People and Money system
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HR Operations and School/Department Admin Guide- How to Adjust Absence Balances
HR Operations and School/Dept Admin
Estimated time to complete: 6 minutes

In Brief...

This is a simple overview of the process.

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 be 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.

For detailed guidance, see the next section.

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

![Dashboard screenshot showing 'My Client Groups' and 'Person Management' options](image1)

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

![Person Management search results](image2)
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 be 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,
a. select the relevant **Reason**

b. select the relevant **Date**
c. 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.

This is the result
Please refer to Glossary