal	l Leave	o	ther	Hat	show	Annual	Leave 2	Study	Leave	Overall		
	Taken	Remaining	Talen	Remaining	Taken	Remaining	Taken	Remaining	Taken	Remaining	Taken	Remaining	Taken	Remaining	
Arthur Able	18	67	0	0	0	0	0	0	9	-9	0	0	29	58	
iryan Irowne	11	-11	0	0	0	0	7	-7	2	-2	0	0	20	-20	
) Duke	6	-6	0	0	0	0	0	0	0	0	6	-6	12	-12	
Charles Campese	8	-8	0	0	0	0	0	0	10	-10	0	0	18	-18	
dith everage	27	-27	0	0	0	0	0	0	14	-14	0	0	41	-41	
öreg Sarrett	10	-10	0	0	0	0	0	0	0	0	0	0	10	-10	
lorence	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

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0845 094 1995