



System User Guide

School/Department Administrator Guide to Absence and Leave

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Introduction

This guide covers key tasks for School/Department Administrators in managing annual leave on behalf of an employee system process. It is related to the following Process User Guides:

- [Guide to Annual Leave](#)
- [Guide to Maternity Leave](#)
- [Guide to Partner, Parental and Special Leave](#)
- [Guide to Sickness Absence](#)
- [Guide to Shared Parental Leave](#)

Information on the different types of leave and absence options with links to relevant policies can be found on the [leave and absence options](#) webpage.

Reports

To support the Absence management policy (for sickness absence) the following three absence review reports have been developed as a management tool and will be emailed directly to the employee's line manager. Managers will only receive an email if there is data to report.

- Weekly Open Sickness Absences Report – all instances of sickness absence which do not have an Absence End Date on the day the report is run
- Monthly Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period
- Monthly Sickness Absence Review for 3 or More Periods in a rolling 6-month period

If an employee has more than one assignment, all line managers for the employee will be sent the report.

The three reports have been developed as a management tool to allow managers to monitor and review attendance levels of staff and support staff health and wellbeing. It may not always be the case that action has to be taken on receiving one or more of the three absence reports. The information in the report should be reviewed and considered in line with the [Absence Management Policy](#) and [Absence Management guidance for Line managers](#). Advice should be sought from your local HR Partner before taking any formal action.

- The Absence review reports are also available through the Absence Report app in People and Money and can be run at any time. The reporting period will mirror the report sent to the line manager. Further details are available in the guide '[How to view Absence Reports](#)' (under the 'Reporting' heading).
- The Open Absences Report will be sent each Monday, to line managers who have a direct report flagged as being off with sickness absence (e.g. currently have the open absence box ticked) in People and Money. If an employee has more than one assignment, all line managers for the employee will be sent the report. An open-ended absence must be closed off when the employee returns to work.

- The Monthly Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period will be sent on the first day of the month where a direct report meets the review point in the reporting period.
- The Monthly Sickness Absence Review for 3 or More Periods in a rolling 6-month period will be sent on the first day of the month where a direct report meets the review point in the reporting period.

Unauthorised Absence

1. After recording unauthorised absence, the School/Department Admin should investigate employee whereabouts, locate employee, and find out reason for absence.
2. Once the employee is found, cancel the unauthorised absence and use the correct absence type to record the absence.
3. For multi-assignments holders, you do not need to submit at assignment level as unauthorised absence is applied across all assignments.
4. **Sponsored Workers** - if you are entering a period of unauthorised absence for more than 10 consecutive working days for a sponsored worker (someone that holds a Skilled Worker or Temporary Worker Sponsored researcher visa) this must be reported to the UKVI. Once you submit this leave type HR Operations will pick this up and report this as part of their weekly reporting duties. Further information is available on the [Reporting Duties for sponsored staff](#) webpage.

Adjusting Absence Balances

With effect from 1st January 2024 the system will prevent anyone going into a negative leave balance and will show an error message when this occurs. In exceptional circumstances for example where someone has started near the end of the year and won't have accrued enough leave for the Christmas Closure days you should:

1. Refer to the [Annual Leave Calculator](#) for the balance of annual leave entitlement
2. Make a positive adjustment to the current year annual leave balance
3. Then future date a negative adjustment for the following leave year. This will ensure that any leave 'borrowed' will be deducted when the next annual leave year commences.

In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

Entering Absence on behalf of an Employee

1. From the homepage select the **Navigator** button on the top left corner
2. Expand **My Client Groups** and select **Person Management**
3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
4. Select the **Tasks** button on the right side of the screen
5. Under the Absences section, select **Absence Records**
6. Click the **Add** button
7. Select the appropriate **Absence Type** from the list of options available in the dropdown menu
8. Fill in the **Start Date**; then the **End Date**, **Start Date Duration**, and **End Date Duration** if known. You can also check the **Single day** box if applicable
9. In the Details section, add any Comments or Attachments if needed
10. Press **Submit**

Cancelling Absence on behalf of an Employee

1. From the homepage select the **Navigator** button on the top left corner
2. Expand **My Client Groups** and select **Person Management**
3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
4. Select the **Tasks** button on the right side of the screen
5. Under the Absences section, select **Absence Records**
6. Against the absence you wish to cancel, click on the **Actions** dropdown and select **Withdraw**
7. A warning message asking if you want the selected record to be deleted will appear. Press **OK**

Amending Absence on behalf of an Employee

1. From the homepage select the **Navigator** button on the top left corner
2. Expand **My Client Groups** and select **Person Management**
3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
4. Select the **Tasks** button on the right side of the screen
5. Under the Absences section, select **Absence Records**
6. **Select** the absence record you wish to edit
7. Make the necessary changes and press **Submit**

Adding Unauthorised Absence

1. From the Home page, click the **Navigator** menu icon located at the top left.
2. Open **My Client Groups** and click the **Person Management** link.
3. **Search** for and **select** the relevant employee

4. Click on the **Tasks** icon on the far right of the screen
5. In the Absences section, select **Absence Records**
6. Click on the **Add** button
7. Select the Absence Type '**Unauthorised Absence**' from the list of dropdown options
8. Enter the **Start Date**; and **End Date**, **Start Date Duration** and **End Date Duration** if known. You have the option to check the **Single day** or **Open ended** leave boxes as appropriate.
9. Select the Reason as:
 - a. '**UKVI**' for sponsored employees, those with a Skilled Worker or Temporary Worker Sponsored researcher Visa.
 - b. '**Unauthorised Absence**' for non-sponsored employees
10. Click **Submit**.

Cancelling Unauthorised Absence

1. From the Home page, click the **Navigator** menu icon located at the top left.
2. Open **My Client Groups** and click the Person Management link.
3. **Search** for and **select** the relevant employee
4. Click on the **Tasks** icon on the far right of the screen
5. In the Absences section, select **Absence Records** to view all the absences against this employee's record
6. Against the UKVI absence you wish to cancel, click on the **Actions** dropdown and select **Withdraw**
7. A warning message asking if you want the selected record to be deleted will appear. Press **OK**

How to Adjust Leave Balances

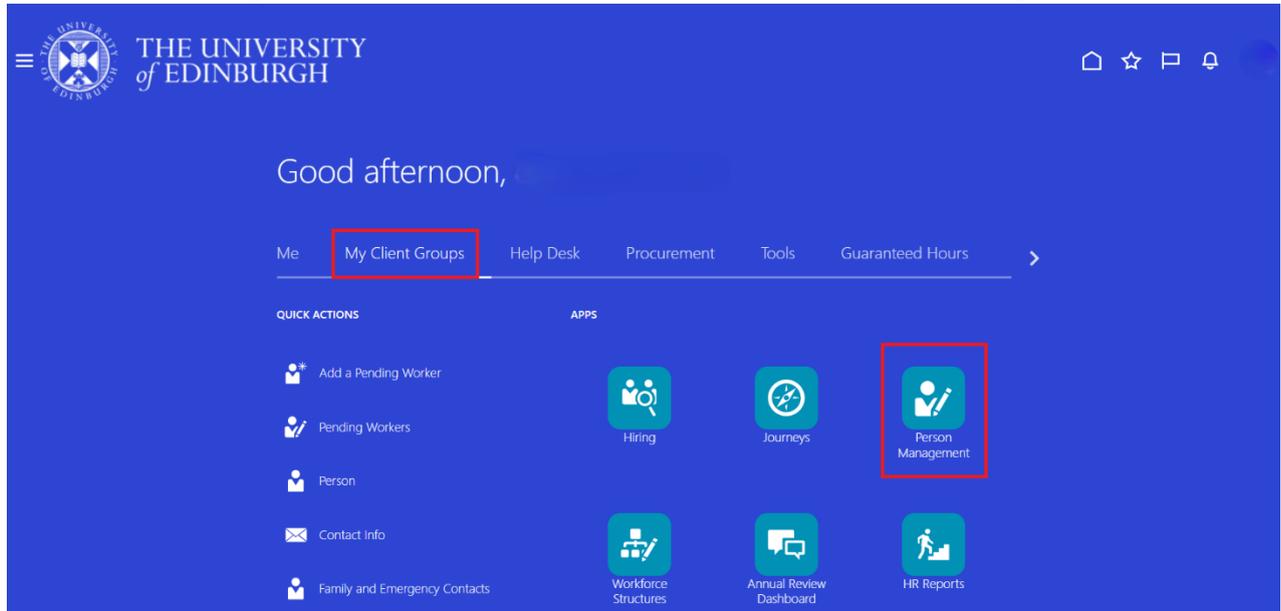
1. From the dashboard, click on **My Client Groups**, then **Person Management**
2. **Search** for and **select** the employee (by clicking on the link on their name)
3. Click on the **Tasks** icon and select **Absence Records**
4. Click on the **dropdown arrow on the Enrollments and Adjustments** button under Plan Balances and select **Adjust Balance**
Note: In some instances, you might see a >> icon. Please click on this and you will see the Enrollments and Adjustments button appear.
5. In the Adjust Balance pop up that appears, select the relevant **Reason** and **Date**, and enter the **Adjustment Amount**. In case you're looking to reduce the absence balance, ensure you **prefix a minus (-)** to the adjustment amount to get the correct figure.

In Detail

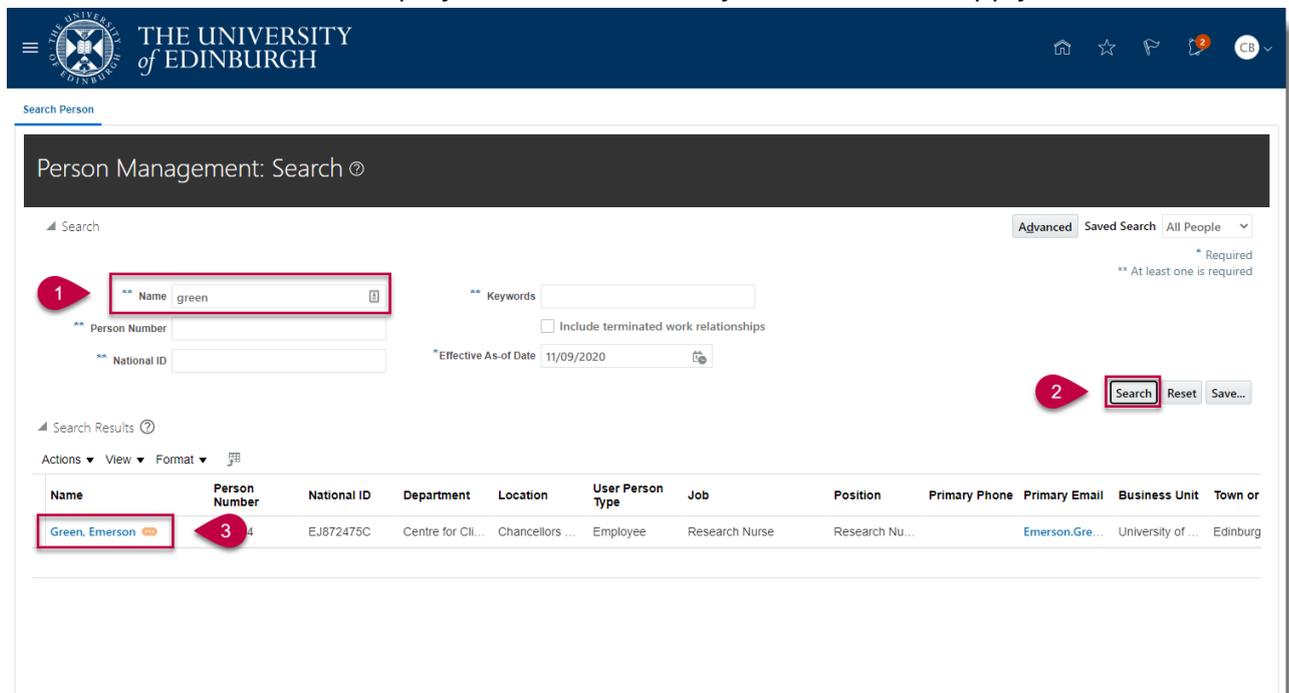
This section provides the detailed steps and includes relevant screenshots from the system.

Entering Absence on behalf of an Employee

1. From the homepage select the **My Client Groups** tab and the **Person Management** tile.



2. **Search** for and **select** the employee on whose behalf you would like to apply for leave.



3. Select the **Tasks** button on the right side of the screen

The screenshot shows the 'Emerson Green: Person Management' interface. The header includes the University of Edinburgh logo and navigation icons. The main content area displays 'Employment' details for a person with ID 158564, including work relationship information (University of Edinburgh, Employee, hired 22/09/2014) and assignment details (Research Nurse, started 24/08/2020). On the right-hand side, a vertical toolbar contains several icons, with the top icon (a list or document symbol) highlighted by a red rectangular box.

4. Under the Absences section, select **Absence Records**

This screenshot shows the same 'Emerson Green: Person Management' page as above, but with the right-hand navigation menu expanded. The menu lists various sections: 'Absences' (with sub-items 'Absence Cases' and 'Absence Records', where 'Absence Records' is highlighted with a red box), 'Payroll', 'Compensation', and 'Personal and Employment'. The main content area remains the same, showing employment and assignment details for the person with ID 158564.

5. Click the **Add** button

Emerson Green: Person Management
Person Number: 158564

Employment x Absence Records x

Manage Absences and Entitlements

Absences

Most Recent or Current Absence
Type: Unauthorised Leave
Dates: 11/09/2020 - Open ended
Status: In progress
Duration: Open ended

Next Scheduled Absence
Type: Leave
Dates: 15/09/2020 - 15/09/2020
Status: Scheduled
Duration: 7 Hours

Pending Actions

Existing Absences

View **+ Add** Recalculate Time Period: Last 6 months Type Status Detach

Dates	Employer	Type	Duration	Status	Processing Status	Actions
15/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled	✓	⌵
11/09/2020 - End date not de...	University of Edinburgh	Unauthorised Leave	0 Hours	In progress	✓	⌵
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn	✓	⌵

Plan Participation

6. Select the appropriate **Absence Type** from the list of options available in the dropdown menu

THE UNIVERSITY of EDINBURGH

Emerson Green: Person Management
Person Number: 158564

Employment x Absence Records x

Absence Administration

Save Submit Cancel

*Absence Type

- Emergency Time off for Dependants
- Industrial Action
- Leave
- Other Paid Leave
- Special Paid Leave
- Unauthorised Leave

7. Fill in the **Start Date**; then the **End Date**, **Start Date Duration**, and **End Date Duration** if known. You can also check the **Single day** box if applicable. If the absence is logged as open ended an end date must be added when the period of absence finishes, see [Amending Absence on Behalf of an Employee](#) section below.

Emerson Green: Person Management
Person Number: 158584

Absence Administration

*Absence Type: Leave

Basic Mode

Single day

*Start Date: dd/mm/yyyy

*End Date: dd/mm/yyyy

Duration: 0 Hours

*Start Date Duration: Hours

*End Date Duration: Hours

Details: Plan Use, Action Items

Comments

Add Attachment: None

8. In the **Details** section, add any Comments or Attachments if needed

Absence Administration

*Absence Type: Leave

Basic Mode

Single day

*Start Date: 16/09/2020

*End Date: 16/09/2020

Duration: 7 Hours

*Start Date Duration: 7 Hours

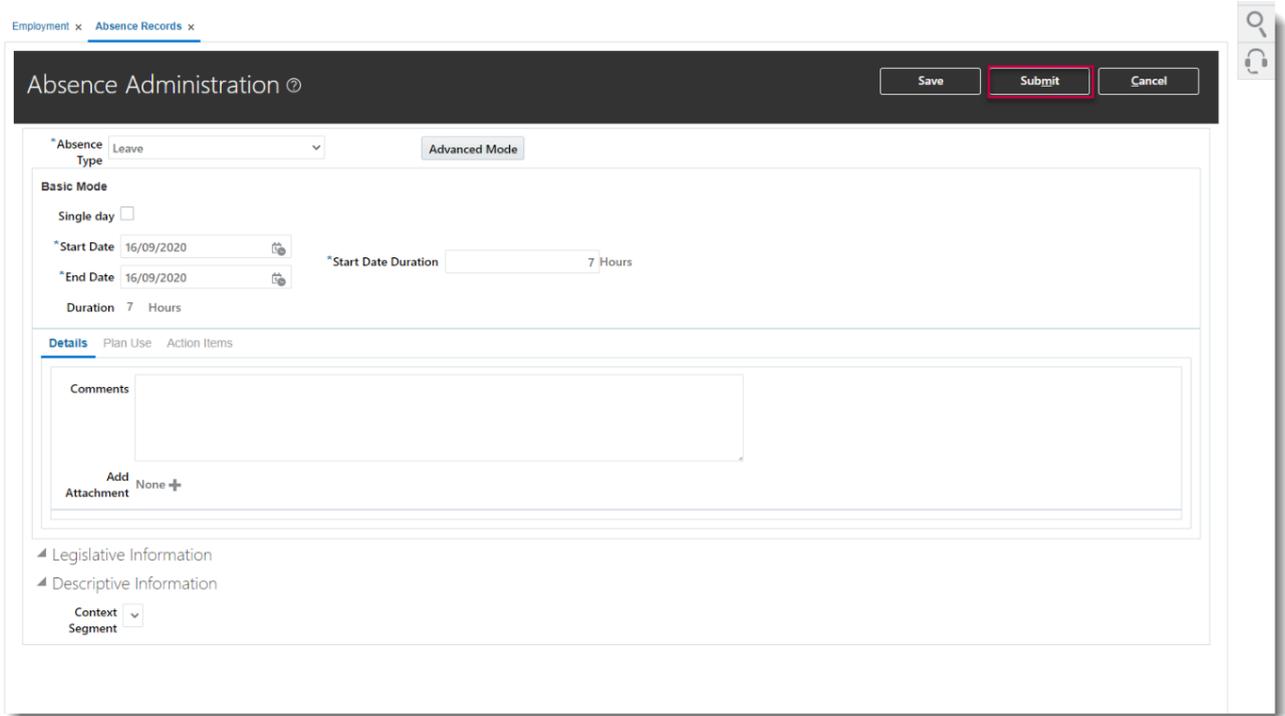
Details: Plan Use, Action Items

Comments

Add Attachment: None

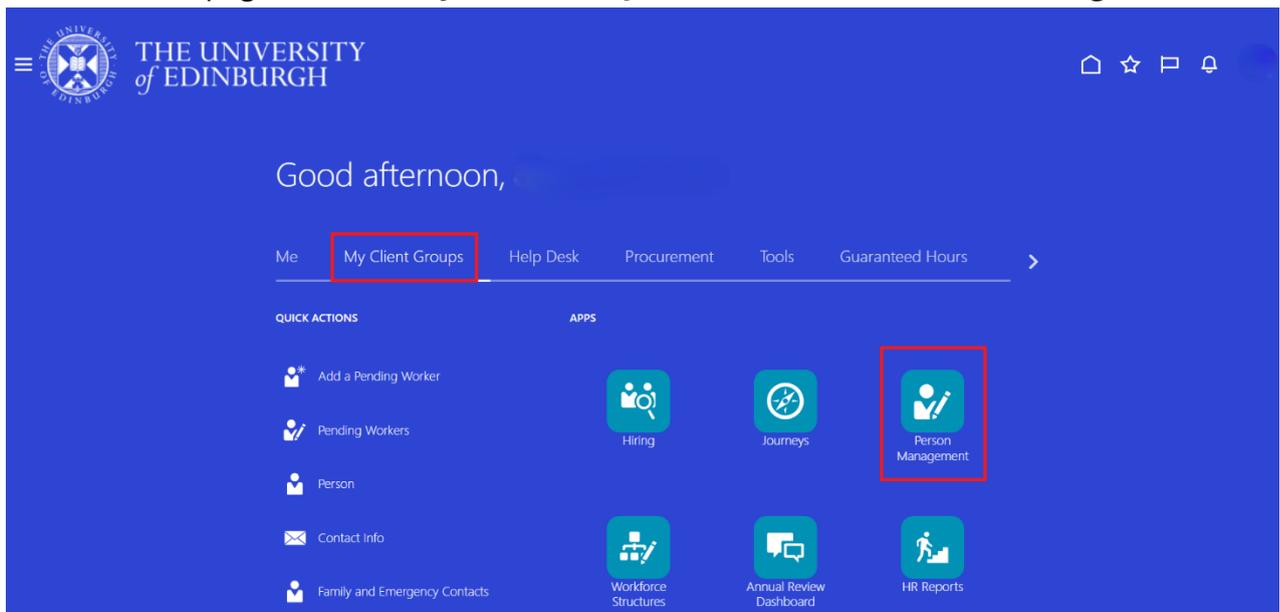
9. Press **Submit**.

Note: Pressing **Save** will not complete the process instead it saves the request as a draft.



Cancelling Absence on behalf of an Employee

1. From the homepage select the **My Client Groups** tab and select the **Person Management** tile.



2. **Search** for and **select** the employee on whose leave you would like to cancel.

Person Management: Search

Search

Advanced Saved Search All People

Required
** At least one is required

1 Include terminated work relationships

Person Number Effective As-of Date 11/09/2020

National ID

2

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson	158564	EJ872475C	Centre for Cli...	Chancellors ...	Employee	Research Nurse	Research Nu...		Emerson.Gre...	University of ...	Edinburg

3. Select the **Tasks** button on the right side of the screen

Emerson Green: Person Management

EG

Person Number 158564

Close

Tasks

Employment

Done

Work Relationship

Legal Employer University of Edinburgh Country United Kingdom

Worker Type Employee

Hire Date 22/09/2014

Assignment: Research Nurse

Action Assignment Change Effective Start Date 24/08/2020 (2 of 2)

Action Reason Change Primary Assignment Effective End Date

View History

Assignment Details

Assignment Number 158564 Assignment Status Active - Payroll Eligible

Business Unit University of Edinburgh Primary Yes

Person Type Employee Projected End Date

4. Under the Absences section, select **Absence Records**

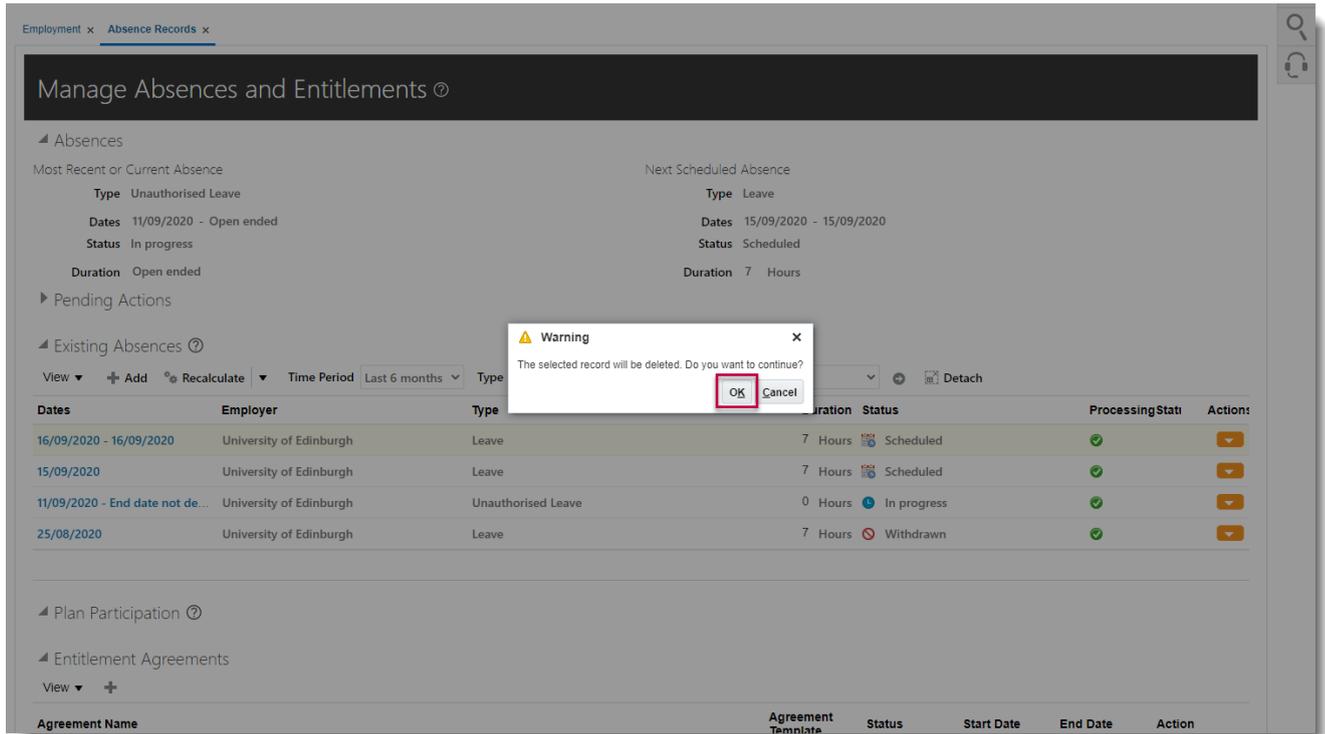
The screenshot shows the 'Emerson Green: Person Management' interface. On the right-hand navigation menu, under the 'Absences' section, the 'Absence Records' option is highlighted with a red rectangular box. Other menu items include 'Compare', 'Absence Cases', 'Payroll', 'Compensation', and 'Personal and Employment'.

5. Against the absence you wish to cancel, click on the **Actions** dropdown and select **Withdraw**.

The screenshot displays the 'Manage Absences and Entitlements' page. It features a table of absence records with columns for Dates, Employer, Type, Duration, and Status. A dropdown menu is open over the first row, showing the 'Withdraw' option selected and highlighted with a red box. A red circle '1' points to this option, and another red circle '2' points to the dropdown arrow. The table contains the following data:

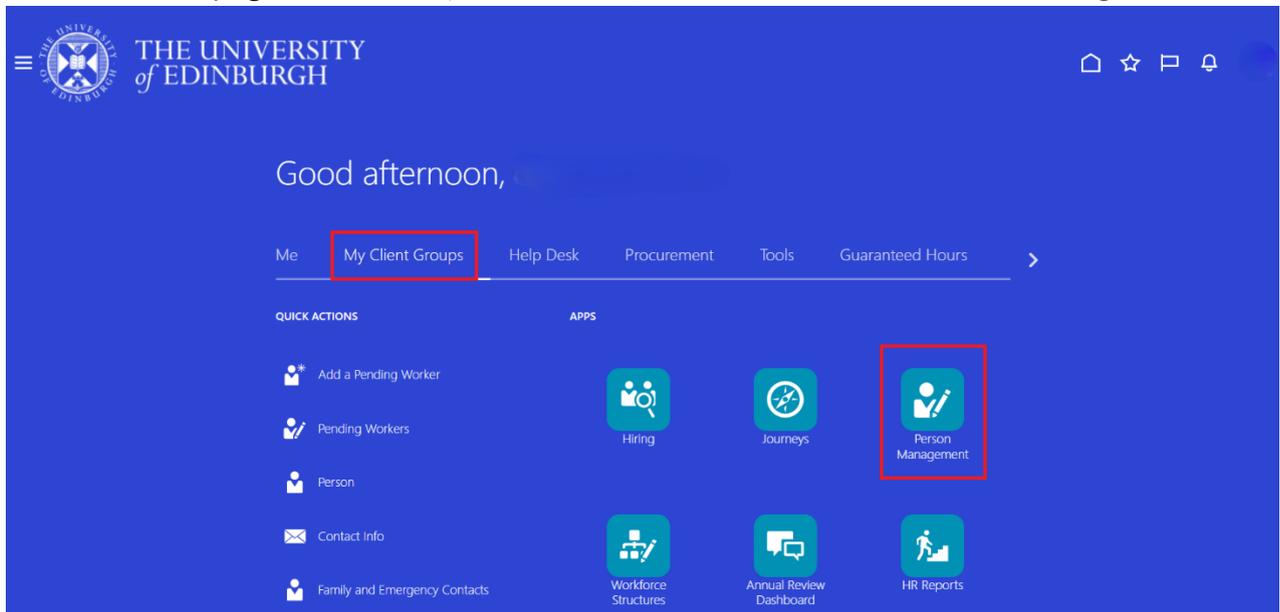
Dates	Employer	Type	Duration	Status
16/09/2020 - 16/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled
15/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled
11/09/2020 - End date not de...	University of Edinburgh	Unauthorised Leave	0 Hours	In progress
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn

6. A warning message asking if you want the selected record to be deleted will appear. Press **OK**.



Amending Absence of behalf of an Employee

1. From the homepage select the **My Client Groups** tab and select the **Person Management** tile.



2. **Search** for and **select** the employee on whose behalf you would like to apply for leave.

Person Management: Search

Search

Advanced Saved Search All People

Required
** At least one is required

1

** Name green

** Keywords

** Person Number

Include terminated work relationships

** National ID

*Effective As-of Date 11/09/2020

2

Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson	158564	EJ872475C	Centre for Cli...	Chancellors ...	Employee	Research Nurse	Research Nu...		Emerson.Gre...	University of ...	Edinburg

3. Select the **Tasks** button on the right side of the screen

Emerson Green: Person Management

Close

EG

Person Number 158564

Employment x

Employment Done

Work Relationship

Legal Employer University of Edinburgh Country United Kingdom

Worker Type Employee

Hire Date 22/09/2014

Assignment: Research Nurse

Action Assignment Change Effective Start Date 24/08/2020 (2 of 2)

Action Reason Change Primary Assignment Effective End Date

View History

Assignment Details

Assignment Number 158564 Assignment Status Active - Payroll Eligible

Business Unit University of Edinburgh Primary Yes

Person Type Employee Projected End Date

Tasks

4. Under the Absences section, select **Absence Records**.

The screenshot shows the 'Emerson Green: Person Management' interface. The navigation sidebar on the right contains the following menu items: Compare, Absences (with a sub-item 'Absence Records' highlighted by a red box), Payroll, Compensation, and Personal and Employment. The main content area displays 'Work Relationship' and 'Assignment: Research Nurse' details.

5. **Select** the absence record you wish to edit.

The screenshot shows the 'Manage Absences and Entitlements' page. It features a table of absence records with the following data:

Dates	Employer	Type	Duration	Status	Processing Status	Actions
16/09/2020 - 16/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled	✓	⌵
15/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled	✓	⌵
11/09/2020 - End date not de...	University of Edinburgh	Unauthorised Leave	0 Hours	In progress	✓	⌵
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn	✓	⌵

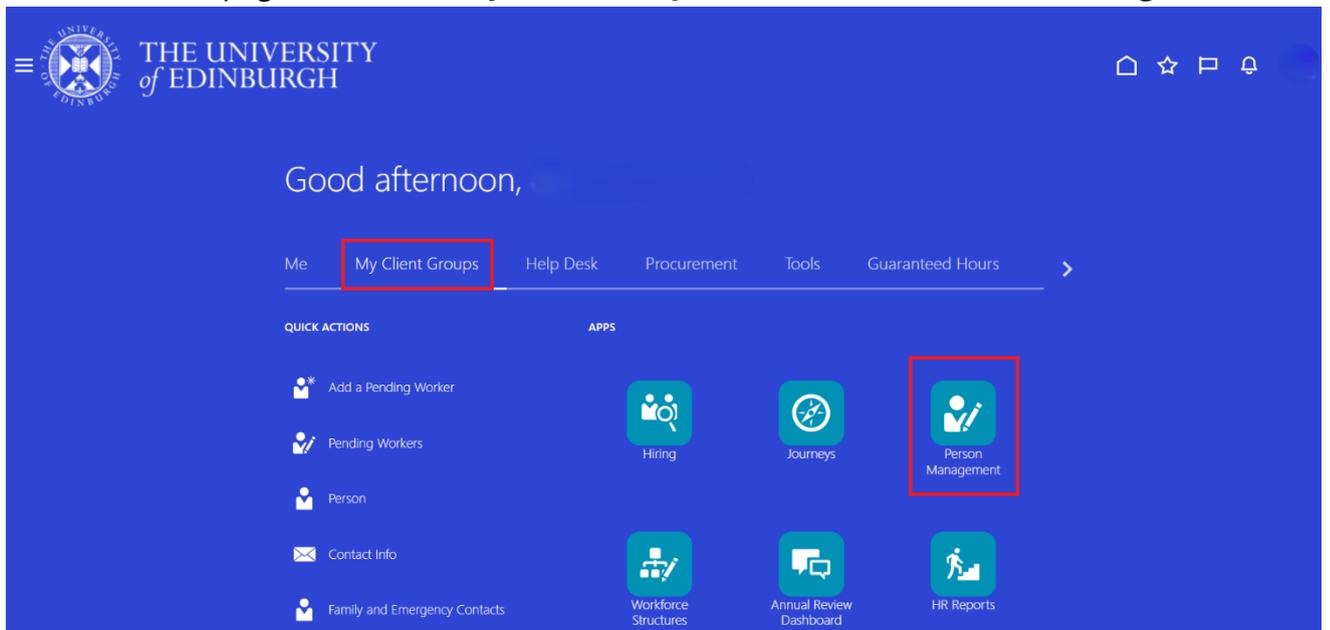
The first row of the table is highlighted in blue, and the date range '16/09/2020 - 16/09/2020' is enclosed in a red box.

6. Make the necessary changes and press **Submit**. If you are ending an open ended absence untick the box and add an end date.

The screenshot shows the 'Absence Administration' interface. At the top, it identifies the user as Emerson Green with Person Number 158564. The form is set to 'Advanced Mode' with 'Absence Type' as 'Leave'. Under 'Basic Mode', the 'Start Date' is 16/09/2020, 'End Date' is 16/09/2020, and 'Duration' is 7 Hours. The 'Submit' button is highlighted with a red box. There are also 'Save' and 'Cancel' buttons. A 'Comments' field and 'Add Attachment' option are visible at the bottom.

Adding Unauthorised Absence

1. From the Home page, click on the **My Client Groups** tab and select the **Person Management** tile.



2. Search for and select the relevant employee.

Person Management: Search

Search Person

Advanced Saved Search All People

** Name green

** Keywords

** Person Number

** National ID

* Effective As-of Date 11/09/2020

Include terminated work relationships

Search Reset Save...

Search Results

Name	Person Number	National ID	Department	Location	User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson		EJ872475C	Centre for Cl...	Chancellors ...	Employee	Research Nurse	Research Nu...		Emerson.Gre...	University of ...	Edinburgh

3. Click on the **Tasks** icon on the far right of the screen.

Emerson Green: Person Management

EG

Person Number 158564

Close

Employment x

Employment Done

Work Relationship

Legal Employer University of Edinburgh Country United Kingdom

Worker Type Employee

Hire Date 22/09/2014

Assignment: Research Nurse

Action Assignment Change

Action Reason Change Primary Assignment

Effective Start Date 24/08/2020 (2 of 2)

Effective End Date

View History

Assignment Details

Assignment Number 158564

Business Unit University of Edinburgh

Person Type Employee

Assignment Status Active - Payroll Eligible

Primary Yes

Projected End Date

4. In the Absences section, select **Absence Records**.

The screenshot shows the 'Emerson Green: Person Management' interface. The 'Absence Records' option in the right-hand navigation menu is highlighted with a red rectangular box. The main content area displays 'Employment' details for a person with ID 158564, including their work relationship and assignment information.

5. Click on the + **Add** button.

The screenshot shows the 'Manage Absences and Entitlements' interface. In the 'Existing Absences' section, the '+ Add' button is highlighted with a red rectangular box. Below this, a table lists existing absence records.

Dates	Employer	Type	Duration	Status	ProcessingStati	Action:
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn	✓	⌵

- Select the Absence Type '**Unauthorised Absence**' from the list of dropdown options.

The screenshot shows the 'Absence Administration' form for Emerson Green. The 'Absence Type' dropdown is open, and 'Unauthorised Leave' is selected and highlighted with a red box. The form includes buttons for 'Save', 'Submit', and 'Cancel'.

- Enter the **Start Date**; and **End Date**, **Start Date Duration** and **End Date Duration** if known. You have the option to check the **Single day** or **Open ended** leave boxes as appropriate.

The screenshot shows the 'Absence Administration' form with the 'Basic Mode' section highlighted in red. The 'Absence Type' is 'Unauthorised Leave'. The 'Basic Mode' section includes checkboxes for 'Single day' and 'Open ended leave', and input fields for 'Start Date', 'End Date', 'Start Date Duration', and 'End Date Duration'. Below this is the 'Details' section with a 'Reason' dropdown and a 'Comments' text area.

- Select the Reason '**UKVI**' for sponsored employees (employees with a Skilled Worker or Temporary Worker Sponsored researcher Visa). Alternately, select 'Unauthorised Absence for non-sponsored employees.

Emerson Green: Person Management

Person Number: 158564

Absence Administration

Absence Type: Unauthorised Leave

Advanced Mode

Basic Mode

*Start Date: 11/09/2020

Open ended leave:

Estimated End Date: dd/mm/yyyy

*Start Date Duration: 7 Hours

Details

Reason: UKVI

Comments: Unauthorised absence

Legislative Information

Descriptive Information

Context Segment

Buttons: Save, Submit, Cancel

9. Click **Submit**.

Note: Clicking **Save** will not submit the leave request instead the request is saved as a draft.

Emerson Green: Person Management

Person Number: 158564

Absence Administration

Absence Type: Unauthorised Leave

Advanced Mode

Basic Mode

*Start Date: 11/09/2020

Open ended leave:

Estimated End Date: dd/mm/yyyy

*Start Date Duration: 7 Hours

Details

Reason: UKVI

Comments: Unauthorised absence

Legislative Information

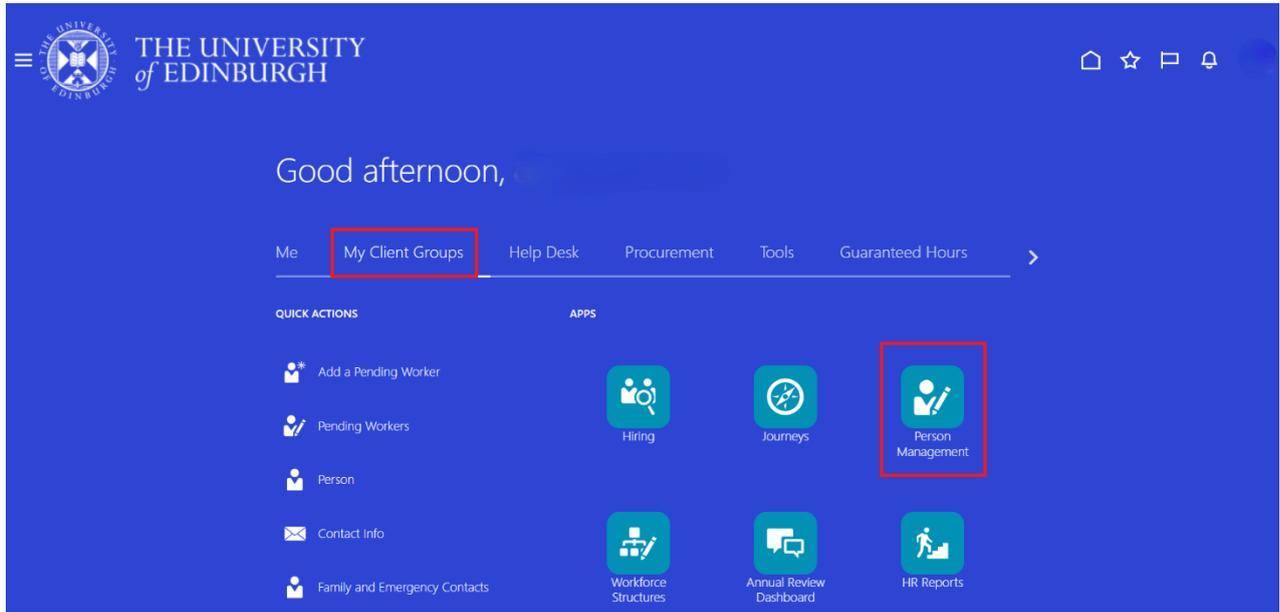
Descriptive Information

Context Segment

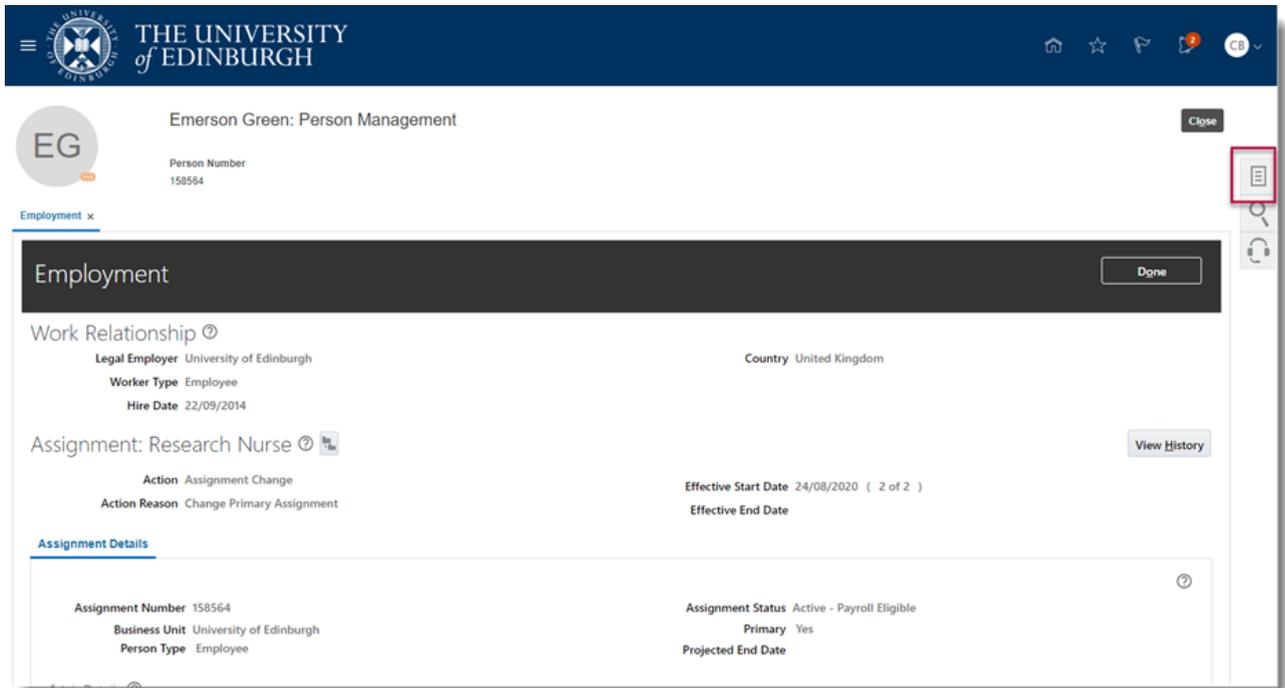
Buttons: Save, **Submit**, Cancel

Cancelling Unauthorised Absence

1. From the homepage select the **My Client Groups** tab and the **Person Management** tile.



2. **Search** for and **select** the relevant employee
3. Click on the **Tasks** icon on the far right of the screen.



- In the Absences section, select **Absence Records** to view all the absences against this employee's record.

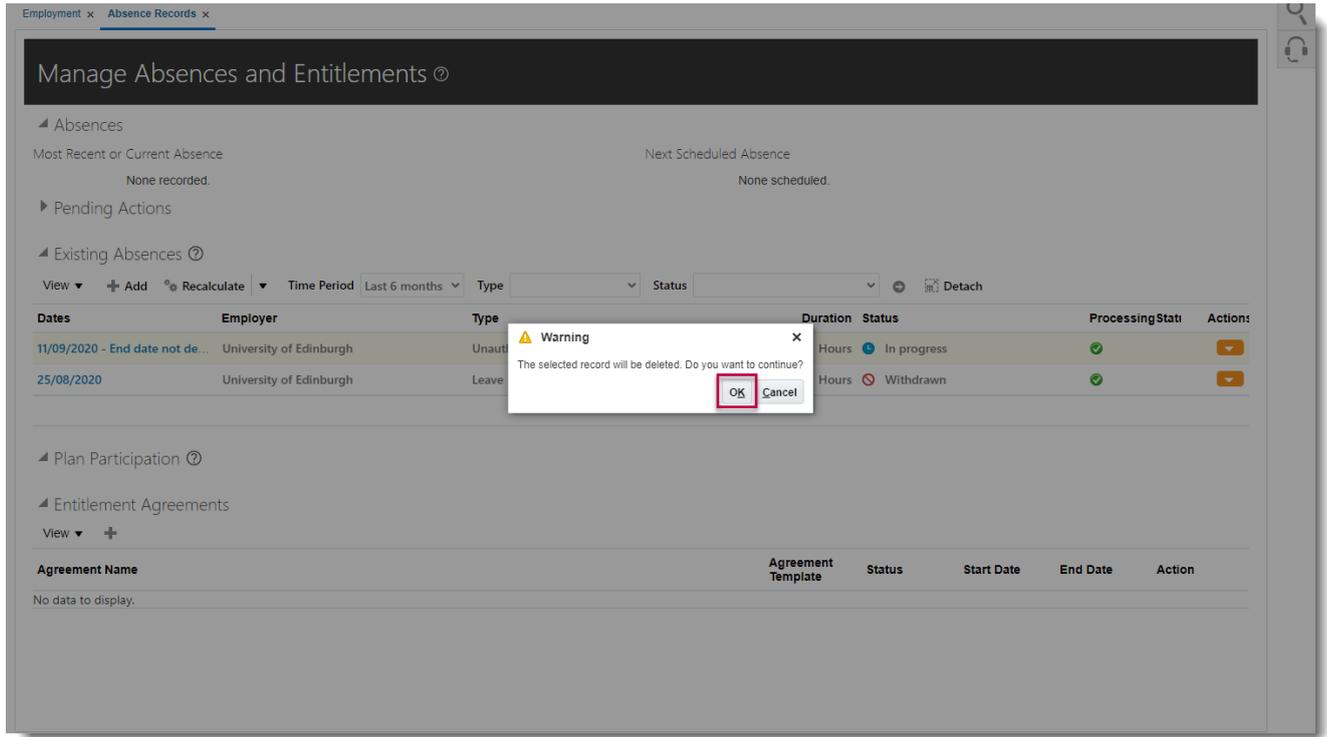
The screenshot shows the 'Emerson Green: Person Management' page. On the right-hand side, there is a navigation menu. Under the 'Absences' section, the 'Absence Records' option is highlighted with a red rectangular box. Other menu items include 'Compare', 'Absence Cases', 'Payroll', 'Compensation', and 'Personal and Employment'.

- Against the UKVI absence you wish to cancel, click on the **Actions** dropdown and select **Withdraw**.

The screenshot shows the 'Manage Absences and Entitlements' page. A table lists existing absences. The second row, dated '25/08/2020', is highlighted in yellow. An 'Actions' dropdown menu is open for this row, and the 'Withdraw' option is highlighted with a red box. A red circle with the number '1' is placed over the dropdown arrow, and another red circle with the number '2' is placed over the 'Withdraw' option.

Dates	Employer	Type	Duration	Status	Actions
11/09/2020 - End date not de...	University of Edinburgh	Unauthorised Leave	0 Hours	In progress	[Green checkmark] [Yellow dropdown]
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn	[Green checkmark] [Yellow dropdown]

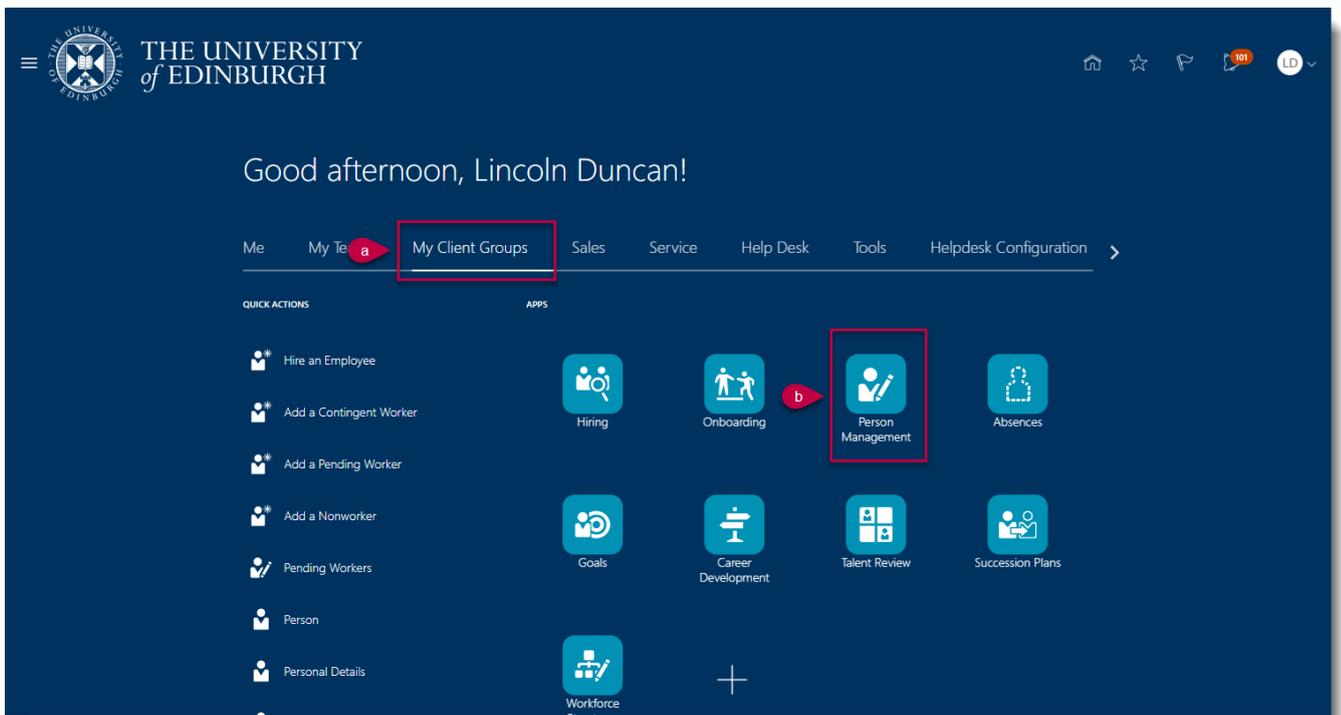
6. A warning message asking if you want the selected record to be deleted will appear. Press **OK**.



How to Adjust Leave Balances

This section provides the detailed steps and includes relevant screenshots from the system.

1. From the dashboard, click on **My Client Groups**, then **Person Management**.



2. Search for and select the employee (by clicking on the link in their name).

Person Management: Search

Search

Advanced Saved Search All People

** Name: rose

** Keywords:

** Person Number:

** National ID:

*Effective As-of Date: 6/11/2020

Include terminated work relationships

Search Reset Save...

Search Results

Name	Person Number	National ID	Department	Location	User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Perry, Rose	178496	EB409155C	HR-Systems	Dalhousie Land	Employee	HR Administrator	HR Administr...	440131 651 0...	Rose.Perry@t...	University of ...	Edinburg
Rose, Raquel	135746	KM603192A		Chancellors B...	Employee	Senior Lecturer (No...	Senior Lecturer	440131 651 0...	core.notificat...	University of ...	Edinburg

3. Click on the Tasks icon and select Absence Records.

Raquel Rose: Person Management

Person Number: 135746

Employment

Work Relationship

Legal Employer: University of Edinburgh

Worker Type: Employee

Hire Date: 28/04/2008

Country: United Kingdom

Assignment: Fellow in Medical Education

Action: Change of Position

Action Reason:

Effective Start Date: 9/10/2020 (1 of 1)

Effective End Date:

Assignment Details

Assignment Number: 135746

Business Unit: University of Edinburgh

Person Type: Employee

Assignment Status: Active - Payroll Eligible

Primary: Yes

Projected End Date:

- Compare
- Absences
 - Absence Records
 - Work Schedule Assignment
- Payroll
 - Costing for a Person
 - Payroll Relationships
 - Element Entries
- Compensation
 - Change Salary
 - Individual Compensation
 - View Compensation History
 - View Total Compensation Statement
- Personal and Employment
 - Person
 - Allocate Checklists
 - Employment
 - Continuous service Dates
 - Direct Reports
 - Create Work Relationship
 - Work Relationship
 - Areas of Responsibility
 - User Account
 - Talent Profile
 - Document Records
 - Document Delivery Preferences
 - Person Identifiers for External Applications

4. Click on the **dropdown arrow on the Enrollments and Adjustments** button under Plan Balances and select **Adjust Balance**

Note: In some instances, you might be see a >> icon. Please click on this and you will see the Enrollments and Adjustments button appear.

Employment x Absence Records x

Manage Absences and Entitlements

Absences
Most Recent or Current Absence: None recorded. Next Scheduled Absence: None scheduled.

Pending Actions

Existing Absences
View Add Recalculate Time Period: Last 6 months Type Status Detach

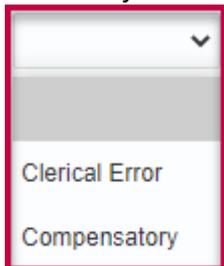
Dates	Employer	Type	Duration	Status	ProcessingStat	Action
No data to display.						

Plan Participation
Plan Balances
View Accruals Enrollments and Adjustments Status: Active

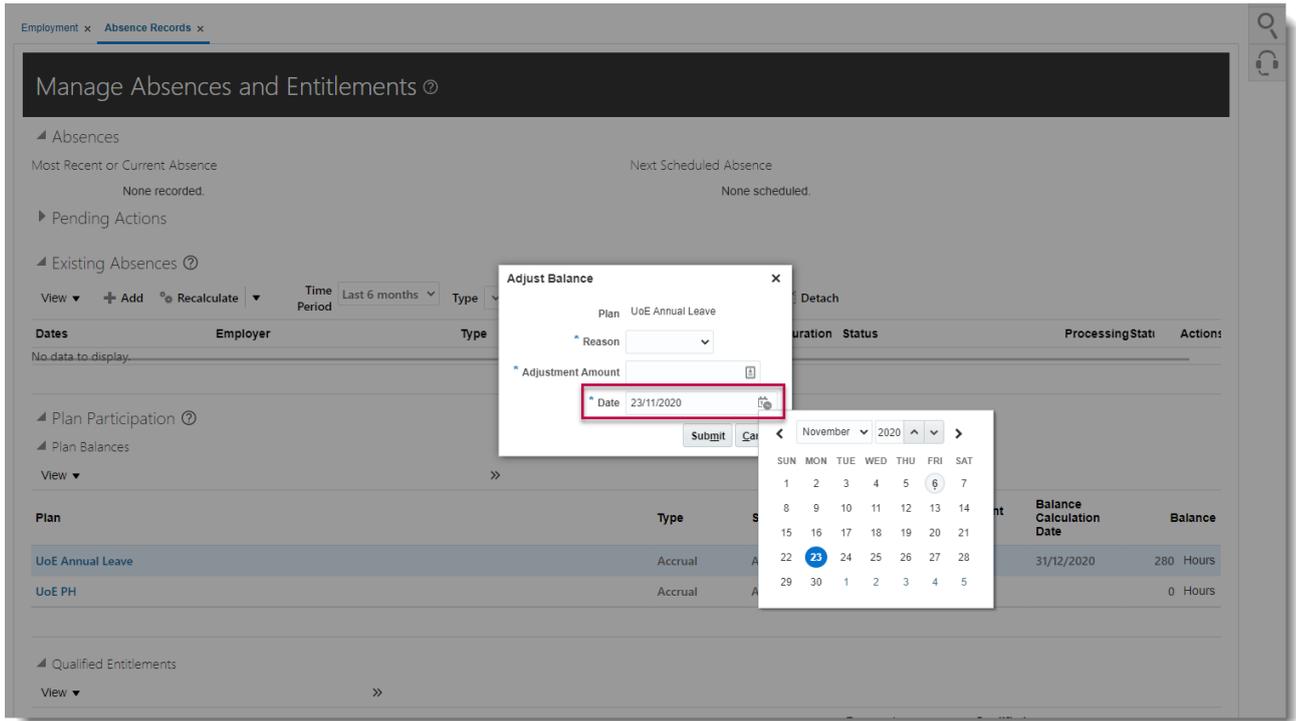
Plan	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
UoE Annual Leave	Accrual	Active	1/11/2019		31/12/2020	280 Hours
UoE PH	Accrual	Active	29/09/2020			0 Hours

Qualified Entitlements
View >>

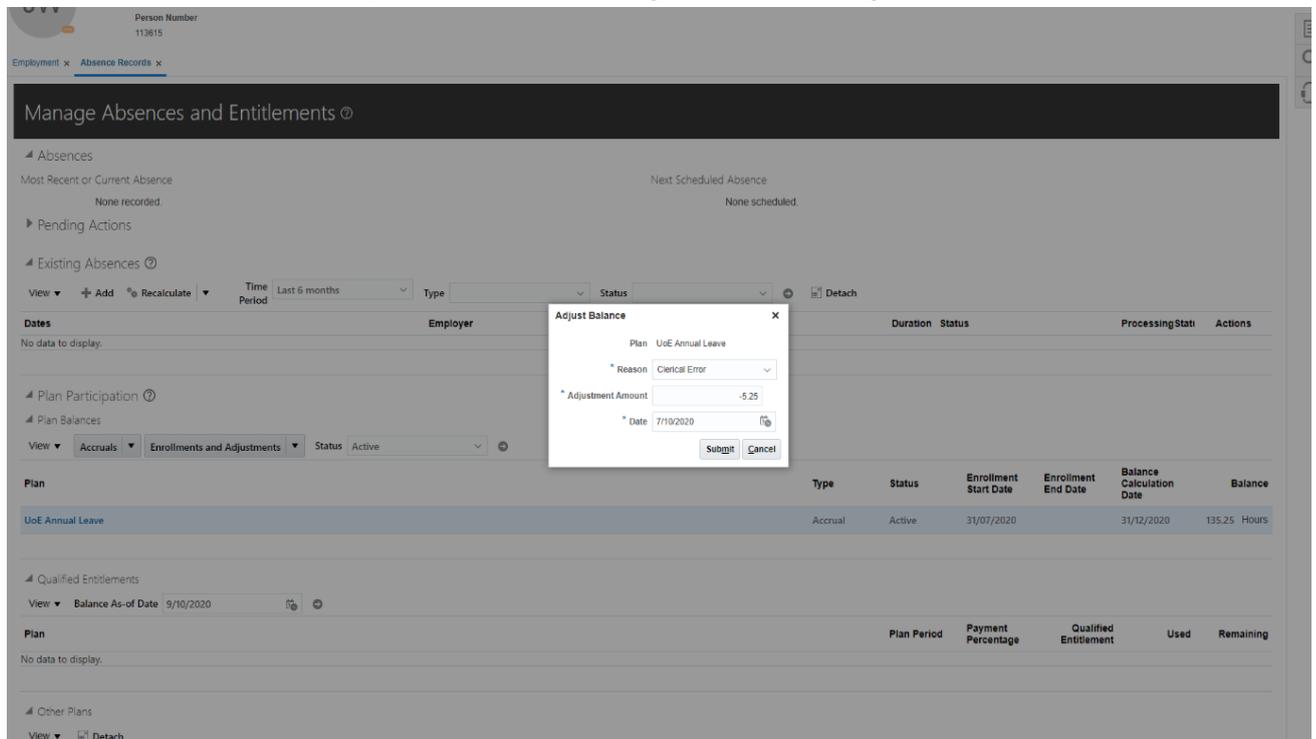
5. In the Adjust Balance pop up that appears, select the relevant **Reason**



6. Select the relevant **Date**.



7. Enter the **Adjustment Amount**. In case you're looking to reduce the absence balance, ensure you **prefix a minus (-)** to the adjustment amount to get the correct figure.



Note – Please choose the Date carefully within the Adjust balance box. It is important to note that this will be the date the adjusted balance takes effect.

E.g. in this example the employee had 135.25hrs shown in balance. It should have been 130hrs so we have deducted 5.25

Appendix

Appendix 1 – How to Enter Leave on behalf of an Employee

Please refer to the [Leave and absence options](#) webpage for when the absence type should be used, links to policy and further guidance. The table below highlights the absence types that can be selected as an SDA.

Absence Type	Reason (if applicable)
Emergency Time off for Dependants	
Leave	
Maternity	
Other Paid Leave	Academic/Sabbatical Adoption Appointment Antenatal Appointment Antenatal Appointment - partner Antenatal Appointment – personal CPD Delegate CPD Speaker Conference/Seminar Personal Health and Welfare Appointment Study Leave TOIL Training/Training Course
Parental Bereavement	<p>Not to be confused with Bereavement Leave (paid leave for the loss of an immediate family member). Parental Bereavement leave type should be used for the loss of a child up to the age of 18 years.</p> <p>Please review the Absence and Leave Options webpage and the Special Leave Policy for circumstances when this reason should be used.</p> <p>Bereavement leave can be selected under Special Paid Leave</p>
Partner Adoption	
Partner Birth	
Phased Return	
Sickness	Select a value from the dropdown menu in people and Money to record the sickness reason.
Special Paid Leave	Army Reserves/Volunteer Reserve Forces Bereavement Leave Compassionate Leave Emergency Domestic Situations Fertility treatment Funeral

	Jury Service Police Statement Voluntary Public Service/Leave for public duties Volunteering Activities Witness at Court
Surrogacy and Adoption	
Unauthorised Leave	UKVI – select this for a sponsored worker Unauthorised Leave
Unpaid Leave	Academic/Sabbatical Army reserves/Volunteer Reserve Forces Authorised Absence Campaigning for Election to Parliament Carers Leave Compassionate Leave Emergency Time off for Dependents Extend Unpaid Leave Representing your Country Unauthorised Absence Voluntary Public Service/Leave for Public Duties
Unpaid Parental Leave	

Version History

Version	Date	Description	Approved By
1.1	N/A	Draft	
2.0	09 June 2025	Updated guide to new format and separated from Line Manager guide to sickness absence.	ME

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.