



THE UNIVERSITY *of* EDINBURGH

System User Guide

School/Department Administrator / HR Helpline / HR Operations – How to Adjust Absence Balances

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Introduction

This guide covers key tasks for School/Department Administrators, HR Helpline, and HR Operations in the absence balance adjustment system process. It is related to the Process User Guide for Annual Leave which is linked below:

[Guide to Annual Leave](#)

Please note that the system prevents 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 (please see the 'How to use the Annual Leave Calculator' demo video on the [People and Money demo videos webpage](#) under the 'Absence and Leave' heading for further information).
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, screenshots and tips is provided within the 'In Detail' section.

1. **If you are an SDA:**

From the homepage select the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and click on the **Absences and Entitlements** app.

If you are in HR Operations/Helpline:

From the homepage navigate to **My Client Groups** and then select **Absences**. Select Absences and Entitlements.

2. Type the employee's Name, Person Number or Assignment Number into the **Search bar** and click on their name to continue.
3. Click on the **Plans** tab.
4. Click on the **ellipsis (3 dots)** in the **Actions** column and select **Adjust Balance**.
5. In the Adjust Balance pop up that appears,
 - a. Enter the relevant **Date**.
 - b. Select the relevant **Reason** from the drop down menu.
 - c. Enter the **Adjustment Amount**. If you want to reduce the absence balance, ensure you **prefix a minus (-)** to the adjustment amount to get the correct figure.
6. Click on the **Submit** button.

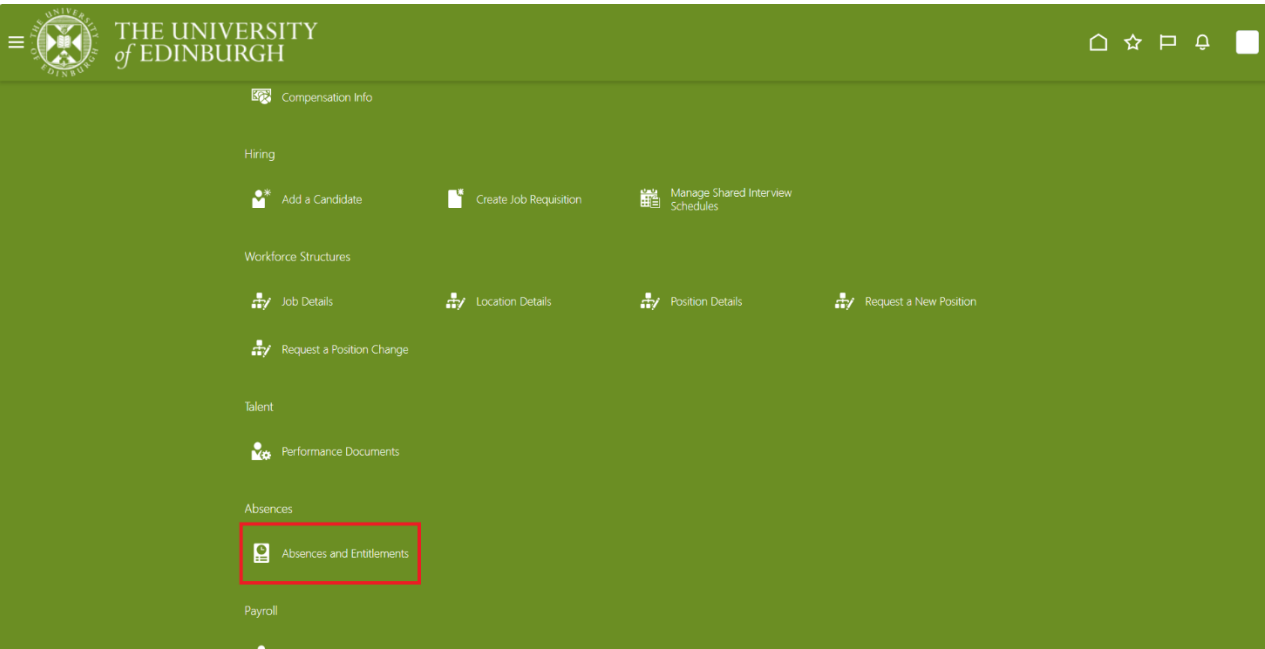
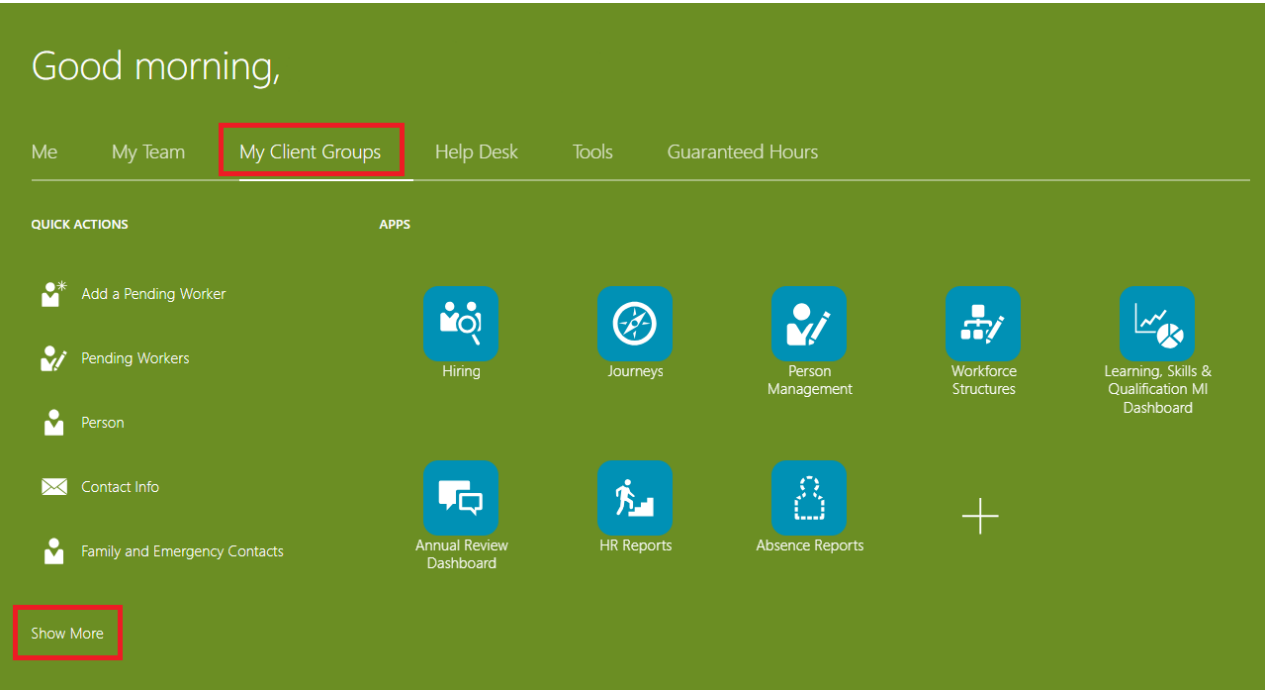
7. The **Adjust Balance** menu will disappear and a notification saying “**Adjustment submitted**” will pop up at the bottom of the page. The balance figure will now reflect the changes you submitted.

In Detail

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

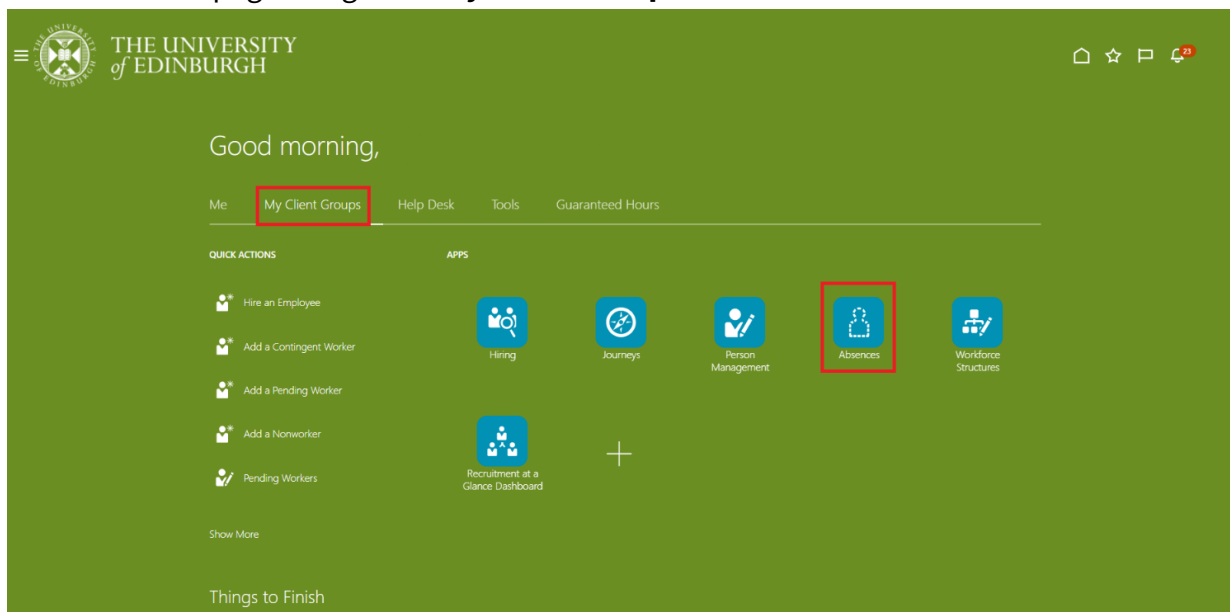
1. **If you are a School/Department Administrator:**

From the homepage select the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and click on the **Absences and Entitlements** app.

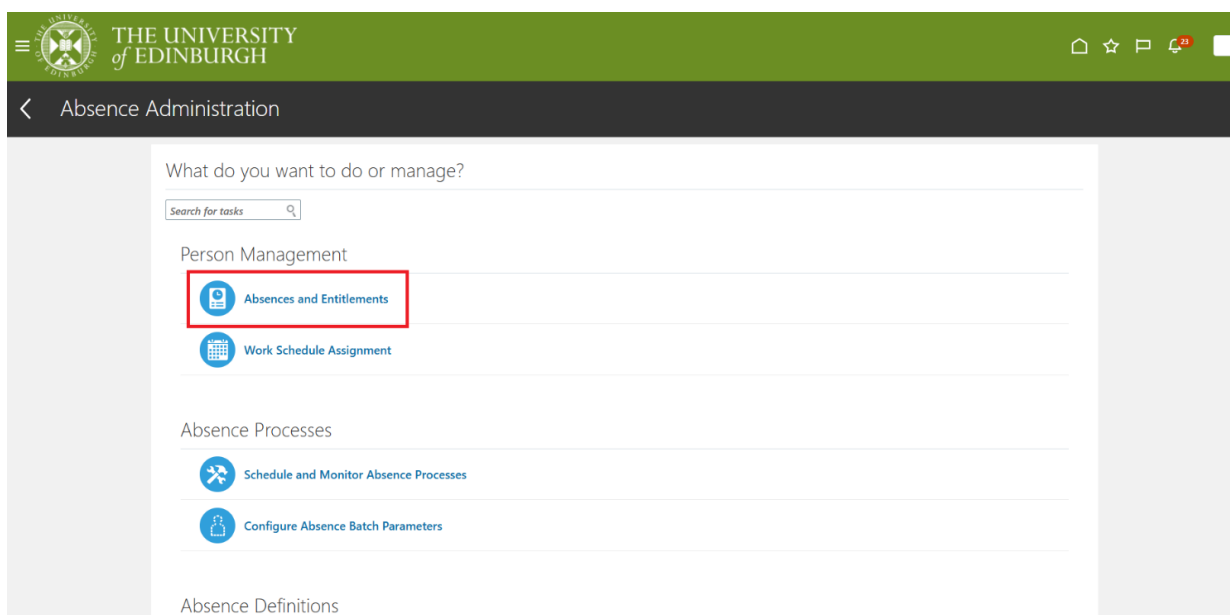


If you are in HR Operations/Helpline:

- a. From the homepage navigate to **My Client Groups** and then select **Absences**.

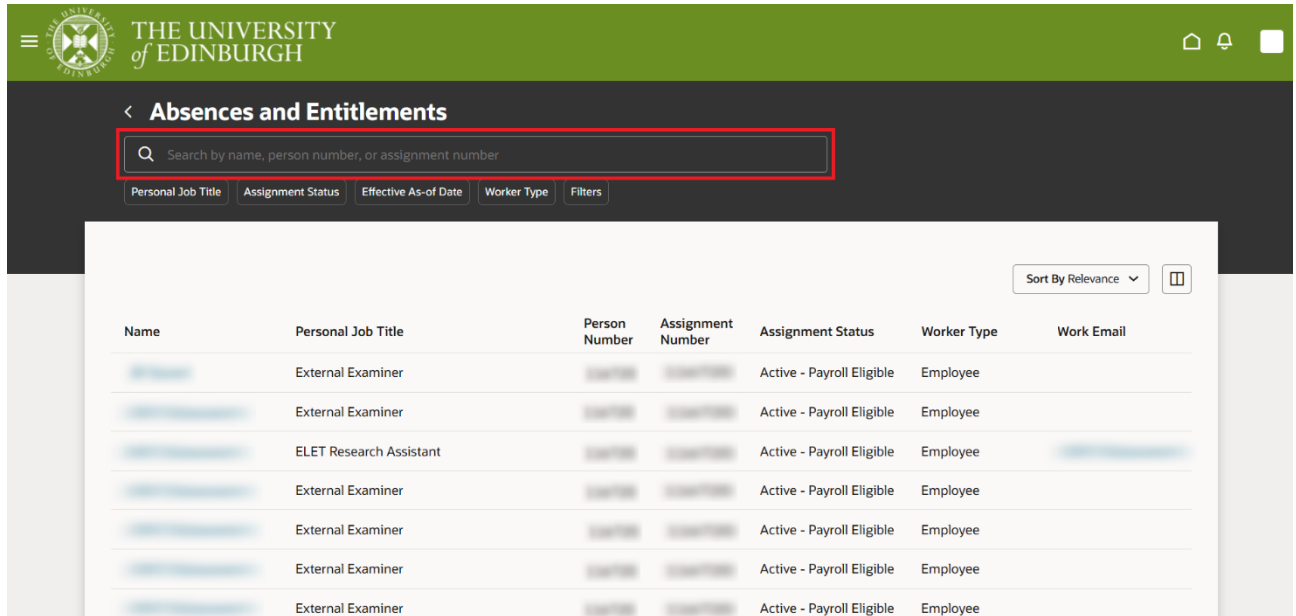


- b. Select **Absences and Entitlements**.



2. Type the employee's Name, Person Number or Assignment Number into the **Search bar** and click on their name to continue. You can use the **filters** below the Search bar to refine your search.

Note: Inactive assignments are visible in the **Absences and Entitlements** app. If you select an inactive assignment, an error may appear. To ensure you are selecting an active assignment, you can change the **Assignment Status** filter below the Search bar to '**Active – Payroll Eligible**'.



Absences and Entitlements

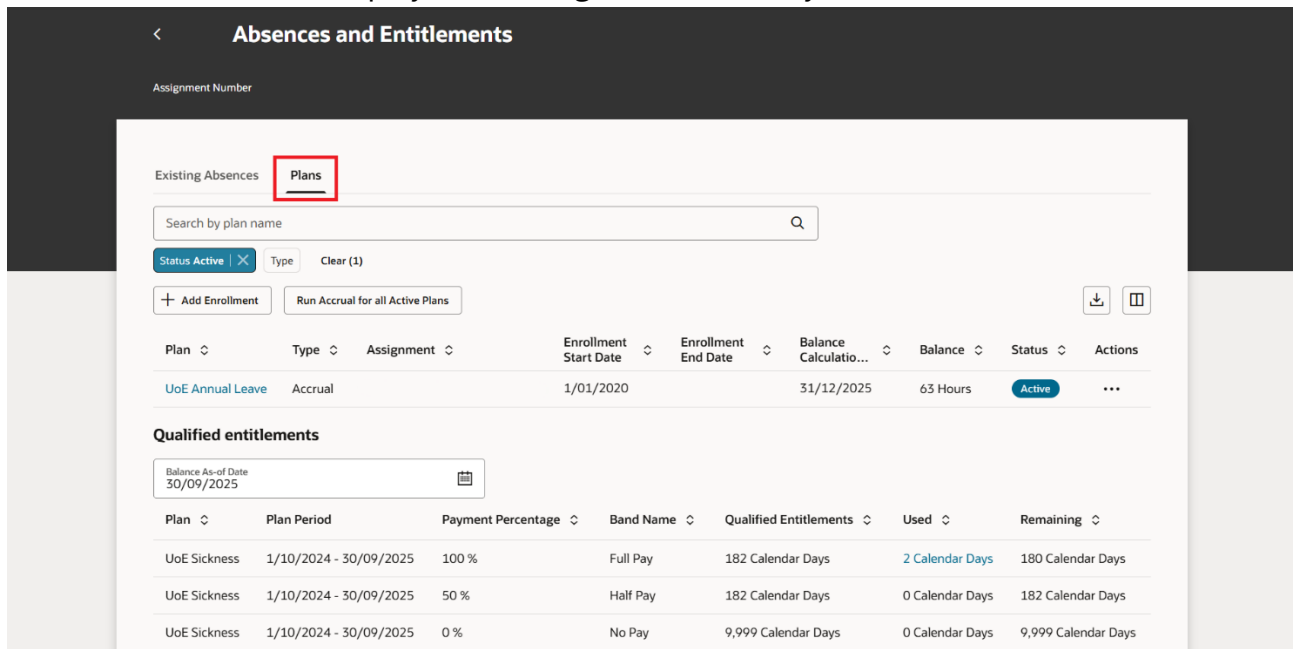
Search by name, person number, or assignment number

Personal Job Title Assignment Status Effective As-of Date Worker Type Filters

Sort By Relevance

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
[Redacted]	External Examiner	[Redacted]	[Redacted]	Active - Payroll Eligible	Employee	
[Redacted]	External Examiner	[Redacted]	[Redacted]	Active - Payroll Eligible	Employee	
[Redacted]	ELET Research Assistant	[Redacted]	[Redacted]	Active - Payroll Eligible	Employee	[Redacted]
[Redacted]	External Examiner	[Redacted]	[Redacted]	Active - Payroll Eligible	Employee	
[Redacted]	External Examiner	[Redacted]	[Redacted]	Active - Payroll Eligible	Employee	
[Redacted]	External Examiner	[Redacted]	[Redacted]	Active - Payroll Eligible	Employee	
[Redacted]	External Examiner	[Redacted]	[Redacted]	Active - Payroll Eligible	Employee	

3. You will be taken to the employees **Existing Absences** tab by default. Click on the **Plans** tab.



Absences and Entitlements

Assignment Number

Existing Absences **Plans**

Search by plan name

Status Active Type Clear (1)

+ Add Enrollment Run Accrual for all Active Plans

Download Print

Plan	Type	Assignment	Enrollment Start Date	Enrollment End Date	Balance Calculation...	Balance	Status	Actions
UoE Annual Leave	Accrual		1/01/2020		31/12/2025	63 Hours	Active	...

Qualified entitlements

Balance As-of Date 30/09/2025

Plan	Plan Period	Payment Percentage	Band Name	Qualified Entitlements	Used	Remaining
UoE Sickness	1/10/2024 - 30/09/2025	100 %	Full Pay	182 Calendar Days	2 Calendar Days	180 Calendar Days
UoE Sickness	1/10/2024 - 30/09/2025	50 %	Half Pay	182 Calendar Days	0 Calendar Days	182 Calendar Days
UoE Sickness	1/10/2024 - 30/09/2025	0 %	No Pay	9,999 Calendar Days	0 Calendar Days	9,999 Calendar Days

4. Click on the **ellipsis (3 dots)** in the **Actions** column and select **Adjust Balance**.

The screenshot displays the 'Absences and Entitlements' interface. At the top, there's a header with a back arrow and the title 'Absences and Entitlements'. Below it, a sub-header 'Assignment Number' is visible. The main content area is divided into two tabs: 'Existing Absences' and 'Plans'. The 'Plans' tab is active, showing a search bar 'Search by plan name' and a filter 'Status Active' with a dropdown arrow. Below the filter, there are buttons for '+ Add Enrollment' and 'Run Accrual for all Active Plans'. A table lists the plans with columns: Plan, Type, Assignment, Enrollment Start Date, Enrollment End Date, Balance Calculation..., Balance, Status, and Actions. The first row is 'UoE Annual Leave' with an 'Accrual' type, '1/01/2020' start date, '31/12/2025' end date, '63 Hours' balance, and 'Active' status. The 'Actions' column for this row contains an ellipsis (three dots) which is highlighted with a red box. Below the table, there's a section for 'Qualified entitlements' with a 'Balance As-of Date' dropdown set to '30/09/2025'. This section contains a table with columns: Plan, Plan Period, Payment Percentage, Band Name, Qualified Entitlements, Used, and Remaining. It lists three rows for 'UoE Sickness' with different payment percentages (100%, 50%, 0%) and corresponding entitlements and used amounts.

Run Accrual
Update Enrollment
Adjust Balance
Transfer Balance
Disburse Balance
Transfer Balance from pool
Return balance to pool
Update Balance Details
Initiate Donation
Delete Enrollment

5. In the Adjust Balance pop up that appears,

a. Enter the relevant **Date**.

Note: Please choose the Date carefully within the Adjust Balance box as this will be the date the adjusted balance takes effect.

b. Select the relevant **Reason** from the drop down menu.

c. Enter the **Adjustment Amount**. If you want to reduce the absence balance, ensure you **prefix a minus (-)** to the adjustment amount to get the correct figure. For example, in

the screenshot below, the employee had 63 hours shown in their balance. It should have been 60 hours so we have entered ‘-3’ in the **Adjustment Amount** field.

Absences and Entitlements

Assignment Number

Existing Absences **Plans**

Search by plan name

Status Active X Type Clear (1)

+ Add Enrollment Run Accrual for all Active Plans

Plan	Type	Assignment	Enrollment Start Date	Enrollment End Date	Balance Calculation...	Balance
UoE Annual Leave	Accrual		1/01/2020		31/12/2025	63 H

Qualified entitlements

Balance As-of Date 30/09/2025

Plan	Plan Period	Payment Percentage	Band Name	Qualified Entitlements	Used
UoE Sickness	1/10/2024 - 30/09/2025	100 %	Full Pay	182 Calendar Days	2 Calen
UoE Sickness	1/10/2024 - 30/09/2025	50 %	Half Pay	182 Calendar Days	0 Calen
UoE Sickness	1/10/2024 - 30/09/2025	0 %	No Pay	9,999 Calendar Days	0 Calen

Adjust Balance

Plan UoE Annual Leave

Date 2/06/2025

Reason Clerical Error

Adjustment Amount -3 Hours

Cancel Submit

6. Click on the **Submit** button. **Note:** there is a small delay after you have pressed the Submit button, you do not need to press it again.

Absences and Entitlements

Assignment Number

Existing Absences **Plans**

Search by plan name

Status Active X Type Clear (1)

+ Add Enrollment Run Accrual for all Active Plans

Plan	Type	Assignment	Enrollment Start Date	Enrollment End Date	Balance Calculation...	Balance
UoE Annual Leave	Accrual		1/01/2020		31/12/2025	63 H

Qualified entitlements

Balance As-of Date 30/09/2025

Plan	Plan Period	Payment Percentage	Band Name	Qualified Entitlements	Used
UoE Sickness	1/10/2024 - 30/09/2025	100 %	Full Pay	182 Calendar Days	2 Calen
UoE Sickness	1/10/2024 - 30/09/2025	50 %	Half Pay	182 Calendar Days	0 Calen
UoE Sickness	1/10/2024 - 30/09/2025	0 %	No Pay	9,999 Calendar Days	0 Calen

Adjust Balance

Plan UoE Annual Leave

Date 2/06/2025

Reason Clerical Error

Adjustment Amount -3 Hours

Cancel **Submit**

7. The **Adjust Balance** menu will disappear and a notification saying “**Adjustment submitted**” will pop up at the bottom of the page. The balance figure will now reflect the changes you submitted.

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Absences and Entitlements

Assignment Number

Existing Absences

Plans

Search by plan name

Q

Status Active X

Type

Clear (1)

+ Add Enrollment

Run Accrual for all Active Plans

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Plan	Type	Assignment	Enrollment Start Date	Enrollment End Date	Balance Calculation...	Balance	Status	Actions
UoE Annual Leave	Accrual		1/01/2020		31/12/2025	60 Hours	Active	...

Qualified entitlements

Balance As-of Date 30/09/2025

Calendar

Plan	Plan Period	Payment Percentage	Band Name	Qualified Entitlements	Used	Remaining
UoE Sickness	1/10/2024 - 30/09/2025	100 %	Full Pay	182 Calendar Days	2 Calendar Days	180 Calendar Days
UoE Sickness	1/10/2024 - 30/09/2025	50 %	Half Pay	182 Calendar Days	0 Calendar Days	182 Calendar Days
UoE Sickness	1/10/2024 - 30/09/2025	0 %		Calendar Days	0 Calendar Days	9,999 Calendar Days

Adjustment submitted X

Version History

Version	Date	Description	Approved By
1.0	13 October 2025	- Updated guide to new format. - Updated screenshots to reflect new Redwood screens.	M Easton

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.