

STAFF NOTICE NO: 61

(Original date of issue March 1999)

APPLICATIONS FOR LEAVE ABSENCE/FLEXI LEAVE/SPECIAL PAID LEAVE/TIME OFF IN LIEU (FORM E7A) AND OVERTIME CLAIMS (FORM E2)

STAFF NOTICE NO 60 NOTIFIED CHANGES TO THE RULES ON RECORDING AND AUTHORISATION OF LEAVE

1. Two revised forms were introduced with effect from 1 April 1999 covering the above. The reason for their introduction was that managers were given a greater amount of responsibility for approving and controlling their staffs' Leave of Absence, Flexi Leave (if appropriate) Special Paid Leave and Time off in Lieu (TOIL) for overtime worked or travelling time incurred (if appropriate). Details of the revisions are as follows:

APPLICATIONS FOR LEAVE OF ABSENCE/FLEXI LEAVE/SPECIAL PAID LEAVE/TIME OFF IN LIEU (TOIL) – FORM E7A

2. The revised form was introduced on 1 April 1999. However, staff whose leave year runs from 1 November or 1 December should also be using the form.

The form makes separate provision for recording of:

- Annual Leave
- Flexi Leave*
- Special Paid Leave
- Time off in Lieu* (Of overtime/travel time)

*Not applicable to non overtime grades.

Annual Leave

3. The record of annual leave should be completed in the normal way showing:

- Leave applied for (dates)
- Number of days applied for
- Cumulative total of leave taken
- Balance to be taken

4. It is the responsibility of each individual and their line manager to ensure that the correct number of days leave is awarded and recorded, including carry over of leave from one year to the next. As stated in Staff Notice No 60, increased leave allowance due to length of service, or promotion must be approved in advance by Personnel Services, HQ.

Full details are contained in Chapter 10 (Full-time staff) and Chapter 3 (Part-time staff) of the Staff Handbook.

Flexi Leave

5. Applicable to staff whose hours are managed through a Flexi Time (Flexible Working Hours) System. The following columns should be completed:

- i. The dates on which Flexi Leave is taken should be recorded under the 'Leave applied for' column.
- ii. The amount of Flexi Leave taken recorded under the Flexi Leave column.

Detailed rules on flexi time are contained in local instructions.

Special Paid Leave

6. The authority to grant Special Paid Leave is delegated to Cost Centre Managers. Cost Centre Managers must ensure that the granting of Special Paid Leave is justified and falls fully within the rules set out in Chapter 10 of the Staff Handbook. The following columns should be completed.

- Leave applied for (dates)
- Special Paid Leave (number of days)
- Remarks column to record reason for Special Paid Leave.

Special Unpaid Leave

7. The Authority to grant Special Unpaid Leave is delegated to Cost Centre Managers, however, applications/authority must be forwarded to Personnel Services for pay and record action.

Time off in Lieu (TOIL)

8. Appropriate to staff who decide to take Time Off in Lieu of overtime/travel time worked.

Full guidance on the entitlements to overtime and time off in lieu are set out in the Staff Handbook Chapter 11.

9. When opting for TOIL instead of overtime/travel time payment, an individual must have a credit entered on the leave sheet. When taken, a debit entry should be made on the leave sheet.

The columns to be completed for TOIL are:

- Leave applied for
- Credit (when saving time to be taken off later) eg 3 hours
- Debit (when time actually taken off) eg 2 hours
- Balance – In this example one hour credit remaining

If the individual is on Flexible working, a credit will also need to be forwarded to the appropriate Flexi Controller to adjust his/her flexi entitlement.

NOTE: - TOIL can never be taken in advance of overtime worked. It must never be credited before it is taken to inflate flexi credit or reduce a flexi debit. Overtime must be approved in advance by a manager who has specific delegated financial authority to do so.

Controls

10. These forms are subject to audit and may be inspected at any time by Internal Audit or Personnel Services. All forms should be retained for this purpose.

OVERTIME CLAIM – FORM E2

11. The overtime/travel time claim form enables the appropriate amount of overtime/travel time to be paid where 'Time off in Lieu (TOIL)' is taken as part of the reward for additional hours worked.

12. You will note that only Saturday and Sunday overtime/travel time requires TOIL hours to be recorded. This is because TOIL taken for Monday to Friday overtime/travel time can only be taken as actual hours worked with no additional payment eg 3 hours overtime equals 3 hours TOIL. It can of course be claimed purely as an overtime payment. Overtime at other times can be taken as a mixture of TOIL for hours worked/travelled and payment.

13. For example on Saturdays, overtime/travel time worked for grades up to Pay Band 2 can be taken as TOIL for actual hours worked or travelled but, in addition staff are entitled to claim a payment for Saturday premium which is paid at half plain time rate. This means that to pay the premium rate Personnel Services need to know the number of hours overtime/travel time worked and the number of hours (if applicable) taken as TOIL. Similar options are available for Sunday/Bank holiday working though payment rates differ.

14. Any enquiries relating to the above should be addressed to David Taylor in Personnel Services. General advice in completing overtime claims, recording leave and TOIL can be made to Personnel Services contacts shown on Personnel's Intranet site.

David Taylor
Personnel Services
September 2001