

Annual Leave Policy

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1. Purpose and principles

BrisDoc is committed to ensuring that co-owners can take the paid annual leave to which they are entitled while maintaining safe, effective and sustainable services for patients. Annual leave is an important part of rest, recovery and wellbeing and should be planned and taken throughout the leave year.

The policy is based on the following principles:

- co-owners should be enabled and encouraged to take their annual leave entitlement within the relevant leave year;
- annual leave requests will be considered fairly, consistently and without unlawful discrimination;
- approval of leave must take account of safe staffing, required skills and service delivery rather than fixed historic limits on the number of people who may be away;
- co-owners are responsible for requesting leave in good time, but they are not responsible for arranging their own cover as a condition of approval;
- managers are responsible for actively managing leave balances and should not allow operational pressures to result in statutory leave routinely going untaken; and
- where the law provides a more favourable right than this policy, the statutory right will apply.

2. Scope

This policy applies to all BrisDoc co-owners and workers who are entitled to paid annual leave, including people working full-time, part-time, part-year, bank, casual or irregular hours arrangements.

For simplicity, the term “co-owner” is used throughout this policy. Where legal rules differ because an individual is a worker rather than an employee, or because they are an irregular-hours or part-year worker, BrisDoc will apply the rules appropriate to their legal status and contractual arrangements.

The policy does not apply to genuinely self-employed contractors or locum clinicians who do not have worker status or a contractual right to paid annual leave. Their arrangements are governed by the relevant contract for services.

Individual contracts may provide specific or enhanced annual leave terms. Where a contractual entitlement is more favourable than this policy or the statutory minimum, the contractual entitlement will apply.

3. Holiday year

BrisDoc's annual leave year runs from 1 January to 31 December.

Co-owners who join or leave BrisDoc part way through the leave year will have their annual leave entitlement calculated on a pro-rata basis, subject to the specific statutory rules that apply to irregular-hours and part-year workers.

Annual leave should normally be taken during the year in which it is accrued. Carry-over is only permitted in accordance with section 8 of this policy.

4. Annual leave entitlement

4.1 Statutory minimum

The statutory minimum paid annual leave entitlement is 5.6 weeks in each leave year. For a co-owner working five days each week, this is 28 days and can include bank and public holidays. BrisDoc contractual entitlements may be higher than the statutory minimum.

4.2 BrisDoc Standard Entitlements

The following entitlement is based on a full-time working week of 37.5 hours and a 7.5-hour day. Entitlement is pro-rated for part-time co-owners and is normally managed in hours to reflect different working patterns.

Length of service	Annual leave	Bank holidays	Total full-time entitlement
Years 1–2	25 days / 187.5 hours	8 days / 60 hours	247.5 hours
Years 3–4	26 days / 195 hours	8 days / 60 hours	255 hours
Years 5–9	27 days / 202.5 hours	8 days / 60 hours	262.5 hours
Years 10–14	28 days / 210 hours	8 days / 60 hours	270 hours
Year 15 onwards	29 days / 217.5 hours	8 days / 60 hours	277.5 hours

4.3 Salaried GPs

The following entitlement is based on a full-time working week of 37.5 hours and is pro-rated where appropriate. Study leave is separate from annual leave and should be managed in accordance with the Training and CPD Policy and the co-owner's contractual arrangements.

Length of service	Annual leave + bank holidays	Total annual leave hours
Years 1–2	30 days + 8 bank holidays	285 hours
Years 3–4	31 days + 8 bank holidays	292.5 hours
Year 5 onwards	32 days + 8 bank holidays	300 hours

4.4 Bank, casual, irregular-hours and part-year workers

Bank, casual, irregular-hours and part-year workers are entitled to statutory paid annual leave. They are not excluded from annual leave entitlement simply because holiday pay is calculated or paid differently.

For irregular-hours and part-year workers, statutory leave normally accrues at 12.07% of hours worked in each pay period, subject to the current statutory calculation and rounding rules. Where a contract provides an enhanced entitlement above the statutory minimum, the appropriate enhanced accrual will be applied.

BrisDoc may use rolled-up holiday pay where the law permits this for an irregular-hours or part-year worker. Where it is used, holiday pay will be calculated at the required percentage of total pay, paid at the same time as pay for work completed and shown separately on the payslip. Rolled-up holiday pay does not remove the right to annual leave or rest from work.

4.5 Changes in hours or working pattern

Where contracted hours or working patterns change during the leave year, entitlement will be recalculated to reflect the relevant periods worked at each contractual level. The leave system and payroll records will be adjusted accordingly.

5. Bank and public holidays

BrisDoc provides services across weekends and on public holidays. Co-owners may therefore be required to work on a bank or public holiday where this is part of their contractual or rostered working arrangements.

Bank holiday entitlement forms part of the overall annual leave entitlement shown in section 4 and is pro-rated for part-time co-owners. How a bank holiday is applied to a particular working pattern will be managed through the leave and rota system in accordance with the individual's contract.

Where an additional bank holiday is formally declared for England and Wales, BrisDoc will provide an equivalent additional paid leave entitlement, pro-rated for part-time co-owners, unless a different contractual arrangement applies.

The dates of bank and public holidays are those published by GOV.UK for England and Wales. BrisDoc services may remain open on these dates.

6. Holiday pay

Holiday pay will be calculated in accordance with current legislation and BrisDoc payroll arrangements so that co-owners receive the pay to which they are legally and contractually entitled when taking annual leave.

For regular-hours co-owners, relevant elements of normal remuneration will be included in holiday pay where legally required. This can include regularly paid overtime or additional hours, commission and payments relating to professional status, length of service or qualifications. Where a statutory reference period is required, BrisDoc will use the applicable 52 paid-week reference period and look back further, up to the statutory limit, where necessary to identify paid weeks.

For irregular-hours and part-year workers, statutory holiday pay will be calculated at the normal rate required by law. Where rolled-up holiday pay is used, the requirements in section 4.4 will apply.

Payroll principle

Detailed calculation rules may change as legislation or case law develops. The payroll procedure may therefore set out the calculation methodology without requiring a policy revision, provided the methodology remains consistent with this policy and the law.

7. Requesting and approving annual leave

7.1 Making a request

Annual leave requests must be submitted through RotaMaster, or any successor system designated by BrisDoc, and must be approved before a co-owner makes non-refundable commitments.

Co-owners should request leave as early as reasonably possible. The following BrisDoc-wide planning expectations apply unless a local arrangement approved under section 7.3 provides a longer notice period for a clear operational reason:

Length of leave requested	Normal planning expectation
Up to 3 working days	At least 4 weeks where reasonably practicable
More than 3 working days but less than 2 weeks	At least 8 weeks
2 weeks or more	At least 12 weeks and prior discussion with the line manager

These are planning expectations rather than an automatic reason to refuse a request. Managers may approve leave with shorter notice where safe staffing and service delivery allow. Co-owners should normally take no more than two consecutive weeks of paid annual leave at one time unless the line manager agrees a longer period in advance.

Bank or casual co-owners who do not have contracted shifts are not required to book annual leave simply because they do not wish to accept work for a period. Once a shift has been accepted or booked, normal rota and cancellation arrangements apply.

For record-keeping purposes, statutory annual leave taken by bank, casual and irregular-hours workers will be recorded in accordance with BrisDoc's leave and payroll arrangements, even where no formal leave approval is required

7.2 How requests will be considered

Managers will seek to accommodate annual leave wherever reasonably possible. Requests may be refused where approving them would create an unacceptable risk to safe staffing, required skill mix, service delivery or other essential operational requirements.

When considering competing requests, managers should take account of:

- the staffing levels and skills required to operate the service safely and effectively;
- leave that has already been approved;
- fairness over time, particularly for repeatedly popular periods such as school holidays, Christmas and other significant dates;
- relevant individual circumstances, including disability-related needs, pregnancy, religion or belief, and caring responsibilities, while recognising that these do not automatically create priority for particular dates unless required by law or as a reasonable adjustment;
- the ability to offer reasonable alternative dates where the requested dates cannot be approved; and
- the need for co-owners to be able to take their full statutory entitlement during the leave year.

First-come, first-served may be used as one factor, but managers should avoid relying on it as the sole method for allocating repeatedly popular periods where that would create an unfair pattern year after year.

Where a request is refused, the manager should provide the reason and, where practicable, discuss alternative dates.

7.3 Local operational arrangements

The previous service-by-service limits on the number of people who may be away at one time are not part of this policy. Services and teams may maintain local operational guidance where this is genuinely required to manage safe staffing, minimum skill mix or predictable peak demand.

Any local guidance must:

- be consistent with this policy and with contractual and statutory annual leave rights;
- be based on current staffing and skill requirements rather than inherited historic limits;
- be proportionate and avoid blanket restrictions unless there is a clear operational justification;
- set out any peak-period or minimum-staffing arrangements transparently so co-owners can plan ahead;
- be approved by the relevant Head of Service or Director and reviewed at least annually; and
- not be used in a way that routinely prevents co-owners from taking their annual leave entitlement.

7.4 Refusing, restricting or cancelling leave

BrisDoc may refuse a request for particular dates, restrict leave during defined periods or, in exceptional circumstances, cancel previously approved leave where there is a genuine business or patient-safety requirement. Any such decision must comply with contractual and statutory notice requirements.

Cancelling approved leave should be a last resort. Managers should consider the impact on the co-owner and explore all reasonable alternatives before doing so.

8. Carry-over of annual leave

8.1 Normal BrisDoc carry-over

Co-owners are expected to take their annual leave during the leave year. With line manager approval, BrisDoc will normally allow up to one contractual working week, or the equivalent number of hours, above the statutory minimum to be carried into the following leave year. This leave must normally be used by 31 March.

Carry-over under this provision is not intended to replace good leave planning. Managers should review leave balances during the year and support co-owners to take outstanding leave.

8.2 Statutory carry-over

The normal BrisDoc carry-over limit and 31 March deadline do not apply where the law requires leave to be carried forward. Statutory carry-over may arise, for example, where a co-owner has been unable to take leave because of sickness or statutory leave, or where BrisDoc has not provided a reasonable opportunity to take statutory leave or has not warned the co-owner that it would otherwise be lost.

The amount that may be carried over and the period within which it must be used will be determined by the statutory rules applying to the individual's working arrangement and circumstances. The People team will advise where required.

9. Holiday buy-back

BrisDoc may allow co-owners to sell back unused contractual annual leave that is above the statutory minimum entitlement. Statutory annual leave cannot be exchanged for payment instead of being taken, except where employment ends.

Buy-back is subject to manager approval, service requirements and the co-owner having taken or having a realistic plan to take their statutory minimum leave. Requests should normally be made at least four weeks before the end of the leave year. Payment will be made at the applicable normal rate of pay.

Buy-back is not an automatic entitlement and BrisDoc may limit or suspend the arrangement where required for operational, wellbeing or financial reasons.

10. Sickness and annual leave

10.1 Sickness during pre-booked annual leave

If a co-owner becomes unfit for work because of sickness or injury during a period of pre-booked annual leave, they may ask for the affected period to be treated as sickness absence rather than annual leave. The annual leave will then be re-credited and can be taken at a later date.

To have annual leave re-credited, the co-owner must notify their manager in accordance with the Sickness & Wellbeing Policy and provide the normal sickness evidence required under that policy, including while outside the UK.

Where the reporting and evidence requirements are not met, BrisDoc may decline to re-credit the annual leave unless there is a reasonable explanation for the failure to comply.

10.2 Annual leave while absent through sickness

A co-owner who is absent through sickness may request annual leave. BrisDoc will not require a co-owner to take annual leave instead of sickness absence. Where annual leave is requested and approved, sickness absence will pause for the period of annual leave and holiday pay will apply; sickness absence may resume afterwards if the co-owner remains unfit for work.

10.3 Accrual and carry-over during sickness

Annual leave continues to accrue during sickness absence in accordance with the co-owner's contractual entitlement and applicable law. Where sickness prevents annual leave being taken within the leave year, statutory carry-over rights will be applied in accordance with section 8.2.

11. Annual leave during statutory leave

Annual leave continues to accrue during statutory leave in accordance with the co-owner's contractual entitlement and applicable law. This includes maternity, paternity, adoption, shared parental, ordinary parental, neonatal care, parental bereavement and carer's leave, together with any other statutory leave introduced by legislation.

Annual leave and statutory leave cannot normally be taken at the same time. Co-owners should agree with their manager when accrued annual leave will be taken before or after a period of statutory leave. Where statutory leave means annual leave cannot be used within the leave year, the applicable statutory carry-over rules will apply.

12. Starting and leaving BrisDoc

12.1 Joining part way through the leave year

A co-owner joining BrisDoc part way through the leave year will receive a proportionate entitlement for the remainder of that year. The statutory accrual method will be used where required for irregular-hours or part-year workers.

12.2 Leaving BrisDoc

On termination of employment or engagement, BrisDoc will pay for accrued annual leave that has not been taken where payment in lieu is required. This applies irrespective of the reason for termination, including summary dismissal.

Where a co-owner has taken more annual leave than they have accrued, BrisDoc may deduct the value of the excess leave from final pay where the contract or another lawful agreement authorises the deduction.

BrisDoc may require accrued leave to be taken during a notice period where this is operationally appropriate and the required notice is given.

13. Roles and responsibilities

13.1 Co-owners

- plan annual leave across the year and request it in good time;
- check that leave is approved before making non-refundable commitments;
- monitor their leave balance and raise any concerns promptly;
- comply with local rota arrangements that are consistent with this policy; and
- notify sickness during annual leave in accordance with the Sickness & Wellbeing Policy if they wish the leave to be re-credited.

13.2 Line managers

- consider requests promptly, fairly and consistently;
- balance individual requests with safe staffing, required skill mix and service delivery;
- avoid requiring co-owners to arrange their own cover as a condition of approval;
- monitor leave balances throughout the year and actively encourage co-owners to take their statutory entitlement;
- give clear warning where leave may be lost if it is not taken, unless statutory carry-over applies;
- record decisions accurately in the designated system; and
- seek People Team advice where there is a complex entitlement, equity, inclusion or statutory carry-over issue.

13.3 Heads of Service and Directors

- ensure workforce planning supports reasonable access to annual leave;
- approve and periodically review any local operational leave guidance;
- challenge patterns of repeated refusal, excessive untaken leave or reliance on carry-over; and
- ensure any exceptional restrictions or cancellation of approved leave are proportionate and appropriately authorised.

13.4 People and Payroll teams

- maintain appropriate guidance on entitlement, carry-over and statutory requirements;
- support managers and co-owners with complex cases;
- ensure holiday pay and entitlement calculations reflect current law and contractual arrangements; and
- support accurate records and monitoring.

14. Records and monitoring

BrisDoc will maintain records of annual leave and holiday pay in accordance with legal requirements. From 6 April 2026, this includes records of leave taken, leave carried over, holiday pay and payments in lieu of holiday, including sufficient detail about the elements included in holiday pay.

These records will be retained for at least six years from the date they are made. RotaMaster, payroll systems and other authorised records may be used together to meet this requirement.

The People Team may monitor annual leave usage, carry-over, refusals and other relevant data to identify organisational or service-level risks, equity and inclusion concerns, disproportionate impacts or barriers to co-owners taking adequate leave.

15. Equity and inclusion

Annual leave arrangements will be applied in accordance with the Equality Act 2010 and BrisDoc's equity and inclusion commitments and values. Managers should consider whether a request or proposed restriction interacts with a protected characteristic or a reasonable adjustment requirement.

Requests connected with religious or cultural observance, disability, pregnancy or caring responsibilities should be considered sensitively and consistently alongside service needs. No category of request has automatic priority unless required by law, but managers should seek a fair and proportionate outcome.

Appendix 1: BrisDoc-wide annual leave booking approach

This appendix provides the single BrisDoc approach that replaces the previous service-by-service annual leave limits. It should be read alongside section 7.

Stage	BrisDoc approach	Manager consideration
1. Plan	Co-owner checks likely leave dates and requests as early as possible using the planning expectations in section 7.1.	Is the request clear and is there sufficient information to assess it?
2. Request	Request is entered in RotaMaster or the designated leave system.	What leave is already approved and what staffing/skill mix is required?
3. Assess	Manager considers safe staffing, service delivery, fairness and relevant individual circumstances.	Can the request be approved safely? If not, is there a reasonable alternative?
4. Decide	Manager approves or refuses the request and records the decision.	If refusing, provide the reason and discuss alternatives where practicable.
5. Monitor	Co-owner and manager monitor the remaining leave balance across the year.	Is the co-owner at risk of not taking statutory leave? What action is needed?
6. Review locally	Services review any local operational guidance at least annually.	Is the guidance still justified by current staffing, skill mix and service design?

Local guidance

Local guidance should deal only with operational requirements such as minimum staffing, essential skill mix or clearly defined peak-period arrangements. It should not create separate annual leave entitlements, different carry-over rules or blanket restrictions that conflict with this policy.

Appendix 2: Version control

Version	Date	Reviewed by	Summary of changes
1–4	2006–2022	Various	Initial policy and subsequent reviews, including statutory entitlement changes, service booking guidance and introduction of RotaMaster.
5.1	2023–2024	E. Veale / policy owners	Updated terminology, bank holiday wording, job titles and annual leave allowance presentation.
5.2	January 2026	M. Duncan	Updated sickness during annual leave provisions to allow re-crediting of leave where sickness requirements are met.
6.0	September 2026	Director of People & OD	Major review. Updated scope to include bank, casual, irregular-hours and part-year workers; updated holiday pay, statutory carry-over and record-keeping provisions; broadened statutory leave section; removed legacy service-by-service booking limits; introduced a single BrisDoc-wide booking framework; updated organisational terminology and obsolete references.

Appendix 3: Equity, Inclusion & Values Impact Assessment

This Equity, Inclusion and Values Impact Assessment (EIVIA) ensures that BrisDoc's Annual Leave Policy upholds our duties under the Equality Act 2010, supports inclusive and equitable practice, and is consistent with BrisDoc's values, expected behaviours and employee-owned culture. It considers both the potential impact on co-owners with protected characteristics and wider circumstances which may affect equitable access to annual leave.

The policy is intended to enable co-owners to take the paid annual leave to which they are entitled while maintaining safe, effective and sustainable services. Version 6.0 introduces a single BrisDoc-wide approach to requesting and approving annual leave, removes historic service-specific limits, and requires managers to consider requests fairly, consistently and in light of relevant individual circumstances.

This assessment considers both equality impact and quality impact. It also reflects on intersectionality and the potential compounding effects where a co-owner has more than one protected characteristic or relevant personal circumstance.

Protected Characteristic	Potential Impact Identified?	Actions Taken / Considerations
Age	Yes – potential differential impact	Annual leave entitlement increases with length of service for some contractual groups, which may correlate with age, but entitlement is determined by contractual service rather than age itself. All co-owners remain entitled to at least the applicable statutory minimum. Managers should avoid assumptions about leave needs based on age, career stage or length of service.
Disability	Yes – potential barriers and positive impact	Disabled co-owners may need annual leave at particular times because of treatment, recovery, fatigue or other disability-related circumstances. The policy specifically requires managers to consider disability-related needs and reasonable adjustments when considering requests. Managers should consider whether flexibility in notice, timing or duration is appropriate and seek People Team advice where necessary. Sickness and annual leave provisions also ensure that qualifying sickness during annual leave can result in leave being re-credited.
Sex	Yes – potential indirect impact	Patterns of caring responsibility and other personal circumstances may mean that some groups experience greater demand for leave during school holidays or other popular periods. A rigid first-come, first-served system could therefore disadvantage some co-owners. The policy requires fairness over time, consideration of relevant individual circumstances and avoids first-come, first-served being the sole method for allocating repeatedly popular periods.
Gender Reassignment	Yes – potential sensitivity and access considerations	Co-owners undergoing gender reassignment may require time away from work for appointments, treatment or recovery. Requests should be handled sensitively and confidentially and without assumptions. Managers should seek People Team advice where time away is connected with gender reassignment

Protected Characteristic	Potential Impact Identified?	Actions Taken / Considerations
		to ensure that the appropriate leave or other arrangement is used and that the co-owner is not treated less favourably.
Pregnancy and Maternity	Yes – positive safeguards	Annual leave continues to accrue during maternity and other statutory leave and statutory carry-over provisions apply where annual leave cannot be taken because of statutory leave. Pregnancy is also expressly identified as a relevant circumstance when leave requests are considered. Managers should ensure that annual leave is not used as a substitute for statutory pregnancy or maternity rights.
Race	Yes – potential indirect impact	Some co-owners may wish to take longer periods of leave for overseas travel, visiting family or significant cultural occasions. The policy allows periods exceeding two consecutive weeks with manager agreement rather than imposing an absolute restriction. Managers should consider such requests consistently and proportionately and ensure that apparently neutral local arrangements do not create unjustified disadvantage for particular racial or ethnic groups.
Religion or Belief	Yes – potential impact and positive safeguard	Religious festivals and observance do not necessarily coincide with UK bank holidays and may create competing requests for particular dates. Religion or belief is specifically identified as a relevant individual circumstance within the policy. No particular religion or belief has automatic priority, but managers should seek reasonable and proportionate solutions while maintaining service requirements.
Sexual Orientation	No differential impact identified	The policy applies equally irrespective of sexual orientation. Leave connected with family, relationships or significant personal events should be considered on the same basis for all co-owners. Statutory and contractual family leave provisions apply according to eligibility rather than sexual orientation.
Marriage and Civil Partnership	No differential impact identified	Annual leave entitlement and the process for requesting leave do not differ according to marriage or civil partnership status. Requests connected with significant family or personal events should be considered consistently.
Intersectionality	Yes – potential compounding impact	Co-owners may experience overlapping impacts associated with several protected characteristics or personal circumstances. For example, disability, religion, caring responsibilities and working pattern may combine to affect when leave is needed or how easily it can be taken. Managers should consider the individual circumstances rather than applying assumptions or rigid rules.
Other relevant equity and	Yes – positive impact	Part-time, bank, casual, irregular-hours and part-year working are not protected characteristics in themselves but may intersect with sex, age, disability and caring responsibilities. Version 6.0

Protected Characteristic	Potential Impact Identified?	Actions Taken / Considerations
inclusion considerations		expressly brings bank, casual, irregular-hours and part-year workers within scope rather than excluding them from the policy. The policy also provides for appropriate pro-rata and statutory calculation arrangements.

Inclusion and BrisDoc Values

The policy has also been considered from the perspective of wider inclusion and BrisDoc's values and co-owner principles. Access to annual leave can be affected by circumstances which are not themselves protected characteristics, including working pattern, caring responsibilities, financial circumstances, school holiday arrangements, cultural and family commitments, contractual status and the ability to plan leave significantly in advance.

The policy supports inclusion by applying a single BrisDoc-wide framework, requiring managers to consider individual circumstances, avoiding rigid first-come, first-served arrangements for repeatedly popular periods, allowing reasonable flexibility and requiring local restrictions to be objectively justified and regularly reviewed.

The policy supports BrisDoc's values and employee-owned culture by balancing the wellbeing and individual needs of co-owners with our responsibilities to colleagues, patients and sustainable service delivery. It promotes fairness, transparency and shared responsibility: co-owners are expected to plan and request leave reasonably, while managers and leaders are responsible for creating realistic opportunities for leave to be taken.

No additional adverse inclusion or values impact has been identified. The principal risks are inconsistent application between teams, repeated disadvantage for particular groups in accessing popular leave periods, and operational pressures resulting in some co-owners being less able to take their entitlement. Monitoring leave refusals, untaken leave, carry-over and local arrangements will help identify and address these risks.

Overall assessment

No inherent adverse equality or quality impact has been identified from the policy itself. Overall, Version 6.0 is expected to have a positive equality impact compared with the previous policy.

Implementation will be monitored through patterns of leave refusal, untaken leave and carry-over, including any evidence of disproportionate impact on groups.