



Bupa Global UK  
Bupa Group in the UK

# Annual Leave Policy

*March 2022*

## 1. Purpose

We want people to love working for Bupa, so we're committed to working practices and policies that reward loyalty, increase employee engagement and support our purpose of helping people live longer, healthier, happier lives.

The Bupa Code means that we stay safe and well and your wellbeing is a priority to us.

This policy explains our approach to annual leave and bank holiday entitlement, how to calculate, request and manage your annual leave effectively and what you can expect from your manager.

You can refer to the Other Leave policy for information about other occasions when you may need to take time off from work.

## 2. Scope

This policy applies to all BGUK in the UK and Ireland and Group functions in the UK geography, with the exception of Bupa Dental Care (where local policies apply). This policy excludes all non-employees e.g. bank, self-employed, contractors, agency workers.

This policy does not form part of your contract of employment and will be reviewed from time to time to ensure that it reflects Bupa's legal obligations and business needs.

Area	Scope Area Breakdown	In Scope
<b>Provision business units</b>	Cromwell	✓
	Care Services	✓
	Clinics	✓
	Dental – Republic of Ireland	x
	Dental - UK	x
<b>UK Insurance</b>	UKI	✓
<b>BG</b>	BG Europe - Copenhagen (BDS, incl BGA)	x
	BG Europe - Head Office (UK)	✓
	BG APAC (China, Hong Kong, Singapore)	x
	BG AIM (Africa, India, Middle East, incl Bupa Egypt Insurance (BEI))	x
	BG Egypt - Bupa Egypt Services (BES)	x
	BG Branches (Switzerland)	x
	BG DAC (ROI)	✓
	BG DAC Branches (Travel, Netherlands)	x
<b>BGUK MU Functions</b>	All BGUK MU functions	✓
<b>Bupa Group Functions</b>	All Group functions in the UK	✓

## 3. Principles and Requirements

### 1. The annual leave year

Your holiday year runs from the 1<sup>st</sup> April to the 31<sup>st</sup> March each year.

### 2. Your annual leave entitlement

Your annual leave entitlement is detailed in your terms and conditions of employment. It will usually be shown as a full-time equivalent entitlement and based on a full leave year. Your entitlement will be pro-rated if you are a part time or fixed term employee.

#### **Carrying Over Annual Leave**

For health and wellbeing reasons you should take your full entitlement each leave year. In agreement with your manager a maximum of five days can be carried over into the next leave year provided this doesn't take your new allowance over 30 days (unless there are mitigating circumstances that have prevented you taking your annual leave such as long term sickness absence or exceptional business reasons). If you've been on family related leave e.g. maternity please refer to the relevant policy. You must take this carried over annual leave during the first three months of the new annual leave year (April, May and June). More information and resources about health and wellbeing and personal energy can be found on the Health and Wellbeing hub on People Place.

#### **Contractual Annual Leave Entitlements and Long Service Awards**

Dependent on your individual terms and conditions, your contractual annual leave entitlement may increase in line with your length of service with Bupa. This differs to a long service award which is a non- contractual one-off award. This only applies for the year in which your anniversary falls, not a permanent increase in annual leave entitlement. Please refer to the Long Service Award policy for further detail.

### 3. Buying and selling annual leave

You may be able to buy or sell some of your annual leave entitlement each year. Please refer to our Flexible Holiday scheme and FAQs.

### 4. Calculating your annual leave

#### **Calculating your FTE**

To calculate your annual leave entitlement, firstly you will need to know your FTE (full time equivalent) percentage. This is the percentage of full-time hours that you are contracted to work.

Your scheduled hours per week, divided by the default weekly hours for your business area, then multiplied by 100 gives your FTE% (full time equivalent).

- $FTE\% = (\text{scheduled hours/default weekly hours for business area}) \times 100$
- E.g. 30 scheduled hours a week / 37.5 default hours a week = 0.8.
- $0.8 \times 100 = FTE\ 80\%$

#### **Calculating your annual leave entitlement in days**

Your base annual leave entitlement in days (which can be found in your contract), multiplied by your FTE% gives your full annual leave entitlement for the year.

- Base entitlement in days x FTE% = full annual leave entitlement
- E.g. 25 day entitlement x 80% = 20 day annual entitlement

### **Calculating your annual leave entitlement in hours**

The amount of annual leave you're entitled to for the year in days should be multiplied by the standard full time daily hours for your business area.

The standard full time daily hours for your business area are calculated by dividing the standard weekly full-time hours for your business area by 5:

- 37.5 hours a week/5 days = 7.5 hours per day

To calculate the annual hours you are entitled to, multiply your annual entitlement in days by the standard full time daily hours for your business area:

- 20 days full annual entitlement x 7.5 hours per day = 150 hours annual entitlement, based on an FTE of 80%.

When calculating annual leave, make sure it doesn't take you below the minimum legal leave allowance required depending upon where you are employed.

In the UK this is: 5.6 weeks paid holiday per year or pro-rated part time equivalent. For a full time employee this equates to 20 days plus bank holidays (28 days in total).

In Ireland this is:

(a) 4 working weeks in a leave year in which you work at least 1,365 hours (unless it is a leave year in which you change employment (for example joining or leaving Bupa), or

(b) one-third of a working week for each month in the leave year in which you work at least 117 hours, or

(c) 8 per cent. of the hours you work in a leave year (but subject to a maximum of 4 working weeks).

### **Joining Bupa during the holiday year**

If you join Bupa part way through the holiday year you will receive a pro-rated entitlement based on your full annual entitlement:

- (full entitlement / 12) x number of full months to be worked in current holiday year.

Your first month calculated as follows:

- If your joining date is the 1 – 15 of the month, you will receive your full entitlement for that month.
- If your joining date is the 16 – 31 of the month, you will receive 50% of your entitlement for that month.

## 5. Bank holidays

Bupa recognises the following bank holidays:

### **In England and Wales,**

New Year's Day, Good Friday, Easter Monday, the first Monday in May, the last Monday in May, the last Monday in August, Christmas Day, Boxing Day (if it is not a Sunday) and 27 December if Christmas Day or Boxing Day falls on a Sunday.

### **In Scotland,**

New Year's Day, 2 January, Good Friday, Easter Monday, the first Monday in May, the last Monday in May, the first Monday in August, Christmas Day, Boxing Day (if it is not a Sunday) and 27 December if Christmas Day or Boxing Day falls on a Sunday.

### **In Northern Ireland,**

New Year's Day, St Patrick's Day, Good Friday, Easter Monday, early May bank holiday, spring bank holiday, Battle of the Boyne (Orangemen's Day) 13 July (or the following Monday where this falls on a weekend), summer bank holiday, Christmas Day, Boxing Day (or a substitute weekday).

### **In the Republic of Ireland,**

New Year's Day, St Brigid's Day (from 2023) St. Patrick's Day, Easter Monday, the first Mondays in May, June and August, the last Monday in October, Christmas Day and St. Stephen's Day.

Should additional bank holidays be announced to mark a particular occasion e.g. a royal wedding or jubilee, your manager will make you aware of how this impacts you.

If you work in an area of Bupa which is open as usual on a bank holiday, and you wish to request the day off, you will need to request this in advance. Approval will be subject to availability and business needs. If your request is unsuccessful, you will be able to take the time on another occasion.

If you work in an area of Bupa which is closed on the recognised dates you will not need approval in order to take the day off. If you manage your annual leave through Workday, however, you will need to book bank holidays into the system at the start of each annual leave year and these will be deducted from your bank holiday entitlement.

In Ireland, if you work, or are 'normally rostered' to work, on a Public Holiday you are entitled to an additional day's holiday or a paid day off within a month of that day if you're required to work, or a paid day off that day if you're not required to work, as agreed with your manager. If you are not normally rostered to work on a day on which the Public Holiday falls, for example, if you are a part-time employee, you will be entitled to one fifth of your normal weekly rate of pay for the Public Holiday. On occasion work commitments may require your attendance at work on a Public Holiday. Eligible employees will be granted the following compensation in such circumstances:

- One day normal pay
- One additional day's annual leave
- An additional day's pay for working core hours (core hours fall within the period 10.00 am to 4.00 pm). An hourly rate of overtime applies for any hours worked over the core hours.

If you work part time you will be entitled to a pro-rated amount of bank holidays based on the days and hours you work. These will be added to your annual leave entitlement and will be deducted as appropriate when a Bank Holiday falls.

## **Calculating Bank Holiday Allowance**

The bank holiday year period is the same as the annual leave holiday period - 1 April - 31 March. To calculate your bank holiday entitlement, multiply the number of bank holidays in that year by your FTE%, for example:

- 8 days x 80% = 6.4 days entitlement

To convert this to hours multiply your bank holiday entitlement in days by the standard full time daily hours for your business area, for example:

- 6.4 days entitlement x 7.5 standard full-time hours per day for the business unit = 48 hours

Any individuals joining Bupa part way through the holiday year will accrue bank holidays that occur from the month they joined to end of that holiday year. For example:

Individual joins Bupa on the 3 January. They will accrue bank holidays for New Year's Day and any others that fall in that year up to 31 March.

## **6. Mid-year changes to annual leave**

Changes of circumstances, such as a change in contracted hours or a new role etc. during the holiday year (1 April – 31 March) may affect your annual leave entitlement. To calculate your new entitlement, you should use the following calculation:

- Step 1: Use the calculations above for Annual Leave and Bank Holidays to work out the pro-rated entitlement in hours for the part of the year up to the hours change.
- Step 2: Use the calculations above for Annual Leave and Bank Holidays to work out the pro-rated entitlement in days for the part of the year after hours change.
- Step 3 Add these together to give the new entitlement for the current holiday year.

## **7. Part day / hour round up and round down**

Following a change, if the total annual leave entitlement results in a decimal number you should adopt the following principle of rounding up or down:

- Less than or equal to .24: Round down to the nearest whole number.
- From .25 to .74: Allocate as half hour/day.
- Equal to or greater than .75: Round up to the nearest hour/day.

Please ensure, if rounding down, that this doesn't take you below the minimum statutory leave allowance of 5.6 weeks or part time equivalent. For a full-time employee this equates to 20 days plus bank holidays (28 days in total).

## **8. Requesting annual leave**

To have a healthy work life balance it is important that you spread your annual leave evenly throughout the year and you are responsible for using your annual leave allocation appropriately throughout the year. We suggest that you have at least two occasions of five days and avoid taking more than 25% of your entitlement in the last three months of the leave year. More information and resources about

health and wellbeing and personal energy can be found on the Health and Wellbeing hub on People Place.

Wherever possible you must request your annual leave at the earliest opportunity. Your manager can guide you on the correct local process. We suggest that you give at least one month's notice for requests of one week or more and two weeks' notice for periods of less than one week. At such peak times of absence such as school holidays and religious festival periods a preference system may be introduced to help manage high demand. A preference system means that all requests for leave during certain peak demand periods will be invited and considered at the same time rather than on a first come first served basis. The aim of this is to be able to gain an overall view of demand and allocate leave fairly and consistently.

### **Approval of Annual Leave**

Your manager will aim to approve your request within five working days but they can reject it in certain circumstances. These may include insufficient annual leave remaining, lack of notice/same day request, or business requirements. Your manager will explain the reason for declining your request. All annual leave will need to be approved by your manager before you can take the annual leave. You must therefore not make any holiday bookings or travel arrangements until you have received approval from your manager. If you take annual leave that has been requested and not approved this will be classed as unauthorised absence and action may be taken under the Disciplinary Policy.

## **9. Overtime and annual leave**

You are not permitted to take annual leave and then work for enhanced pay on the same date. If you wish to work on a date previously booked off as annual leave you must cancel your annual leave and work your contracted hours before becoming eligible for any additional hours to be paid at an enhanced rate.

## **10. Annual leave for term time workers**

If you are a term time worker, you will work a reduced number of weeks of the year and your annual leave must be taken during the remaining weeks that you do not work.

Your annual leave entitlement will not be pro-rated based on the reduced number of working weeks. It will only be pro-rated if you work part-time hours.

## **11. Sickness during annual leave**

We want you to enjoy your annual leave however if you unfortunately fall ill during your annual leave your manager will be able to consider adding the planned leave back on to your allocation for any period covered by a fit note. Failure to provide a fit note issued by your GP may result in you not receiving time back in respect of sickness absence. Please refer to our Sickness Absence Policy for further information.

## **12. Leaving Bupa**

Your manager will confirm your annual leave entitlement according to the month in which you leave Bupa.

If you leave Bupa part way through the holiday year your entitlement will be pro-rated on how many months you have worked:

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- $(\text{full entitlement} / 12) \times \text{number of full months to be worked in current holiday year}$ .

If you leave part way through the holiday year your annual leave will be pro-rated as follows:

- If your leaving date is the 1st – 15th you will receive 50% of your entitlement for that month
- If your leaving date is the 16th – 31st you will receive 100% of your entitlement for that month

If you leave Bupa within the same month of joining, your pro-rated entitlement will be calculated on the number of days that you were employed.

You should arrange with your manager to take any remaining leave during your notice period. This applies whether you are leaving Bupa voluntarily or through redundancy. You will be entitled to pay in lieu for any which you are unable to use. This payment will be subject to income tax and National Insurance contributions in the usual way.

If you take more leave than your pro-rated entitlement, the relevant amount will be deducted from your salary payment.

## 4. Responsibilities

Role	Responsibilities
<p><b>Everyone in scope of this policy must</b></p>	<ul style="list-style-type: none"> <li>• comply with this policy</li> <li>• be familiar with your annual leave entitlement and keep a track of this throughout the holiday year.</li> <li>• not make any personal commitments (e.g. booking a holiday) before your manager approves your leave request</li> <li>• give your manager adequate and reasonable notice when requesting annual leave.</li> <li>• follow the local requesting and approval arrangements.</li> <li>• take your annual leave appropriately throughout the year.</li> <li>• not exceed your annual allocation.</li> </ul>
<p><b>People Managers must</b></p>	<ul style="list-style-type: none"> <li>• confirm your annual entitlement in line with this policy.</li> <li>• consider your request for annual leave fairly, consistently and take into account business requirements.</li> <li>• approve your request for annual leave within five working days.</li> <li>• arrange for a delegate to consider and approve leave requests in their absence.</li> <li>• keep an accurate and current record of your annual leave requests and allocation.</li> </ul>

## 5. Monitoring and Reporting

### **Monitoring**

Annual leave is usually managed and monitored by the relevant People system or other resource planning system in place in the business area in which you work. Whichever system is in use whether online or offline, managers are responsible for keeping an accurate and current record of your annual leave requests and allocation.

### **Reporting**

Depending upon the People system in place in your area of the business, managers may have the ability to report on team annual leave allowances and usage.

Other ad hoc reporting may be produced for management insight.

## 6. Definitions

The following defines the key terms used within this policy

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<b>Pro-rata</b>	<ul style="list-style-type: none"><li>You're entitled to your contractual holiday entitlement which is calculated in proportion to the hours you work. Use the calculation guidance provided in the policy.</li></ul>
<b>Part time</b>	<ul style="list-style-type: none"><li>A part time worker is someone who works fewer than the full-time hours assigned to that role.</li></ul>
<b>Fixed term</b>	<ul style="list-style-type: none"><li>A fixed-term contract is for a specified amount of time e.g. six months.</li></ul>
<b>Term time</b>	<ul style="list-style-type: none"><li>Individuals with a term time contract work fewer weeks per year, generally during school term time only.</li></ul>

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## 7. References and Associated Documentation

### Risk Management Framework - Links

<b>Level 2 Risk Category</b>	This policy relates to the People (Operational) Level 2 Risk Category.
<b>Bupa Enterprise Policy</b>	This policy relates to the People Enterprise Policy
<b>Risk Appetite</b>	See relevant Enterprise policies on the Risk Hub.

### Related Policies and Supporting Documentation

- The Bupa Code
- Disciplinary Policy
- Sickness Absence Policy
- Other Leave Policy
- Long Service Policy
- Flexible Holiday Scheme
- Flexible Working Policy
- Health and Wellbeing Hub

## Document Control

<b>Information Security Classification:</b>	Business Use Only
<b>Publication location:</b>	People Place (externally visible)

<b>Title/Version:</b>	BGUK Annual Leave Policy	
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<b>Approval:</b>	BGUK People Policy Review Board (sub-committee to BGUK People Risk Committee)
<b>Date Approved:</b>	<b>21 March 2022</b>
<b>Valid from:</b>	<b>1 March 2022</b>
<b>Next Review Date:</b>	<b>October 2022</b>

Change History				
Version	Status	Date	Author / Editor	Details of Change
4.1	DRAFT	21 February 2022	Claire Bracegirdle	Added paragraph to future proof additional ad hoc bank holidays. Made amendments to reflect changes in the flexible holiday policy (now scheme).
5	FINAL	28 March 2022	Lindsey Peel	Final version for publishing.

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