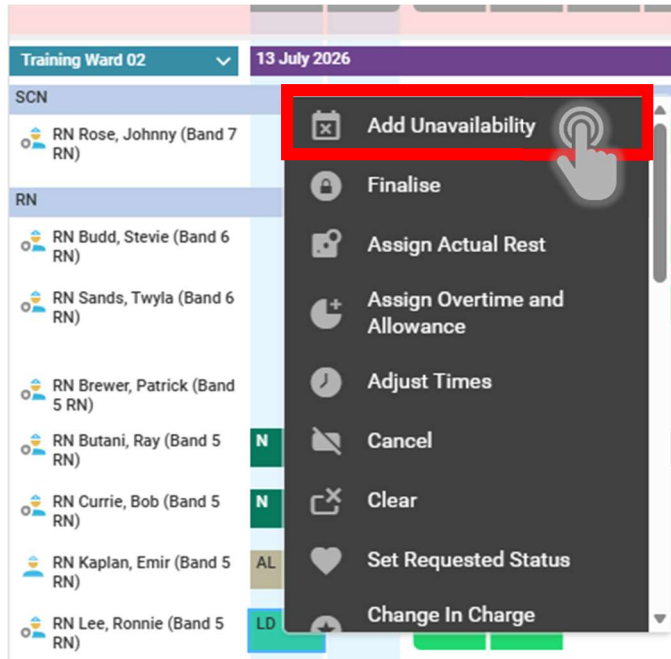


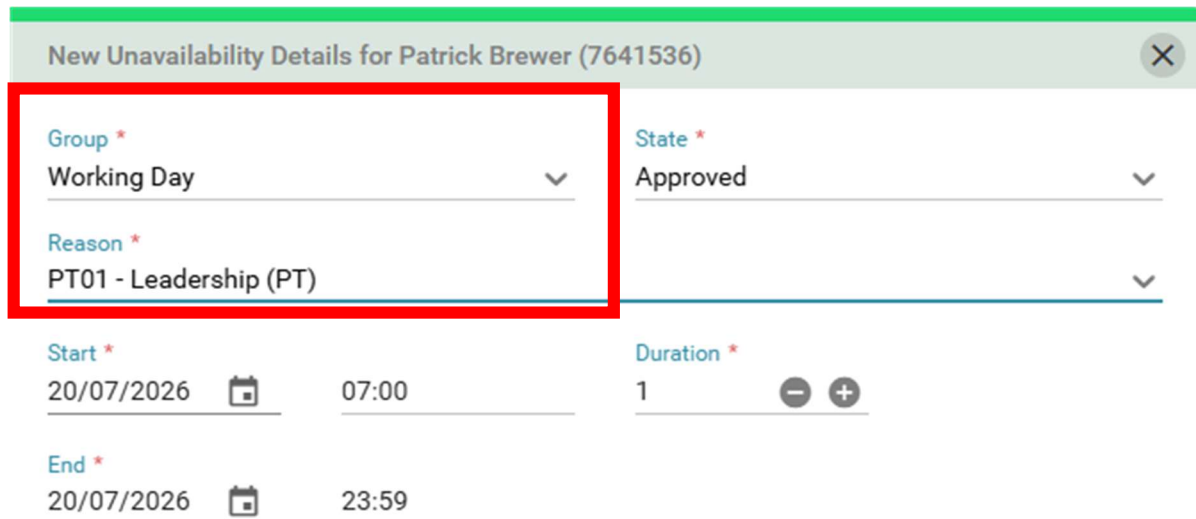
Recording Protected Time to Lead in Optima

To enter Protected Time to Lead on Optima identify the shift and Left Click. A box will appear from here select **Add Unavailability**



When you click on **Add Unavailability** the next box will open – as per the screen shot Protected Time to Lead should reflect:

- **Group** → Working Day
- **Reason** → PT01 Leadership (PT)



The screenshot shows the 'New Unavailability Details for Patrick Brewer (7641536)' form. The 'Group' and 'Reason' fields are highlighted with a red box. The 'Group' field is set to 'Working Day' and the 'Reason' field is set to 'PT01 - Leadership (PT)'. The 'State' field is set to 'Approved'. The 'Start' field is set to '20/07/2026' at '07:00' and the 'End' field is set to '20/07/2026' at '23:59'. The 'Duration' field is set to '1'.



The unavailability will default to the full shift length time and the start and end time will reflect the full day. These should only be altered if the times relate to a part shift absence

Group *		State *	
Working Day		Approved	
Reason *			
PT01 - Leadership (PT)			
Start *		Duration *	
20/07/2026	07:00	1	
End *			
20/07/2026	23:59		

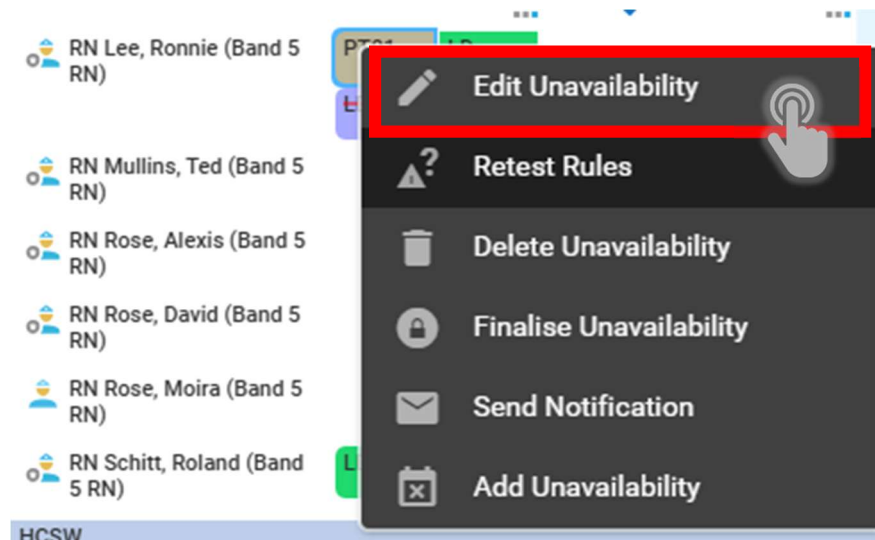
Work Time Refresh

Amending Protected Time to Lead in Optima

Identify the **PT01** Unavailability



Right Click and a popup of additional options will appear - **EDIT Unavailability**



This will display the unavailability details – from here you can edit the times

Group *
Working Day

Reason *
PT01 - Leadership (PT)

Start *			Dur
20/07/2026		12:00	1
End *			
20/07/2026		13:00	

Once done you will note the specific times now appear on the unavailability on the roster

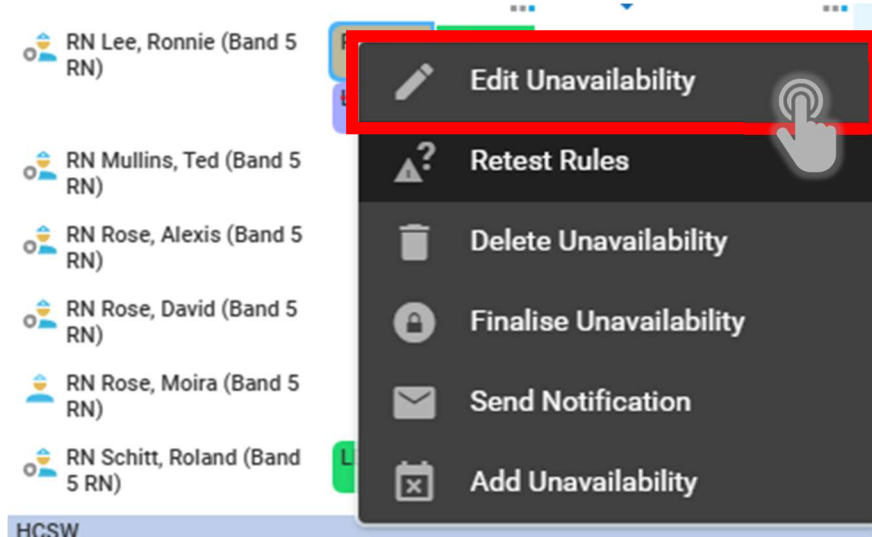
Note: Multiple PT01 unavailability entries can be added within a single shift to reflect separate periods of Protected Time to Lead taken throughout the day.

For example, if Protected Time to Lead is taken at different periods throughout the day, separate PT01 unavailability entries can be added for each time period (e.g. 09:00-11:00 and 14:00-16:00) as demonstrated below.

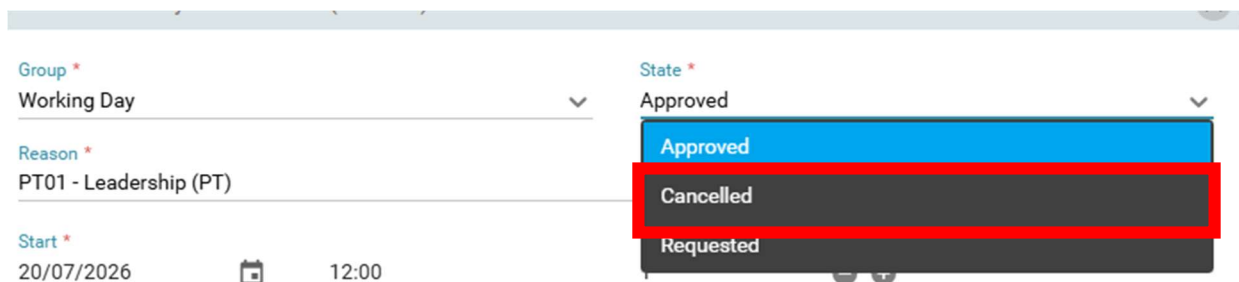


Cancelling Protected Time to Lead in Optima

If the PTL has to be cancelled this should be done by again right clicking on the unavailability



From the unavailability panel it is **important you update the State to Cancelled**



Record why cancelling Protected Time to Lead in Optima

Click on the unavailability to open the Prompt

From here select 'add note'

PT01 - Leadership (PT)



Ronnie Lee
 Band 5 RN

Edit Unavailability

Retest Rules

More

Unavailability Details

Audit Trail

Attributes

 Cancelled

Warnings and Violations

Retest Rules

This Unavailability has not broken any rules

Working Day

Group

Working Day

Unavailability Reason

Leadership (PT)

Start

20 Jul 2026 12:00

End

20 Jul 2026 13:00

Duration

1 days (1 hours)

Requested Date

-

Unfinalised Unavailability Details

Posting

Unfinalised Dates

FK4184757

20/07/2026

Unavailability Notes

No Notes

Add Note

You can now enter the reason for cancelation

Add Note

Type a Note

now click ok

Cancel

OK

Reporting cancelled Protected Time to Lead in Optima

To report on all cancelled Protected Time to Lead unavailability's, Select

Rostering → Unsalability → Unavailability List

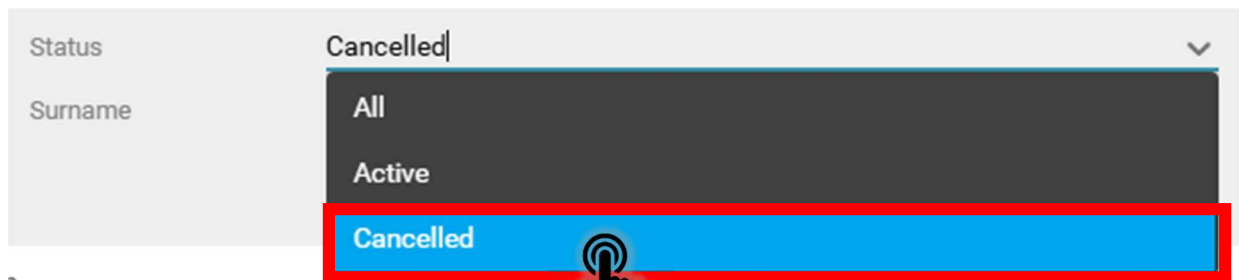


From here select the relevant information

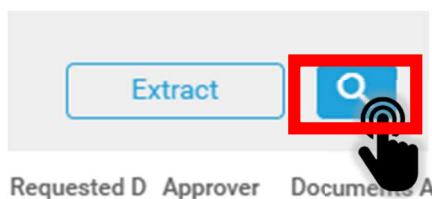
Unavailability List 0 Records

Unit	Training Ward 02	From *	15/08/2026	To *	14/09/2026
Team	Any	Show	All	Staff No	
Group	Any	Status	Active	Assignment No	

- Unit
- From *
- To *
- Status (this will default to Active – change to All or Cancelled)



Click search



The report will now display any cancelled shifts within that date range. If a note was added this will also appear here

Surname	Forenames	Staff Number	Group	Reason	Start	End	Last Note ↓	Hours In P	Hours In P	Total Duration	State	Departments
 Sands	Twyla	7641530	Working Day	Leadership (PT)	27/07/2026	27/07/2026	ward activity	01:00	1.00	1	Cancelled	-
 Lee	Ronnie	7641533	Working Day	Leadership (PT)	20/07/2026	20/07/2026	Ward Activity	01:00	1.00	1	Cancelled	-
 Brewer	Patrick	7641536	Working Day	Leadership (PT)	20/07/2026	20/07/2026	ward activity	02:30	2.50	1	Cancelled	-
 Rose	Johnny	7641528	Annual Leave	Annual Leave	10/08/2026	17/08/2026		43:30	43.50	8	Approved	-

Reporting on Active Protected Time to Lead in Optima

To report on all active Protected Time to Lead unavailability's, Select:

Rostering → Unavailability → Unavailability List



From here select the relevant information

Unavailability List 0 Records

Unit	Training Ward 02	From *	15/08/2026	To *	14/09/2026
Team	Any	Show	All	Staff No	
Group	Any	Status	Active	Assignment No	

- Unit
- From *
- To *
- Status (this will default to Active)

Status: Active

Surname

All

Active

Cancelled

Click search

Extract

Search

Requested D Approver Documents A

The report will now display any cancelled shifts within that date range. If a note was added this will also appear here

Surname	Forenames	Staff Number	Group	Reason	Start ↑	End	Last Note	Hours In Period	Hours In Period	Total Duration	State	Department
Rose	Johnny	7641528	Working Day	Leadership (PT)	09/09/2026	09/09/2026	06:30	6.50	1		Approved	
Rose	Johnny	7641528	Working Day	Leadership (PT)	17/09/2026	17/09/2026	06:30	6.50	1		Approved	
Rose	Johnny	7641528	Working Day	Leadership (PT)	21/09/2026	21/09/2026	06:30	6.50	1		Approved	
Rose	Johnny	7641528	Working Day	Leadership (PT)	29/09/2026	29/09/2026	06:30	6.50	1		Approved	