

CUSTOMER STORY



Sussex Partnership NHS Foundation Trust

Creating a streamlined approach
to recording annual leave



THE CHALLENGE



Following the successful implementation of Allocate Optima (Health Roster) to more than 5,000 staff on 400 rosters across the Trust, it was necessary to find a more streamlined and accurate way of recording and inputting annual leave into the system.



5,000 STAFF



400 ROSTERS

Many managers were unaware of the annual leave entitlement for their staff and the fact that it could be affected by a number of factors, such as length of service.

During the Allocate Optima (Health Roster) rollout, the annual leave had been input half way through the year and had therefore rolled over inaccurately the following year.

The e-Rostering team decided to make annual leave calculation more accurate by streamlining the process, including:

THE SOLUTION

1

Collaborating with the ESR team to create a user-friendly annual leave calculator that can automatically input the correct number of bank holidays for a specified period.

2

Creation of a spreadsheet template with fixed annual leave entitlements that could be filled in and sent back to the rostering teams.

3

Loading up the completed template to a CSV file before importing the person accrual plan and entitlement for each team onto Allocate Optima.

4

Adding an additional column to the template that calculated annual leave entitlement following adjustments made for previous years.

THE RESULTS

1

The new process has provided a more accurate and robust way of calculating staff entitlements and adding them to the Allocate Optima system.

2

It has helped with accounting for any unplanned changes, such as added bank holidays or the Thank You Day given to all staff for their support during the COVID-19 pandemic.

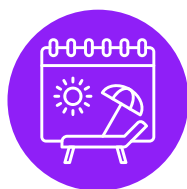
3

The new system has also helped to reduce enquiries about annual leave entitlements being added inaccurately to the system. Reducing from around 10 enquiries a day, to one or two a day.

TOP TIPS



Send out a template for managers to fill in with annual leave requirements



Set a fixed amount of holiday rather than an annual rate



Be organised and send communications out as early into the new year as possible

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