

Holiday - Employee Mini Guide

Written by Sharon Clarke on 31 Dec 2019



This Mini Guide supports the [Holiday Policy](#).

In the event of any difference between this guide and the policy, the policy will prevail.

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For information about the Holiday Pay Supplement which was introduced from June 2016 refer instead to the [Holiday Pay Supplement – Employee mini-guide](#).

Part One: General Holiday Guidance

Introduction

This mini-guide contains further information to support you in the following areas:

- [planning your holiday](#)
- [Public Holidays](#)
- [sickness absence and holiday](#)
- [the extended holiday scheme](#)
- [general questions and answers](#)

You should book holiday through self service under [My Details](#).

More information on keying holiday through self service, and how PeopleSoft calculates and processes holiday can be found in the [Employee's Guide to PeopleSoft HR](#).

For information on taking a two week continuous break see Part Two of this guide. From 1 January 2017 this requirement applies only to Treasury and specified Finance teams.

Planning your holiday

Making sure that you get time away from work throughout the year to relax and recharge is important to both your health and wellbeing and to ensure that you can remain motivated when at work.

When you are thinking about planning your holiday it is worth considering the following:

- are you getting a break from work on a regular basis?
- are there particular events or times that you would like to take as holiday?
- are you getting long enough breaks to properly recharge?

Your holiday will always need to be authorised by your manager in advance and they will need to take various things into consideration, including the requests of other team members and the requirements of the operation. It is a good idea to check with your team members to see whether they are requesting holiday at the same time as you.

You should try and give your manager as much notice as you can and always wait until you have gained authorisation before you make any holiday bookings.

Public Holidays

How is your Public Holiday leave entitlement calculated?

For employees on PeopleSoft, the system will automatically calculate your surplus or deficit based on the working pattern which has been keyed for you. If your working pattern is incorrect then you will need to ask your manager to correct this on your HR record.

If you work full-time or part-time, working the same hours every day between Monday and Friday, your Public Holiday entitlement will always be the same as the Public Holidays that fall in the calendar year. This means you will have enough leave to take time off on all the Public Holidays that fall on days that you normally work.

However if you work full-time or part-time with a working pattern which doesn't include Mondays or Fridays, or where you work different hours on different days you can use the [Public Holiday](#)

Calculators to work out your individual entitlement (however if you are on PeopleSoft this will automatically show on the 'My Details' page).

You will still need to use your Public Holiday leave to cover any Public Holidays that you don't work which fall in your working pattern, however you might find that you have more or less Public Holiday entitlement that you need (which will depend on your working pattern). If you have more leave than you need to cover the Public Holidays, you can book this at an alternative time using your normal holiday booking arrangements.

If you have a Public Holiday deficit, you will need to make up the time. Talk to your manager about the best way to do this at the start of the year – you can use a combination of early starts or late finishes, using TOIL time, or part of your Annual Holiday entitlement. If your records are kept on PeopleSoft and you agree to work additional hours to make up the deficit, your manager will need to contact AskHR to make an adjustment on the system.

Some employees will have a working pattern which means they need to work on the Public Holiday, if this is the case, you will be able to take your Public Holiday leave at another time that you agree with your manager.

What are the arrangements for Christmas and Public Holiday working?

These arrangements are communicated by the Group each year.

What happens if you are sick on a day you had planned to work additional hours to make up a Public Holiday deficit?

If you are sick on one of your normal working days, the sickness absence will be recorded as normal against your contracted hours, any additional hours you were due to make up on this date will not be counted and you will need to arrange to make these up separately.

If you are sick on a date you are due to work additional hours only to make up your Public Holiday deficit and this isn't part of your contracted hours/dates, this will not be recorded as sickness absence and you will need to arrange with your manager to make up the hours at another time.

Sickness Absence and Holiday

What happens if I fall ill on a holiday, can I rebook my holiday?

This will depend on the circumstances. Further information can be found in the [Holiday Policy](#).

What happens if I have not been able to take some, or all, of my holiday entitlement due to sickness absence?

Where possible holiday should be used within the holiday year and when you are off sick you can still book and take holiday by contacting your manager. However, there may be circumstances where you are prevented from taking leave due to sickness absence and in some cases, may be able to carry forward additional holiday to the next year.

When reviewing whether or not you will be able to carry forward more than the standard amount, we will consider:

- The amount of leave you have already taken during the holiday year (inclusive of Public Holidays)
- Whether it is sickness absence that has prevented the holiday being taken. For example, if you are in work for much of the year, but have not taken holiday other than Public Holiday, a sickness absence starting close to the year end will not have prevented you from taking your holiday and so the amount of holiday you may be allowed to carry forward will be reduced

The maximum amount of carried forward holiday leave you will be allowed in these circumstances will be four weeks less any holiday and Public Holiday leave taken in the holiday year. For more information please refer to the [Holiday Policy](#).

In these circumstances you should contact AskHR Option 5.

The following examples are provided for guidance only and advice should be sought from HR on your specific case:

- A part time employee who works 28 hours and has an annual leave entitlement of 144 hours starts sickness absence on 1 July and doesn't return for the rest of the year. Before they started their sick leave, they had already taken 96 hours of annual leave and 50 hours Public holiday leave, totalling 146 hours for the year. In this instance, the employee has taken more than 112 hours (which is four weeks leave) and therefore cannot carry forward any additional holiday over and above the standard two days (pro-rata).
- A full-time employee with an annual leave entitlement of 26 days has three instances of long term sickness absence during the year totalling 22 weeks. Although they have returned to work, they commence a fourth period of absence which starts on 10 October and they do not return for the rest of the year. Throughout the leave year they have taken 6 days annual leave and 9 days Public Holiday leave totalling 15 days for the year. In this instance the employee has not taken four weeks leave (20 days) and so will be allowed to carry forward five days to be used by the end of the following year (inclusive of the standard carry forward). In this example, the employee's manager should contact AskHR Option 5 to arrange for the standard carry forward to

be increased from two to five days. Also, if the employee wishes to take holiday whilst on PSB the manager should contact AskHR to ensure this is paid correctly.

The Extended Holiday Scheme (EHS)

The Holiday Policy explains how you can participate in the Extended Holiday Scheme, by completing an [Extended Holiday Scheme eform](#) before 31 March in the year you want to start accumulating holiday. The eform will confirm that you would like to join the scheme and how many days you would like to accumulate in each of the years (up to three days per year between years one and five) and you can view a copy of the submitted eform via My Details.

You can then take the days you have accumulated in the sixth year of the scheme (although you cannot add it onto holiday from the end of the fifth year or the beginning of the seventh year). You will still need to seek advance approval of the dates of your extended holiday in year six, and we ask that you start discussing this with your manager at least four months before you want to take the leave – though it's advisable to discuss this even earlier if you can.

Between years one and five inclusive HR will make the adjustment to your holiday record on My Details. In year six, HR will adjust your holiday again and return your accumulated days to you. When planning to use the holiday in the sixth year you should agree the dates of your extended holiday locally, and then book the whole extended holiday through My Details

Your manager will also keep local records of the holiday you have accumulated during the first five years of the scheme. If you move jobs during that period, make sure you inform your new manager, and that your records are passed across.

General Questions and Answers

What do you need to do to take time off to observe a religious festival?

If you would like to take time off to observe a day of religious significance on a day you are contracted to work you should request this in the normal way using part of your annual holiday entitlement. Further information can be found in the [Time Off for Other Reasons Policy](#).

If you are promoted part year and entitled to a higher holiday entitlement, how will your holiday be calculated?

If you are promoted during the year you will receive the increase holiday entitlement pro-rata. For example, if you worked four months with an entitlement of 27 days and eight months with an

entitlement of 30 days, your entitlement will be based on 4/12's of 27 plus 8/12's of 30. The pro-rata holiday will be rounded up or down to the nearest half day.

If your holiday entitlement has increased because of a service entitlement, when can you take it?

You will be able to take your service entitlement increase any time in the calendar year that you reach the relevant anniversary (subject to normal booking rules). So, if your anniversary is 30 October, and you would be entitled to a higher entitlement when you reach the anniversary, you can take this holiday at any time in that holiday year. If your holiday is recorded on PeopleSoft, the system will calculate your entitlement automatically.

This is different from any one-off holiday days you receive as part of a long service recognition award – see our [Rewards Policy](#) for more information.

Do you need to do anything if you want to carry forward two days (pro rata for part-timers)?

PeopleSoft will automatically carry forward up to two days (14 hours) of your unused entitlement into next year. This is calculated on a pro-rata basis for part-timers using the calculation (weekly hours/weekly contracted full time hours) x 7 hours x 2 days. This ensures that all employees working the same number of hours receive the same entitlement to carry forward holiday, irrespective of their working pattern. This does, however, mean that the carry forward entitlement might be slightly more or slightly less than your normal working day.

Any entitlement carried forward should be taken by the end of the following January.

Does PeopleSoft record holiday for employees on a term-time contract?

No, details of your holiday entitlement are contained in your term-time contract but won't be recorded on PeopleSoft. However, if you have bought holiday through '[MyReward](#)' this will be shown separately on PeopleSoft.

Part Two: Taking a two week continuous break (Treasury and specified Finance teams only)

- [Introduction](#)
- [Which business areas need to take a two week holiday?](#)
- [What should you do you have personal circumstances which mean that you need to take your holiday in shorter periods than two weeks?](#)
- [Questions and Answers: Two week holiday](#)

Introduction

With effect from 1 January 2017, this requirement only applies to employees in Treasury and in specified Finance teams.

Asking employees in these specific areas to take a two week continuous break is one of the ways in which we can control risk. Our previous regulator, The Financial Services Authority, indicated that this approach can help prevent, and detect, issues related to rogue trading and employee fraud. Many financial firms operate a similar policy.

If you don't work in one of the specified business areas, you are not required to take a two week continuous holiday, although you may still choose to request a two week break. Even if you don't work in one of these areas, you can still request a two week break. We encourage you to plan your holiday in a way which gives you a proper break away from work – and many employees will still want to take a break of one or two weeks during the year.

Which business areas need to take a two week holiday?

The two week holiday requirement applies to all employees in Treasury and the following Finance teams:

- Finance Systems team;
- Finance Central Services; and
- Finance roles in Nationwide International (which includes the Finance Director / Deputy MD, Financial Accountant, Accountant and Accounts Assistant);

who have been continuously employed in the holiday year for six or more months, **unless you:**

- Are employed on a term time contract (as you'll already have a continuous two week break from work)
- Are a new starter who joins after 1st July each year (for your first holiday year only)
- Have been absent for another reason (such as a short unpaid leave break, on long term sickness absence whilst in receipt of prolonged sickness benefit, on maternity, adoption or shared parental leave, or career break) during the holiday year for a continuous period of two weeks or more (although short term, intermittent, periods of sickness absence are not counted towards this).

The policy on which business areas need to take a two week break may be reviewed from time to time and any changes to the Holiday Policy are communicated by Joint Statement.

What should you do you have personal circumstances which mean that you need to take your holiday in shorter periods than two weeks?

Talk to your manager and explain your circumstances. Your manager will consider your request and if they agree to waive the policy, this will need to be supported by your level 3 Senior Executive.

To enable your request to be considered, your manager will need to understand the reasons that you are asking for a dispensation. They will then need to share this information with their level 3 Senior Executive. Your manager will also need to talk to you about alternative risk control measures which may be needed if your request is approved. Such measures might involve a short change to the tasks that you carry out so that there can be a two week break.

Your manager will confirm whether your request has been accepted, and discuss with you other control measures which may need to be applied. If your request has been agreed, this will only apply for that holiday year and you will need to speak with your manager again if your circumstances continue into the next holiday year.

Questions and Answers: Two week holiday

Why has this requirement been reviewed and how have the roles which need to take a two week holiday been identified?

The requirement to take a two week holiday was introduced in 2010 to supplement Nationwide's internal fraud control measures. It followed from the Regulator's findings (the FSA at the time) into the Société Générale case of rogue trading. Since its introduction we have reviewed the policy on a number of occasions, taking account of improved internal fraud detection capabilities and other improvements which mitigate the risk of fraud. Following a further review in 2016 we have confirmed that this requirement will only apply to Treasury and specified Finance teams from 2017. It may be necessary to review this policy again in future.

Does the requirement to take a two week break also apply to employees who work part time?

Yes, but if you work part-time you only need to take the same proportion of your annual entitlement as a full-time employee (for example if you work three days a week, you will only need to book six days to take a two week break from work).

Can Public holiday's count towards the two week continuous holiday?

Yes, the requirement is to take a continuous break of two weeks (14 consecutive calendar days), which can include Public holidays which fall during the holiday leave.

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