

Back to Basics: Annual Leave

5. Annual Leave Rules

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Back to Basics Sessions



Managing Annual Leave Requests



Annual Leave Entitlements



Annual Leave Hours



Annual Leave Notifications



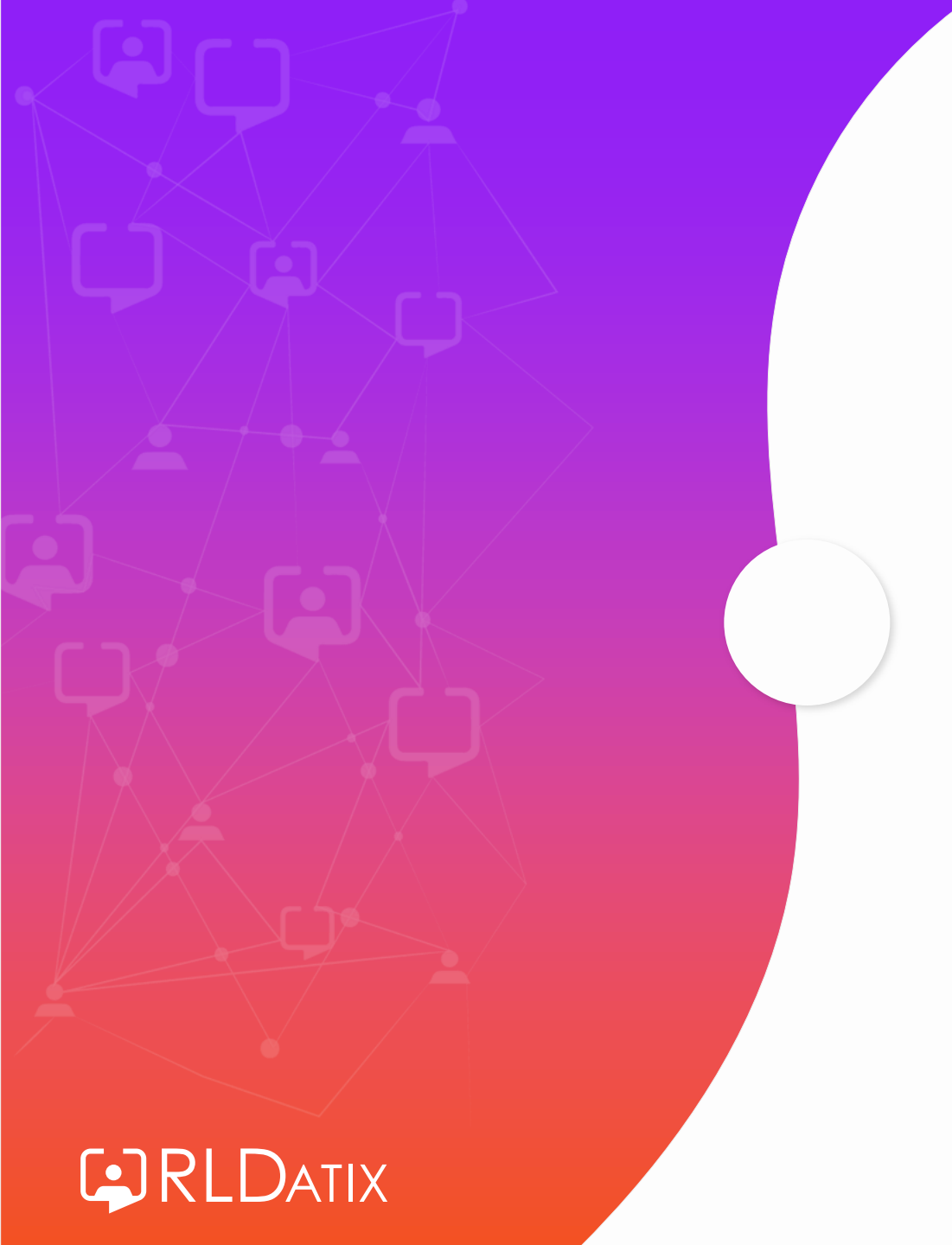
Annual Leave Rules

Objective

To understand the basics of how rules are set up and configured, as well as which key rules should be explored for Annual Leave Management.

Agenda

- Rule Basics
 - Warnings and Violations
 - Exclusions
 - Global / Unit Rules
- Annual Leave Rules
- Supporting Documentation



Rule Basics

Warnings and Violations

Reference Data > Rules > Warnings and Violations

Ref Data Actions: Rules

Ref Data Tools: Rules

Navigation: Rostering, SafeCare, Personnel, Payroll

Filters: Organisation, Payroll, Person, Unavailability, Rostering, Temporary Staffing

Warnings & Violations

Name: _____

Name	Rule Type ↑
> Availability	
> Employee Online	
> Person Unavailabilities	
> Shift Restrictions	
> Skills And Grade	
> Temporary Staffing	
> Unit Unavailabilities	
> Work Contract	
> Working Restrictions	

Organisation Payroll Person Unavailability Rostering Temporary Staffing SafeCare Attenda

Warnings & Violations

Name

Name ↑	Rule Type
> Availability	
> Employee Online	
Person Unavailabilities	
⚠ This unavailability exceeds the maximum length allowed.	Max Unavailability Length Rule
⚠ This person has more leave planned than their entitlement allows	Leave Entitlement Rule
⚠ The max percentage of staff on leave in a week has been exceeded.	Max Percent Staff On Leave Rule
⚠ This person has more leave planned than their earned balance allows	Earned Leave Entitlement Rule
⚠ This person has more study leave planned than their entitlement allows.	Study Leave Entitlement Rule
⚠ This person has more leave planned than the Entitlement Type allows.	Non Earned Entitlement Rule
❗ This person has more leave planned than the Entitlement Type allows.	Earned Entitlement Rule
⚠ Approved Unavailability cannot have zero Contracted hours.	Restrict Zero Hours Unavailability Rule
⚠ The person has exceeded the threshold for self-certified sickness days in a rolling	Maximum Number Of Self-Certified Sickness Days In Rolling Reference Period
❗ Unable to Request Unavailability Over Shift.	Prevent Leave Over Shift Rule
⚠ This person does not have enough rest after consecutive days worked.	Rest After Consecutive Days Unavailability Rule
⚠ This junior doctor does not have enough rest after consecutive days worked.	Junior Doctors Rest After Consecutive Days Unavailability Rule
⚠ This earned accrual has balance below the threshold.	Min Allowed Earned Accrual Balance Rule

Warnings & Violations

Name Unable to Request Unavailability Over Shift.
 Rule Prevent Leave Over Shift Rule
 Target Unavailability
 Scope Any

Edit Rule Definition Rule Instances

Rule Definition Details

Explanation When a person is assigned the specified Shifts on the rule, the rule will prevent Unavailability from being requested depending on whether it is set as a warning or violation.

Weighting
 30

Violation EOL Always Treat As Violation
 Warning
 Off

Exclusions

Manual Rostering Auto Rostering
 Personal Patterns Shared Patterns
 Global Patterns Global Patterns Candidate Selection
 Demand Patterns Exclude For Temporary Staff

Clear Save ?

Organisation ▾ Payroll ▾ Person ▾ Unavailability ▾ Rostering ▾ Temporary Staffing ▾ SafeCare ▾ Attendar

Warnings & Violations

Name _____

Name ↑	Rule Type
> Availability	
> Employee Online	
<ul style="list-style-type: none"> This unavailability exceeds the maximum length allowed. Max Unavailability Length Rule This person has more leave planned than their entitlement allows Leave Entitlement Rule The max percentage of staff on leave in a week has been exceeded. Max Percent Staff On Leave Rule This person has more leave planned than their earned balance allows Earned Leave Entitlement Rule This person has more study leave planned than their entitlement allows. Study Leave Entitlement Rule This person has more leave planned than the Entitlement Type allows. Non Earned Entitlement Rule This person has more leave planned than the Entitlement Type allows. Earned Entitlement Rule Approved Unavailability cannot have zero Contracted hours. Restrict Zero Hours Unavailability Rule The person has exceeded the threshold for self-certified sickness days in a rolling Maximum Number Of Self-Certified Sickness Days In Rolling Reference Period Unable to Request Unavailability Over Shift. Prevent Leave Over Shift Rule This person does not have enough rest after consecutive days worked. Rest After Consecutive Days Unavailability Rule This junior doctor does not have enough rest after consecutive days worked. Junior Doctors Rest After Consecutive Days Unavailability Rule 	

Warnings & Violations

Name Unable to Request Unavailability Over Shift.
 Rule Prevent Leave Over Shift Rule
 Target Unavailability
 Scope Any

Edit Rule Definition Rule Instances

Rule Instances 2 Records

Import Global Rules from Master
 Export Global Rules

Name ↑	Rule Type	Shift Group
Global Prevent Unavailability Over Shift Rule	Global	-
no leave over Nights	Shift Group	General Surgery

Violation

- Prevents action from being taken

Violation
 Warning
 Off

EOL Always Treat As Violation

Add Unavailability

New Unavailability Details for R


Group *
Annual Leave

Reason *
A/L - Annual Leave

Unavailability Related Reason
-

Start *
10/01/2022 07:00

Your change has not been saved



Your change has not been saved

The Annual Leave entitlement for Greep, Rachel (90000129) has been exceeded. Annual Leave total: 225 hours, entitlement: 200.00 hours.

Note

If the rule applies to a duty or unavailability that is laid down before the rule is set to a violation, then this duty / unavailability will remain in its current state until the Retest Rules option is selected, after which the unavailability would display the broken rule, and the duty will flag as red, and will display the broken rule.

Warning

- Allows action to be taken
- Marks as orange
- Displays warning on unavailability

Violation


Warning

Off

EOL Always Treat As Violation

Note

If EOL Violation is not ticked any request rules will be allowed to break. A warning will display in EOL, and it will display as a broken rule in the roster. For unavailabilities, in EOL an orange icon will display by the requested leave to indicate that it is in a requested status but has broken a rostering rule


 Annual Leave 8-22 Feb 2023

18	19	20	21
Ex3	Ex3	Ex3	Ex3
Lx3	Lx3	Lx3	Lx3
DO	DO	DO	DO

Attributes

Approved

Warnings

 **Global Non-Earned Flexible Entitlement Rule**
The Annual Leave entitlement for Greep, Rachel (90000129) has been exceeded. Annual Leave total: 225 hours, entitlement: 200.00 hours.

[Retest Rules](#)

Annual Leave

Group _____ Annual Leave _____

Unavailability Reason _____ Annual Leave _____

Start _____ 19 Apr 2023 07:00

End _____ 19 Apr 2023 23:59

Duration _____ 1 days (7.5 hours)

Requested Date _____

EOL Always Treat as Violation

- Paired with Warning
- Allows action to be taken in Allocate Optima (HealthRoster) but not EOL/Loop/ME

Violation

Warning

Off

EOL Always Treat As Violation

The screenshot shows the MEDICONLINE interface. At the top, there are navigation icons for Rostering, My Profile, and Timesheets. A dark sidebar on the left contains menu items: View Rosters, Record Availability, Available Locum Duties, Earned Accruals, and Leave. The main content area features a red error banner with a warning icon and the text: "Error The Annual Leave entitlement for Greep, Rachel (90000129) has been exceeded. Annual Leave total: 217.5 hours, entitlement: 200.00 hours." Below the banner are three tabs: Annual Leave (selected), Study Days, and Other Leave. Under the Annual Leave tab, the heading "Entitlement Periods" is visible, followed by a date range "01 Apr 2023 - 31 Mar 2024" with navigation arrows.

Off

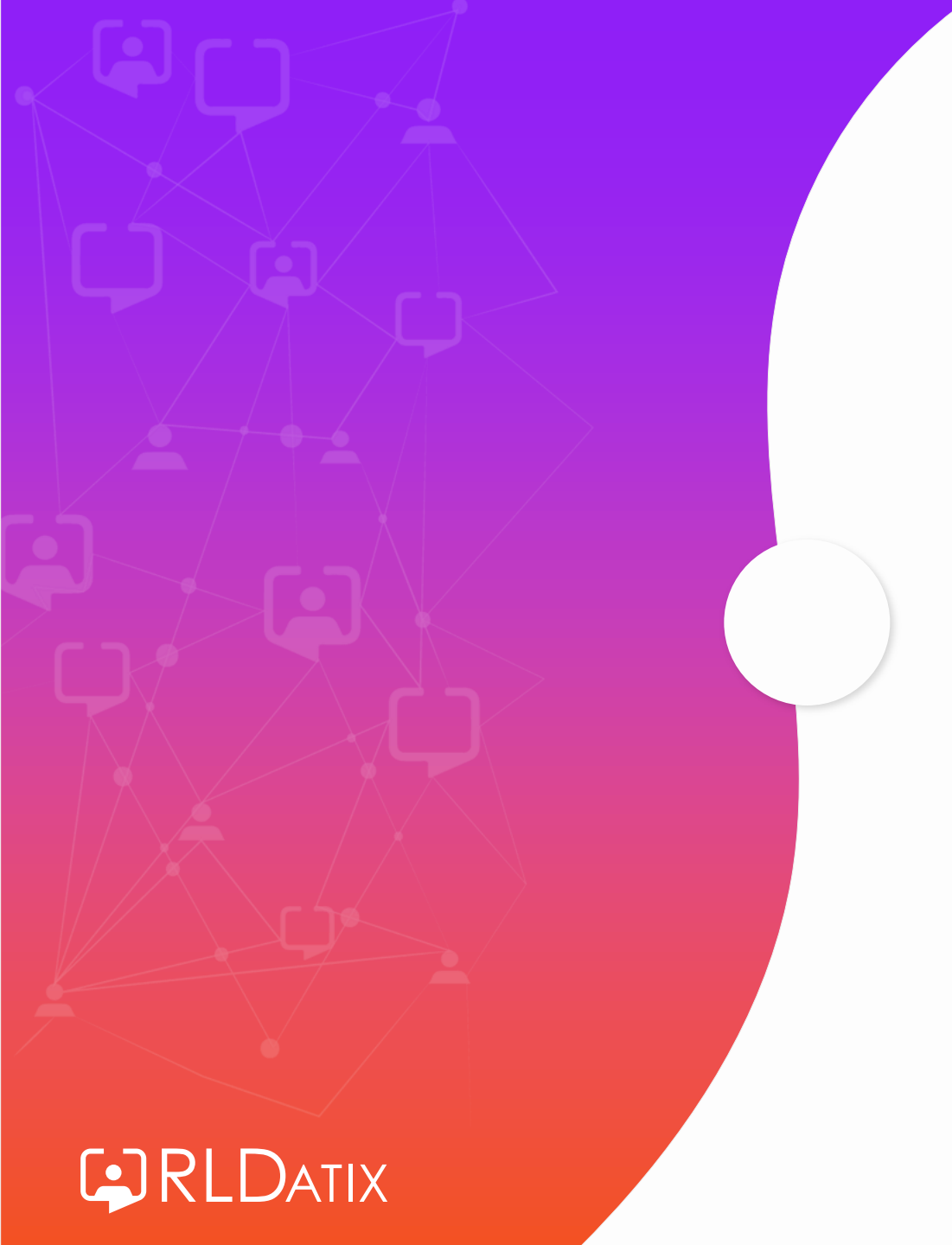
- Rule does not trigger

Violation

Warning

Off

EOL Always Treat As Violation



Exclusions

- **Manual Rostering**
Refers to all assignments that are made manually (including bookings made in EOL/Loop)
- **Autoroosting**
Refers to all assignments laid down by autoroster
- **Personal Patterns, Shared Patterns, Global Patterns or Demand Patterns**
Refers to all assignments as part of the associated pattern that are laid down by autoroster
- **Exclude for Temporary Staffing**
Refers to assignments to a staff member's non-substantive posting

Warnings & Violations

Name This person has more leave planned than their entitlement allows
 Rule Leave Entitlement Rule
 Target Unavailability
 Scope Global

Edit Rule Definition Rule Instances

Rule Definition Details

Explanation Highlights where a person's assigned leave exceeds their leave entitlement.

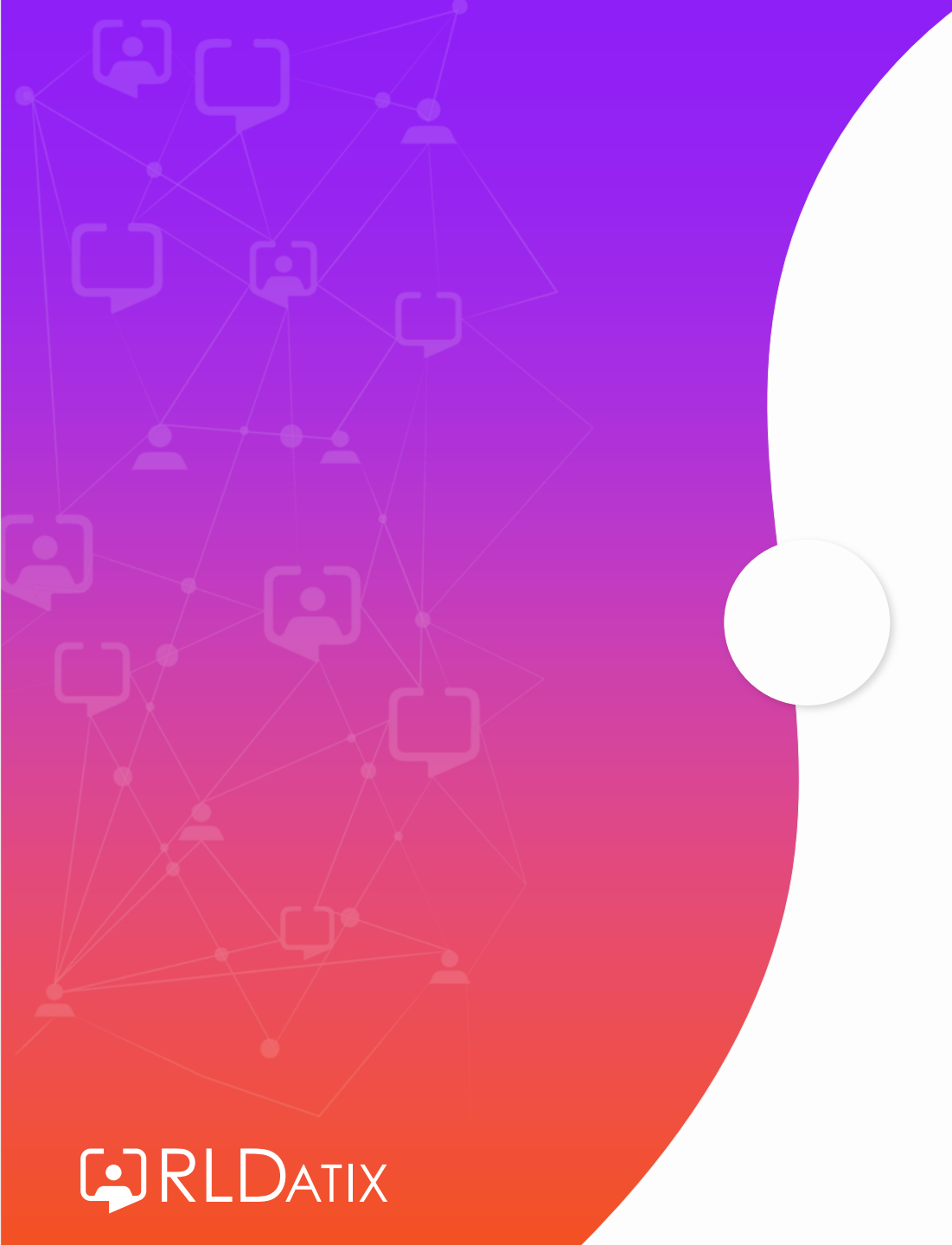
Weighting
30

Violation
 Warning
 Off

EOL Always Treat As Violation

Exclusions

<input type="checkbox"/> Manual Rostering	<input type="checkbox"/> Auto Rostering
<input type="checkbox"/> Personal Patterns	<input type="checkbox"/> Shared Patterns
<input type="checkbox"/> Global Patterns	<input type="checkbox"/> Global Patterns Candidate Selection
<input type="checkbox"/> Demand Patterns	<input type="checkbox"/> Exclude For Temporary Staff



Global Rules

Admin> Rostering Admin> Global Rules

Ref Data Actions: Rules

Ref Data Tools: Rules

Roster Admin Actions: Manage Rules

Rule Definition ✕

Warnings & Violations

Name This person has more leave planned than the Entitlement Type allows.
Rule Non Earned Entitlement Rule
Target Unavailability
Scope Global

[Edit Rule Definition](#) [Rule Instances](#)

Rule Definition Details

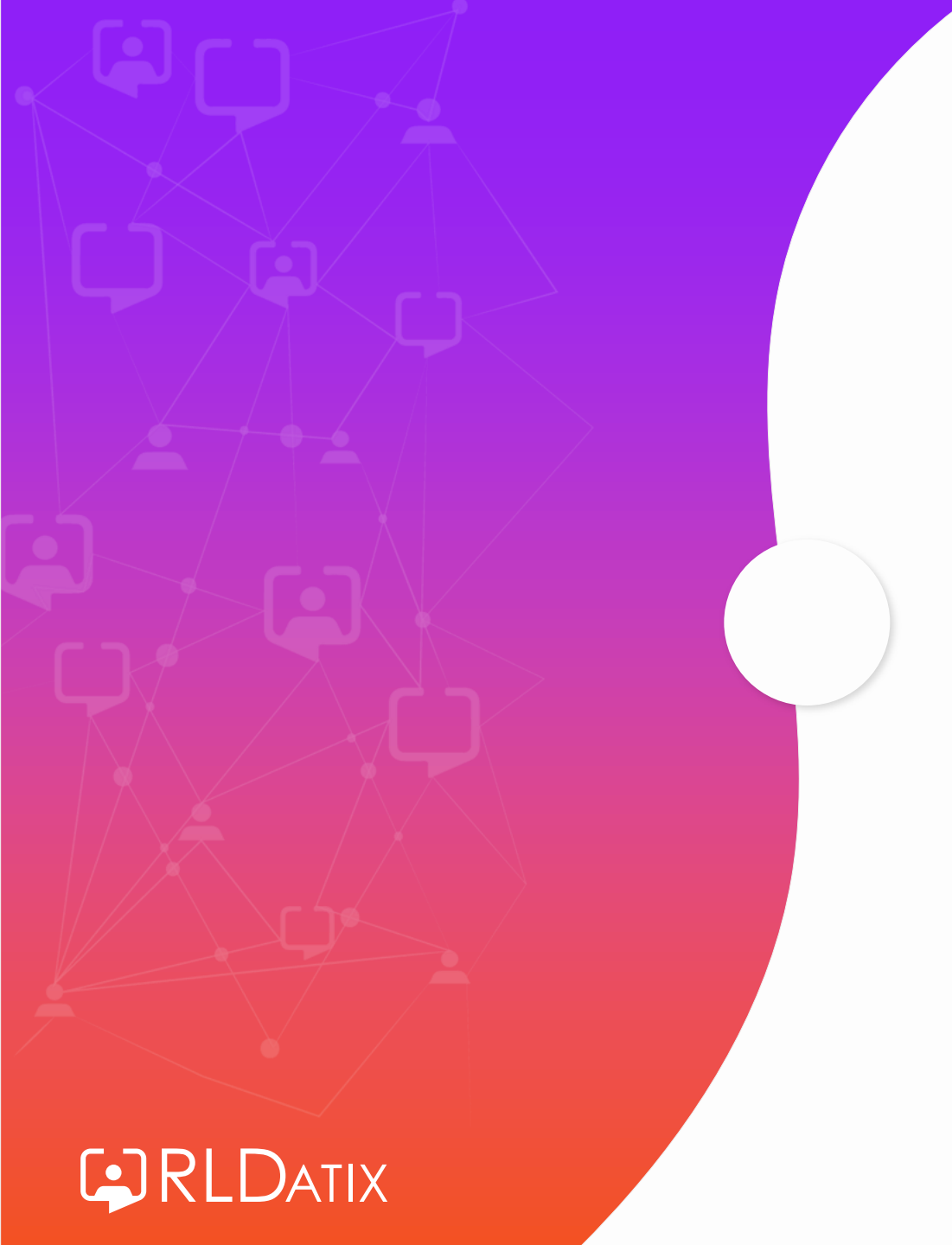
^ Rostering SafeCare Personnel Payroll **Admin** Gateway Reference Data

Rostering Admin User Accounts Planning Interface Audit Reports Logs Imports

Global Rules

[+](#) Create Duty Rule [+](#) Create Unavailability Rule [⋮](#) More 44 Records

Name ↓	Rule Type	Applicability Type
✓ T - Sickness 7 days or more must be medically cert	Sickness Certification Rule	Applies To All Except
✓ T - Over a Year on Sick Leave Check Stop Pay	Max Unavailability Length Rule	Applies To All Except
✓ T - Over 6 mths Sickness Check Pay Reduction to Half	Max Unavailability Length Rule	Applies To All Except
✓ T - Minimum 7 days notice request A/L	EOL Request Notice Period Rule	Applies To All Except
✓ T - Max10 Sick Episodes in a year Check sick record	Person Sickness Rule	Applies To All Except
✓ T - 4 Carers Leave Episodes per year	Max Unavailability Episodes in Period Rule	Applies To All Except
✓ T - 3rd Sick Episode within 3 mth Refer to Occ Health	Person Sickness Rule	Applies To All Except
👤 MigrationOnlyDutyRule	Migration Only Duty Rule	Only Applies To



Unit Rules

Admin> Rostering Admin> Shifts, Patterns and Rules

Roster Admin Actions: Shifts Patterns & Rules

Roster Admin Tools: Shifts Patterns and Rules

Roster Admin Actions: Manage Rules

The screenshot shows the 'Shift Group' interface for 'Pine Ward'. On the right side, there is a menu with the following items: 'Create Shift', 'Create Duty Rule', and 'More'. The 'More' item is highlighted with a red box. A dropdown menu is open from 'More', listing: 'Create Unavailability Rule' (highlighted with a red box), 'Edit Shift Group', 'Add Global Pattern', and 'Add Shared Pattern'. On the left, a sidebar contains 'Shifts', 'Duty Rules', 'Unavailability Rules', and 'Global Patterns'. The main area displays a table of 'Rules' with 7 records. The table has columns for 'Name' and 'Rostering Rule Type'. The first two rows are visible:

Name ↑	Rostering Rule Type
At least 1 free weekend	Weekend Rule
No more than 13 night in a month	Max Shifts In Ref

✕
Create Rule

Create Rule for Pine Ward










Rule Name *

Rule Type ▼ ⓘ

Parameters

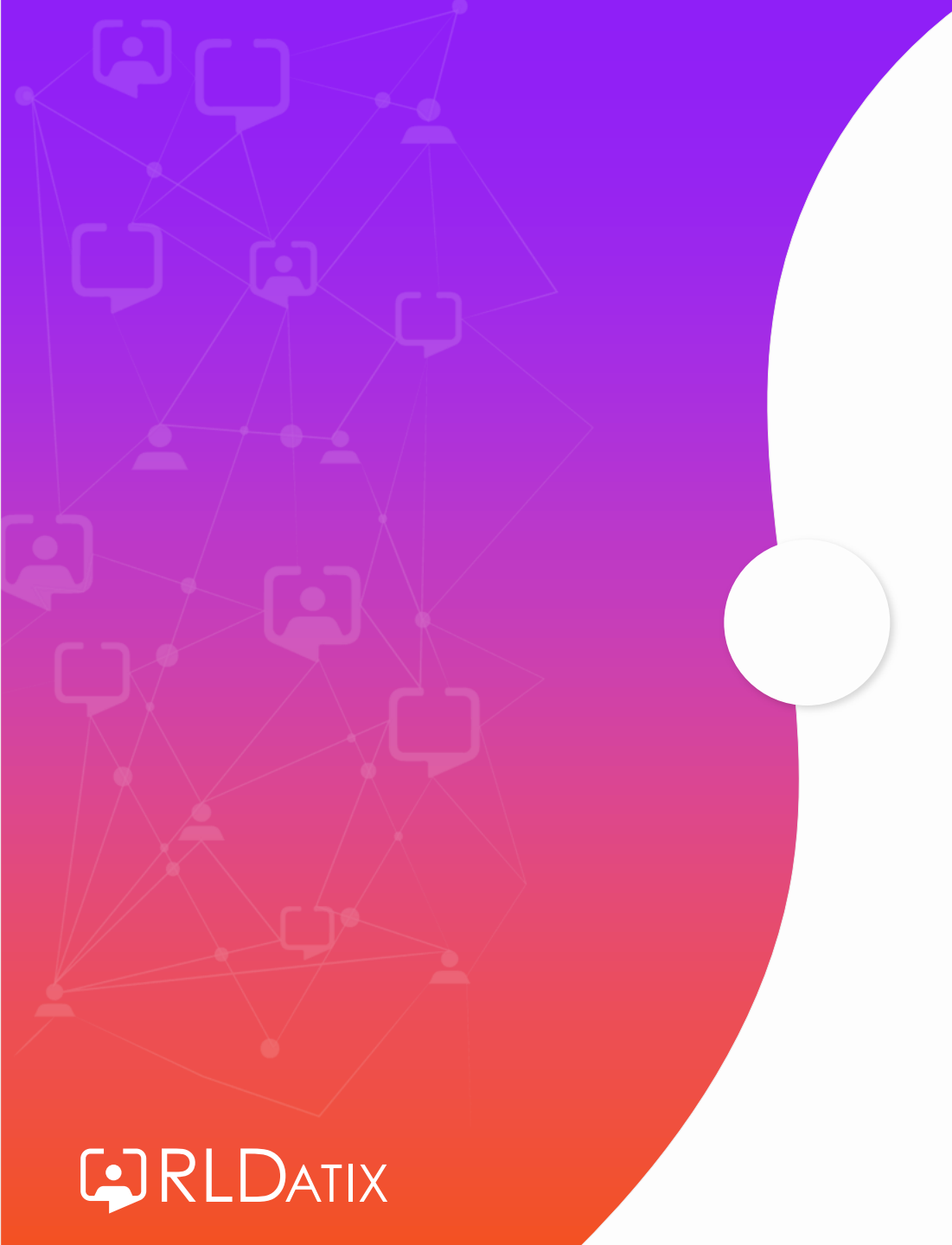
Rule Applicabilities

Applies To All Except
 Only Applies To

 Assign Skill	 Assign Person	 Assign Grade Type
 Assign Grade Type Category	 Assign Staff Group/Grade	 Assign Team
 Assign Posting Type	 Assign Enterprise Work Contracts	 Assign Grade Work Contracts

Delete Rule Applicability

Applicability Type ↑
Rule Applicability Details



Annual Leave Rules

Leave Entitlement Rule / Non Earned Entitlement Rule



Warnings & Violations	
Name	Rule Type
> Availability	
> Employee Online	
▼ Person Unavailabilities	
⚠ This unavailability exceeds the maximum length allowed.	Max Unavailability Length Rule
⚠ This person has more leave planned than their entitlement allows	Leave Entitlement Rule
⚠ The max percentage of staff on leave in a week has been exceeded.	Max Percent Staff On Leave Rule
⚠ This person has more leave planned than their earned balance allows	Earned Leave Entitlement Rule
⚠ This person has more study leave planned than their entitlement allows.	Study Leave Entitlement Rule
⚠ This person has more leave planned than the Entitlement Type allows.	Non Earned Entitlement Rule
⚠ This person has more leave planned than the Entitlement Type allows.	Earned Entitlement Rule
⚠ Approved Unavailability cannot have zero Contracted hours.	Restrict Zero Hours Unavailability Rule
⚠ The person has exceeded the threshold for self-certified sickness days in a rolling	Maximum Number Of Self-Certified Sickness Days In Rolling Reference Period
⚠ Unable to Request Unavailability Over Shift.	Prevent Leave Over Shift Rule
⚠ This person does not have enough rest after consecutive days worked.	Rest After Consecutive Days Unavailability Rule
⚠ This junior doctor does not have enough rest after consecutive days worked.	Junior Doctors Rest After Consecutive Days Unavailability Rule
⚠ This earned accrual has balance below the threshold.	Min Allowed Earned Accrual Balance Rule

Warnings & Violations

Name This person has more leave planned than the Entitlement Type allows.
Rule Non Earned Entitlement Rule
Target Unavailability
Scope Global

[Edit Rule Definition](#) [Rule Instances](#)

Rule Definition Details

Explanation Highlights where a person's leave exceeds their leave entitlement for non-earned-balances.

Weighting − +

Violation EOL Always Treat As Violation
 Warning
 Off

Exclusions

<input type="checkbox"/> Manual Rostering	<input type="checkbox"/> Auto Rostering
<input type="checkbox"/> Personal Patterns	<input type="checkbox"/> Shared Patterns
<input type="checkbox"/> Global Patterns	<input type="checkbox"/> Global Patterns Candidate Selection
<input type="checkbox"/> Demand Patterns	<input type="checkbox"/> Exclude For Temporary Staff

Leave Entitlement Rule / Non Earned Entitlement Rule

- Global Rule
- **Leave Entitlement Rule** applies to all entitlement types
- **Non Earned Entitlement** and **Earned Entitlement** Rules superseded this rule in 10.7.2
- Non-Earned = Annual Leave
- Earned = Toil, Lieu etc.
- Recommended Violation or a Warning (EOL Violation)

Rule Definition

Warnings & Violations

Name This person has more leave planned than the Entitlement Type allows.

Rule Non Earned Entitlement Rule

Target Unavailability

Scope Global

Edit Rule Definition Rule Instances

Rule Definition Details

Explanation Highlights where a person's leave exceeds their leave entitlement for non-earned-balances.

Weighting
30

Violation
 Warning
 Off

EOL Always Treat As Violation

When triggered in Allocate Optima (HealthRoster) as Warning

Violation

Warning

Off

EOL Always Treat As Violation

The screenshot displays the HealthRoster interface. On the left, a roster grid shows dates from 19 to 25. A yellow box labeled 'A/L' is positioned over the 22nd and 23rd, with a warning icon at its bottom right corner. The right-hand side shows a detailed view for 'Rachel Greep, Band 5 RN'. The 'Unavailability Details' tab is active, showing the following information:

- Attributes:** Approved
- Warnings:** Global Non-Earned Flexible Entitlement Rule. The Annual Leave entitlement for Greep, Rachel (90000129) has been exceeded. Annual Leave total: 240 hours, entitlement: 200.00 hours. A 'Retest Rules' button is present.
- Annual Leave:** Group _____ Annual Leave _____
Unavailability Reason _____ Annual Leave _____
Start _____ 20 Apr 2023 07:00

When triggered in Allocate Optima (HealthRoster) as Violation

Violation EOL Always Treat As Violation

Warning

Off

The screenshot shows the 'Add Unavailability' form in the HealthRoster system. The form fields are: Group (Annual Leave), Reason (A/L - Annual Leave), Unavailability Related Reason (-), Start (24/04/2023 07:00), and End (27/04/2023 23:59). A modal error message is displayed over the form, stating: 'Your change has not been saved'. The message includes an orange warning icon and the text: 'The Annual Leave entitlement for Greep, Rachel (90000129) has been exceeded. Annual Leave total: 247.5 hours, entitlement: 200.00 hours.' The background shows a calendar grid with dates 24, 25, 26, and 27.

When triggered in EOL (with EOL Violation)

- Violation
- EOL Always Treat As Violation
- Warning
- Off

MEDIC ONLINE

Rostering My Profile Timesheets

Error
The Annual Leave entitlement for Greep, Rachel (90000129) has been exceeded. Annual Leave total: 217.5 hours, entitlement: 200.00 hours.

Annual Leave Study Days Other Leave

Entitlement Periods

< > 01 Apr 2023 - 31 Mar 2024

View Rosters
Record Availability
Available Locum Duties
Earned Accruals
Leave

When triggered in EOL (Warning > No EOL Violation)

Violation EOL Always Treat As Violation

Warning

Off

▼ Episodes (7)

Status	Period
✓ Annual Leave	1-9 Apr 2023
⚠️ Annual Leave	4-18 Apr 2023

MEDICONLINE

Rostering My Profile Timesheets

WARNING
The Annual Leave entitlement for Greep, Rachel (90000129) has been exceeded. Annual Leave total: 217.5 hours, entitlement: 200.00 hours.

Annual Leave Study Days Other Leave

Entitlement Periods

< > 01 Apr 2023 - 31 Mar 2024

Restrict Zero Hours Unavailability

- Global Rule
- Prevents approved periods of leave with 0 hours
- Applies to all unavailability reasons



Global Restrict Zero Hours Unavailability Rule

Approved Unavailability 'Annual Leave' cannot have zero contracted hours.

Work Time

Week Start 26/03/2023 ▼

Posting ↑ Sun 26/03 Mon 27/03 Tue 28/03 Wed 29/03

Bean Ward (Ba	00:00	00:00	00:00	00:00
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Rule Definition

Warnings & Violations

Name Approved Unavailability cannot have zero Contracted hours.

Rule Restrict Zero Hours Unavailability Rule

Target Unavailability

Scope **Global**

Edit Rule Definition

Rule Instances

Rule Definition Details

Explanation This restricts Unavailability from having zero contracted hours in an approved state.

Weighting

10

Violation

Warning

Off

EOL Always Treat As Violation

Max Unavailability Length Rule

- Any Scope
- Can specify unavailability reason

Create Rule for Hollie Test Unit

Rule Name *
Max 2 Weeks

Rule Type
Max Unavailability Length Rule

Overrides Global Rule
-

Parameters

Unavailability Reason Group *
Annual Leave

Unavailability Reason
A/L

Threshold (Days) *
14

Use Duration

- Controls the amount of leave you can take at one time

Rule Definition

Warnings & Violations

Name This unavailability exceeds the maximum length allowed.

Rule Max Unavailability Length Rule

Target Unavailability

Scope Any

Edit Rule Definition Rule Instances

Rule Definition Details

Explanation Highlights where an unavailability is longer than the defined maximum duration.

Weighting
30

Violation
 Warning
 off

EOL Always Treat As Violation

- If triggered in EOL (EOL Violation)

Violation

Warning


Off

EOL Always Treat As Violation


 MEDICONLINE



Rostering

 View Rosters


 Record Availability


 Available Locum Duties


 Earned Accruals

 Leave

 Request Duty



 **Error**
Cannot have more than 14 working days of Annual Leave in one episode.

 Annual Leave

 Study Days


 Other Leave

Entitlement Periods

  01 Apr 2022 - 31 Mar 2023

Request Leave Form

Full day(s) Partial day

From
04 Apr 2023 

Number of days
15 

End date
Tue, 18 Apr 2023

Reason:
Annual Leave 

Submit Leave Request

- If triggered in EOL (Warning > No EOL Violation)

Violation
 EOL Always Treat As Violation

Warning

Off

▼ Episodes (7)

Status	Period
✓ Annual Leave	1-9 Apr 2023
⚠️ Annual Leave	4-18 Apr 2023

MEDIC ONLINE

[Rostering](#)
[My Profile](#)
[Timesheets](#)

[View Rosters](#)
[Record Availability](#)
[Available Locum Duties](#)
[Earned Accruals](#)
[Leave](#)
[Request Duty](#)

WARNING
Cannot have more than 14 working days of Annual Leave in one episode.

[Annual Leave](#)
[Study Days](#)
[Other Leave](#)

Entitlement Periods

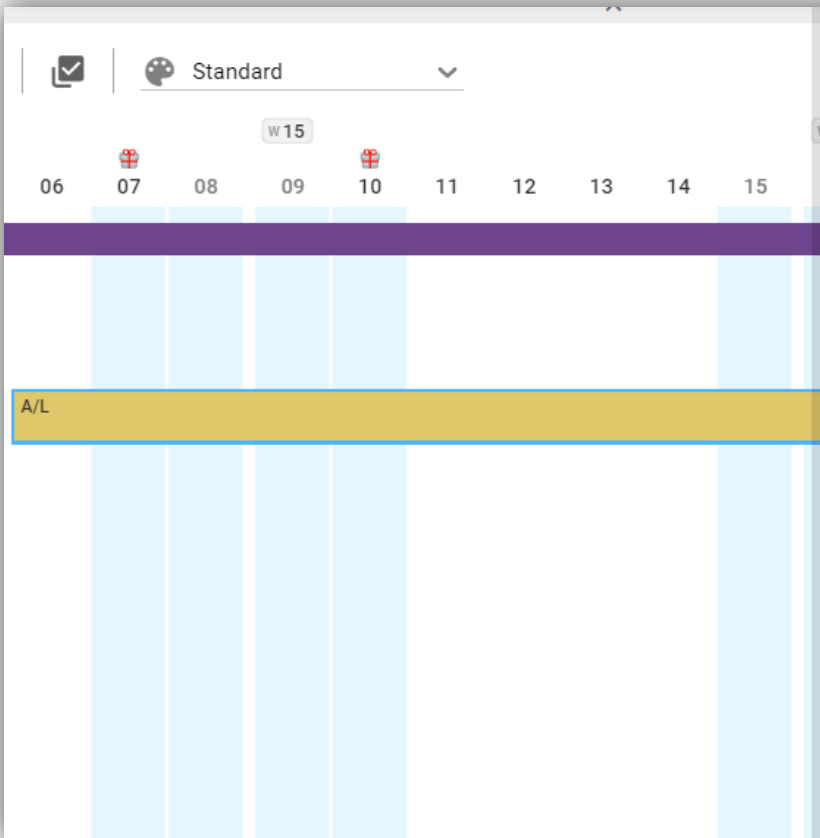
< > 01 Apr 2022 - 31 Mar 2023

- If triggered in Allocate Optima (HealthRoster) as a Warning

Violation
 EOL Always Treat As Violation

Warning

Off



Unavailability Details | Audit Trail

Attributes

Approved

Warnings [Retest Rules](#)

Max 2 Weeks
Cannot have more than 14 working days of Annual Leave in one episode.

Annual Leave

Group _____ Annual Leave

Unavailability Reason _____ Annual Leave

Start _____ 06 Apr 2023 07:00

End _____ 20 Apr 2023 23:59

Duration _____ 15 days (97.5 hours)

Requested Date _____ -

- If triggered in Allocate Optima (HealthRoster) as Violation

Violation EOL Always Treat As Violation


Warning


Off

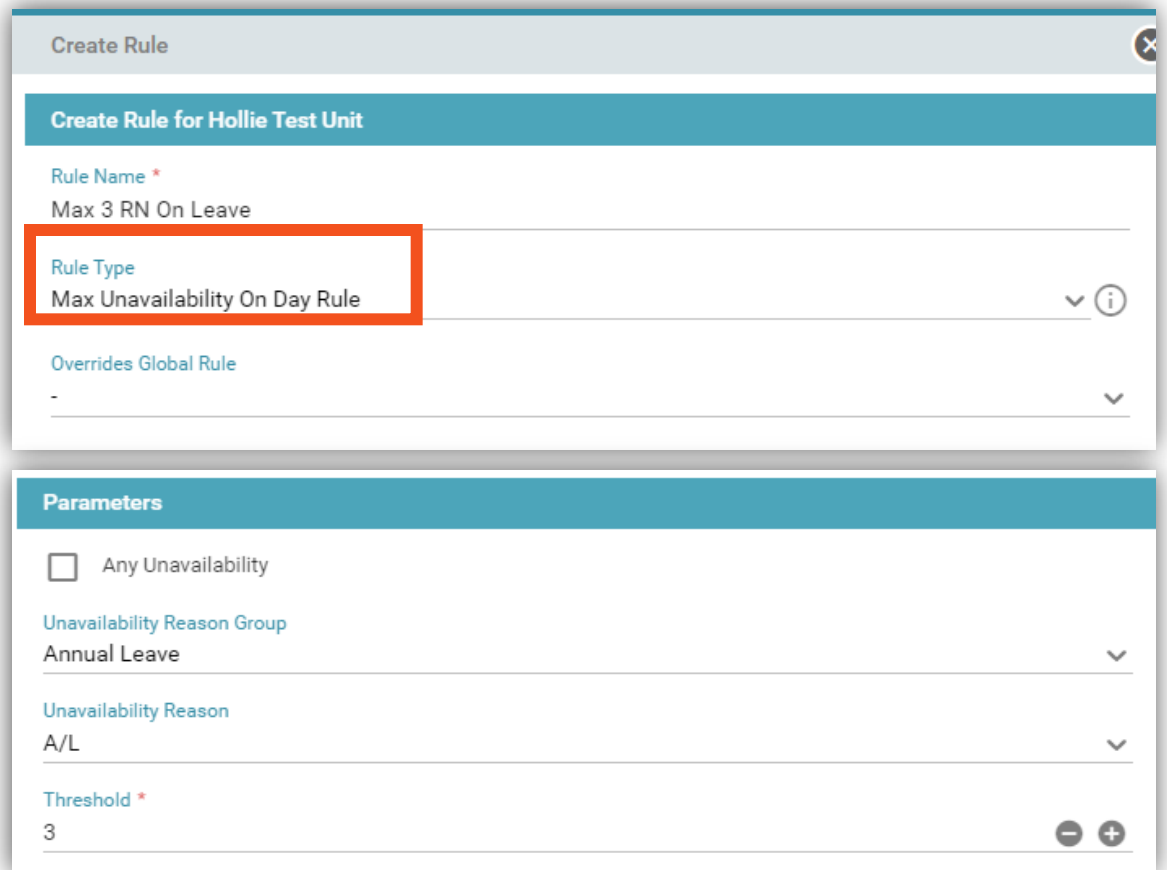
The screenshot displays the 'Add Unavailability' form in the HealthRoster system. The form fields are: Group (Annual Leave), Reason (A/L - Annual Leave), Unavailability Related Reason (-), and Start (06/04/2023 07:00). A modal error message is overlaid on the form, stating: 'Your change has not been saved' with an orange exclamation mark icon. The message text reads: 'Your change has not been saved' and 'Cannot have more than 14 working days of Annual Leave in one episode.' The background shows the 'Admin Gateway' interface with 'Attendance Exceptions' and 'All Shift Types' dropdown.

Max Unavailability on Day Rule

- Any Scope
- Can specify unavailability reason
- Ensures enough staff available to work at any time

 **Error**
Cannot have more than 3 people on Annual Leave on 03/02/2023.

 **Max 3 RN On Leave**
Cannot have more than 3 people on Annual Leave on 03/02/2023.



Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Max 3 RN On Leave

Rule Type
Max Unavailability On Day Rule

Overrides Global Rule
-

Parameters

Any Unavailability

Unavailability Reason Group
Annual Leave

Unavailability Reason
A/L

Threshold *
3

Max Unavailability Hours In Week Rule

- Any Scope
- Limits the amount of unavailability hours taken in the unit within a week
- Can specify unavailability reason

Error
Cannot have more than 80:00 Unavailability hours of Annual Leave - A/L in week 06/02/2023 - 12/02/2023 yet 108:00 hours are assigned.

Max 80 Hours in Week
Cannot have more than 80:00 Unavailability hours of Annual Leave - A/L in week 06/02/2023 - 12/02/2023 yet 100:00 hours are assigned.

Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Max 80 Hours in Week

Rule Type
Max Unavailability Hours In Week Rule

Overrides Global Rule
-

Parameters

Any Unavailability

Unavailability Reason Group *
Annual Leave


Unavailability Reason
A/L

Threshold (Hours) *
80.00

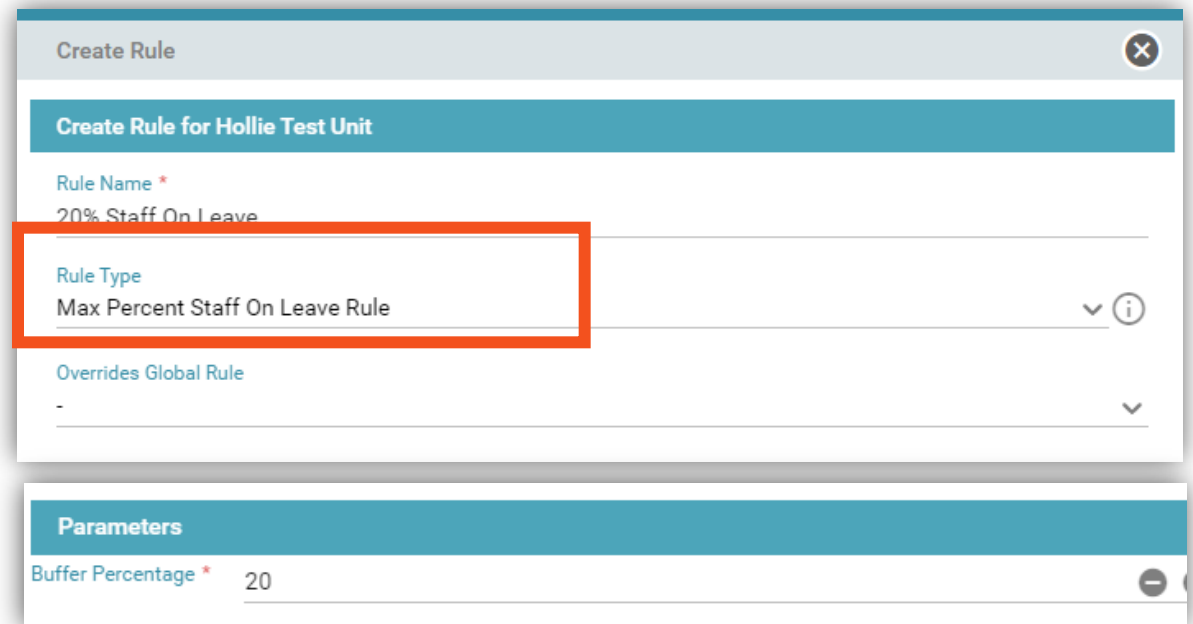
Max Percent Staff on Leave Rule

- Any Scope
- Restricts the percentage of annual leave in a week

- Calculates based on a percentage of the contracted hours in the week
- Applies only to Annual Leave

 **Error**
The percentage of staff on leave is too high.

 **20% Staff On Leave**
The percentage of staff on leave is too high.



Create Rule

Create Rule for Hollie Test Unit

Rule Name *
20% Staff On Leave

Rule Type
Max Percent Staff On Leave Rule

Overrides Global Rule
-

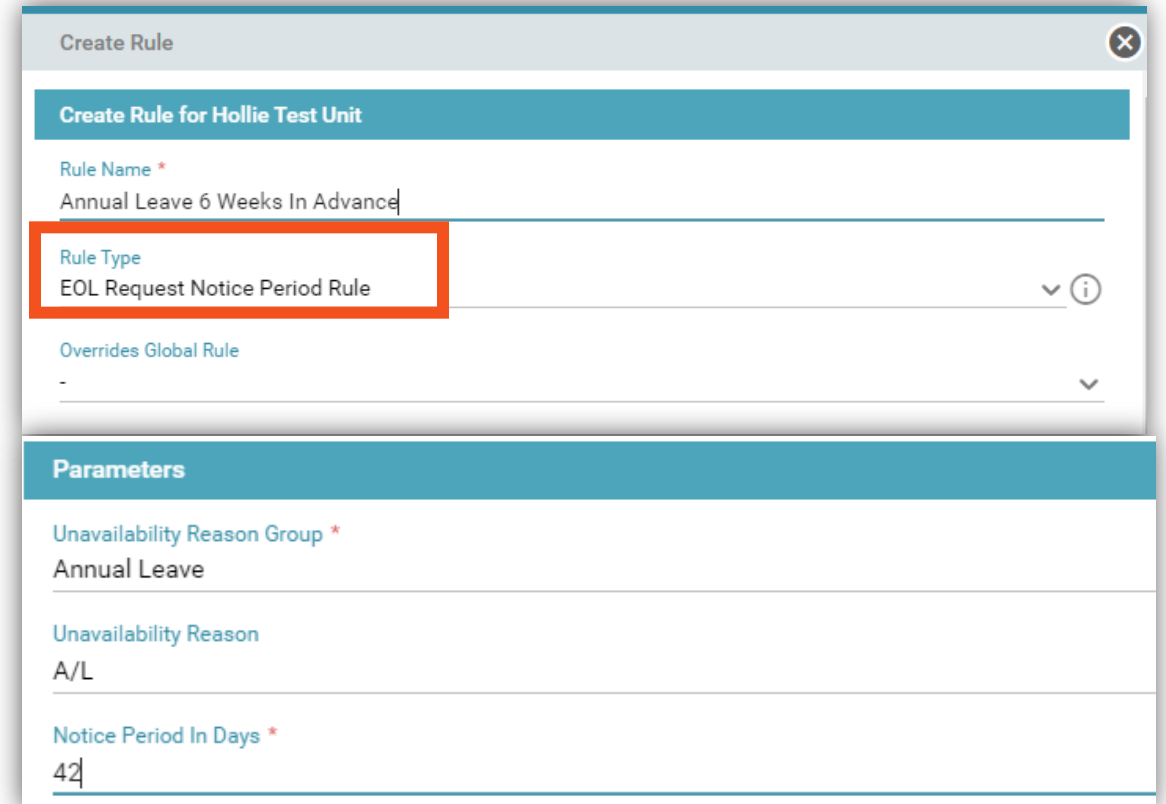
Parameters
Buffer Percentage * 20

EOL Request Notice Period

- Any Scope
- Enforces set notice before booking leave

- Ideal to keep in line with approval timelines
- Can specify unavailability reason

Error
This Unavailability request 24/01/2023 07:00 to 24/01/2023 23:59 does not comply with the required 42 day notice period.



Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Annual Leave 6 Weeks In Advance

Rule Type
EOL Request Notice Period Rule

Overrides Global Rule
-

Parameters

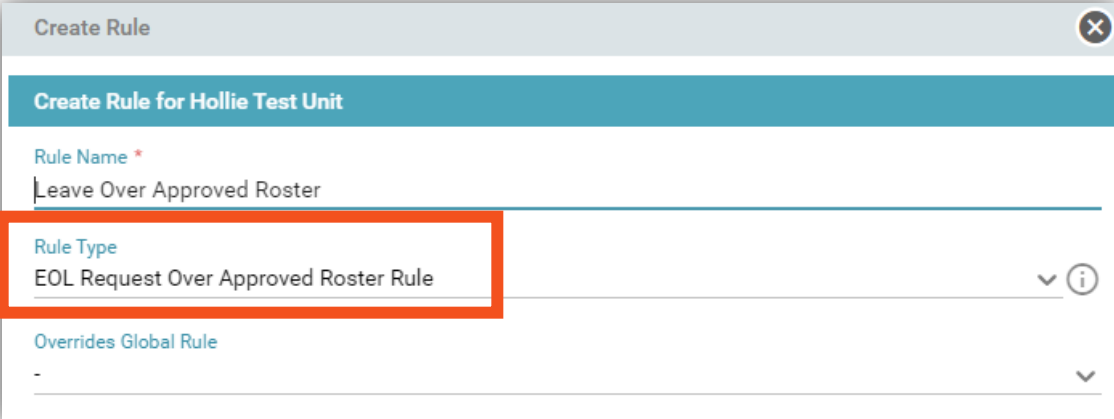
Unavailability Reason Group *
Annual Leave

Unavailability Reason
A/L

Notice Period In Days *
42

EOL Request Over Approved Roster

- Any Scope
- Prevents unavailability requests over an approved roster
- Only triggers if request would cancel something with approved work time on that date
- Applies to all unavailability reasons (cannot specify reason)



Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Leave Over Approved Roster


Rule Type
EOL Request Over Approved Roster Rule

Overrides Global Rule
-

Error
This Unavailability overlaps with an approved Roster for Hollie Test Unit.

Prevent Leave Over Shift Rule

- Any Scope
- Triggers if worker requests a period of leave if already assigned a specific shift
- Applies to all unavailability reasons (cannot specify reason)

 **Error**
Unable to request unavailability of Annual Leave when working OC N on 26/01/2023.

 **No RN Leave Over On Call Night**
Unable to request unavailability of Annual Leave when working OC N on 26/01/2023.

Create Rule


Create Rule for Hollie Test Unit

Rule Name *
No RN Leave Over On Call Night

Rule Type
Prevent Leave Over Shift Rule

Overrides Global Rule
-

Parameters

Available Shift Types and Shifts	Selected Shift Types and Shifts
 OC N (OC N)	20:00 - 07:00

Restrict Annual Leave During Embargo Periods

- From 11.1.4
- Prevents Annual Leave requests during Embargo Periods

- Reference Data> Unavailability> Embargo Periods
- *Ref Data Tools: Embargo Periods*
Ref Data Actions: Embargo Periods.

 **Prevent Leave Over Christmas**
Cannot request Annual Leave during these Embargo Periods: Christmas (24/12/2022 - 02/01/2023)

 **Error**
Cannot request Annual Leave during these Embargo Periods: Christmas (24/12/2022 - 02/01/2023)

Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Prevent Leave Over Christmas

Rule Type
Restrict Annual Leave During Embargo Periods

Overrides Global Rule
-

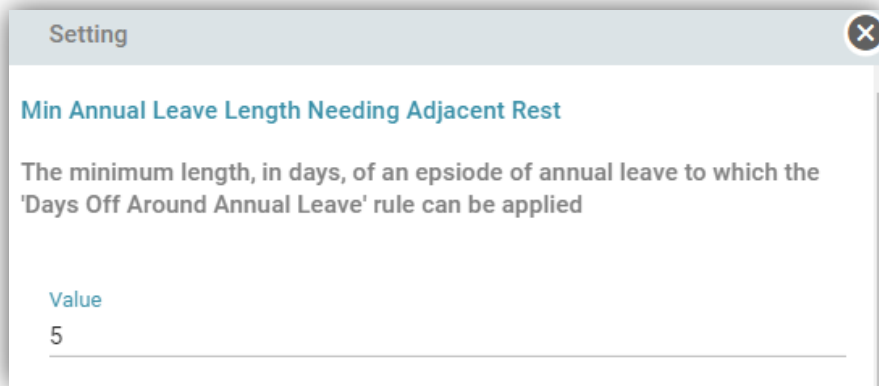
Parameters

Applicable Embargo Period Types

- Christmas

Days Off Around Annual Leave Rule

- Any Scope
- *Reference Data > Organisation > Settings*
'Min Annual Leave Length Needing Adjacent Rest'



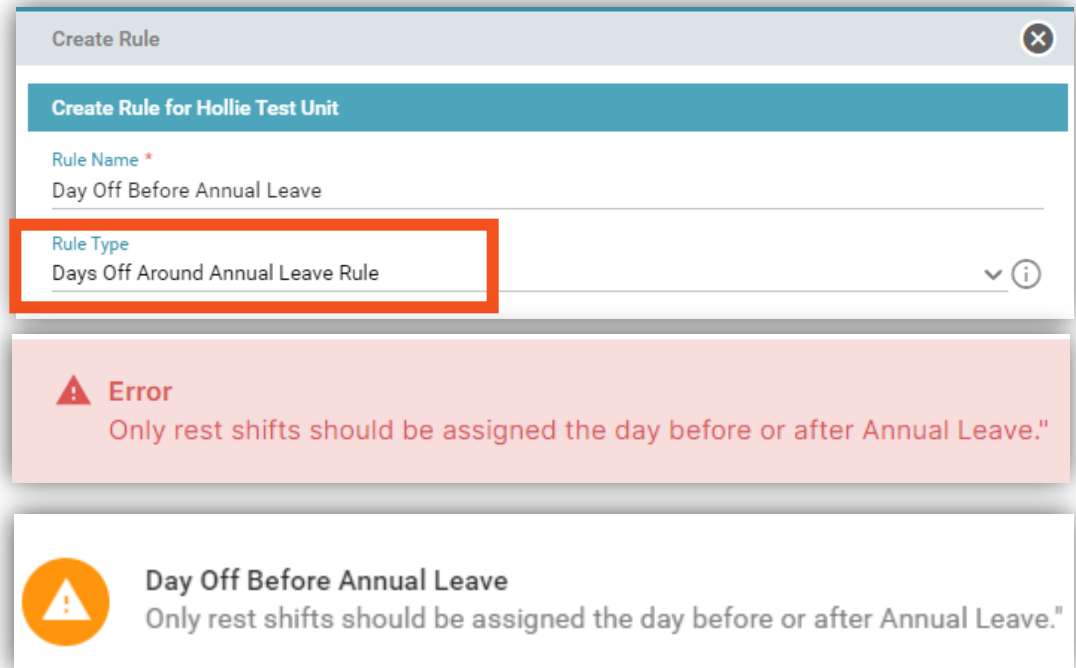
Setting

Min Annual Leave Length Needing Adjacent Rest

The minimum length, in days, of an episode of annual leave to which the 'Days Off Around Annual Leave' rule can be applied

Value
5

- Ensures that duty the day before after a period of leave of a certain length is a rest shift
- Only applies to Annual Leave



Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Day Off Before Annual Leave

Rule Type
Days Off Around Annual Leave Rule


Error
Only rest shifts should be assigned the day before or after Annual Leave."

Day Off Before Annual Leave
Only rest shifts should be assigned the day before or after Annual Leave."

Max Unavailability Days in Period Rule

- Any Scope
- Limits the amount of unavailability days you can take within a reference period
- Can specify unavailability reason

 **Error**
Cannot have more than 10 days of Annual Leave - A/L in the period 21/11/2022 to 30/04/2023.

 **Max 10 Annual Leave Days in 3 Months**
Cannot have more than 10 days of Annual Leave - A/L in the period 19/12/2022 to 16/04/2023.

Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Max 10 Annual Leave Days in 3 Months

Rule Type
Max Unavailability Days in Period Rule

Overrides Global Rule
-

Parameters

Unavailability Reason Group *
Annual Leave


Unavailability Reason
A/L

Weeks In Ref Period *
12

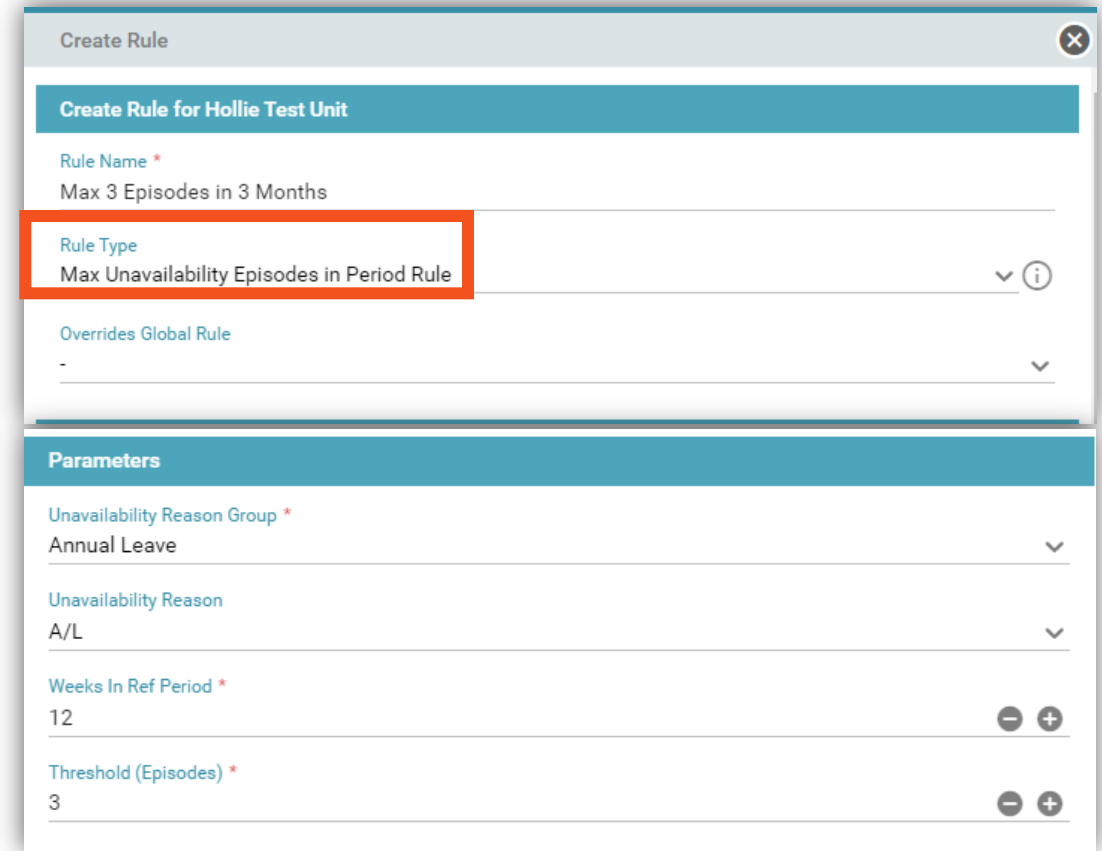
Threshold (Days) *
10

Max Unavailability Episodes in Period Rule

- Any Scope
- Prevents too many episodes of leave within a period
- Can specify unavailability reason

 **Error**
Cannot have more than 3 episodes of Annual Leave - A/L in the period 21/11/2022 to 12/02/2023.

 **Max 3 Episodes in 3 Months**
Cannot have more than 3 episodes of Annual Leave - A/L in the period 21/11/2022 to 12/02/2023.



Create Rule

Create Rule for Hollie Test Unit

Rule Name *
Max 3 Episodes in 3 Months

Rule Type
Max Unavailability Episodes in Period Rule

Overrides Global Rule
-

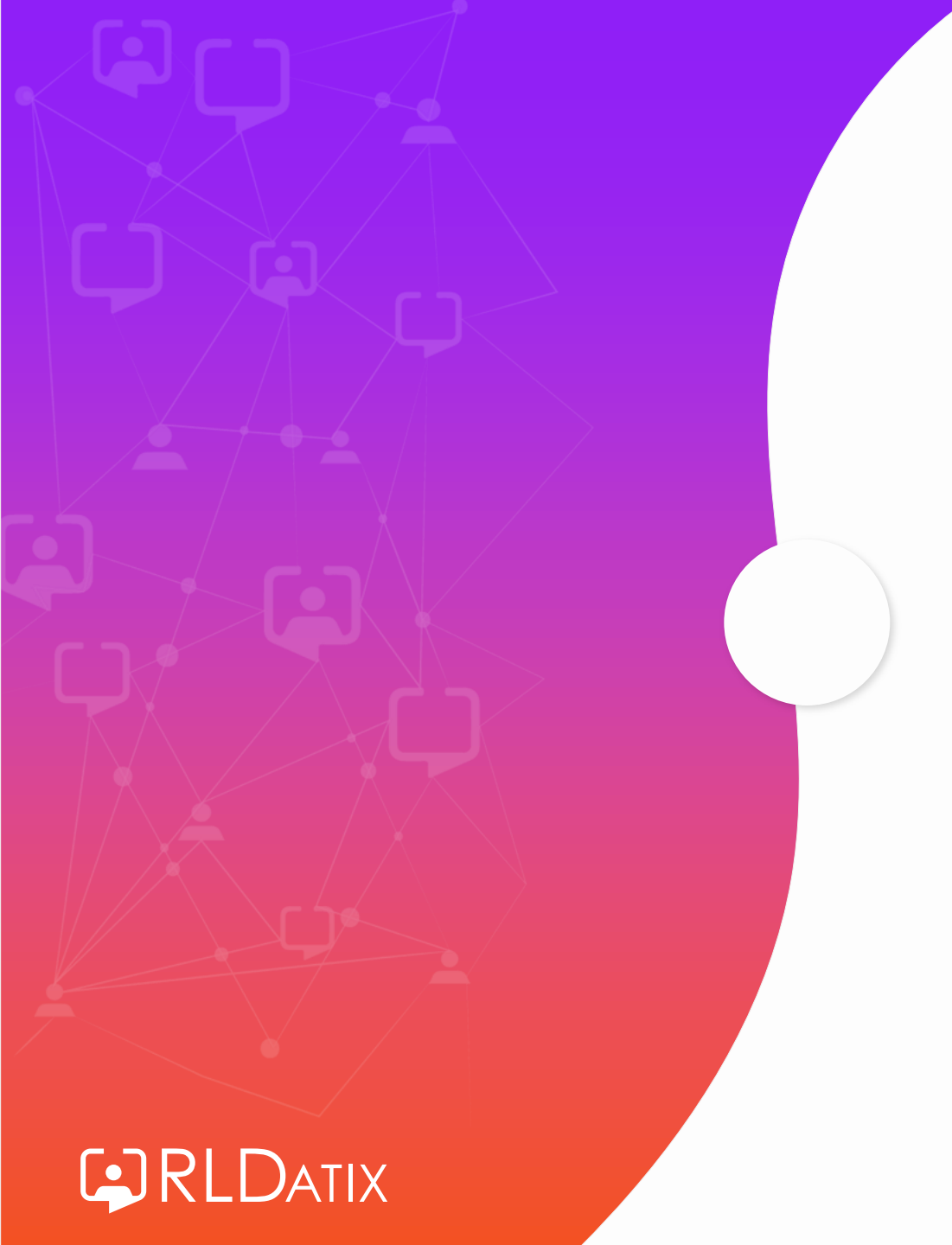
Parameters

Unavailability Reason Group *
Annual Leave

Unavailability Reason
A/L

Weeks In Ref Period *
12

Threshold (Episodes) *
3



Supporting Documentation



- HealthRoster 11- Rules (Entity Guide) Feature Guide
<https://www.allocate.support/hc/en-us/articles/5749094872348-HealthRoster-Rules-Entity-Guide->
- HealthRoster 11- Duty Rules
<https://www.allocate.support/hc/en-us/articles/360017469739-HealthRoster-Duty-Rules->
- HealthRoster 11 – Rules Feature Guide
<https://www.allocate.support/hc/en-us/articles/360016889440-HealthRoster-Rules>



Questions?



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