

# THE UNIVERSITY of EDINBURGH

# System User Guide School/Department Administrator Guide to Absence and Leave

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# Contents

Introduction	3
In Brief	5
Entering Absence on behalf of an Employee	5
Cancelling Absence on behalf of an Employee	5
Amending Absence on behalf of an Employee	5
Adding Unauthorised Absence	5
Cancelling Unauthorised Absence	6
How to Adjust Leave Balances	6
In Detail	7
Entering Absence on behalf of an Employee	7
Cancelling Absence on behalf of an Employee1	.1
Amending Absence of behalf of an Employee1	.4
Adding Unauthorised Absence1	.7
Cancelling Unauthorised Absence2	22
How to Adjust Leave Balances2	:4
Appendix2	9
Appendix 1 – How to Enter Leave on behalf of an Employee2	29

/ersion History	.31
Reviewers & Approvers	.31

# 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:

- <u>Guide to Annual Leave</u>
- <u>Guide to Maternity Leave</u>
- Guide to Partner, Parental and Special Leave
- <u>Guide to Sickness Absence</u>
- <u>Guide to Shared Parental Leave</u>

Information on the different types of leave and absence options with links to relevant policies can be found on the <u>leave and absence options</u> 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 <u>Absence Management Policy</u> and <u>Absence Management guidance for Line managers</u>. 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 '<u>How to view Absence Reports</u>' (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 <u>Reporting Duties for sponsored staff</u> webpage.

#### **Adjusting Absence Balances**

With effect from 1<sup>st</sup> 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 <u>Annual Leave Calculator</u> 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**
- 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. Plagsa click on this and you will see to

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

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.

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	<b>*</b>	Family and Emergency Contac		Workforce Structures	Annual Review Dashboard	HR Reports				

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

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Person Number	****	Include terminated v	vork relationships					
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Name Person National ID	Department Location	on User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson 🚥 🦪 4 EJ872475C	Centre for Cli Chance	ellors Employee	Research Nurse	Research Nu		Emerson.Gre	University of	Edinburg

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

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EG Employment ×	Emerson Green: Person Management Person Number 158564					Cl <u>o</u> se	0,0
Employn Work Relat Legal Wo	nent tionship ® Employer University of Edinburgh orker Type Employee Hire Date 22/09/2014	Country United Kingdom			Done		
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## 4. Under the Absences section, select **Absence Records**

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Employment		Compare     Absences     Absence Cases     Absence Records     Payroll     Costing for a Person     Payroll Relationships     Element Entrives     Compensation     Change Salary     Individual Compensation
Work Relationship Legal Employer University of Edinburgh Worker Type Employee Hire Date 22/09/2014 Assignment: Research Nurse Action Assignment Change Action Reason Change Primary Assignment	Country United Kingdom Effective Start Date 24/08/2020 ( 2 of 2 ) Effective End Date	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
Assignment Number 158564 Business Unit University of Edinburgh Person Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date	User Account     Taient Profile     Document Records     Document Delivery Preferences     Person Identifiers for External Applications

#### 5. Click the **Add** button

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

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Emerson Green: Person Mana Person Number 158564	gement				Cl <u>o</u> se	□ •
Absence Administration ③ *Absence  Type  Fmergency Time off for Dependants Industrial Action Leave Other Paid Leave Special Paid Leave Unauthorised Leave		Save Subj	nit	Cance	4	<u>C</u>

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 <u>Amending Absence on Behalf of an</u> <u>Employee</u> section below.

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

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#### 9. Press Submit.

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

Absence Le	ave		~	Advanced	Mode					
sic Mode										
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# Cancelling Absence on behalf of an Employee

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

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	Pending Workers		Hiring	Journeys	Person Management			
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	Family and Emergency Contact	ts	Workforce Structures	Annual Review Dashboard	HR Reports			

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

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earch Person											
Person Manag	jement: Se	arch @									
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Name	Person Number	National ID	Department	Location	User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson 🚥	34	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

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EG	Person Number 158554						Ξ
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	Hire Date 22/09/2014						
Assignmer	nt: Research Nurse 🛛 ங				View ]	History	
	Action Assignment Change	Effective Start Date 24/08/2020 (2 of 2)					
Actio	on Reason Change Primary Assignment	Effective End Date					
Assignment De	tails						
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Assignme	ent Number 158564	Assignment Status Active - Payroll Eligible					
Bu	usiness Unit University of Edinburgh	Primary Yes					
	erson type Employee	Projected End Date					

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

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Assignment Numl Business U Person Ty	ber 158564 Init University of Edinburgh ype Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date	Takent Profile     Document Records     Document Delivery Preferences     Person Identifiers for External Applications

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

Employment × Absence Records ×	-						0				
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25/08/2020	University of Edinburgh	Leave		7 Hours 🚫 Withd	rawn	© _	-				
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6. A warning message asking if you want the selected record to be deleted will appear. Press **OK**.

Employment × Absence Records	×				0
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15/09/2020	University of Edinburgh	Leave	7 Hours 🔀 Scheduled	۲	
11/09/2020 - End date not de	University of Edinburgh	Unauthorised Leave	0 Hours <b>()</b> In progress	۲	
25/08/2020	University of Edinburgh	Leave	7 Hours 🚫 Withdrawn	۲	
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View 🔻 🕂					
Agreement Name			Agreement Status Start Date	End Date Action	

# Amending Absence of behalf of an Employee

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

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	Goo	od afternoo	n, e					
	Me	My Client Groups	Help Desk	Procurement		Guaranteed Hours	>	
	QUICK AC	TIONS	APPS					
	<mark>≌</mark> * ⊿	dd a Pending Worker						
	<b>2</b> / P	ending Workers		Hiring	Journeys	Person Management		
	P	erson						
	<u>×</u> (	Contact Info		<b>*</b> /	<b>F</b> D	<u>∱_</u>		
	<b>*</b> =	amily and Emergency Contact		Workforce Structures	Annual Review Dashboard	HR Reports		

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

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earch Person											
Person Manag	jement: Se	earch @									
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** Person Number ** National ID			*Effective A	Inclu As-of Date 11/09/2	de terminated wo	ork relationships			2	Search Reset	Save
Actions View Forma	et ▼ ∰ Person	National ID	Department	Location	User Person	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson 🚥	34	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

	THE UNIVERSITY of EDINBURGH		â	☆	P	P	CB ~
Engloyment x	Emerson Green: Person Management Person Number 158564					Close	
Work Relat	ionship Employer University of Edinburgh rker Type Employee Hire Date 22/09/2014	Country United Kingdom			Doni	·	
Assignmer Actio	t: Research Nurse 🛛 ங Action Assignment Change n Reason Change Primary Assignment	Effective Start Date 24/08/2020 ( 2 of 2 ) Effective End Date			View	History	
Assignme Bu P	nt Number 158564 siness Unit University of Edinburgh erson Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date				0	

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

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Emerson Green: Person Management Person Number 158564 Employment × Employment × Work Relationship Legal Employer University of Edinburgh Worker Type Employee Hire Date 22/09/2014 Assignment: Research Nurse	E Country United Kingdom	Compare     Absence Cases     Absence Cases     Absence Records     Payroll     Costing for a Person     Payroll Relationships     Element Entries     Compensation     Change Salary     Individual Compensation     View Total Compensation Statement     Personal and Employment     Person     Allocate Checklists     Employment     Continuous service Dates
Action Assignment Change Action Reason Change Primary Assignment Assignment Details	Effective Start Date 24/08/2020 ( 2 of 2 ) Effective End Date	Direct Reports     Create Work Relationship     Work Relationship     Arreas of Responsibility     User Account
Assignment Number 158564 Business Unit University of Edinburgh Person Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date	Talent Profile     Document Records     Document Delivery Preferences     Person Identifiers for External Applications

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

Employment × Absence Records ×							0				
Manage Absenc	Manage Absences and Entitlements @										
Absences											
Most Recent or Current Absenc	e		Next Scheduled	Absence							
Type Unauthorised L	eave		Туре	Leave							
Dates 11/09/2020 - C	Dpen ended		Dates	15/09/2020 - 15/09/202	20						
Status In progress		Status	Scheduled								
Duration Open ended			Duration	7 Hours							
Pending Actions											
✓ Existing Absences ⑦ View マ → Add 🏾 🏶 Recald	culate  Time Period Last 6 months	Туре	✓ Status	~	Detach						
Dates	Employer	Туре		Duration Sta	atus	ProcessingStati	Actions				
16/09/2020 - 16/09/2020	University of Edinburgh	Leave		7 Hours 📸	Scheduled	0					
15/09/2020	University of Edinburgh	Leave		7 Hours 👸	Scheduled	0					
11/09/2020 - End date not de	University of Edinburgh	Unauthorised Leave		0 Hours 🕒	In progress	Ø					
25/08/2020	University of Edinburgh	Leave		7 Hours 🚫	Withdrawn	0					
Plan Participation ②											
Entitlement Agreemen	its										
View - +											
Agreement Name				Agreement St	tatus Start Date	End Date Action					

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

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FG	Emerson Green: Person Management				Close	•
	Person Number 158564					Ξ
Employment × Absence	ce Records ×					0
Absence A	Administration ©	e Sub <u>m</u>	it	<u>C</u> ance	1	<u></u>
*Absence Type	Ve V Advanced Mode					
Basic Mode						
Single day						
*Start Date 1	6/09/2020 to *Start Date Duration 7 Hours					
*End Date 1	6/09/2020 to					
Duration 7	7 Hours					
Details Plan	Use Action Items					
Comments						
Add Attachment	None 🕂					

## Adding Unauthorised Absence

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

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<b>2</b> /	Pending Workers		Hiring	Journeys	Person Management				
۵	Person								
<b></b>	Contact Info		<b>#</b> /	<b>F</b> D	1 Augusta				
<u></u>	Family and Emergency Contacts		Workforce Structures	Annual Review Dashboard	HR Reports				

2. Search for and select the relevant employee.

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erson Manag	gement: S	earch @									
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** Name g	reen	Â	**	Keywords	ude terminated w	ork relationships					
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search Results ⑦ ctions ▼ View ▼ Form Name	at ▼ 月 Person	National ID	Department	Location	User Person	Job	Position	Primary Phone	Primary Email	Business Unit	Town
Green, Emerson 🚥	3	EJ872475C	Centre for Cli	Chancellors	Employee	Research Nurse	Research Nu		Emerson.Gre	University of	Edinb

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

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Enployment ×	Emerson Green: Person Management Person Number 158564			Cl <u>o</u> se	
Employme	ent		D <u>o</u> ne		
Work Relatio Legal Em Worke Hird	pnship ⑦ ployer University of Edinburgh Country United er Type Employee er Date 22/09/2014	Kingdom			
Assignment: Action R	Research Nurse (2) 12 Action Assignment Change Effective Start Date 24/08/ Reason Change Primary Assignment Effective End Date	2020 ( 2 of 2 )	View <u>H</u>	istory	
Assignment I Busin Perso	Number 158564 Assignment Status Active - ess Unit University of Edinburgh Primary Yes on Type Employee Projected End Date	Payroll Eilgible		0	

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

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Employment x Employment		Compare Compare Compare Compare Compare Compare Costing for a Person Costing for a Person Payroll Relationships Element Entries Compensation Compensation Compensation Compensation Compensation Compensation Compare Compensation Compensatio
Work Relationship Legal Employer University of Edinburgh Worker Type Employee Hire Date 22/09/2014	Country United Kingdom	Change Salary     Individual Compensation     View Compensation History     View Total Compensation Statement Personal and Employment     Person     Allocate Checklists
Assignment: Research Nurse © ங Action Assignment Change Action Reason Change Primary Assignment Assignment Details	Effective Start Date 24/08/2020 ( 2 of 2 ) Effective End Date	Employment     Continuous service Dates     Direct Reports     Create Work Relationship     Work Relationship     Araes of Responsibility     User Account
Assignment Number 158564 Business Unit University of Edinburgh Person Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date	Talent Profile     Document Records     Document Delivery Preferences     Person Identifiers for External Applications

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

	THE UNIVERSITY f EDINBURGH				<b>⋒</b> ☆ ₽	Ç <mark>2</mark>	СВ
	Emerson Green: Person Ma	nagement				Close	
EG	Person Number 158564						l
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Manage A	bsences and Entitleme	nts @					
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View 🔻 🕂 Add	⁰⊛ Recalculate  ▼ Time Last 6 n Period	oonths 🎽 Type 🔍 Status	~	Detach			
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25/08/2020	University of Edinburgh	Leave		7 Hours 🚫 Withdrawn	0		
Plan Participa	tion 🕐						
Entitlement A	greements						
	-						

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

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EG Employment × Abser	Emerson Green: Person Management Person Number 158564			Close	
Absence	Administration © save s	b <u>m</u> it	Cance	1	0
"Absence Type En In Le	ergency Time off for Dependants dustrial Action ave ther Paid Leave				
Sr Ut	authorised Leave				

7. 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.

EG	Emerson Green: Person Management Ctigse	
-	158564	Ξ
Employment x Absence	e Records x	9
Absence A	Administration @ Save Submit Cancel	
*Absence Unai	Advanced Mode	- 1
Basic Mode Single day *Start Date do *End Date do Duration 0	d/mm/yyyy to Part Date Duration Hours	
Details         Plan U           Reason	Use Action Items	
<ul> <li>Legislative In</li> <li>Descriptive</li> <li>Context </li> <li>Segment</li> </ul>	Information Information	

8. 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.

50	Emerson Green: Perso	n Management			Close
EG	Person Number 158564				≣
nployment × Absence Re	cords ×				9
Absence Ad	ministration ©			Save Sut	<u>mit</u>
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UKV	1				
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9. Click Submit .

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

C	Emerson Gree	en: Perso	n Management				Close
.G	Person Number 158564						
ment × Absence	e Records x						
bsence A	Administratio	n @			Save	Submit	Cancel
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asic Mode							
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Reason	UKVI ~	]					
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6

## Cancelling Unauthorised Absence

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

■ THE UNI of EDINB	VERSITY URGH			
	Good afternoon,			
	Me My Client Groups Help De	esk Procurement	Tools Guaranteed Ho	uurs >
	QUICK ACTIONS	APPS		
	Add a Pending Worker			
	Pending Workers	Hiring	Journeys Person	n
	Person		Manager	nent
	Contact Info	<b>#</b> /	<b>5</b>	
	Family and Emergency Contacts	Workforce Structures	Annual Review HR Repo Dashboard	orts

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

	THE UNIVERSITY of EDINBURGH		ଜ	☆	P	P	СВ
EG Employment ×	Emerson Green: Person Management Person Number 158554					Close	
Employr	nent				Done	,	ť
Work Rela Lega W	ationship ⑦ I Employer University of Edinburgh Forker Type Employee Hire Date 22/09/2014	Country United Kingdom					
Assignme Acti	nt: Research Nurse © 🖫 Action Assignment Change Ion Reason Change Primary Assignment	Effective Start Date 24/08/2020 ( 2 of 2 ) Effective End Date			View	∐istory	
Assignm	ent Number 158564 Ausiness Unit University of Edinburgh Person Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date				0	

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

	THE UNIVERSITY of EDINBURGH		n tr 🕫 😳 🗸 📾 🗸
EG Employment ×	Emerson Green: Person Management Person Number 155564		Compare Absences Absence Cases Absence Records Payroll Costing for a Person Payroll Relationships Element Entries Compensation Compensation Change Salary
Work Rela Legal W Assignmen Acti	tionship ⑦ Employer University of Edinburgh orker Type Employee Hire Date 22/09/2014 ht: Research Nurse ⑦ Action Assignment Change on Reason Change Primary Assignment	Country United Kingdom Effective Start Date 24/08/2020 ( 2 of 2 ) Effective End Date	Individual Compensation     View Compensation History     View Total Compensation History     Personal and Employment     Person     Allocate Checklists     Employment     Continuous service Dates     Direct Reports     Create Work Relationship     Work Relationship     Areas of Responsibility
Assignment De Assignme Bi	ent Number 158564 usiness Unit University of Edinburgh Person Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date	User Account     Talent Profile     Document Records     Document Delivery Preferences     Person Identifiers for External Applications

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

ployment x Absence Records	s ×			
Manage Absei	nces and Entitlements	©		
Absences				
fost Recent or Current Abs	sence	Next Sch	reduled Absence	
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Pending Actions				
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View - + Add % Re	ecalculate  Time Period Last 6 mon	ths 🗸 Type 🗸 Status	✓ ④	Administer
Dates	Employer	Туре	Duration Status	Withdrawn Record Deletion
1/09/2020 - End date not d	e University of Edinburgh	Unauthorised Leave	0 Hours 🕒 In progress	o 1 🖸
25/08/2020	University of Edinburgh	Leave	7 Hours 🚫 Withdrawn	0 🔽
Plan Participation (	୬			
Entitlement Agreen	nents			
View •				
			Agreement Status Start Date Template	End Date Action
Agreement Name				

- 6. A warning message asking if you want the selected record to be deleted will appear. Press **OK**.
  - Employment × Absence Records :

Absences ost Recent or Current Absen     None recorded     Pending Actions	ce		Next Scheduled Absence None scheduled.				
Existing Absences ⑦ View ▼ 🕂 Add 👒 Reca	Iculate 🔻 Time Period Last 6 months 👻	Туре	<ul> <li>✓ Status</li> </ul>	~ 🖸 🗑 D	etach		
ates	Employer	Туре	Duration	Status		ProcessingStati	Actions
1/09/2020 - End date not de	University of Edinburgh	Unaut	Warning X Hours	In progress		ø	
5/08/2020	University of Edinburgh	Leave	OK Cancel	O Withdrawn		O	
Plan Participation ⑦							
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greement Name			Agreement Template	Status	Start Date	End Date Action	
a data ta display							

## 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.

≡ <sup>1</sup> THE UI of EDIN	NIVERSITY IBURGH	ŝ	\$	P	£ <mark>101</mark>	<b>D</b> ~
	Good afternoon, Lincoln Duncan!					
	Me My Te Ay Client Groups Sales Service Help Desk Tools Helpdesk Configurati	ion	>			
	QUICK ACTIONS APPS					
	🕈 Hire an Employee					
	Add a Contingent Worker Hiring Onboarding Person Absences Management					
	Add a Pending Worker					
	Image: Pending Workers     Goals     Career     Talent Review     Succession Plans       Image: Pending Workers     Goals     Career     Talent Review     Succession Plans					
	Person					
	Personal Details					
	P Vokule					

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

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irch Person											
Person Manag	ement: S	earch @									
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										** At least one	* Required is required
** Name ro	se	۵	**	Keywords	d						
** National ID			*Effective	As-of Date 6/11/202	20	elationships					
National ID									a	Search Reset	Save
▲ Search Results ⑦									-		
Actions ▼ View ▼ Forma	at ▼ 🎵										
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 🚥 🖌	b 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.

$\equiv \underbrace{\text{THE UNIVERSITY}}_{of EDINBURGH}$		☆ ☆ ☞ 📁 🔟~
Raquel Rose: Person Management Person Number 135746  Employment ×	a Q Q	Compare      Absence Records     Work Schedule Assignment      Payroll      Costing for a Person      Payrol Relationships      Element Entries  Compensation
Work Relationship Legal Employer University of Edinburgh Worker Type Employee Hire Date 28/04/2008	Country United Kingdom	Change Salary Change Salary Individual Compensation View Compensation History View Total Compensation Statement Personal and Employment Allocate Checklists Employment
Assignment: Fellow in Medical Education @ ங Action Change of Position Action Reason Assignment Details	Effective Start Date 9/10/2020 ( 1 of 1 ) Effective End Date	Continuous service Dates     Direct Reports     Create Work Relationship     Work Relationship     Areas of Responsibility     User Account     Tatest Dentile
Assignment Number 135746 Business Unit University of Edinburgh Person Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date	raient Prome     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 × Absence Record	ds ×							0
Manage Abse	ences and Entitl	ements ⊘						•
Absences								
Most Recent or Current Ab	bsence		Next Scheduled Ab	sence				
None recor	rded.		Nor	e scheduled.				
Pending Actions								
Evisting Absences	0							
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View	Enrollments and Adjustmen	ts 🔻 S. a tive 🗸 🕻						
Plan	Add Enrollment Update Enrollment		Туре	Status	Enrollment Start Date	Enroliment End Date	Balance Calculation Date	Balance
UoE Annual Leave	Delete Enrollment		Accrual	Active	1/11/2019		31/12/2020	280 Hours
UoE PH	Adjust Balance		Accrual	Active	29/09/2020			0 Hours
	Transfer Balance							
Qualified Entitlements	Disburse Balance							
View <b>v</b>	Update Balance Details	»						

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



#### 6. Select the relevant **Date.**

Employment × Absence Records ×												0
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= Existing Absences @	Adjust Balance		×									
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	* Date	23/11/2020	, ta									
<ul> <li>Plan Participation (2)</li> </ul>				Novemk	or w	2020	<b>A</b>					
A Plan Balances		Sub <u>m</u> it <u>C</u> a		MON		NED TH		A SAT				
View 🔻	»		1	2	3	4 5	6	7				
Dian		Time	8	9	10	11 12	2 13	3 14	nt	Balance	Relense	
Flati		iype	15	16	17	18 19	9 20	21		Date	Balance	
UoE Annual Leave		Accrual	A 22	23	24	25 26	6 27	28		31/12/2020	280 Hours	
UoE PH		Accrual	29	30	1	2 3	4	5			0 Hours	
Qualified Entitlements												
View • »												

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.

Person Number 113615							
Employment x Absence Records x							
Manage Absences and Entitlements ©							
▲ Absences							
Most Recent or Current Absence	Next Scheduled Absence						
None recorded.	None scheduled	1.					
▲ Existing Absences ②							
View  + Add  Recalculate  View  Time Last 6 months  Type	v Status v O	Detach					
Dates Employer	Adjust Balance X		Duration Sta	tus		ProcessingState	Actions
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	* Reason Cierical Error ~						
A Plan Participation @	* Adjustment Amount -5.25						
Plan Balances	Date 7/10/2020						
View  Accruais  Enrollments and Adjustments  Status  Active	Sub <u>m</u> it <u>C</u> ancel					Patrone	
Plan		Туре	Status	Enrollment Start Date	Enrollment End Date	Calculation Date	Balance
UoE Annual Leave		Accrual	Active	31/07/2020		31/12/2020	135.25 Hours
Qualified Entitlements							
View View Balance As-of Date 9/10/2020				Davament	Qualifier		
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4.0542344							
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vicit • (E) Detach							

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 <u>Leave and absence options</u> 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	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.
	Please review the <u>Absence and Leave Options</u> webpage
	and the Special Leave Policy for circumstances when
	this reason should be used.
	Bereavement leave can be selected under Special Paid
	Leave
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	Updated guide to new format and separated	ME
	2025	from Line Manager guide to sickness absence.	

# **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.