

Special leave procedure

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Scope



This policy covers all BT UK employees and provides a comprehensive summary of special leave, both in terms of statutory rights and entitlements under BT's special leave provisions, some of which are discretionary and may be paid or unpaid. It does not cover:-

- [Volunteer Reserve Forces](#) - annual training is covered in this document but for arrangements that apply during national conflict See ISIS @ http://documents.intra.bt.com/bookstore/isis/pnl/i_pnltemp/1empa042/@Generic_BookView
- [Holidays / Vacation](#) (Annual Leave)

Full details of the entitlements available for these types of leave are held under separate policies and can be found by clicking on the categories which will link to the relevant website.

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Overview



It is recommended that employees refer to [BT's career/life planning website](#) to review the full range of options available to them if they are planning an absence from work or require greater flexibility with their existing attendance patterns

Special leave is an absence from work of half a day or more to meet an individual's needs. There is no automatic right to special leave except where there are specific requirements as part of government legislation (see statutory section below [http..... link](#)) i.e. statutory entitlement.

Individuals make a request for special leave to their line manager, who has discretion to approve or reject an application. If an application is rejected, the grounds for doing so must be made clear to the applicant.

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Types of leave



Leave can be paid or unpaid. It may be the case that an application will attract a combination of both paid and unpaid leave. The local manager should determine the balance.

- **Statutory leave** The basic entitlement to certain types of leave derives from statute. Such leave is as set out in section 6 below. In many cases, BT's leave provisions are more generous than this basic minimum.

- **Casual leave** Up to 4 hours or half a day's paid leave to attend a one off appointment or deal with an emergency that does not fit within the special leave definition. The individual will normally be required to make up the time taken within a reasonable timeframe that should be agreed with their line manager, except in cases of distress.
- **Discretionary leave** there are specific circumstances where paid or unpaid leave may apply as detailed in paragraphs 5, 6, 7 and 8. However, paid and/or unpaid leave may also be granted for other circumstances not specifically covered there.
- **Discretionary Paid leave** is with full pay (i.e. basic pay plus any London Weighting and assigned allowances). Absences on paid leave do not affect an employee's basic pay, incremental date, annual leave entitlement, or pension.
- **Discretionary Unpaid leave** will normally count towards service and pay progression providing the individual is marked fully satisfactory (or given an equivalent marking) on their current job. Individuals planning to take unpaid leave should be aware of the following :
 - when four weeks or more unpaid leave is taken, there will be a pro rata reduction in annual leave entitlement normally in the same leave year.
 - the individual will be expected to pay their own pension scheme contributions including employer contributions for members of the BTPS if they wish to restore pensionability for the period for which unpaid leave was authorised. (BTRP pension members should also refer to their pension terms & conditions and seek further advice as necessary)
 - an individual's pay should be reduced by 1/12th of their annual salary divided by the total number of days in the month concerned for each day of unpaid leave taken, and be reduced by the number of public/bank holidays, off days, rest days, Saturdays or Sundays falling within the period of unpaid leave (if not it would be part of standard holiday) - However, when any of these days occur at the beginning or end of a period of unpaid leave, they should not be counted.

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Time off



Time off for medical purposes

Medical appointments, including GP and dental appointments should where possible be arranged during leave or scheduled time off, or an attendance swap arranged. In exceptional circumstances where this is not possible, maximum notice should be given of the need to take time off from work, for which [casual leave](#) may be requested. Every effort should be made to make arrangements which minimise the impact on the business, for example by seeking an early or late appointment.

Where regular medical appointments are necessary in respect of a disability, this should be managed under the principles of [Managing Changing Capabilities](#). The manager, taking advice where necessary from the [OHS](#), should consider the need to make reasonable adjustments to the individual's attendance arrangements. This adjustment can be supported by one or more of the following options: paid special leave; casual leave; use of annual leave; temporary reduction in hours, flexible attendance according to the individual circumstances of the application.

Applications for leave relating to hospital appointments required for urgent diagnostic tests, consultations or emergency treatment should be considered under paid special leave terms

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Responsibilities



Line manager.

- Considers requests for special leave of one week or less, authorises leave and ensures it is recorded in accordance with local operational requirements.
- Raise a  [BT People System](#) Special leave case to inform Accenture HR Services of all special unpaid leave granted.
- Explains the conditions affecting any period of leave and any additional impacts that taking special leave may have on pay, pension, benefits etc.
- Record all requests and agreed periods of paid special leave

Second line manager or above.

- Authorises longer periods of leave, involving the HRBP in the decision.

Accenture HR Services.

- Record all unpaid special leave and make any pay or pension adjustments required as a result of the leave.

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Statutory leave



Statutory leave – family

-  [Maternity Leave](#)
-  [Paternity Leave](#)
-  [Parental Leave](#)
-  [Adoption Leave](#)

Time off for dependants.

For more details on BT's approach to the care of dependants please refer to  [BT's carers policy](#)

Under the Employment Relations Act 1999 an employee is entitled to take a reasonable amount of time off where necessary:-

- to provide assistance on an occasion when a dependant falls ill, gives birth or is injured or assaulted.

- to make arrangements for the provision of care for a dependant who is ill or injured.
- in consequence of the death of a dependant.
- because of the unexpected disruption or termination of arrangements for the care of a dependant.
- to deal with an incident which involves a child of an employee and which occurs unexpectedly in a period during which an educational establishment which the child attends is responsible for them.

Most of these issues are covered within BT's paid leave provisions.

Statutory leave - Other

Statutory rights to time off for public duties.

The Employment Rights Act 1996 requires that employees be permitted time off (unpaid) to undertake specific public duties. The amount of time off to be permitted and the occasions on which it should be allowed are those that are reasonable in the circumstances giving full consideration to:

- the amount of leave that is required both to perform the public duty in question and also on the specific occasion in question.
- the amount of leave that has already been permitted for such purposes, other public duties and/or trade union business.
- the operational consequences of the employee's absence.

Under BT's policy, such leave may be paid or unpaid.

Legislation covers employees who are:

- Justices of the Peace.
- members of a local authority, a regional or area health authority or health board.
- members of any statutory tribunal.
- members of the managing or governing body of an educational establishment.
- members of a water authority or river purification board.

Reasonable time off under the Act must be allowed for all JP duties, for attendances at meetings of the bodies referred to above and any of their committees or sub committees, and for the performance of duties approved by the body in discharging its functions or by those of its committees or sub committees.

Jury service.

Paid leave should be allowed for the duration of the Jury Service (if a Juror's allowance is paid, BT pay should only cover the difference) but only for days on which the person is required to attend. On days when the person is not required to attend, normal working should be resumed, similarly for part days, if practicable to do so.

People summoned to serve on a jury must immediately inform their line manager. The summons must be complied with unless an exemption is granted by the Court. Exemption from Jury Service on the grounds of inconvenience to BT should be claimed if unacceptable inconvenience would be caused to the Company. In such cases, people will be asked to apply to the Court to be excused on those grounds and will be given a letter from their line manager in support of the application.

Statutory leave taken as Paid Special leave

| Type of leave | Length | What for | Conditions |
|--------------------|-------------------|---|--|
| Public Duties | 18 days a year | For JPs (or equivalent) magisterial duties and local government work. | Although the Employment Rights Act 1996 places no obligation on an employer for payment to be made, paid leave may be allowed provided such public duties are unpaid. |
| | 24 days in a year | For mayors | |
| | 6 days | For water authorities. | |
| | 4 days | For governing bodies of a local education authority. | |
| Political Purposes | Up to 4 weeks | To stand for Parliament (either UK, Scottish, Welsh or European) | During the election period up to the day on which the result of the poll is declared. See discretionary unpaid leave section for employees who are already elected for Parliament. |

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Discretionary paid leave



Applications for paid Discretionary leave should be made to the employees line manager. The line manager should consider the individual circumstances of the application and decide whether paid leave is appropriate and if so the number of days up to the maximum levels shown below.

Paid leave is normally appropriate in the following circumstances, but see "Conditions":

| Type of leave | Length | What for | Conditions |
|-----------------------|---|---|--|
| FAMILY REASONS | | | |
| Family Bereavement | An unspecified amount of paid special leave but normally at least 5 days would be offered | Husband/wife, civil partner spouse equivalent, same sex partner/spouse equivalent or child. (A spouse equivalent would be somebody who lives with an employee and could reasonably be regarded as being in the same relationship as a husband or wife.) | In deciding the amount of paid special leave, account should be taken of the closeness of the relationship that the employee had with the deceased, whether or not the employee has the responsibility for making the funeral arrangements, and if long distance travel is involved |
| Family Bereavement | Up to 5 days | On the death of a close relative, partner or same sex partner (i.e. somebody who has a special relationship with, but does not actually live with, the employee. e.g. a fiancé or fiancée, an immediate blood relative or equivalent, e.g. parents, brother, sister, grandparent. | Paid special leave may also be appropriate on the death of a more distant relative, or somebody who is not a relative, if the person had a special relationship with the employee, e.g. somebody who shared a residence with the employee, acted as a guardian, or performed the role of one of the relatives listed |

above.

NB Additional discretionary leave may be offered in circumstances of on-going and severe bereavement / distress this may be on a paid or unpaid basis

| | | | |
|--------------------------|---------------|--|---|
| Nursing Sick Relatives | Up to 2 weeks | To nurse or care for a sick or elderly relative By their very nature, these will vary considerably and cannot be precisely defined. | Can be allowed for each case of illness |
| Urgent Domestic Problems | Up to 5 days | | Can be allowed for each incident. |

SOCIAL REASONS

| | | | |
|---|--|---|--|
| First Aid | Time needed for attending training courses or participating in competition. | BT First Aiders. | |
| Annual training in the Reserve & Auxiliary Forces | Up to 2 weeks | Attending training camps for annual training as an obligation of membership of the reserve & auxiliary forces. Competitors or officials at major national or international competitions. | NB - For Volunteer Reserve Forces: Arrangements that apply during periods of National Conflict - see replacement for ISIS PNL/EMP/A042 |
| Sport & Recreation | | e.g. Special Constabulary, Mountain Rescue and Lifeboat Service | Employees may be allowed paid special leave to serve in a voluntary organisation which provides a service to the community. |
| Youth Leadership Training | Up to 5 days leave in any 12 month period. | Attending youth leadership training courses, e.g., Scouting, Cadet associations. | |
| BT related/sponsored training and/or examinations | Up to 1 days study leave per exam paper and ½ day to attend each examination | For revision leave and/or to attend examinations | BT full or part sponsored training/study. BT related training |
| Investitures | | Commandment to attend an investiture or receive the Duke of Edinburgh's Gold Award | |
| Other reasons | It is not possible to list every eventuality and line managers may consider that a measure of paid leave is appropriate in circumstances that are not listed here. | | |

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Discretionary unpaid leave



Applications for unpaid Discretionary leave should be made to the employees line manager. Using the unpaid special leave form available from the downloads section to the left of this page **The line manager should consider the individual circumstances of the application and decide whether unpaid leave is appropriate**

Unpaid leave is normally appropriate in the following circumstances, but see "Conditions":

| Type of leave | Length | What for | Conditions |
|----------------------------|---|--|--|
| SOCIAL REASONS | | | |
| Political Purpose | For a term of office up to 5 years | For employees who have been elected as an MP (either UK, Scottish or European) or Welsh Assembly Member. | Political Purposes - for employees who are seeking election. |
| Overseas Voluntary Service | | For employees engaged in work of some value to BT | |
| Travel | | For employees who wish to take time off work to travel | Dependent on operational circumstances |
| Other reasons | It is not possible to list every eventuality and line managers may consider that a measure of unpaid leave is appropriate in circumstances that are not listed here - see also paragraph 4.1. | | |

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Prolonged unpaid leave



Prolonged periods of unpaid leave.

For detailed advice on a range of options and entitlements please refer to the  [Newstart "Time Out" website](#)

Where a lengthy period of unpaid leave is allowed, the following must be explained to the individual concerned and recorded:

- any conditions attached to the leave.
- the fact that they may not be able to return to their existing jobs.
- the changed conditions relating to their pension contributions during the period of leave and the option which could be made available to members of the BTPS (final salary pension scheme) of electing to pay their own and BT's contributions. Members of the BTRP (money purchase retirement plan) will resume contributions on returning to work, or resumption of pay whichever is sooner. It should also be made clear that the Inland Revenue would normally allow continued membership of either pension scheme during a period of absence only if there were a definite expectation of return to work, if the individual did not become a member of any other pension scheme, and for a maximum of three years only.

- local arrangements for keeping them informed of business activities and developments.
- the acceptability, or otherwise, of foreign medical certificates.
- The impact of some types of unpaid leave on cumulative service (available from the downloads section to the left of this page)
- the possible consequences of any failure to return to work on the agreed date.

If an employee fails to return to work on the agreed date, the circumstances should be investigated as fully as possible and further action taken as appropriate under the rules and procedures relating to sick leave, discipline, or abandonment of service.

Unauthorised absences or industrial action.

These will not count towards pension unless the individual elects to pay both their own and BT's contribution.

10 Forms



Holiday Record Card are available via the normal stationery process.

The unpaid special leave form is available from the download section to the left of this page. To submit an authorised period of unpaid special leave raise a case on the [BT people system](#)-

Requests for paid special leave should be agreed and recorded locally by the line manager.

11 Process



The person requesting the unpaid special leave should download and complete the [application form](#) then forward it to their line manager, preferably by e mail.

It is the line manager's responsibility to create a case and attach the application form and submit to Accenture HR Services. (ensure all periods of leave are recorded locally.)

To create a case the manager must log into the [BT People System](#) then select **Manager Self Service > Create a Case**

Then click the link **Create Case on an Employee** choose the employee

Next complete the appropriate details using **special leave** as the category and then select the appropriate speciality type.

Use the Attach a File button to attach the completed form.

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Contacts



Completed unpaid leave application forms should be attached to a  [BT People System](#) case or if no on-line access is available posted or faxed to:

Accenture HR Services

PP RF10

Timbold Drive

Kents Hill Park

Milton Keynes

MK7 6TT

Fax: 01908 356813

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FAQs



Q1. I want some paid leave to care for my sick child. What do I do?

A1. You should discuss it with your line manager immediately. BT's special leave policies already cover leave for nursing sick relatives and urgent domestic problems and it is a statutory right to take reasonable time off to make arrangements for the provision of care for a dependant/child.

Q2. Under what other circumstances can I have urgent time off for my dependants?

A2. BT's special leave policies already cover a wide range of circumstances. The Employment Relations Act 1999 provides for reasonable time off for the following circumstances:

to provide assistance on an occasion when a dependant falls ill, gives birth or is injured or assaulted.

to make arrangements for the provision of care for a dependant who is ill or injured in consequence of the death of a dependant.

because of the unexpected disruption or termination of arrangements for the care of a dependant.

to deal with an incident which involves a child of an employee and which occurs unexpectedly during term time.