

Annual Leave Planning Workshop

NSW Health



Facilitator Guide

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What is the Rostering Capability Framework?

The Rostering Capability Framework (RCF) is a range of initiatives that will help build NSW Health's ongoing capability in rostering and ensure sustainability in practice, in order to achieve the outcomes outlined in the *NSW Health Rostering Strategy 2017-2022*.

A key component of the RCF is the development of high quality rostering capability which will be embedded as a fundamental skill for all managers across NSW Health.

Active participation in the RCF will contribute towards achievement of the strategy.

What is your role in the Rostering Capability Framework?

The Rostering Capability Framework has been designed to be a sustainable solution to continually improve the quality of rosters across the state. To achieve this, it is important experienced rosterers share their knowledge and skills with those who are developing these.

Your role is to guide participants to gain knowledge and apply this knowledge in practical ways that replicate what they will be required to do in their roles.

It is important you continually gauge participant's capability to ensure you are targeting learning activities at the appropriate level.

What resources will you require?

Participant Workbooks

Annual Leave Planners (one for every four participants and a few spares)

Draft Annual Leave Planners (one for every four participants and a few spares)

Annual Leave Planning Cards (one pack for every four participants)

Write on wipe off pens

Pencils

Erasers

Who will your participants be?

This workshop will be undertaken by staff across the organisation. Typically, they will be new to rostering or will have plans to roster in the future. The majority of participants will have experience in being rostered.

Confidentiality

Throughout the workshop, participants will be asked to share their own experiences and it is important the content of these discussions remains confidential.

At the beginning of the workshop, please remind participants of the importance of confidentiality. It would also be worthwhile reinforcing this each time you commence an activity where participants will be sharing stories.

Pre-work

The RCF has a range of online learning modules available through that should be completed prior to attending the Rostering Capability Framework workshop.

For this workshop, it is strongly recommended that staff complete:

- Key Rostering Principles and Concepts

- Gathering Resources to Plan Annual Leave

- Annual Leave Planning

- Managing Excessive Leave

- Action Leave Requests

- Action Unplanned Leave Requests

- Overview of Awards

- Myth Busting

- Check a Roster

- Approve and Publish a Roster

It is important you as the Facilitator have also completed these modules to ensure you are familiar with the content. We also recommend you review the modules prior to facilitating the workshop to refresh your knowledge of the content.

Participants should also have completed their measures of success workbook and should bring along their short and long-term goals for discussion.

Agenda

The below agenda states the duration of each session.

You may like to record the start and finish time for each session to assist you to keep to time.

Start	Finish	Session Title	
		Housekeeping and introductions	20 mins
		Key Rostering Initiatives	10 mins
		Staff Feedback Regarding Rostering	10 mins
		Check a Roster Activity	30 mins
		Reporting to Plan Annual Leave Demonstration	10 mins
		The Annual Leave Cascade	20 mins
		Annual Leave Planning Activity	60 mins
		Scripting	20 mins
		Role Play	30 mins
		Personal Action Plan for Annual Leave Planning Activity	20 mins
		Close	10 mins

Housekeeping and introductions

Session	Instructions	Resources
Housekeeping	<p>Facilities</p> <p>When all participants are in the room, advise them of the location of:</p> <ul style="list-style-type: none"> • Emergency exits • Amenities • Any kitchen facilities. 	<p>Map of facilities (if available)</p>
Session Times	<p>Remind participants that sessions will commence promptly at the times advised in the agenda so it is important they are seated and ready to commence at the stated time.</p> <p>There may be situations where adjustments to times are required. In this instance, it is important you advise participants of this and ensure they are aware of the times they need to return.</p>	
Mobile Phones and Pagers	<p>Ask participants to, where possible, turn mobile devices and pagers to silent to minimise the disruption to other participants.</p> <p>Where these devices need to remain on, request that staff leave the room if there is a need to respond.</p>	
Introductions	<p>Explain your role as Facilitator and your experience as a rosterer.</p> <p>Ask each participant to introduce themselves by stating:</p> <ul style="list-style-type: none"> • Their name • Their role • Their rostering experience • Their experience in annual leave planning. <p>Conduct a discussion as a group.</p>	

Session	Instructions	Resources
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Agenda Today’s workshop will be roughly 3 ½ - 4 hours in duration. To get the most from the experience, it is strongly recommended that you participate in all activities and discussions.

Session Title	
Housekeeping and introductions	20 mins
Key Rostering Initiatives	10 mins
Staff Feedback Regarding Rostering	10 mins
Check a Roster Activity	30 mins
Reporting to Plan Annual Leave Demonstration	10 mins
The Annual Leave Cascade	20 mins
Annual Leave Planning Activity	60 mins
Scripting	20 mins
Role Play	30 mins
Personal Action Plan for Leave Planning Activity	20 mins
Close	10 mins

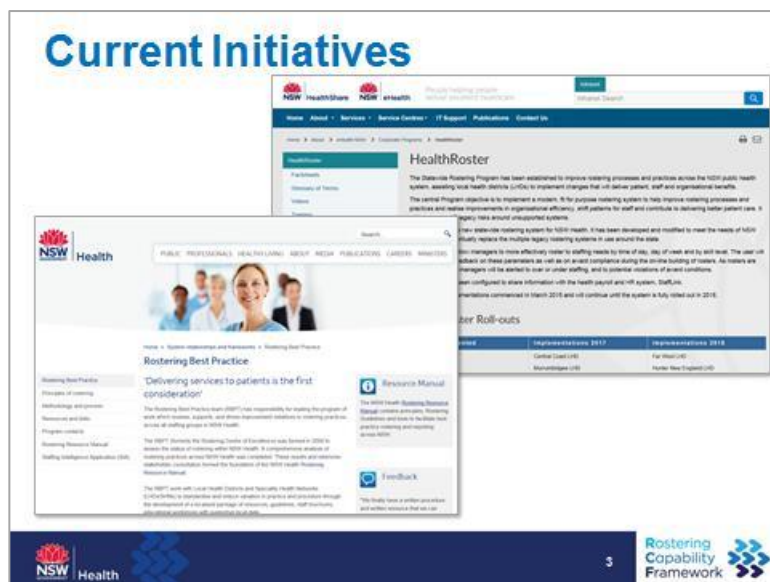
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Learning Outcomes On completion of today’s workshop, participants should be able to:

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- ### Learning Outcomes
- On completion of today’s workshop, you should be able to:
- Explain how the key rostering initiatives support rosterers
 - Check a roster and recommend how to overcome identified issues
 - Gather information to support annual leave planning
 - Predict the outstanding leave balance for staff at the end of the year being planned
 - Follow the correct process to ensure staff plan sufficient annual leave.
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Key Rostering Initiatives

Session	Instructions	Resources
Introduction	In this session, we are going to outline how the key rostering initiatives support rosterers to create and maintain effective rosters.	
Rostering Strategy	<p>The Ministry of Health and eHealth are working together to develop the capabilities of rosterers across the state through:</p> <ul style="list-style-type: none"> • Process improvement • Technological enhancement • Training and Development. 	
Current Initiatives	<p>There are currently three key initiatives working to support rostering across the state. Two you would already be familiar with. These are:</p> <ul style="list-style-type: none"> • Rostering Best Practice • Statewide Rostering Program (HealthRoster). 	

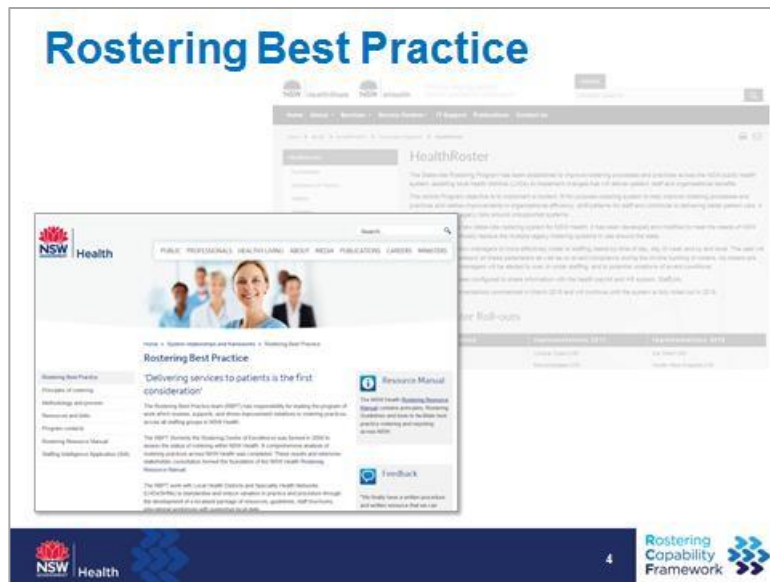


Session	Instructions	Resources
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Rostering Best Practice

The Rostering Best Practice Team facilitates best practice roosting across Health Agencies. Key outcomes of the RBP program include:

- greater adherence to industrial awards
- reduction in existing roosting process variations and inconsistencies
- improvement in workforce resource allocation
- improvement in visibility of safe working hours and fatigue management.



Session	Instructions	Resources
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The Statewide Rostering Program has addressed the technical need through development of the HealthRoster system which supports real time roster management and will support short and medium term operational decision making in regards to staffing.



The Rostering Capability Framework will bridge the gap between these initiatives and will support the continued development of rostering capability in years to come.


Participants in this workshop should have completed the ten online learning modules relating to Leave Management available through MyHealth Learning.

Ask participants

Who has completed the online learning modules?

Session	Instructions	Resources
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Activity

 What three behavioral changes do you intend implementing following completion of the online learning modules?

Explain that the purpose of today’s workshop is to build on the knowledge gained from completion of these modules develop rosterers’ capability to transfer this knowledge to the workplace.

Facilitator note

Make a mental note of any staff who have not completed the online learning modules as there may be gaps in their knowledge that impact on their ability to participate in this workshop.

Staff Feedback Regarding Rostering



Session	Instructions	Resources
Introduction	<p>In this session, we are going to examine some of the feedback from the Your Say cultural surveys in 2015 and 2013.</p> <p>We will examine the quotes and think about how we would respond to a staff member who made these statements.</p>	
Your Say responses	<p>The Your Say survey is a cultural survey of staff across NSW Health that aims to identify areas where actions can be taken to improve workplace culture.</p> <p>These were responses to the free text field where staff were asked what they would like to improve about their work.</p> <p>Ask participants</p> <p><i>For each of the quotes displayed, consider how you would respond if the staff member had stated this to you in person.</i></p>	

Session	Instructions	Resources
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Comments

Your say



For each of the quotes displayed, consider how you would respond if the staff member had stated this to you in person.

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Your say

Rostering. It is openly acknowledged that family and friends get preferential treatment with their shifts. Rostering is used as a form discipline.

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Session	Instructions	Resources
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Comments

Your say

Poor rostering is common with nil regard for social lives or family commitments.






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Your say

Some of our rostering is exhausting, for example working two night shifts and then returning the next day on a day shift.



Quick shifts are also a problem with fatigue.

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Your say

We now have a work place where people cancel their shifts despite being permanent, or demand to turn up at a different time to everyone else or refuse night shift, and take sick leave or have annual leave when the rosters aren't what they want. The managers seem to have no control over this behaviour

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Session	Instructions	Resources
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Comments

Your say

More organised and evenly spread out shift work/rotating roster so that my lifestyle and sleeping patterns are more balanced. E.g. Three morning shifts then a two evening shifts.



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Rostering
Capability
Framework

Your say

The roster has a huge influence on our lives. It is not just a piece of paper. The skill mix & hours staff can work needs to be taken into consideration when the roster is done. The lateness of the roster also needs to be addressed.



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Rostering
Capability
Framework

Your say

The biggest issue within our workforce is the lack of standards with rostering. Rostering for such short periods of time prior to it been released to staff is unfair.



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Rostering
Capability
Framework

Session	Instructions	Resources
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Comments

Your say

Rosters, by allowing a fairer rostering system of day shifts and night shifts so there is equality between staff and no favouritism. I would like more time off between runs of shifts for a better work/ life balance and to gain enough rest to prevent nurse fatigue and burnout

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Rostering Best Practice Website The Rostering Best Practice website contains a range of information and resources to support rosterers to follow best practice principles when rostering.

The website can be viewed by entering the URL below:

<http://www.health.nsw.gov.au/Performance/rostering/Pages/default.aspx>

You may also locate this by typing “rostering best practice nsw health” into your search engine.

Rostering Best Practice

NSW Health | PUBLIC | PROFESSIONALS | HEALTHY LIVING | ABOUT | MEDIA | PUBLICATIONS | CAREERS | MINISTERS

Home > System relationships and frameworks > Rostering Best Practice

Rostering Best Practice

'Delivering services to patients is the first consideration'

The Rostering Best Practice team (RBPT) has responsibility for leading the program of work which reviews, supports, and drives improvement initiatives in rostering practices across all staffing groups in NSW Health.

The RBPT (formerly the Rostering Centre of Excellence) was formed in 2009 to assess the status of rostering within NSW Health. A comprehensive analysis of rostering practices across NSW Health was completed. These results and extensive stakeholder consultation formed the foundation of the NSW Health Rostering Resource Manual.

The RBPT work with Local Health Districts and Specialty Health Networks (LHDs/SHNs) to standardise and reduce variation in practice and procedure through the development of a localised package of resources, guidelines, staff brochures, and other resources.

Resource Manual

The NSW Health Rostering Resource Manual contains principles, Rostering Guidelines and tools to facilitate best practice rostering and reporting across NSW.

Feedback

We finally have a written procedure and written resource that we can...

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The Principles

The following overarching rostering principles have been designed to guide the development of appropriate and efficient rosters.

1. Rosters must ensure that there are sufficient and appropriately skilled staff rostered to work, in order to provide appropriate patient care and to meet anticipated service demands.
2. Rosters must conform to relevant regulatory frameworks, including anti-discrimination, work health and safety legislation, industrial awards, and NSW Health and local health district's and speciality health network's policies.
3. Rostering processes should ensure staff are rostered fairly, while still providing appropriate flexibility to facilitate meeting unit staffing needs.
4. Rosters must make appropriate provision for adequate staff supervision, training and clinical handover.
5. The organisation must have appropriate governance structures in place to oversee roster planning, creation, approval, monitoring and reporting.
6. Rostering practices in NSW Health are based on co-operation between rostering managers and staff, in order to promote fairness in rostering and to deliver appropriate care to patients.

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Session	Instructions	Resources
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Discussion

Ask participants

In a perfect world, if the principles were applied consistently at all times, what impact do you think this would have on staff responses?

What impact would you expect this to have on patients?

Checking a Roster

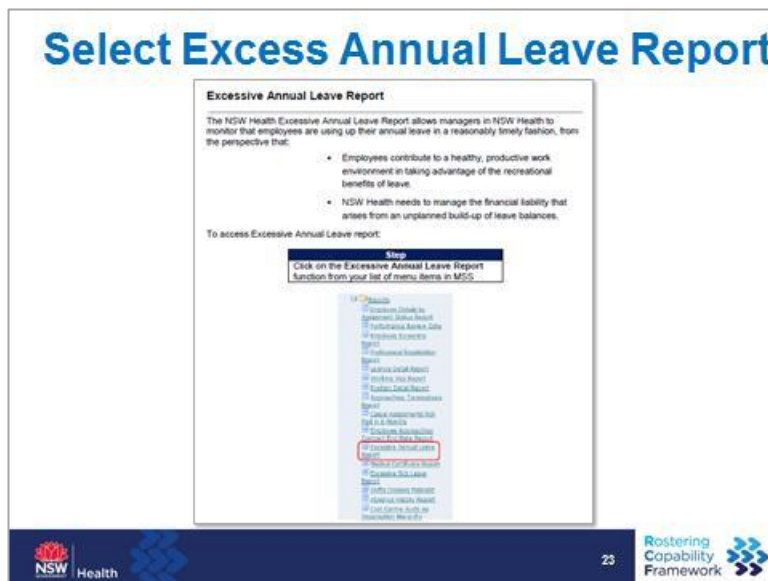
Session	Instructions	Resources
Introduction	In this session, we will review a draft roster to identify if there are any potential issues and to devise a plan to address any identified issues.	Draft roster
Activity	<ol style="list-style-type: none">1. Divide the large group into teams of approximately 3-4 participants.2. Issue each team with a draft roster.3. Ask participants to identify and record any potential issues with the roster.4. Ask participants to devise a plan to address any identified issues.5. Reform the large group and discuss, providing feedback as required.	

Reporting to Plan Annual Leave

Session	Instructions	Resources
Introduction	In this session, we will demonstrate how to obtain instructions to generate an excessive leave balance report to determine the outstanding leave balance of staff within a unit.	
Accessing supporting information	<p>StaffLink is the source of truth for payroll related matters and is the point of reference for determining outstanding annual leave balances.</p> <p>A Manager Self Service User Guide is available through StaffLink and can be referred to for instructions on how to generate an outstanding annual leave report for a unit.</p>	

Session	Instructions	Resources
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1. Select Excessive Annual Leave Report.



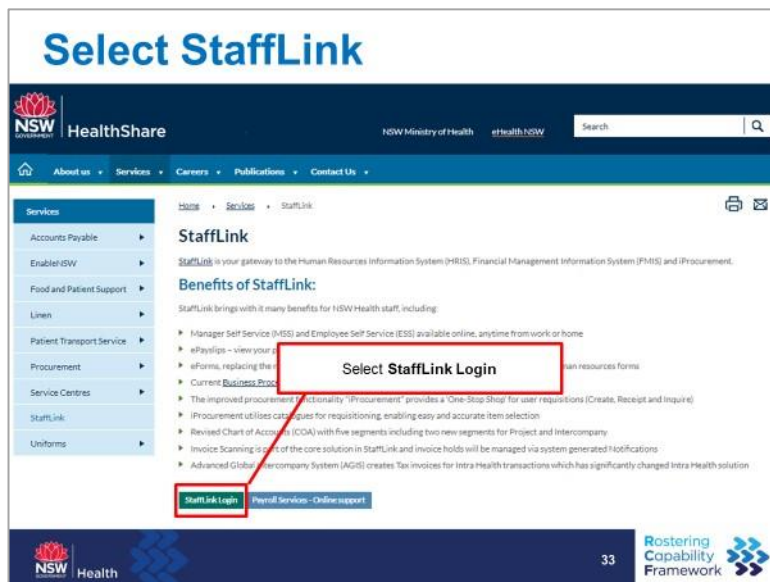
Configuring the excessive leave report

The Excess Annual Leave Report can be configured to meet your needs. The Annual Leave hours limit will default to 304 and can be changed.

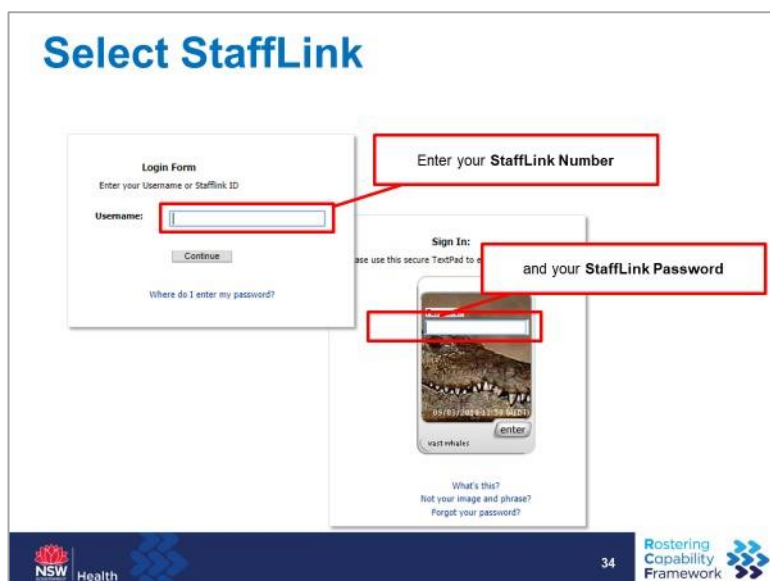
The report will display as an excel spreadsheet and will include all staff exceeding the annual leave hours limit set. If you would like to view all staff annual leave balances, you may set the limit to 1 hour.

The Annual Leave Cascade

Session	Instructions	Resources
Introduction	In this session, we will consider the potential impact of the annual leave cascade on staff decision when annual leave planning.	
Accessing factsheets	<p>When planning annual leave, it is important staff are aware of how taking leave will impact the pay they receive.</p> <ol style="list-style-type: none"> To access factsheets explaining the annual leave cascade, log onto StaffLink. 	<p>Annual Leave Cascade Factsheets</p>

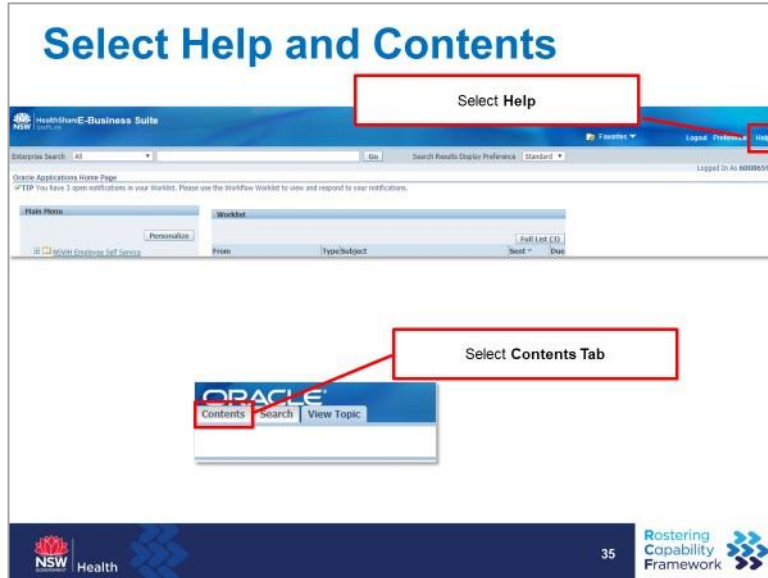


2. Enter your StaffLink Number and password.

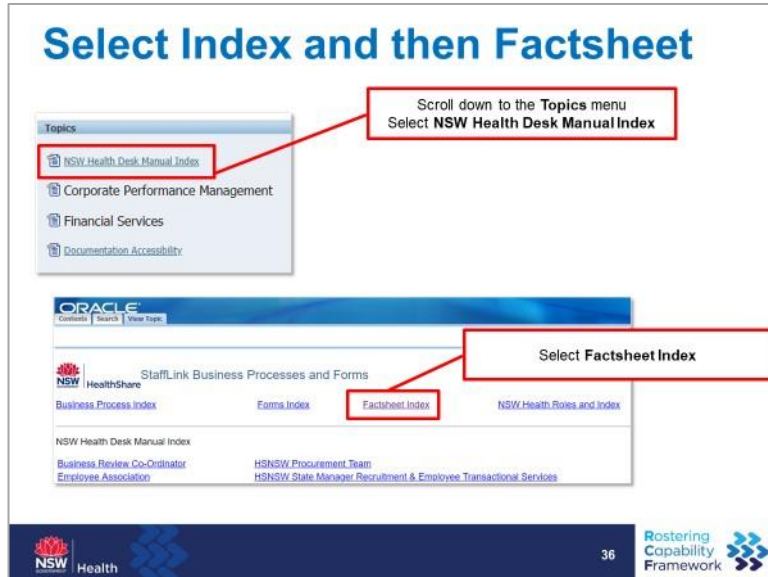


Session	Instructions	Resources
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3. Select the Help button in the top right corner.
4. Select the Contents Tab in the top right corner.



5. Scroll down to the Topics menu and select NSW Health Desk Manual Index.



Session	Instructions	Resources
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There are two Factsheets relating to the Annual Leave Cascade that will be of assistance to rosterers and their staff.

These are:

1. Annual Leave Cascade Detailed Fact Sheet
2. Annual Leave Cascade Simplified Fact Sheet

6. Select the relevant Factsheet.

Open relevant version

ORACLE
Contents Search View Topic

User Factsheets

1. [Annual Leave Cascade Detailed Factsheet](#)
2. [Annual Leave Cascade Simplified Factsheet](#)
3. [Contingent Worker Recruitment Template Guide](#)
4. [Delegating Authority in MSS](#)
5. [Different User Access Levels within StaffLink](#)

Select the relevant Factsheet

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The detailed factsheet is a two page document and provides an overview, explanation and example.

View each version

Annual Leave Cascade Detailed PAYROLL FACTSHEET

Overview
Annual leave is processed using a Cascade function to correctly proportion leave based on award entitlements. All leave follows the cascade process to identify if an employee has an available balance and is entered in the resulting payroll.

Leave Coding in StaffLink
Leave is recorded in StaffLink with a code of LI or LI+ Leave Member (LM) records are created for the consecutive period of leave taken. Leave (LH) records are created per day based on the full period and employee roster pattern with the corresponding hour rate per day.

Leave Considerations
When leave is submitted to StaffLink from a Health Agency, the Roster System make transactions are mapped to meet StaffLink requirements. The Leave Considerations Section provides consideration advice regarding the same leave type into a single leave transaction for the fortnight, this includes the LM record. Where there is a break in the paid period, or between an employee's leave taken on Tuesday and Thursday but with Monday, Wednesday and Friday, a new LM is created.

Cascade Sequence
Operation of the leave type and an employer's collective agreement the cascade process follows a specific sequence. Where a balance is available at the time the need to be taken an L1 record is created for payment. Where a balance is not available, the next leave type in the sequence is utilized until all entitlements are exhausted. Where no available annual leave entitlements are identified, leave without pay (LWOP) is processed. The following are the examples of the cascade sequence from official collective agreements:

Annual Leave Entitlement	Annual Leave No Leave Loading Entitlement
1. Annual Leave Entitlement	1. Annual Leave No Leave Loading Entitlement
2. Annual Leave No Leave Loading Entitlement	2. Annual Leave No Leave Loading Entitlement
3. Public Holiday Leave Entitlement	3. Public Holiday Leave Entitlement
4. Public Holiday Credit Entitlement	4. Public Holiday Credit Entitlement
5. Extra Leave Entitlement	5. Extra Leave Entitlement
6. Annual Leave Pro-Rata Accrual	6. Annual Leave Pro-Rata Accrual
7. Annual Leave No Leave Loading Pro-Rata Accrual	7. Annual Leave No Leave Loading Pro-Rata Accrual
8. Public Holiday Leave Pro-Rata Accrual	8. Public Holiday Leave Pro-Rata Accrual
9. Leave Without Pay	9. Leave Without Pay

The sequence is defined in the StaffLink Cascade report and is a sequence of annual leave entitlements.

Roster Pattern and the Public Holiday Calendar
As part of the Leave Cascade process StaffLink checks an employee's roster pattern for the period of leave and whether any public holidays are due. It uses this information to determine leave hours to accrue to each leave day.

Annual Leave Cascade Simplified PAYROLL FACTSHEET

Annual Leave Cascade Details
Consistent with an employer's Award, Annual Leave can be made up of several different types of leave. These leave codes include "Basic Annual Leave", "Public Holiday Leave" and "Extra Leave". Where an employee takes Annual Leave, each specific leave type is allocated before moving to the next leave type with entitlements prioritised over prior.

The general sequence followed is:

- Basic Annual Leave Entitlement (accrued from prior year)
- Public Holiday Leave Entitlement (accrued from prior year)
- Extra Leave Entitlement (accrued from prior year)
- Basic Annual Leave Pro-Rata Accrual (from current year)
- Public Holiday Leave Pro-Rata Accrual (from current year)
- Once all leave is exhausted Leave Without Pay is used.

Effect on Applications for Leave
When annual leave is taken the cascade sequence is automatically followed by StaffLink and therefore requires no involvement from the employee or manager to allocate the correct leave type per award conditions.

Example
A full-time employee applies for a 4 day annual leave at 7.0hrs per day.
The annual leave taken are 12000010 to 12000013.
Leave is taken on week days, Monday to Thursday.
A total of 28 hours of annual leave are processed by StaffLink from a HR Member.
An employee may be entitled to 28.0 hours leave.

Entitlement Balance as at 30/06/2020

Leave Type	Entitlement (Hours)	Pro-Rata (Hours)
Annual Leave	7.0	7.0
Public Holiday Leave	7.0	7.0
Annual Leave Entitlement	0.0	0.0

Annual Leave Cascade

Date	Leave Type	Hours	Cumulative Hours
12/06/20	Annual Leave Entitlement	7.0	7.0
13/06/20	Public Holiday Leave Entitlement	7.0	14.0
14/06/20	Public Holiday Leave Entitlement	7.0	21.0
15/06/20	Annual Leave Pro-Rata	7.0	28.0
16/06/20	Leave Without Pay	7.0	35.0

Further information
HR & payroll enquiries can be submitted to the Service Centre online by clicking on the Staff Pay Query icon on the <https://www.health.nsw.gov.au/rostering-capability-framework>

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The simplified version details the sequence and provides an example.

Staff can be referred to these factsheets to better understand the annual leave cascade.

Further clarification can also be sought from HR and payroll.

General Sequence

1. Annual Leave Entitlement
2. Annual Leave No Leave Loading Entitlement
3. Public Holiday Leave Entitlement
4. Public Holiday Credit Entitlement
5. Extra Leave Entitlement
6. Annual Leave Pro-Rata Accrual
7. Annual Leave No Leave Loading Pro-Rata Accrual
8. Public Holiday Leave Pro-Rata Accrual
9. Leave Without Pay

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Conduct a brief discussion regarding the different types of leave.

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Ask participants

Why is it important staff understand the annual leave cascade?

Suggested responses

The annual leave cascade has the potential to impact the amount a staff member receives in their pay for the period annual leave is taken. Staff may need to be aware of this prior to taking annual leave as this may affect their decision on when to take leave.

Having this understanding in advance will avoid any disappointment or surprise when the payment is made.

Ask participants

How do you currently discuss the annual leave cascade with your staff?

Suggested responses

Discuss as a large group and provide feedback as required.

Annual Leave Planning Activity

Session	Instructions	Resources
Introduction	<p>In this session we are going to participate in an activity to plan annual leave for a fictional unit.</p> <p>If you have brought the resources listed in the invitation, you may complete the activity for your own unit.</p>	
What is annual leave planning?	<p>Ask participants</p> <p><i>What do we mean when we say annual leave planning?</i></p> <p>Suggested responses</p> <p>This is the process to:</p> <ul style="list-style-type: none"> • ensure staff are aware of their responsibility for managing their annual leave • determine the outstanding annual leave balance for all staff by the end of the year being planned • find a mutually agreeable time for staff to take annual leave • liaise with staff who require support to plan annual leave • establish a plan for all staff to take annual leave over a 12 month period while meeting demand for services. 	

Session	Instructions	Resources
Why plan?	<p data-bbox="389 271 592 300">Ask participants</p> <p data-bbox="389 331 759 360"><i>Why do we plan annual leave?</i></p> <p data-bbox="389 392 647 421">Suggested responses</p> <ul data-bbox="389 452 1206 1579" style="list-style-type: none"> <li data-bbox="389 452 663 481">• To manage fatigue <li data-bbox="389 512 1206 595">• To provide staff with a period of rest and recreation to return to work feeling refreshed and reinvigorated <li data-bbox="389 620 772 649">• To create roster efficiencies <li data-bbox="389 674 647 703">• To check skill mix <li data-bbox="389 728 935 757">• Allows early oversight of required backfill <li data-bbox="389 781 938 810">• Reduce excessive annual leave for fatigue <li data-bbox="389 835 951 864">• Assists with budget management for leave <li data-bbox="389 889 826 918">• Allows us to see the 'big picture' <li data-bbox="389 943 1023 972">• Increases the opportunity for equity and fairness <li data-bbox="389 996 855 1025">• Forces us to think about the future <li data-bbox="389 1050 1002 1079">• Provides visibility to all staff & roster managers <li data-bbox="389 1104 1182 1187">• Enables us to look toward and end goal and identifies steps to achieving that goal <li data-bbox="389 1211 1007 1240">• Identifies issues that may need to be addressed <li data-bbox="389 1265 751 1294">• Enables us to be prepared <li data-bbox="389 1319 1206 1402">• Outline what is likely to occur so we can be prepared and adjust if necessary <li data-bbox="389 1426 1206 1579">• Planning in advance provides greater options than when left to the 'last minute', allowing us to approach a task in an organised manner which reduces time wastage. 	

Session	Instructions	Resources
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Discussion

Conduct a brief discussion by asking participants:

Tell us about your experience

- *What process do you follow to plan your team's annual leave?*
- *Did you counter any barriers to planning your team's annual leave?*
- *How did you overcome these barriers?*
- *What % of your team's annual leave is planned for the next 12 months?*


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Staff**Communication**

When commencing the annual leave planning process, it is important to meet with all staff to advise them of their responsibilities for annual leave planning and outline the process and relevant dates to plan annual leave.

Staff need to be informed of their responsibilities for leave management throughout their employment, from orientation to termination.

Ask participants

How far in advance would you hold the meeting to communicate responsibilities for planning annual leave with staff?

Suggested response

Ideally, eight weeks before leave needs to be planned, to allow staff on leave or absent the same opportunity as others.

This should turn into an embedded culture so that it is almost intuitive to all staff that eight weeks out of every roster year they need to provide the manager with requests.

Session	Instructions	Resources
	<p>Ask participants</p> <p><i>How do you advise staff of the meeting?</i></p> <p>Suggested response</p> <p>The response to this may vary. Use this as an opportunity to discuss with the group.</p> <p>It is important staff are made aware of the leave management process from orientation onwards. This responsibility needs become embedded into the culture to reduce the need to meeting with staff each year when this process becomes business as usual.</p>	
<p>Activity set up</p>	<ol style="list-style-type: none"> 1. Divide the large group into smaller mixed ability teams and ask them to sit together. 2. Issue staff with a draft annual leave planner and ask them to refer to it as the activity is explained. 3. Explain that the activity is detailed in the Participant Workbook. 4. Advise participants they will be working together to follow a step-by-step process to plan annual leave for a unit. 5. Explain each step to so participants understand the resources they have in front of them. 6. Read the questions they will be required to complete so they are aware of what they are required to do 7. Check all participants understand what they are required to. 8. Monitor each team to ensure they are on track and offer support as required. 9. Monitor teams and offer support as required. 	<p>Draft Annual Leave Planner</p> <p>Blank Annual Leave Planner</p> <p>Non-permanent markers</p>

Annual Leave Planning Activity

Your task:

In this activity, you will be developing an annual leave planner for a unit.

The instructions here will take you through a suggested process, however; you should check the correct process for your Health Agency.

You will complete this activity as a team and it is important all members contribute to the discussion.

At the conclusion of the activity, you will be asked to state any assumptions you made and detail your decisions, including reasons for the decision – so keep a note of these as you progress!

Important Point:

StaffLink is the source of truth for determining leave balances.

You should refer to the Western NSW LHD Roster Standards, your Manager or your Workforce representative for clarification on your LHD's recommended processes.

The resources displayed here are examples only. You may have access to different resources, or resources that appear in a different format. However; it is how these resources are utilized that is important.

1. Below is a Staff Profile for a fictional nursing unit. It was provided by the Business Manager and the yellow highlighted cell indicates the unit requires an average 1.48 staff to be on leave at once.

STAFF PROFILE														
XXXXX			#N/A								Updated 23/03/2017			
Award Code	Award Description	Award Hours	Annual Leave weeks p.	Annual Leave Hours p.	Pay No	NAME	RATE	Employment Status	Substantive Hours	Substantive FTE	Current Hours Worked	Current FTE	COMMENTS	
02AIN01	Assistant In Nursing, First Year	38	4	96		Jenny SUNSBURY	17,92002	PPT	24	0.63	24	0.63		
02AIN02	Assistant In Nursing, Second Year	38	7	210		Jacinta TYMOC	18,48873	PPT	30	0.79	30	0.79		
02AIN03	Assistant In Nursing, Third Year	38	7	210		Melanie BAILEY	19,07112	PPT	10	0.26	10	0.26		
02AIN04	Assistant In Nursing, Fourth Year	38	7	210		Amanda McLAREN	19,66444	PPT	30	0.79	30	0.79		
02AIN04	Assistant In Nursing, Fourth Year	38	7	140		Robert ANDERSON	19,66444	PPT	20	0.53	20	0.53		
02AIN04	Assistant In Nursing, Third Year	38	7	126		Samantha HEMMINGS	19,66444	PPT	18	0.53	18	0.53		
02AIN03	Assistant In Nursing, Third Year	38	7	140		Joshua EDWARDS	19,07112	PPT	30	0.79	30	0.79		
02ENME01	Enrolled Nurse with Medication Endorse	38	7	140		Hamish ATTWOOD	22,47521	PPT	20	0.53	20	0.53		
02ENME03	Enrolled Nurse with Medication Endorse	38	7	266		Sandra McLEMENTS	23,44312	FT	38	1.00	38	1.00		
02ENME05	Enrolled Nurse with Medication Endorse	38	7	112		Sonya SIMONS	24,4247	PPT	16	0.42	16.0	0.42		
02ENME05	Enrolled Nurse with Medication Endorse	38	7	0		Falima TYSON	24,4247	PPT	24	0.63	0	0.00	LSL till 7/5/18 contract for this position	
02ENME05	Enrolled Nurse, Fifth Year	38	7	112		Chelsea FITZSIMONS	24,4247	PPT	16	0.42	16	0.42		
02FN01	Registered Nurse, First Year	38	7	266		GRAD LINE	23,99817	FT	38	1.00	38	1.00		
02ENME06	Enrolled Nurse with Medication Endorse	38	7	0		Angela MORAN	25,17388	PPT	16	0.42	0	0.00		
02ENME06	Enrolled Nurse with Medication Endorse	38	7	0		Matilda ROBERTS	25,17388	PPT	19	0.50	0	0.00	Mat Leave to 18/11/2017 to 14/10/2018 ECI required	
02FN03	Registered Nurse, Second Year	38	4	152		Andrew Harrison	27,64833	FT	38	1.00	38	1.00		
02FN03	Registered Nurse, Second Year	38	6	228		Emma JONES	27,64833	FT	38	1.00	38	1.00		
02FN05	Registered Nurse, Fifth Year	38	7	266		Cynthia WATSON	30,5466	FT	38	1.00	38	1.00		
02FN08	Registered Nurse, Eighth Year	38	7	266		Helen ASKEW	35,01704	FT	38	1.00	38	1.00		
02FN08	Registered Nurse, Eighth Year	38	7	266		Marilyn SAMUELS	35,01704	FT	38	1.00	38	1.00		
							Roster Hours Applied						496	
							Total Rostered FTE						12.79	
							FTE on annual leave at once						1.48	
							Available FTE						11.69	
							Vacant FTE						2.58	
							Productive Funded FTE						12.79	
							Non Productive Funded FTE						1.86	
							Overtime Funded FTE						0.00	
							Employment Target						14.27	
							Head Count							
							Employment Target = Total Rostered FTE + FTE on Annual Leave at once							
							Non Productive = Total Rostered FTE + FTE on Annual Leave at once + Sick leave Etc. from green tab							
							Productive total = Total Rostered FTE							
							Roster Hours applied comes from green tab which is same as roster pattern for Each day of the week							

2. Convert the total 'FTE on annual leave at once' from weeks to hours by multiplying this by 38 and record this figure in the 'Total FTE on annual leave' row of blank Annual Leave Planner.

1.48 x 38 =

Annual Leave Planner 2018													
Month	Contract ed hours	January	February	March	April	May	June	July	August	September	October	November	December
Week Commencing		1 8 15 22 29	5 12 19 26	5 12 19 26	2 9 16 23 30	7 14 21 28	4 11 18 25	2 9 16 23 30	6 13 20 27	3 10 17 24	1 8 15 22 29	5 12 19 26	3 10 17 24
Total FTE on annual leave		56.24											
None													
June													

Note: This row has been added to the Rostering Best Practice Annual Leave Planner. Doing this will allow you to use "excel" to perform calculations for you.

3. Access the Blank Annual Leave Planner from the Rostering Best Practice webpage

<http://www.health.nsw.gov.au/Performance/rostering/Pages/resources.aspx>

The screenshot shows the NSW Health website's 'Resources and links' page for Rostering Best Practice. The page includes a navigation menu with options like PUBLIC, PROFESSIONALS, and HEALTHY LIVING. A search bar is located in the top right. The main content area is titled 'Resources and links' and is divided into sections: 'Tools and resources' and 'Templates'. The 'Tools and resources' section lists several documents, including a poster, an infographic, and a frequently asked questions sheet. The 'Templates' section lists various forms and checklists. Two items are highlighted with red boxes: 'Resources and links' in the left sidebar and 'Annual Leave Planner (calendar year) - 2017, 2018, and 2019 [144KB]' in the main content area.

Home > System relationships and frameworks > Rostering Best Practice > Resources and links

Resources and links

Rostering Best Practice

- Principles of rostering
- Methodology and process
- Resources and links**
- Program contacts
- Rostering Resource Manual
- Staffing Intelligence Application (SIA)

Tools and resources

- Rostering Best Practice Poster (2014) [570 KB]
This poster may assist with understanding the objectives, methodology and outcomes of the Rostering Best Practice program.
- Rostering Best Practice Infographic (2015) [13.8MB]
This infographic explains the incentive behind the program and may be useful to Local Health Districts, Speciality Health Networks, Roster Managers and Rostered Staff who are working with the Rostering Best Practice team.
- Allocated Days Off (ADOs) - Frequently Asked Questions (FAQ)
This frequently asked questions sheet has been developed to assist Roster Managers and Rostered staff to understand how Allocated Days Off (ADOs) are calculated, answer common queries and dispel some myths around ADOs.

Templates

- Temporary Individual Roster Arrangements Request Form [666 KB]
- Recording Approved Time in Lieu of Overtime Form [673 KB]
- Sample Roster Requests Form [570 KB]
- Sample Shift Swap Form [588 KB]
- Rostering Measures of Success Checklist [455 KB]
- Annual Leave Planner (financial year) - 2016/17, 2017/18 and 2018/19 [145KB]**
- Annual Leave Planner (calendar year) - 2017, 2018, and 2019 [144KB]**

4. Transfer relevant details from the Staff Profile to the Blank Annual Leave Planner, including:

- Staff Names
- Annual Leave Hours p.a.
- Substantive hours

Note: You will need to identify on your resources, the relevant information and ensure it correlates with this tool. This has already been transferred onto the draft annual leave planner.

STAFF PROFILE											
		#N/A							Updated 23/03/2017		
Award Hours	Annual Leave weeks p.a.	Annual Leave Hours p.a.	Pay No	NAME	RATE	Employment Status	Substantive Hours	Substantive FTE	Current Hours Worked	Current FTE	COMMENTS
38	4	96		Jenny SUNSBURY	17.92002	PPT	24	0.63	24	0.63	
38	7	210		Jacinta TYMOC	18.48873	PPT	30	0.79	30	0.79	
38	7	70		Melanie BAILEY	19.07112	PPT	10	0.26	10	0.26	
38	7	210		Amanda McLAREN	19.66444	PPT	30	0.79	30	0.79	
38	7	140		Robert ANDERSON	19.66444	PPT	20	0.53	20	0.53	
38	7	126		Samantha HEMMINGS	19.66444	PPT	18	0.53	18	0.53	
38	7	140		Joshua EDWARDS	19.07112	PPT	30	0.79	30	0.79	
38	7	140		Hamish ATTWOOD	22.47521	PPT	20	0.53	20	0.53	
38	7	266		Sandra McLEMENTS	23.44312	FT	38	1.00	38	1.00	
38	7	112		Sonya SIMONS	24.4247	PPT	16	0.42	16.0	0.42	
38	7	0		Fatima TYSON	24.4247	PPT	24	0.63	0	0.00	LSL till 7/5/18 contract for this position
38	7	112		Chelsea FITZSIMONS	24.4247	PPT	16	0.42	16	0.42	
38	7	266		GRAD LINE	23.99817	FT	38	1.00	38	1.00	
38	7	0		Angela MORAN	25.17388	PPT	16	0.42	0	0.00	
38	7	0		Matilda ROBERTS	25.17388	PPT	19	0.50	0	0.00	Mat Leave to 18/11/2017 to 14/10/2018 EOI required
38	4	152		Andrew Harrison	27.64833	FT	38	1.00	38	1.00	
38	6	228		Emma JONES	27.64833	FT	38	1.00	38	1.00	
38	7	266		Cynthia WATSON	30.5466	FT	38	1.00	38	1.00	
38	7	266		Helen ASKEW	35.01704	FT	38	1.00	38	1.00	
38	7	266		Marilyn SAMUELS	35.01704	FT	38	1.00	38	1.00	

Year	2018																	
Month	Contracted hours	June	July	August	September	October	November	December	Current annual leave balance including extra leave and public holiday leave	Estimate of Annual Leave Hours p.a.	Planned Annual Leave 2018 (hours)	Annual leave balance at end of 2018 (hours)	Balance at end 2018 (days)	Equiv number of weeks required to exhaust leave				
Week Commencing		28 4 11 18 25	9 16 23 30	6 13 20 27	3 10 17 24	1 8 15 22 29	5 12 19 26 3	10 17 24 31										
Total FTE on annual leave		56.24																
Name																		
Jenny SUNSBURY	24					24 24			24	29.46	96.00	120	5.46	0.23				
Jacinta TYMOC	30	30 30							46.53	210.00	120	136.53	17.96	4.55				
Melanie BAILEY	10		10 10			10 10		10 10	65.77	70.00	100	35.77	4.71	3.58				
Amanda McLAREN	30			30 30					15.48	210.00	180	45.48	5.98	1.52				

- Generate an Excessive Leave Balance report as at the end of the period being planned through StaffLink and record this information in **Leave Balance at end of 2018 (incl accrued, p'hol, extra)**.

Note: For this activity, we have recorded this information for you.

Month	Contract ed hours	September			October				November				December				Current annual leave balance including extra leave and public holiday leave	Estimate of Annual Leave Hours p.a.	Planned Annual Leave 2018 (hours)	Annual leave balance at end of 2018 (hours)	Balance at end 2018 (days)	Equip number of weeks required to exhaust leave																					
		10	17	24	1	8	15	22	29	5	12	19	26	3	10	17							24	31																			
Week Commencing																																											
Total FTE on annual leave																																											
Jenny SUNSBURY	24				24	24												24	29.46	36.00	120	5.46	0.72	0.23																			
Jacinta TYMOC	30																		46.53	210.00	120	136.53	17.36	4.55																			
Melanie BAILEY	10				10	10									10	10			65.77	70.00	100	35.77	4.71	3.58																			
Amanda McLAREN	30														30	30	30		15.48	210.00	180	45.48	5.38	1.52																			
Robert ANDERSON		Obtain this information from StaffLink as it is the source of truth.																					34.52	140.00	0	174.52	22.36	8.73															
Samantha HEMMINGS																																						36.43	126.00	162	60.43	7.35	3.36
Joshua EDWARDS																																			30	30			237.30	140.00	270	167.30	22.01

- Note the total planned annual leave hours for each staff member derived by adding all recorded hours across each horizontal row.

Note: The image below is an extract only. Some months are not visible. Please refer to the partially completed Annual Leave Planner.

Annual Leave Planner 2018																																																			
Month	Contract ed hours	April			May			June			July			August			September			October			November			December			Current annual leave balance including extra leave and public holiday leave	Estimate of Annual Leave Hours p.a.	Planned Annual Leave 2018 (hours)	Annual leave balance at end of 2018 (hours)	Balance at end 2018 (days)	Equip number of weeks required to exhaust leave																	
Week Commencing		3	16	23	30	7	14	21	28	4	11	18	25	2	9	16	23	30	6	13	20	27	3	10	17	24	1	8							15	22	29	5	12	19	26	3	10	17	24	31					
Total FTE on annual leave		56.24																																																	
Name																																																			
Jenny SUNSBURY	24				24	24																				24	29.46	96.00	120	5.46	0.72	0.23																			
Jacinta TYMOC	30																										46.53	210.00	120	136.53	17.36	4.55																			
Melanie BAILEY	10				10	10																					65.77	70.00	100	35.77	4.71	3.58																			
Amanda McLAREN	30																										15.48	210.00	180	45.48	5.38	1.52																			
Robert ANDERSON	20	Add all requested leave hours horizontally (ie for each staff member) and record in the Planned Annual Leave 2018 (hours) column.																					34.52	140.00	0	174.52	22.36	8.73																							
Samantha HEMMINGS	18																																													36.43	126.00	162	60.43	7.35	3.36
Joshua EDWARDS	30																																														237.30	140.00	270	167.30	22.01

9. Note the staff members’ outstanding leave balance at the **end** of the year being planned, was calculated using the following calculation:

Current annual leave balance (incl extra leave and public holiday leave)	+	Estimate of Annual Leave Hours p.a.	-	Planned Annual Leave between now and end 2018 (incl anything that has not yet been processed)	=	Annual leave balance at end of 2018
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Note: This will identify those staff members who are likely to have an excessive leave balance by the end of the year being planned. This is one method to support you to predict the amount of annual leave a staff member will have available by the end of the year being planned. You should speak to your Manager or Workforce representative to determine the accepted process in your LHD. However; with any leave balance figures, it is important to understand what is included in the calculation and the date the figure relates to as this will inform how you manage the leave.

You will need to follow up with these staff members to ensure they plan adequate leave.

We have used formulas in excel to perform calculations and conditional formatting to highlight staff who are likely to have an excessive leave balance by the end of the year being planned.

10. You then convert a number in hours to days, divide the number of hours by 7.6.
11. Once all requests have been added, calculate the total number of staff on leave each week, by adding all hours vertically and compare to the ‘Total FTE on annual leave’ figure calculated in question 2 to identify those weeks where there are too many staff requesting leave, and look at having some staff take their leave at alternate times. Remember to consider the seasonal variations.

Note: We have used excel to perform these calculations automatically and applied conditional formatting to highlight weeks where the ‘FTE on leave at once’ have been exceeded.

Month	Contracted hours	January				
Week Commencing		1	8	15	22	29
Total FTE on annual leave						
Jenny SUNSBURY	24					
Jacinta TYMOC	30			30	30	
Melanie BAILEY	10					
Amanda McLAREN	30	30				
Robert ANDERSON	20					
Samantha HEMMINGS	18	18	18	18	18	18
Joshua EDWARDS	30					
Hamish ATTWOOD	20	20	20			
Sandra McLEMENTS	38					
Sonya SIMONS	16					
Fatima TYSON	24					
Chelsea FITZSIMONS	16		16			
Angela MORAN	16					
Matilda ROBERTS	19					
Andrew HARRISON	38					
Emma JONES	38			38		
Cynthia WATSON	38					
Helen ASKEW	38					
Marilyn SAMUELS	38					
Staff requesting leave per week (hours)		68	54	86	48	18
Legend:						
Total hours planned for 2018						
Total hours to be planned for 2018		2924				

Add columns vertically to determine the number of requested annual leave hours per week.

Determine how to address weeks where staff have either requested either a lower or greater FTE number than is budgeted.

- Refer to the partially completed Annual Leave Planner you have been provided and the “Important Points” below to complete this activity.

Important points:

- Joshua Edwards has made a non-refundable booking for a holiday.
- Matilda Roberts will be taking maternity leave.
- Emma Jones wants to accrue ADOs to put toward Annual Leave request.
- Jenny Sunsbury is a single parent and needs to care for children during school holidays.
- The unit generally has a higher demand for services over June and July.
- Chelsea Fitzsimons has requested to increase her hours 24 per week.
- December and early January are quieter months and staff may be encouraged to take leave.
- Amanda McLaren recently transferred from full time to part time.
- Marilyn Samuels has indicated she may be retiring throughout 2018.

13. Mark on your Annual Leave Planner, the weeks where you have more staff requesting leave than can be accommodated.

Suggested response:

If staff identify all weeks where the Total FTE on annual leave is not met, ask them to consider if there are weeks over the winter months where they would prefer staff not to take leave.

14. Which staff will you be asking to consider alternate dates? Provide a reason for each.

Suggested response:

Need to share school holiday periods equitably.

Staff Member	Requested Dates	Alternate Dates	Reason
Hamish Atwood	w/c 26 Mach, 2, 9, 16 April	Bring forward one week w/c 19, 26 Mach, 2, 9 April	Final week is in school holidays Ask him if his leave needs to be in school holidays or if it could be moved forward one week.
Fatima Tyson	w/c 16, 23 April	w/c 2. 9 April	Has only requested school holidays and Total FTE on annual leave has been exceeded for all school holiday.
Chelsea Fitzsimons	w/c 23, 30 April, 7, 14 May	w/c 30 April, 7, 14, 21 May	Ask Chelsea if the leave needs to be in school holidays and if not, ask to move back one week.
Angela Moran	w/c 16, 23 April w/c 9, 16 July	No need to rebook w/c 23, 30 July	Will exceed her annual leave entitlement. Has only requested school holidays and Total FTE on annual leave has been exceeded for all school holiday.

15. Which weeks would be suitable alternatives for staff to take leave? Provide a reason for each.

Suggested response

Any week where the Total FTE on annual leave has not been met, taking seasonal fluctuations into account.

16. Which staff members would you arrange meetings with to discuss their leave plans?

Staff Member	Reason for discussion	Suggested resolution
Andrew Harrison	Has not scheduled any annual leave for the year.	Request to return with dates within a week.
Robert Anderson	Will have the equivalent of 8.73 weeks holiday by the end of the year being planned, allowing for him being part time.	Follow process to reduce excessive leave balance.
Angela Moran	Will have exceeded outstanding annual leave balance by end of the year.	Needs to cancel some requests for leave and cannot take all school holidays to allow for equity and fairness. Cancel request for w/c 16 and 23 April.
Cynthia Watson	Will have an excessive leave balance by the end of the year being planned.	Follow process to reduce excessive leave balance.
Marilyn Samuels	Will have an excessive leave balance by the end of the year being planned, but has indicated she would like to retire.	Follow process to reduce excessive leave balance as her retirement is not formalised.

17. In small groups, discuss the next steps you would take to finalise the annual leave plan for this unit.

Please be prepared to discuss your thoughts with the larger group.

Activity Debrief – Discussion of Important Points

Issue	Discussion Point
Joshua Edwards has made a non-refundable booking for a holiday.	<p>This leave is green on the planner, indicating it has been approved.</p> <p>Staff are reminded not to book leave prior to it being approved as there is no guarantee a leave request can be approved.</p>
Matilda Roberts will be taking maternity leave.	<p>Maternity leave should be recruited to and not included in annual leave calculations</p>
Helen Askew wants to accrue ADOs to put toward Annual Leave request.	<p>Based on the current plan, Helen will still have excessive leave at the end of the year being planned and should be encouraged to take leave to reduce her outstanding annual leave balance.</p> <p>Accruing ADOs to put toward an annual leave request will not assist with reducing the outstanding annual leave balance.</p>
Jenny Sunsbury is a single parent and needs to care for children during school holidays.	<p>While this is a consideration, this should not mean that Jenny receives all the school holidays as this would be a very biased practice. Other parents may still need to pay for child care in school holidays or want to have/go on holidays with their children, grandchildren, partners etc at this time.</p> <p>It is important all requests are treated equitably and fairly.</p>
The unit generally has a higher demand for services over June and July.	<p>The annual leave plan may have some weeks where the Total FTE on annual leave is not met due to seasonal demand fluctuations. This is acceptable as long as there are other times over the year where the Total FTE on annual leave is exceeded so on average, the target is achieved.</p>
Chelsea Fitzsimons has requested to increase her hours 24 per week.	<p>The Total FTE on annual leave each week will be adjusted regularly to allow for staffing changes.</p> <p>Staff who change working arrangements over the year being planned will need to review their annual leave plans to ensure they will not accrue an excessive leave balance.</p>
December and early January are quieter months and staff may be encouraged to take leave.	<p>The annual leave plan may have some weeks where the Total FTE on annual leave is exceeded due to seasonal demand fluctuations.</p>

<p>Amanda McLaren recently transferred from full time to part time.</p>	<p>Staff transitioning from full time to part time should be encouraged to take leave prior to commencing part time and all leave should be taken within 12 months at a full-time rate.</p> <p>Part time staff may also have hours up to FTE rostered and paid if they have an excessive leave balance.</p>
<p>Marilyn Samuels has indicated she may be retiring throughout 2018.</p>	<p>It is still important to plan annual leave for staff members, despite an indication they may retire as there is a possibility they change their mind and, in this situation, they would still have an excessive leave balance.</p>

Scripting Activity - One

As an individual, prepare an email to send to the staff member to request a meeting to discuss the need to plan their leave.

Find a partner, share your scripts and provide each other with feedback.

In the large group, we will share ideas.

Record your final script below.

Scripting Activity - Two

As an individual, prepare a script to notify a staff member their leave request cannot be approved.

Hint:

Explain the reasons why leave cannot be approved.

Provide alternate solutions.

Inform when they need to return with their preference.

Explain the consequences if the staff member does not return.

Find a partner, share your scripts and provide each other with feedback.

In the large group, we will share ideas.

Record your final script below.

Scripting Activity - Three

As an individual, prepare a script to advise a staff member they need develop a plan to reduce their excessive leave balance.

Hint:

Remind the staff member of their responsibility for planning leave.

Provide dates when leave could be taken.

Inform when they need to return with their preference.

Explain the consequences if the staff member does not return.

Find a partner, share your scripts and provide each other with feedback.

In the large group, we will share ideas.

Record your final script below.

Role Plays

Session	Instructions	Resources
	<ol style="list-style-type: none"> 1. Ask for two volunteers to participate in a role play demonstration to the large group. 2. Debrief these participants explaining, one participant is to adopt the role of the Roster Manager and the other participant is to adopt the role of a staff member. 3. The staff member has an excessive leave balance and has not submitted any annual leave requests for the next 12 months. The Roster Manager has sent the staff member an email requesting a meeting to plan annual leave which had the draft annual leave planner and the staff member's outstanding leave balance report attached. 4. Ask participants to role play the meeting to the large group. 5. Ask participants to observe the role play, taking notes of: <ul style="list-style-type: none"> • What the Roster Manager does well; and • What they would do differently if they were the Roster Manager. 	
	<p style="text-align: center;">Role Play Observation</p> <ol style="list-style-type: none"> 1. What does the Roster Manager do well? 2. What would you do differently if you were the Roster Manager? 	
	<ol style="list-style-type: none"> 6. On conclusion, ask the volunteers to return to their seats. 7. Debrief the activity by asking participants for their thoughts on the points they were asked to observe. 8. Provide feedback as required. 	

Action Planning Activity

Session	Instructions	Resources
Planning Annual Leave for Your Team	<p>Facilitator note:</p> <p>Divide the large group into smaller mixed ability teams and ask them to sit together.</p>	
Activity	<p>Explain</p> <p>In this activity, we will briefly look at the steps to be completed to plan annual leave and then set some dates around when these will be completed.</p> <p>Hand out</p> <p>Issue each team with a set of annual leave planning cards.</p> <p>Ask teams to work together to place the cards in the order they believe they should be completed.</p> <p>Allow 5 minutes.</p> <p>Remind</p> <p>The process to plan annual leave outlined in the online learning modules is a guide only and it is important to check the processes in your Health Agency to ensure you are following the correct process.</p> <p>In your workbook, record the action items that need to be completed to plan your unit's annual leave for the next 12 months. Make a note of who is responsible for each action item and the date to be completed.</p> <p>Regularly monitor these items and record the date completed to ensure each item is addressed.</p>	Annual leave planning cards

Personal Action Plan for Annual Leave Planning

Complete the table to develop an Action Plan for Annual Leave Planning for your team.

Action Item	Completed by (name)	Date to be completed	Date this was completed?
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

Compare your steps to others in your team and have a brief discussion around the order the steps would be completed.

Suggested response

1. Prepare the outstanding leave balance report
2. Meet with the team to outline their responsibilities for planning leave, including a date when requests must be submitted
3. Action leave requests
4. Inform staff of outcome of leave requests
5. Enter leave requests into HealthRoster
6. Update the Annual Leave Planner
7. Negotiate leave dates with staff who are nearing or have an excessive leave balance
8. Document discussions with staff requesting they plan their leave
9. Address requests to make changes to approved leave
10. Address unplanned leave requests.

Debrief

Reform the large group and conduct a brief discussion with the large group by asking:

What tasks will you implement to plan annual leave for your team?

Was there any deviation in the order tasks were performed and if so, what was the reason for this?

Do some tasks vary between participants and if so, what is the reason for this?

Conclusion

Ask participants if anyone has any questions about the content discussed in today's workshop.

Thank participants for their participation and conclude the workshop.