

Holiday Pay

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How do I configure Holiday in CareForIT?

Holiday Pay/Accrual is set up in two places:

- 1) Against the assignment visit type to denote if a visit accrues holiday, is paid, and if it is used as part of the regular pay calculation for Holiday pay.

A visit type that accrues holiday will be used in the calculation that works out how many days a staff member has accrued

Home Care Assignment

Set Mandatory Trg / Skills / Qualifications

All Wales Manual Handling Passport

Basic Emergency First Aid

Care Certificate

Challenging Behaviour

COSHH

Settings

Choose Colour

Type Assignment

Pay

Regular Pay

Accrues Holiday

- 2) Against the Carer record in the Holiday pay tab.

Personal Contact NOK Trg / Skills / Quals Equipment Schedule Notes Avail **Holiday** Settings

Kelly's Daily Rate ⓘ

Calculate

This Year's Holiday

Holiday Taken Holiday Booked Holiday Available

Holiday

-1.0 -0.5 0.0 0.5 1.0

Days

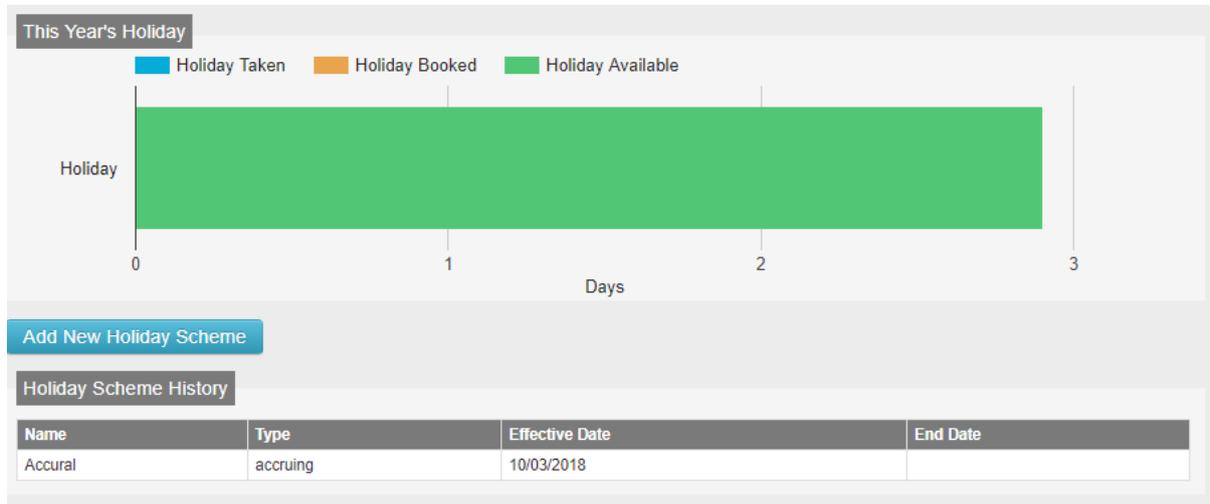
Add New Holiday Scheme

Holiday Scheme History

Name	Type	Effective Date	End Date
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To set up a carer to use holiday pay, you need to assign a Holiday pay scheme to them (the above screenshot doesn't have scheme set up so the system doesn't know what to do), this is done by pressing on "Add Holiday Scheme" the wizard then drives you to enter the details. When setting up a scheme you have 2 options, accrual or fixed, the accrual scheme will look back for 52 weeks with a 4 week buffer if you are at the start of a holiday period (In this case the start of the Holiday period is Apr 1st so the system will look back for 4 weeks to show average pay. Fixed holiday schemes do not

accrue holiday, they are just set as per the scheme, eg fixed at 28 paid days. Once you select the Scheme you then need to select a start date, this should be the employee start date. Then add an end date in if you wish, once you click Add selected Scheme this will be the employees scheme for the dates of the scheme, in the example below, I haven't selected an end date, so this employee will be on a accrual scheme forever, or until another scheme is added.



Once you add a worker to a scheme you will see that everything accrued for the dates of the scheme will show in the Holiday chart. This person has accrued 2.9 days since they started working on 10/3/2018.

Finally, if you add a worker to a new holiday pay scheme and you don't have a end date for the previous scheme, when you add the new scheme a end date for the previous scheme will be inserted.

What are the conditions that make a worker accrue holiday?

For a worker to accrue holiday, visits need to be delivered under a visit type that accrues holiday and those visits need to be reconciled within the system, the person in the example above would have worked on average every 1.7 days since 10/3/18 to 25/6/18(the time this screenshot was taken). A day worked equates to a day annual leave to see more about the calculation check the document based off the government holiday calculator.

How does my worker take holiday?

To add a holiday, simply go to assignments and Add Holiday (this is not a new process), you need to select your holiday type the start and end date, the funder and the staff member. Currently Holiday is limited to one holiday booking for 1 day holiday, this is to allow the person booking the holiday to put in the staff members working days. The holiday assignment should include the working time for that individual. Half days will not work.

NOTE: if you want to pay for a visit in payroll you need to tick "pay" and "holiday pay" in the assignment conversely if you don't want to pay for a visit you need to untick "pay" and "holiday pay" in the assignment.

How do I show what my workers average daily rate is?

If you go to the Holiday tab for a worker you can enter a date to show what the average pay would be from a specific date looking back 12 weeks. Just select your date and click “Calculate” to show this.



The screenshot above shows the average daily rate for Kelly, if you click the ? the view will be expanded to show a breakdown of all the paid visits that accrue holiday.

Week Start	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Total	
	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time
18/06/2018	£102.74	630	£91.62	675	£98.06	555			£111.88	645	£131.59	720	£126.38	660	£662.27	3885
Overall Total															£662.27	3885

The average day rate is calculated by the overall total pay divided by the amount of days worked, rounded to the nearest penny.
Therefore $£662.27/6 = £110.38$, which is Kelly's day rate.

The average hourly rate is calculated by the overall total pay divided by the overall total minutes worked divided by 60, rounded to the nearest penny.
Therefore $£662.27/(3885/60) = £10.23$ which is Kelly's hourly rate.

The screenshot above shows that Kelly has been paid for visits on the week commencing 18/6/18, her daily pay and how many hours she has worked, this functionality will look back and show 12 working weeks.

How do I pay my worker for Holiday they have taken using the holiday pay feature?

Firstly, all the above must be in place on your system and for the worker you want to pay, you need to:

- Have a visit type that accrues holiday
- A holiday scheme set up for your worker
- A holiday taken under a visit that has “pay” and “holiday pay”
- As well as having some locked payroll so they system know what to pay

When you then go to payroll you should see booked holidays, holiday will be paid for the time period they are taken in. When a Holiday pay item is shown you will see a coloured triangle in the upper right corner of the pay column to show green if the worker will be paid or red if they shouldn't be paid for the visit(this screenshot shows that the worker should be paid for this visit):

Wednesday 11/07/2018								
<input type="checkbox"/> 8985		Annual Leave	9:00am	5:00pm	x	x	8:00	£110.38

Visit will be paid at the average daily rate calculated on the history of locked payroll.

When you click on the coloured triangle the person running payroll is presented with below screen which shows how many days requested, the user is then given the option to pay or not to pay.

Holiday Pay Calculator ✕

Kelly has requested **1** day.
How many days will be paid.

|
Days

The gauge shows entitlement use in this holiday year.
 Green marks locked holiday pay.
 White marks available entitlement.
 Orange marks unlocked holiday pay.
 Red marks unentitled time.
▲ Holiday is 10 days over current entitlement