



System User Guide

School/Department Administrator Guide to Family Leave

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Introduction

This guide covers key tasks for School/Department Administrators in the recording family leave system process. It is related to the Process User Guides for:

- [Guide to Maternity Leave](#)
- [Guide to Partner, Parental and Special Leave](#)
- [Guide to Adoption and Surrogacy Leave](#)

The Process User Guides provide supporting guidance on all aspects of every absence process.

Please familiarise yourself with the [Family Leave Policies](#).

Partner leave has previously been known as Paternity Leave.

Any family leave dates should not clash with any other planned absence types such as for annual leave. Where a planned absence already exists within these timeframes it should be deleted before adding the family leave. For further details on how to remove an absence, please refer to the '[How to Amend Leave](#)' section of this guide.

Please review the relevant HR policy for the absence type being processed and work within the guidelines stated. The HR absence policies can all be reviewed [here](#).

Family leave will normally be input into the People and Money system by the employee (and this should always be encouraged), however there may be some situations where the Line Manager or School Department Administrator is required to input leave.

Keeping in Touch (KIT) Days/Shared Parental Leave Keeping in Touch (SPLIT) Days:

KIT and SPLIT days must be processed by the payroll team. To request this, the Line Manager must submit a Service Request detailing whether the employee would like to either be paid for the time or alternatively to take it as Time Owed in Lieu (TOIL).

Please refer to the Maternity, Shared Parental Leave or the Adoption and Surrogacy Leave Policies on the [A to Z of HR Policies](#) webpage for further information surrounding KIT/SPLIT days entitlement and conditions.

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.

How to Record Maternity Leave

1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the **+ Add** button.
4. Select **Maternity** from the **Absence Type** drop-down list.
5. Enter the **Expected** or **Actual Childbirth Date** and **Planned** or **Actual Start** and **End Dates**, as known. If the employee does not plan to return to work, click on the **Won't Return to Work** toggle.
6. Select which pay option the employee has chosen from the **Reason** drop down list and enter the **Notification Date**.
7. Click on the **Drag and Drop** section under **Attachments** to upload a scanned copy of the MAT B1.
8. Add any relevant notes in the **Comments** section.
9. If a Risk Assessment has already been carried out this can also be added to the **Attachments** and the **tick box** and **Date carried out** field can be completed in the **Additional Information** section.
10. There is no need to complete the Legislative Information section or the SMP1 Issue Date.
11. Click on the **Submit** button.

How to Record a Maternity Risk Assessment

1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the maternity absence dates.
4. Click on the **Drag and Drop** section under **Attachments** to upload the **Maternity Risk Assessment**.
5. Scroll to the bottom of the screen and complete the tick box next to **Risk Assessment Done** and enter the date it was carried out.
6. Click on the **Submit** button.

How to Attach a MATB1 to a Maternity Record

1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.

3. Under **Existing Absences**, click on the maternity absence dates.
4. Click on the **Drag and Drop** section under **Attachments** to upload the scanned copy of the MATB1.
5. Click **OK**.
6. Click on the **Submit** button.

How to Record Adoption or Surrogacy Leave

1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the **+ Add** button.
4. Select **Surrogacy and Adoption** from the **Absence Type** drop down list.
5. Enter the **Expected Placement Date**, **Placement Match Date**, and the **Planned Start** and **End Dates** as known. If the employee does not plan to return to work, click on the **Won't Return to Work** toggle.
6. Select which pay option the employee has chosen from the **Reason** drop down list and enter the **Notification Date**.
7. Add any relevant notes in the **Comments** section.
8. There is no need to complete the Legislative Information section or the SAP1 Issue Date.
9. Click on the **Submit** button.

How to Record Partner Leave

Partner Adoption

1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the **+ Add** button.
4. Select **Partner Adoption** from the **Absence Type** drop down list.
5. Enter the **Expected** or **Actual Placement Date**, **Placement Match Date**, and the **Planned** or **Actual Start** and **End Dates** as known.
6. Add any relevant notes in the **Comments** section.
7. There is no need to complete the Legislative Information section.
8. Click on the **Submit** button.

Partner Birth

1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the **+ Add** button.

4. Select **Partner Birth** from the **Absence Type** drop down list.
5. Enter the **Expected** or **Actual Childbirth Date** and **Planned** or **Actual Start** and **End Dates**, as known.
6. Add any relevant notes in the **Comments** section.
7. There is no need to complete the Legislative Information section.
8. Click on the **Submit** button.

How to Record Unpaid Parental Leave

1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.
3. Under **Existing Absences**, click on the **+ Add** button.
4. Select **Unpaid Parental Leave** from the **Absence Type** drop down list.
5. Enter the **Start** and **End Dates**.
6. Add any relevant **Comments**.
7. Click on the **Submit** button.

How to Amend Leave

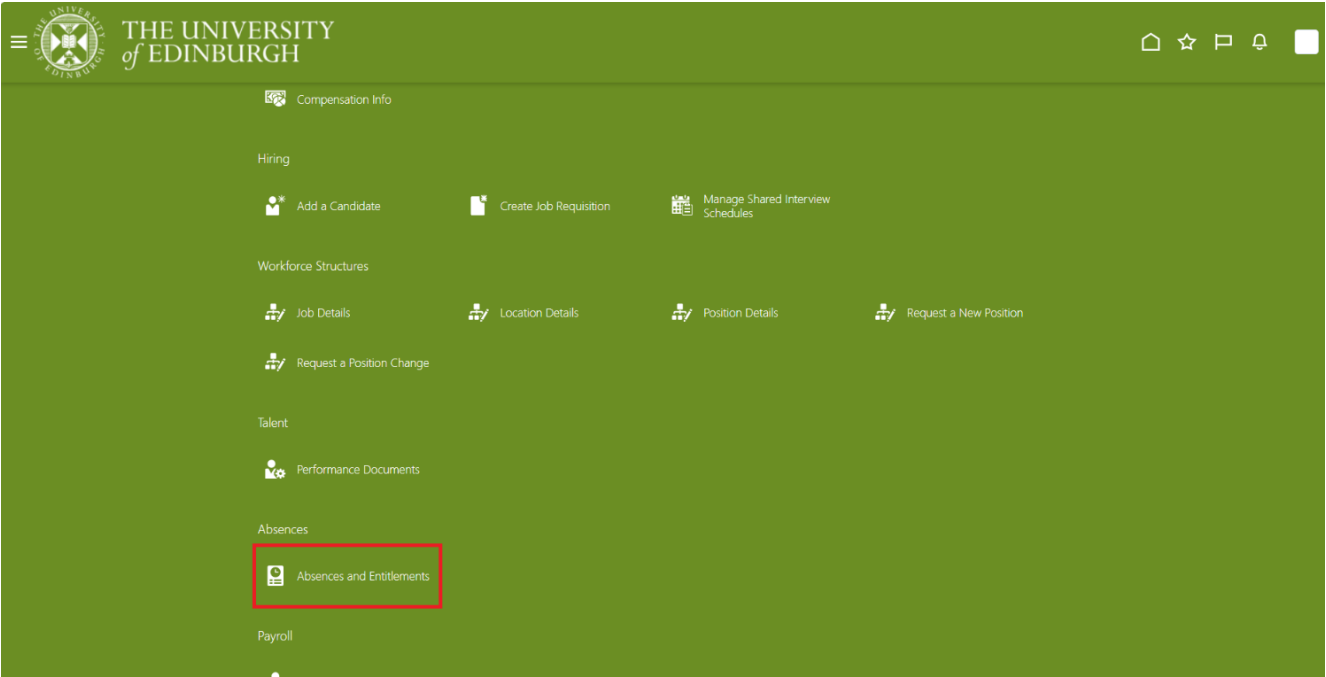
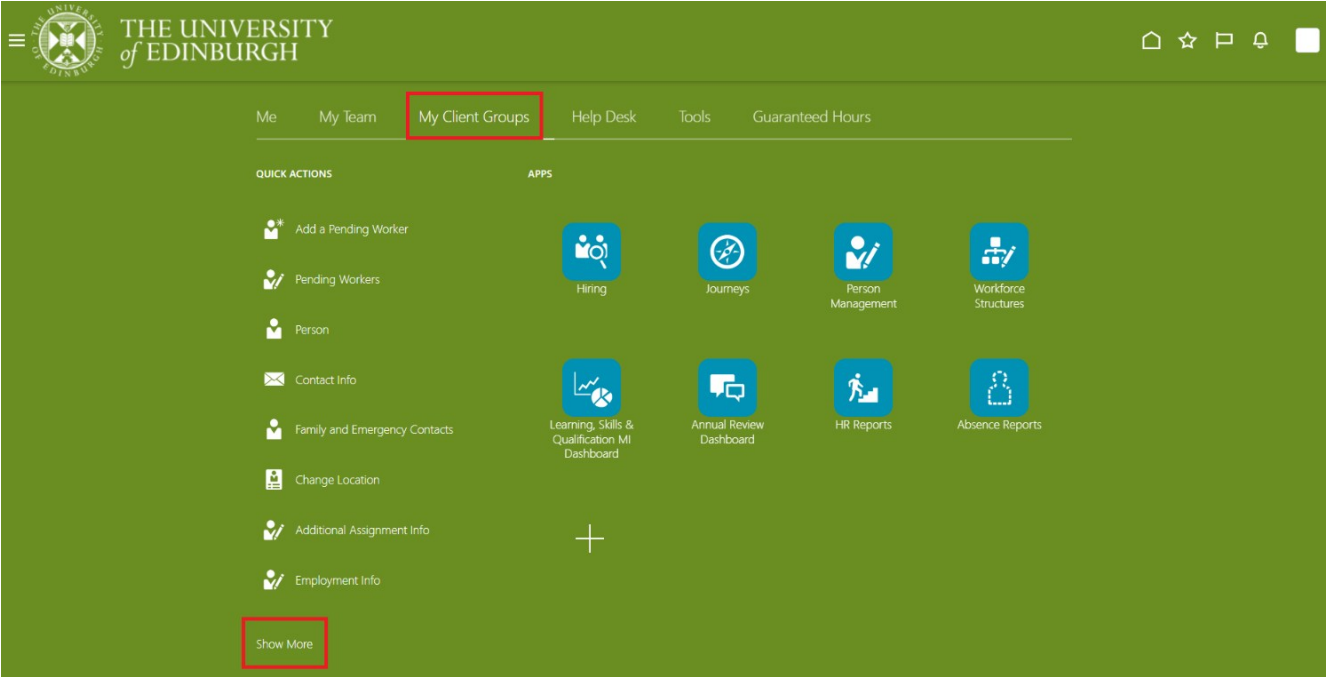
1. From the home page, click on the **My Client Groups** tab, click **Show More**, scroll down to the **Absences** section and select the **Absences and Entitlements** app.
2. Search for the employee.
3. Under **Existing Absences**, find the absence you would like to amend and click on the absence dates (blue text) to open the absence.
4. Make the necessary changes to the leave dates or confirm the **Actual Childbirth Date/Actual Placement Date/Actual Start** and **End dates** if known.
5. Click on the **Submit** button.

In Detail

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

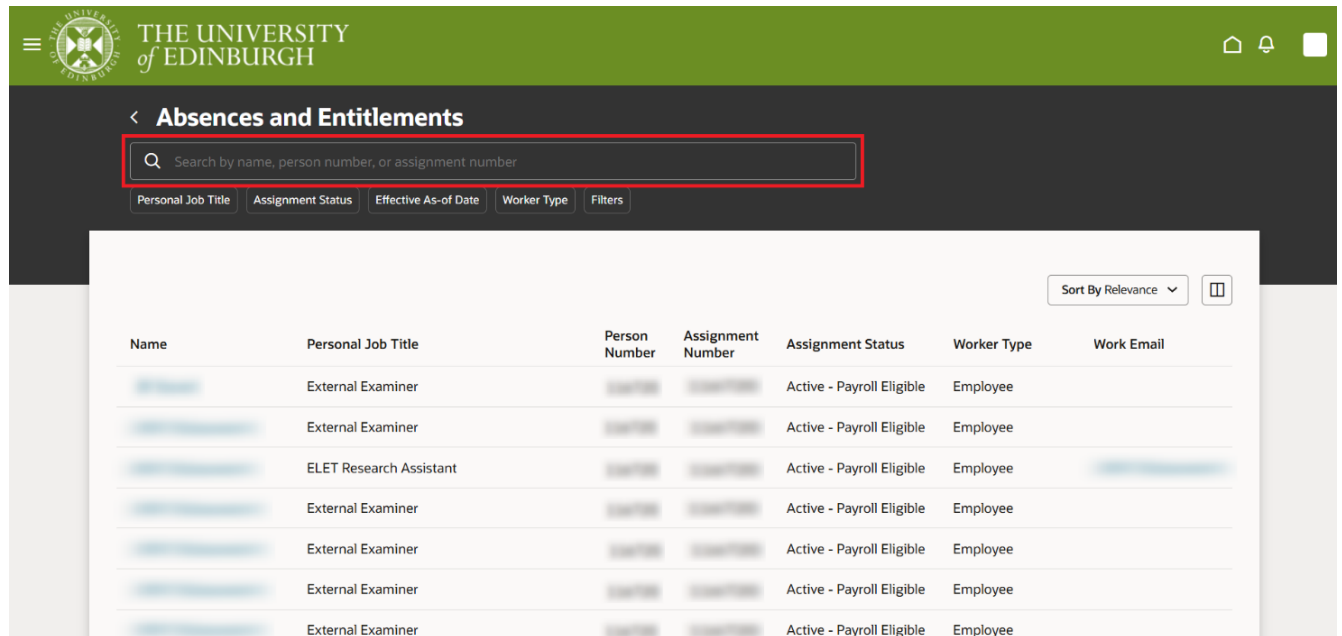
How to Record Maternity Leave

- 1. From the home page, click on the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and 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**'.



3. You will be taken to the **Existing Absences** tab by default.

Check whether there are any existing absences that are scheduled to happen during the proposed **Maternity Leave** dates. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.

If there are any existing absences during that period:

- a. Click on the dates of the absence(s) (blue text) to open it.
- b. The **Edit Absence** screen will open. Click on the **Withdraw** button at the top of the page to cancel the absence.

Please note, a warning message **will not** appear. Once you click on **Withdraw**, the absence will be cancelled.



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Absences and Entitlements

Assignment Number

Existing AbsencesPlans

Search by type

Time Period 24/03/2025

Status

Processing Status

Personal Job Title

Clear (1)

+ Add




Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Delete
Scheduled	26/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	25/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	24/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	20/10/2025 - 23/10/2025	Annual Leave	31 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	29/09/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	



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Edit Absence

CancelWithdrawSubmit

Assignment Number

Absence Type
Annual Leave

Personal Job Title
Postgraduate Programme Administrator

Absence Type Balance
98.27 Hours

Dates

Start Date
20/10/2025

Start Date Duration
7.75

End Date
23/10/2025

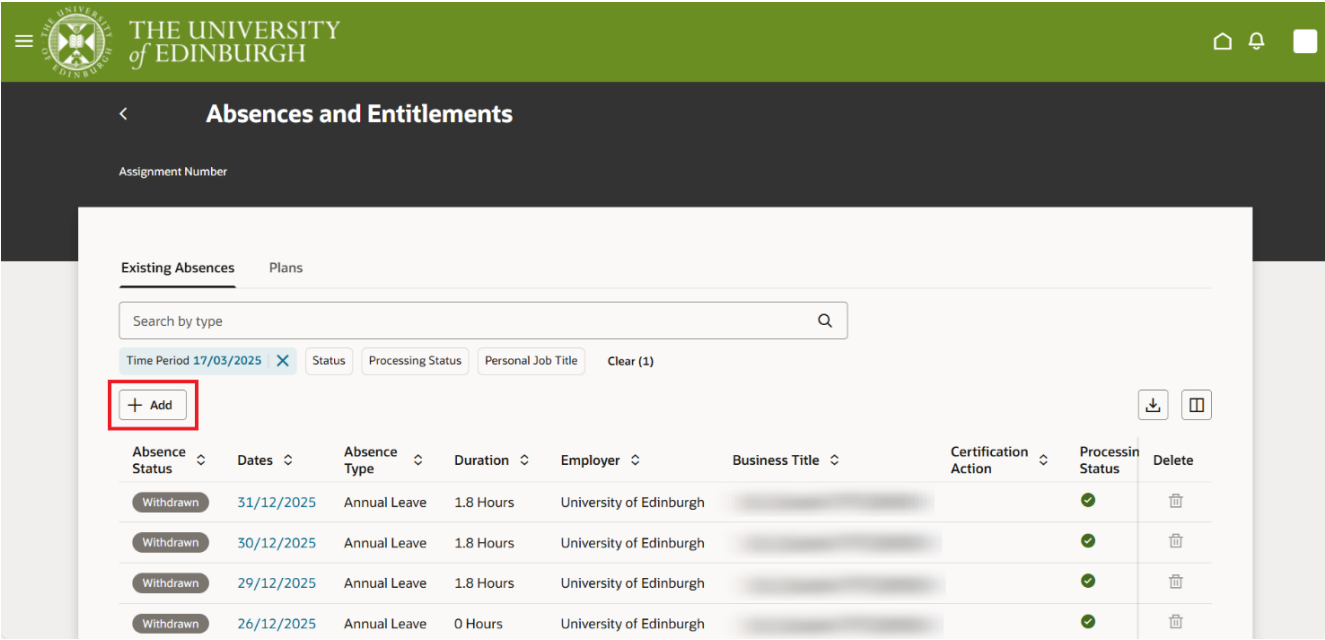
End Date Duration
7.75

Duration
31 Hours

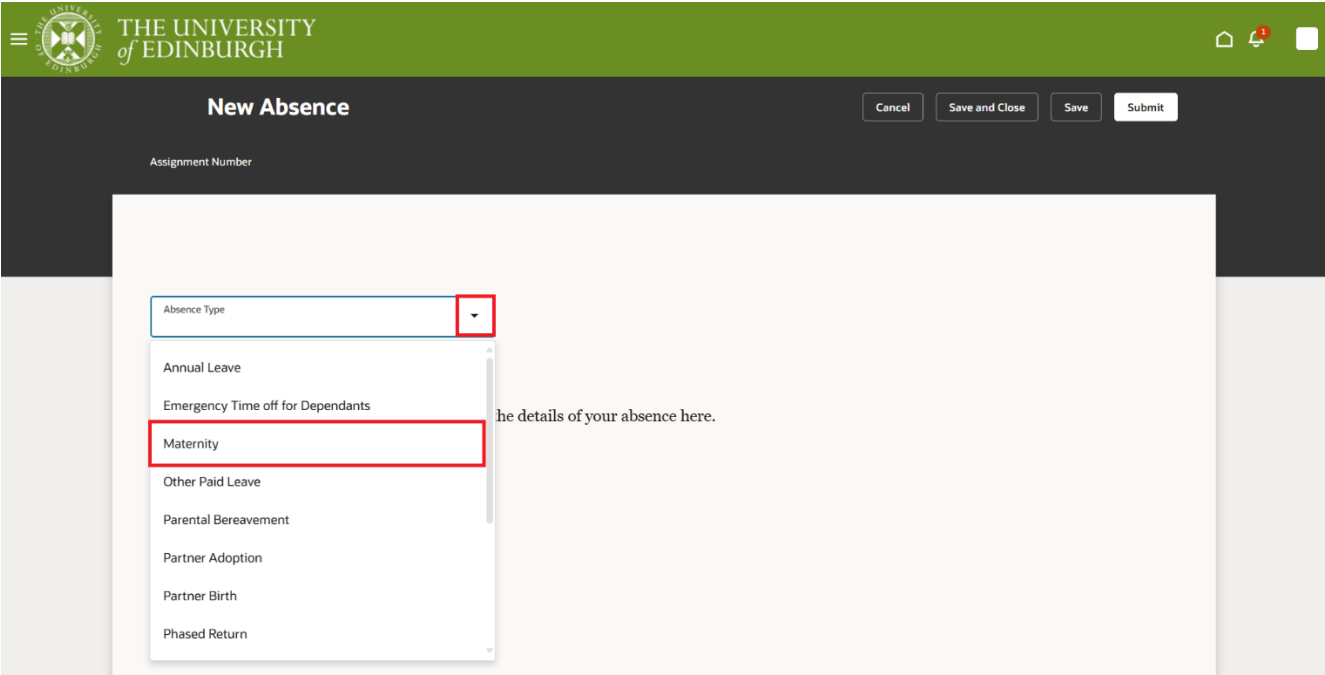
You will be taken back to the **Existing Absences** tab. As you are cancelling an absence on behalf of an employee, the withdrawal is automatically approved and the **Absence Status** will change to **Withdrawn**. If the **Absence Status** is showing as **Pending Approval**, please exit and re-enter the **Absences and Entitlements** screen after a few minutes.

Repeat this step until all of the absences that are scheduled during the proposed period of maternity leave have been withdrawn.

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



5. Select **Maternity** from the **Absence Type** drop-down menu. Alternatively, type 'Maternity' in the **Absence Type** field and select from the drop down.



6. In the **Dates** section, enter the **Expected Date of Childbirth**, the **Planned Start Date** for the absence and the **Planned End Date**. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

Where the employee does not intend to return to work after the maternity leave, click on the **Won't return to work** toggle instead of entering a **Planned End Date**.

The screenshot shows the 'New Absence' form. At the top, there's a header with 'New Absence' and buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the header, there's a section for 'Assignment Number'. The main form area is divided into sections: 'Absence Type' (set to 'Maternity'), 'Dates', and 'Details'. The 'Dates' section contains two columns of date pickers. The left column has 'Expected Childbirth Date', 'Planned Start Date', and 'Planned End Date'. The right column has 'Actual Childbirth Date', 'Actual Start Date', and 'Actual End Date'. There are also two toggle switches: 'Won't return to work' (currently off) and 'Open ended' (currently off). The 'Expected Childbirth Date', 'Planned Start Date', and 'Planned End Date' fields are highlighted with a red box. The 'Details' section at the bottom has a 'Reason' dropdown menu and a 'Notification Date' field.

7. The University of Edinburgh pays enhanced maternity pay. This is referred to as UEMP (University of Edinburgh Maternity Pay). The employee can decide how this is paid during the maternity leave, choosing from options 1-3. Full information on the 3 different options can be found in the HR Maternity Policy which can be reviewed [here](#). Select which option the employee has selected from the **Reason** drop down field.

Note: The system will default to **Option 3**, so please ensure this is updated as applicable.

New Absence

Cancel

Save and Close

Save

Submit

Planned End Date

Actual End Date

Details

Reason
Option 3

Option 1

Option 2

Option 3

Notification Date

Drag and Drop

Select or drop files here.

URL

Add URL

Legislative information

Qualifying Week

Override Average Weekly Earnings

- Enter the **Notification Date** that the employee made their maternity pay selection on.

New Absence

Cancel

Save and Close

Save

Submit

Planned End Date

Actual End Date

Details

Reason
Option 3

Notification Date

Comments

Attachments

Drag and Drop

Select or drop files here.

URL

Add URL

Legislative information

Qualifying Week

Override Average Weekly Earnings

9. Add any relevant **Comments** as applicable.

The screenshot shows the 'New Absence' form. At the top, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below these are two date pickers: 'Planned End Date' and 'Actual End Date'. The 'Details' section contains a 'Reason' dropdown menu set to 'Option 3' and a 'Notification Date' date picker. The 'Comments' text area is highlighted with a red rectangle. Below the comments is the 'Attachments' section, which includes a 'Drag and Drop' area with the text 'Select or drop files here.', a 'URL' input field, and an 'Add URL' button. The 'Legislative information' section at the bottom has a 'Qualifying Week' input field and an 'Override Average Weekly Earnings' input field.

10. To upload the employee's MATB1, click on the **Drag and Drop** section under **Attachments**. Select the MATB1 document and click **Open**.

This screenshot is identical to the previous one, showing the 'New Absence' form. However, in this image, the 'Drag and Drop' area within the 'Attachments' section is highlighted with a red rectangle, indicating the next step in the process.

11. If a Risk Assessment has already been carried out this can also be added to the attachments and the tick box and **Date carried out** field can be completed in the **Additional Information** section at the bottom of the page.

Note: you can record the Risk Assessment at a later date after you've submitted the absence in People and Money. See the [How to Record a Maternity Risk Assessment](#) section for more information.

The screenshot shows the 'New Absence' form. At the top right, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. The form contains several sections: 'Comments' (a text area), 'Attachments' (a 'Drag and Drop' area and a 'URL' field with an 'Add URL' button), 'Legislative information' (a 'Qualifying Week' field and an 'Override Average Weekly Earnings' field), and 'Additional information' (an 'SMP1 Issue Date' field, a 'Date carried out' field, and a 'Risk Assessment Done?' checkbox). Red boxes are drawn around the 'Date carried out' field and the 'Risk Assessment Done?' checkbox.

12. Click on the **Submit** button at the top of the page to complete the absence.

Note: The **Save** and **Save and Close** buttons will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

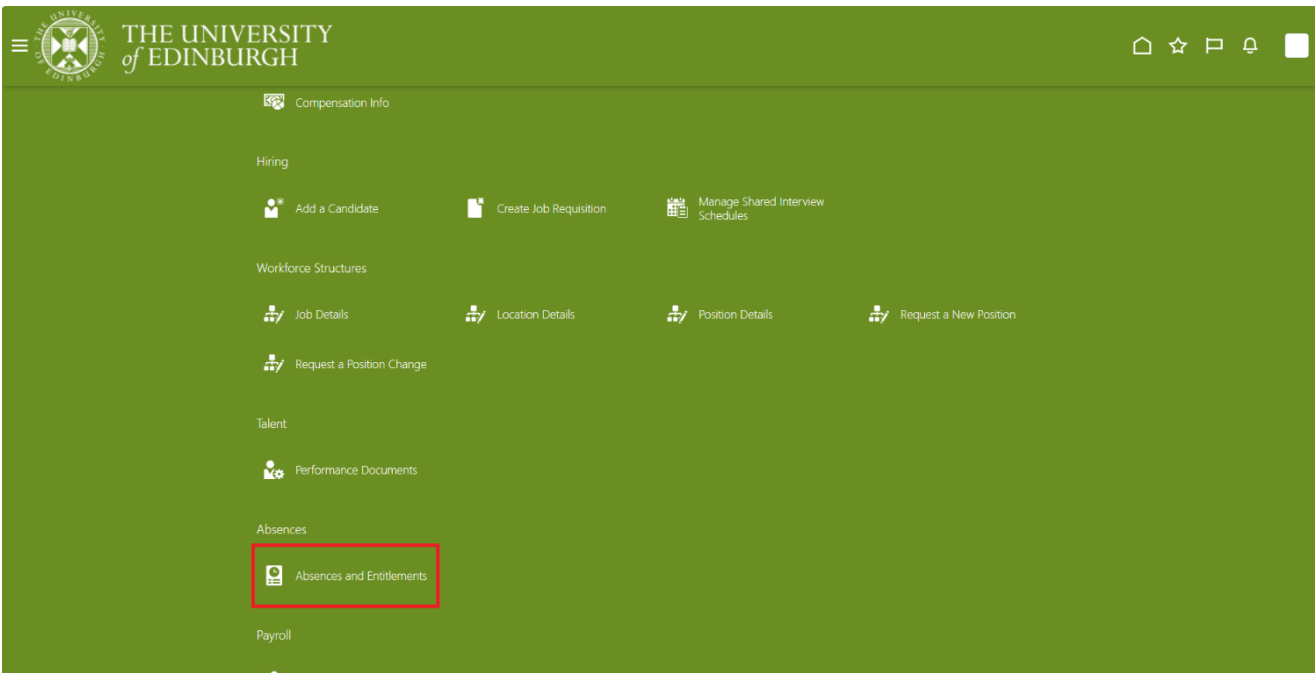
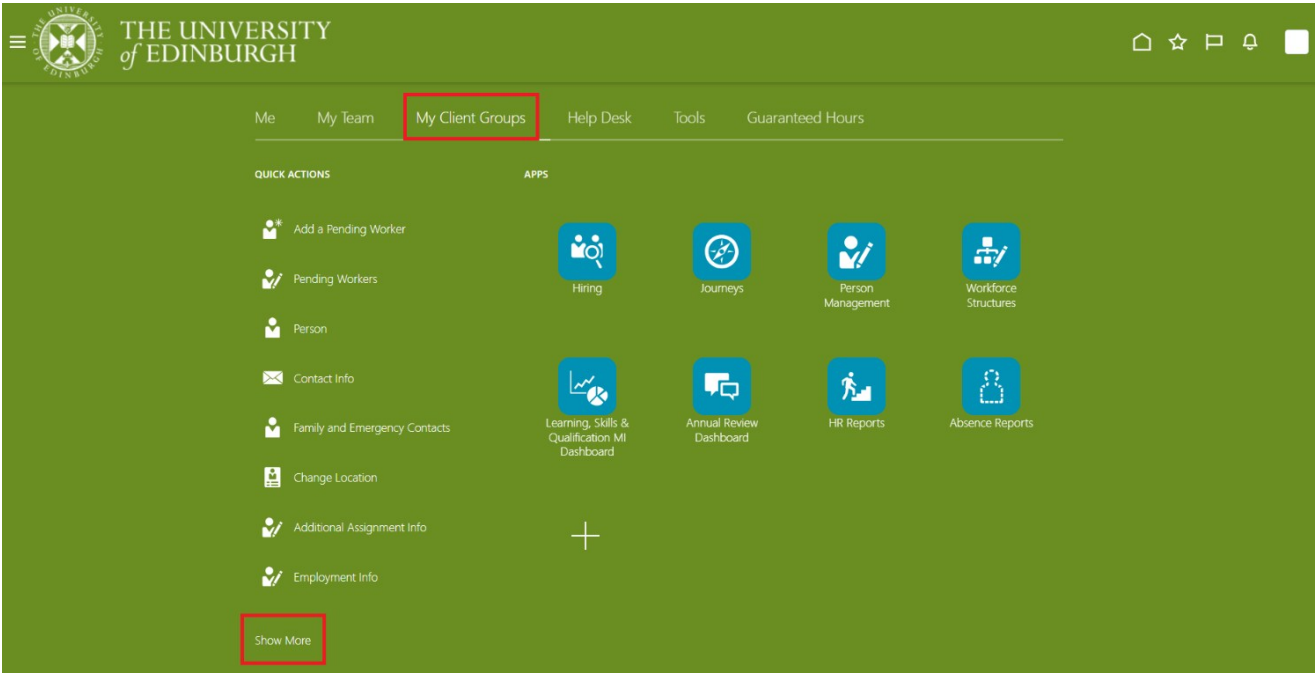
This screenshot is identical to the one above, showing the 'New Absence' form. However, a red box is drawn around the 'Submit' button at the top right of the form, indicating the final step to complete the absence.

How to Record a Maternity Risk Assessment

When a Line Manager has been informed that a Direct Report is pregnant, a risk assessment must be carried out. Once completed, the planned maternity absence must be updated to reflect this.

Please note more than one Risk Assessment can be added if required.

- 1. From the home page, click on the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and 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**'.

3. You will be taken to the **Existing Absences** tab by default.

Find the maternity absence and click on the absence dates (blue text) to open it. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.

4. Scroll down to the **Details** section. Click on the **Drag and Drop** section under **Attachments**. Select the Risk Assessment document and click **Open**.

The screenshot shows the 'Edit Absence' form. At the top, there are buttons for 'Cancel', 'Withdraw', and 'Submit'. Below these are tabs for 'Plan', 'Assignment', 'Activity Start Date', 'Activity End Date', 'Units', 'Payment Percentage', 'Source', and 'Calculation Date'. The main content area starts with 'No data to display.' followed by the 'Details' section. In 'Details', there is a 'Reason' dropdown menu set to 'Option 1' and a 'Notification Date' field set to '29/09/2025'. Below this is a 'Comments' text area. The 'Attachments' section follows, featuring a 'Drag and Drop' area with the text 'Select or drop files here.' which is highlighted by a red rectangular box. Below the drag-and-drop area is a 'URL' input field and an 'Add URL' button. The 'Legislative information' section contains a 'Qualifying Week' field set to '18/01/2026' and an 'Override Average Weekly Earnings' field. At the bottom is the 'Additional information' section.

5. Within the **Additional Information** section, put a tick in the field **Risk Assessment Done** box and update the **Date carried out** field.

This screenshot shows the 'Additional information' section of the 'Edit Absence' form. It includes an 'SMP1 Issue Date' field with a calendar icon. To its right is a 'Risk Assessment Done?' checkbox, which is highlighted by a red rectangular box. Below these is the 'Date carried out' field, also with a calendar icon, which is also highlighted by a red rectangular box. The 'Attachments' and 'Legislative information' sections are visible above this section.

6. Click on the **Submit** button at the top of the page to complete the update.

Edit Absence

CancelWithdrawSubmit

Comments

Attachments

Drag and Drop

Select or drop files here.

URL

Add URL

Legislative information

Qualifying Week

18/01/2026

Override Average Weekly Earnings

Additional information

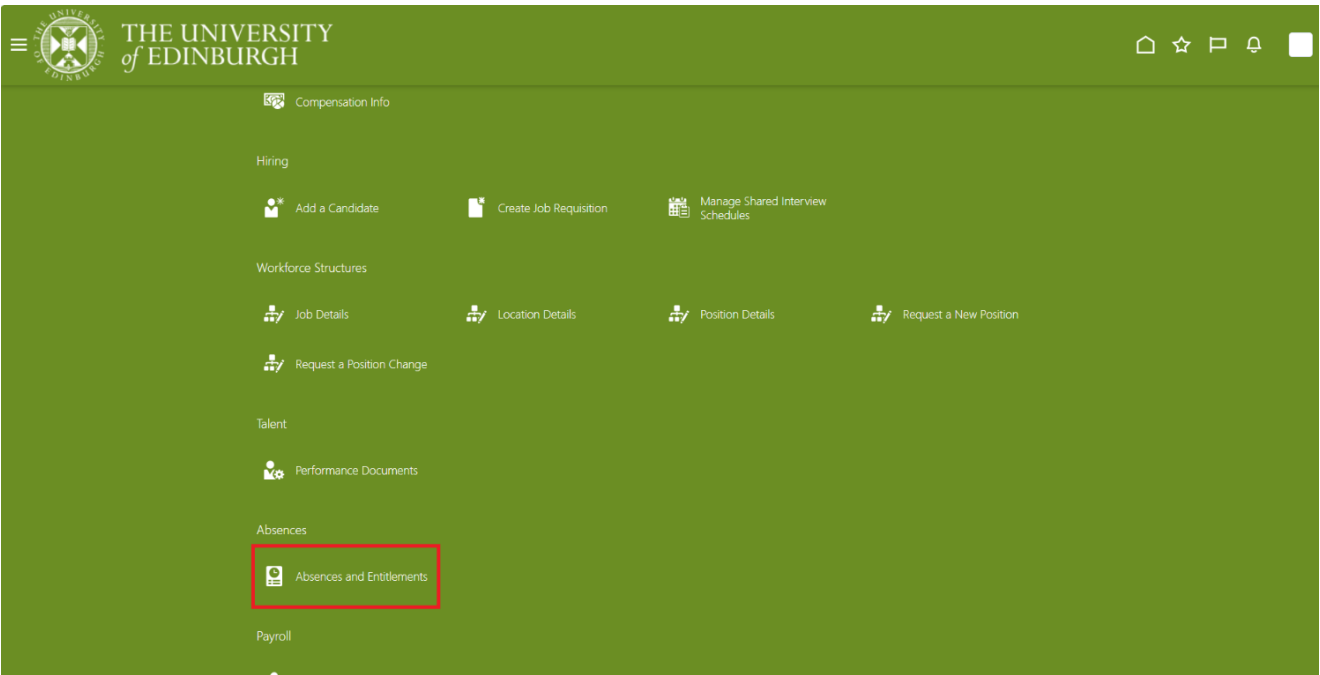
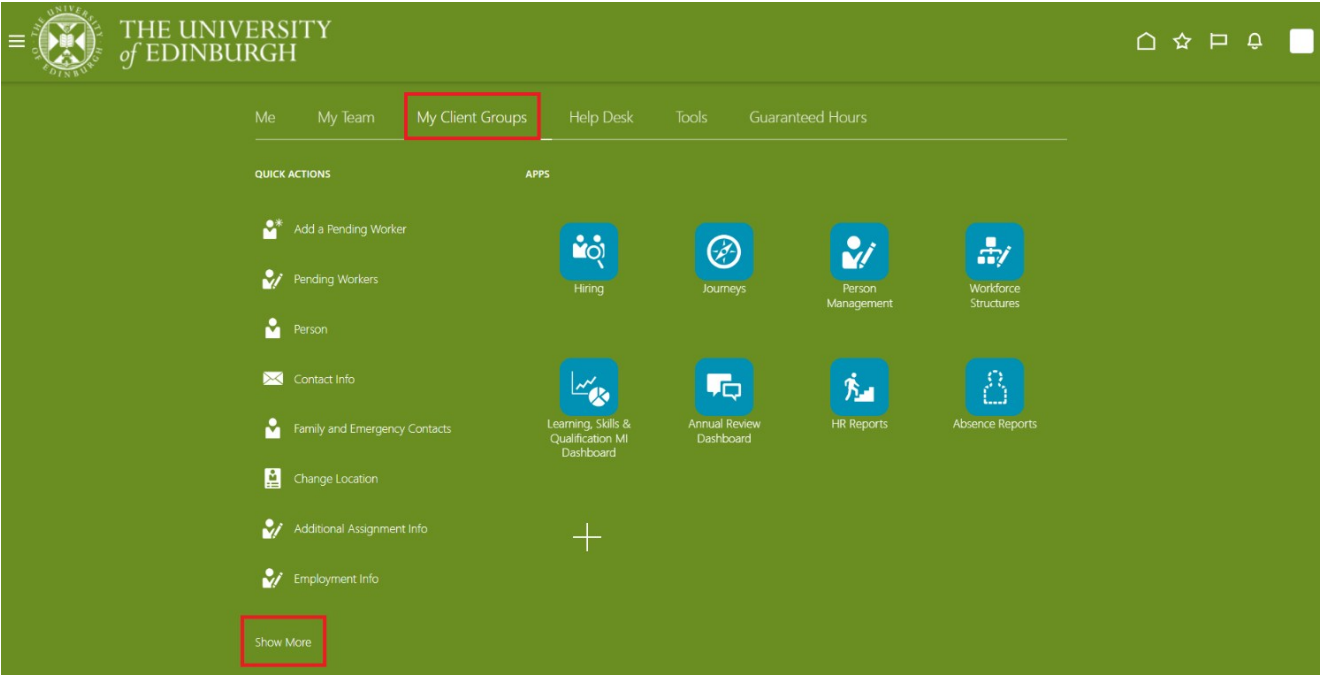
SMP1 Issue Date

Date carried out

Risk Assessment Done?

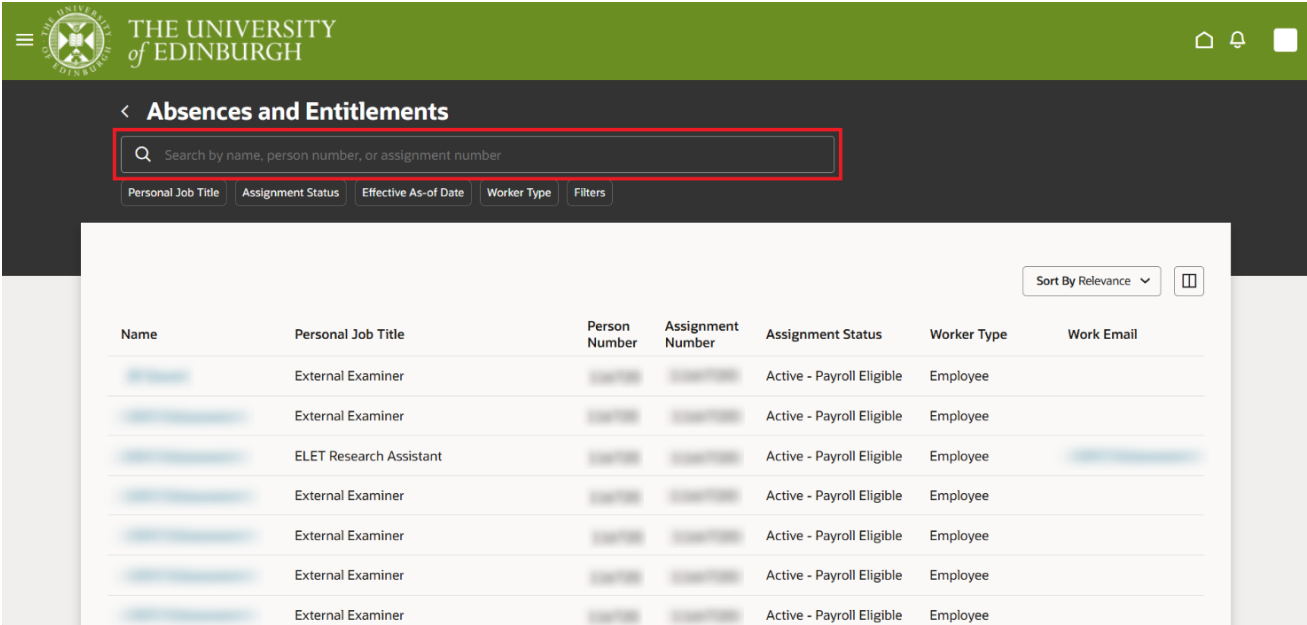
How to Attach a MATB1 to a Maternity Record

- 1. From the home page, click on the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and select **Absences and Entitlements**.



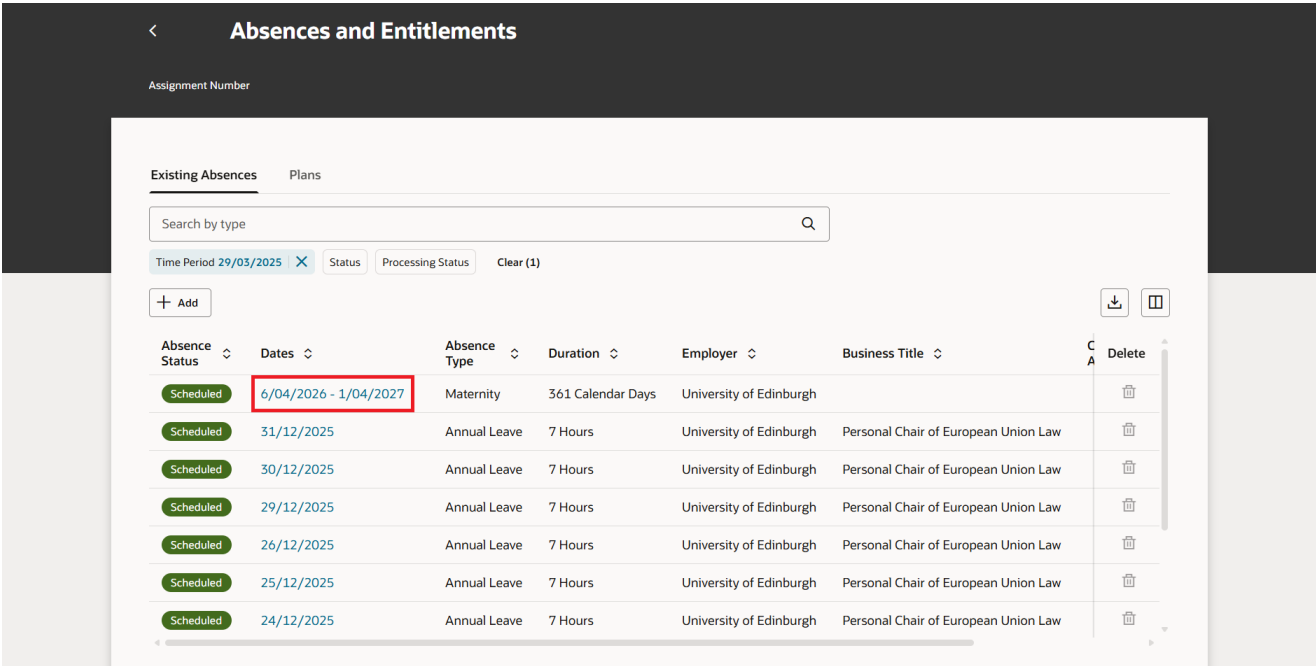
2. Type the employee's Name, Person Number or Assignment Number into the **Search bar** and click on their name to continue. You can use the **filters** below the Search bar to refine your search.

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'.



3. You will be taken to the **Existing Absences** tab by default.

Find the maternity absence and click on the absence dates (blue text) to open it. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.



4. Scroll down to the **Details** section. Click on the **Drag and Drop** section under **Attachments**. Select the MATB1 document and click **Open**.

The screenshot shows the 'Edit Absence' form. At the top, there are buttons for 'Cancel', 'Withdraw', and 'Submit'. Below the header, there is a table with columns: Plan, Assignment, Activity Start Date, Activity End Date, Units, Payment Percentage, Source, and Calculation Date. The table is empty with the text 'No data to display.' Below this, the 'Details' section contains a 'Reason' dropdown menu set to 'Option 1' and a 'Notification Date' field set to '29/09/2025'. There is also a 'Comments' text area. The 'Attachments' section is highlighted with a red box and contains a 'Drag and Drop' area with the text 'Select or drop files here.' Below this is a 'URL' field and an 'Add URL' button. The 'Legislative information' section includes a 'Qualifying Week' field set to '18/01/2026' and an 'Override Average Weekly Earnings' field. The 'Additional information' section is partially visible at the bottom.

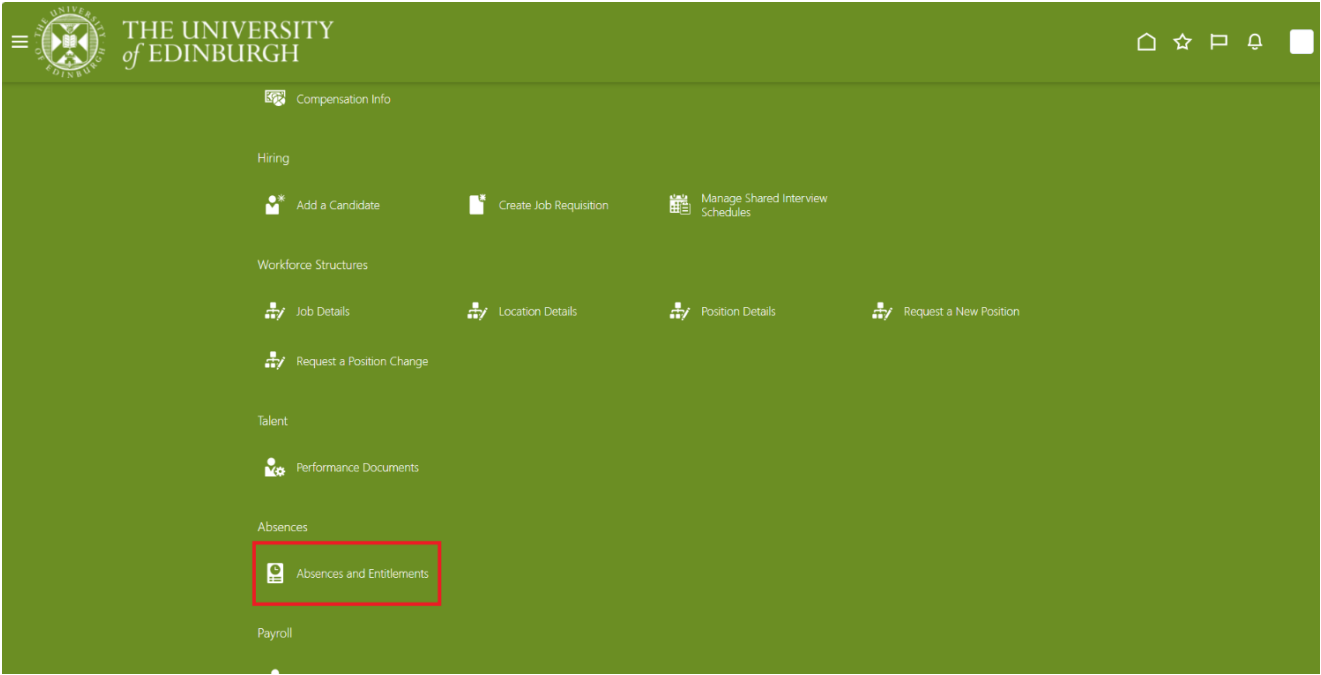
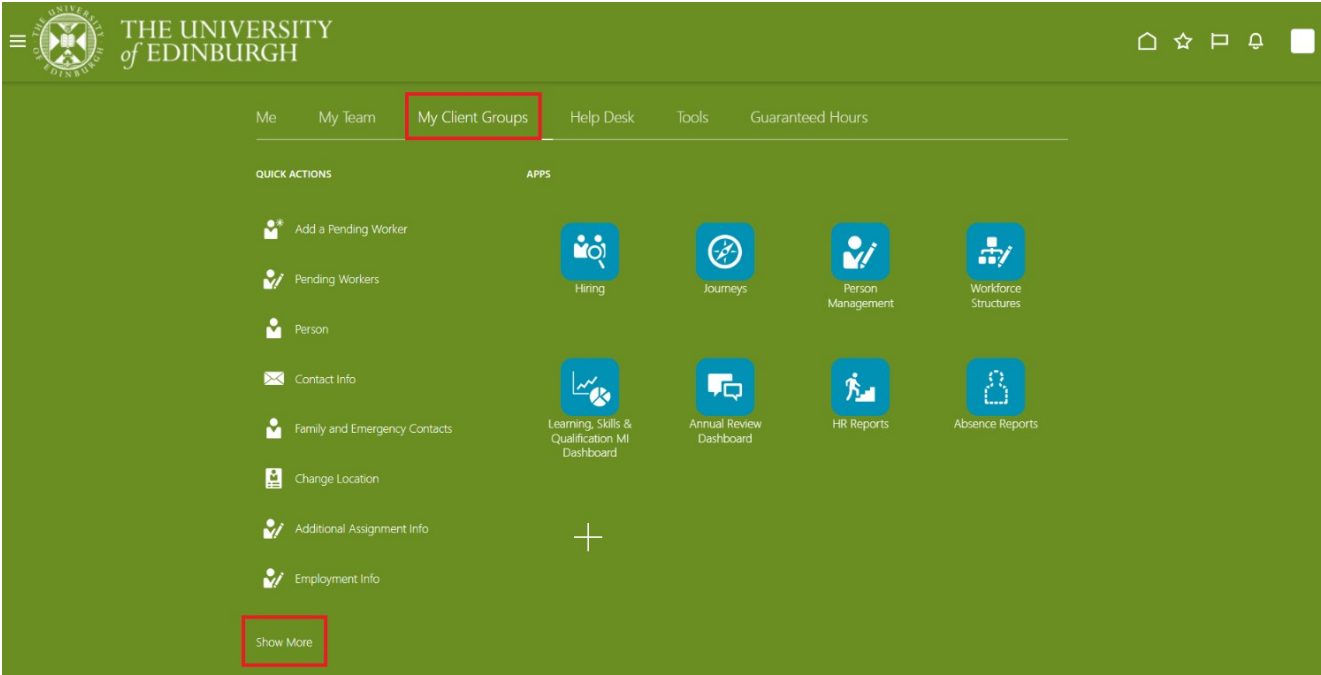
5. Click on the **Submit** button at the top of the page to complete the update.

This screenshot shows the same 'Edit Absence' form, but the 'Submit' button at the top right is highlighted with a red box. The 'Attachments' section is still visible. The 'Additional information' section now shows more fields: 'SMP1 Issue Date' with a calendar icon, 'Date carried out' with a calendar icon, and a 'Risk Assessment Done?' checkbox which is currently unchecked.

How to Record Adoption or Surrogacy Leave

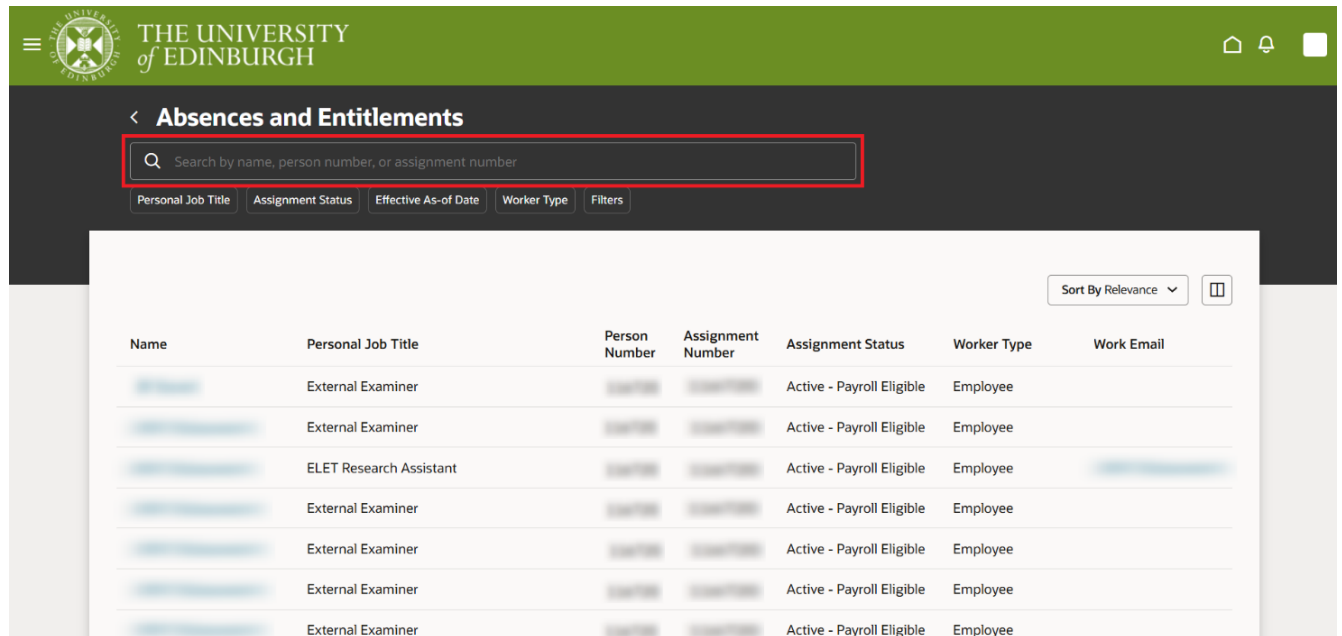
We are aware that the field names within the Adoption and Surrogacy Leave screens may not fit the employee’s individual circumstances. Please refer to the [Appendix](#) as well as the [Guide to Adoption and Surrogacy Leave](#).

- 1. From the home page, click on the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and 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**'.



3. You will be taken to the **Existing Absences** tab by default.

Check whether there are any existing absences that are scheduled to happen during the proposed **Adoption/Surrogacy Leave** dates. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.

If there are any existing absences during that period:

- a. Click on the dates of the absence(s) (blue text) to open it.
- b. The **Edit Absence** screen will open. Click on the **Withdraw** button at the top of the page to cancel the absence.
Please note, a warning message **will not** appear. Once you click on **Withdraw**, the absence will be cancelled.



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Absences and Entitlements

Assignment Number

Existing AbsencesPlans

Search by type

Time Period 24/03/2025
Status
Processing Status
Personal Job Title
Clear (1)

Add

Download
Print

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Delete
Scheduled	26/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	25/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	24/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	20/10/2025 - 23/10/2025	Annual Leave	31 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	29/09/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	



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Edit Absence

Assignment Number

CancelWithdrawSubmit

Absence Type
Annual Leave

Personal Job Title
Postgraduate Programme Administrator

Absence Type Balance
98.27 Hours

Dates

Start Date
20/10/2025

Start Date Duration
7.75

End Date
23/10/2025

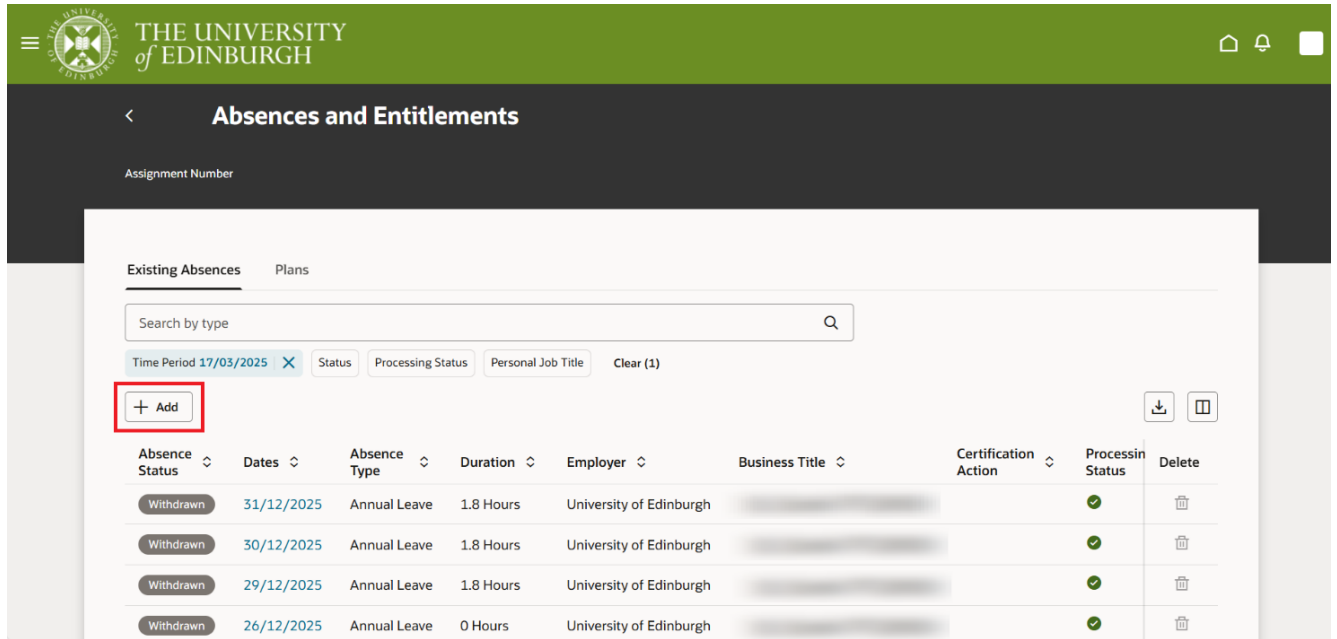
End Date Duration
7.75

Duration
31 Hours

You will be taken back to the **Existing Absences** tab. As you are cancelling an absence on behalf of an employee, the withdrawal is automatically approved and the **Absence Status** will change to **Withdrawn**. If the **Absence Status** is showing as **Pending Approval**, please exit and re-enter the **Absences and Entitlements** screen after a few minutes.

Repeat this step until all of the absences that are scheduled during the proposed period of adoption/surrogacy leave have been withdrawn.

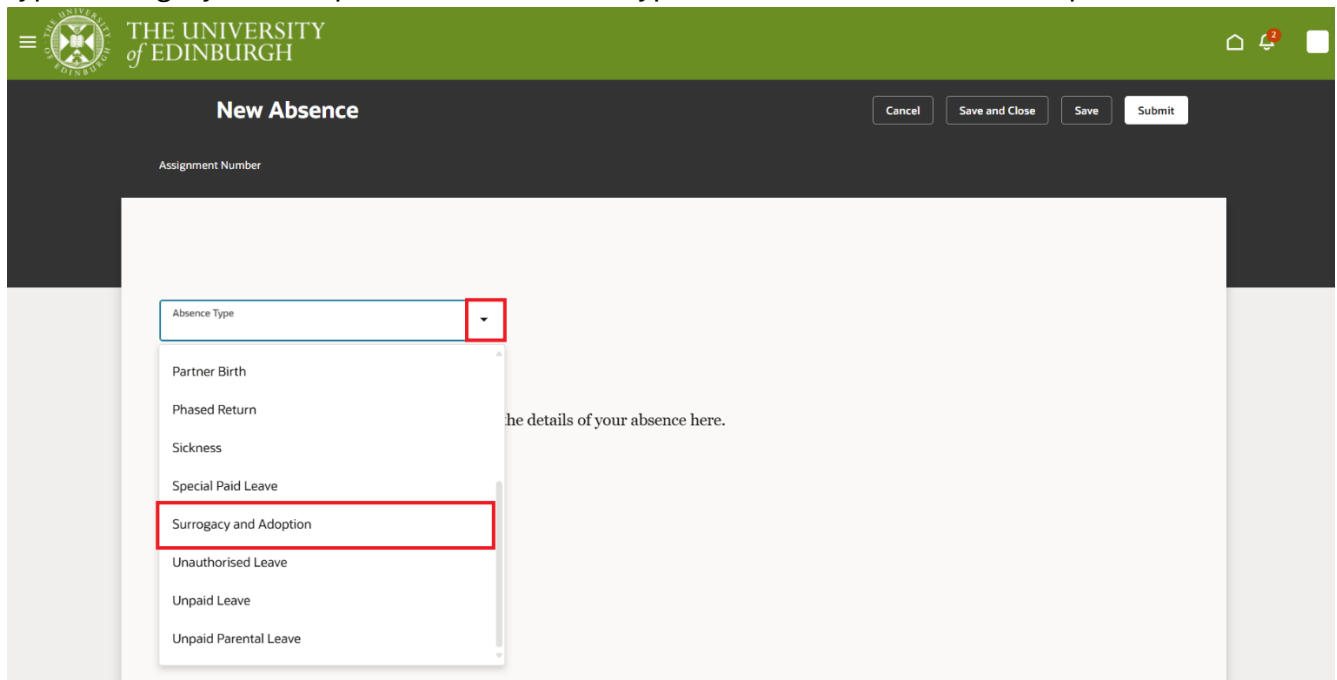
4. Click on the **+ Add** button.



The screenshot shows the 'Absences and Entitlements' page. At the top, there's a header with the University of Edinburgh logo and navigation icons. Below the header, there's a section titled 'Absences and Entitlements' with a sub-section 'Existing Absences'. A search bar is present with the text 'Search by type'. Below the search bar, there are filters for 'Time Period' (17/03/2025), 'Status', 'Processing Status', 'Personal Job Title', and 'Clear (1)'. A red box highlights the '+ Add' button. Below the filters, there's a table with columns: Absence Status, Dates, Absence Type, Duration, Employer, Business Title, Certification Action, Processing Status, and Delete. The table contains four rows of data, all with 'Withdrawn' status and 'Annual Leave' type.

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Certification Action	Processing Status	Delete
Withdrawn	31/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	30/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	29/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	26/12/2025	Annual Leave	0 Hours	University of Edinburgh			✓	

5. Select **Surrogacy and Adoption** from the **Absence Type** drop-down menu. Alternatively, you can type 'Surrogacy and Adoption' in the Absence Type field and select from the drop down.



The screenshot shows the 'New Absence' page. At the top, there's a header with the University of Edinburgh logo and navigation icons. Below the header, there's a section titled 'New Absence' with buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. A sub-section 'Assignment Number' is visible. The main area shows a form with a red box around the 'Absence Type' drop-down menu. The menu is open, showing a list of options: Partner Birth, Phased Return, Sickness, Special Paid Leave, Surrogacy and Adoption (highlighted with a red box), Unauthorised Leave, Unpaid Leave, and Unpaid Parental Leave. Below the menu, there's a text field with the placeholder 'the details of your absence here.'

6. In the **Dates** section, enter the **Expected** or **Actual Placement Date**, the **Placement Match Date**, the **Planned** or **Actual Start** and **End Dates**. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

If the employee does not plan to return to work, click on the **Won't return to work** toggle instead of the **Planned End Date**.

The screenshot shows the 'New Absence' form. At the top, there's a header with the title 'New Absence' and buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the header, there's a dropdown menu for 'Absence Type' with 'Surrogacy and Adoption' selected. The main section is titled 'Dates' and contains several date input fields: 'Expected Placement Date', 'Actual Placement Date', 'Planned Start Date', 'Actual Start Date', 'Planned End Date', 'Actual End Date', and 'Placement Match Date'. Each field has a calendar icon. A toggle switch labeled 'Won't return to work' is located between the 'Expected Placement Date' and 'Planned Start Date' fields. The 'Dates' section is highlighted with a red box. Below the 'Dates' section, there's a 'Details' section which is currently empty.

7. In the **Details** section, select which pay option the employee has selected from the **Reason** drop-down list and enter the **Notification Date** that the employee made their selection on.

Note: The system will default to **Option 3**, so please ensure this is updated as applicable.

New Absence

Cancel

Save and Close

Save

Submit

Details

Reason
Option 3

Notification Date

Option 1

Option 2

Option 3

Attachments

Drag and Drop

Select or drop files here.

URL

Add URL

Legislative information

Birth Date of Child

Disrupted Placement Date

Matching Week

- Add any relevant notes in the **Comments** section.

New Absence

Cancel

Save and Close

Save

Submit

Comments

Attachments

Drag and Drop

Select or drop files here.

URL

Add URL

Legislative information

Birth Date of Child

Disrupted Placement Date

Matching Week

Override Average Weekly Earnings

Additional information

SAP1 Issue Date

9. Attach relevant documentation in the **Attachments** section.

The screenshot shows the 'New Absence' form. At the top right, there are four buttons: 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below these is a 'Comments' text area. The 'Attachments' section is highlighted with a red rectangle; it contains a 'Drag and Drop' area with the text 'Select or drop files here.' and a 'URL' input field with an 'Add URL' button. Below the attachments section are two groups of date pickers: 'Legislative information' (Birth Date of Child, Disrupted Placement Date, Matching Week, Override Average Weekly Earnings) and 'Additional information' (SAP1 Issue Date).

10. Click on the **Submit** button at the top of the page to complete the absence.

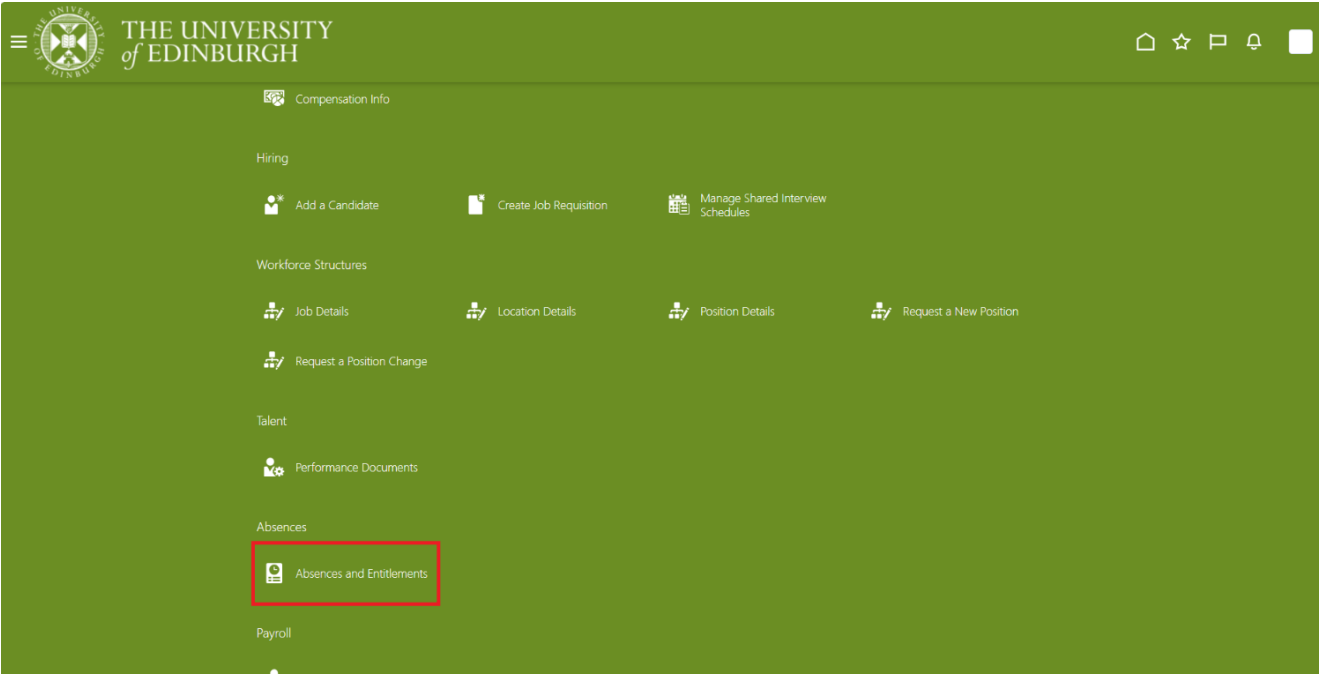
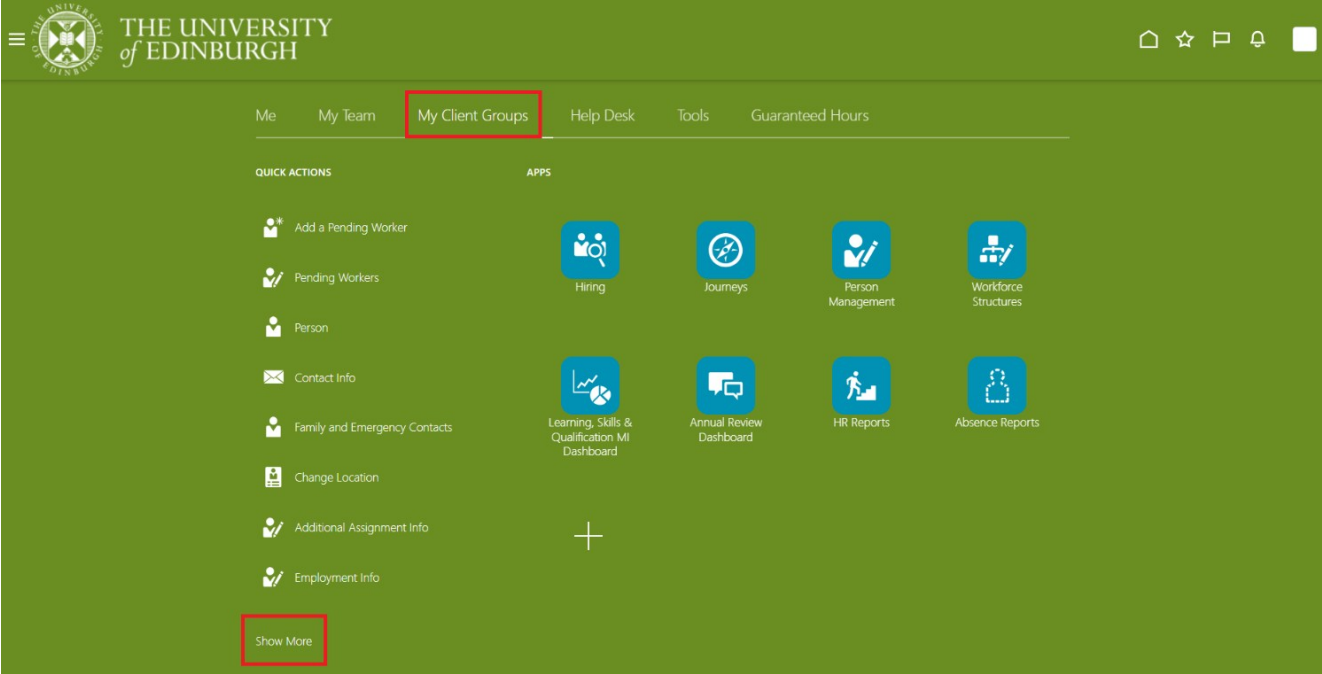
Note: The **Save** and **Save and Close** buttons will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

This screenshot is identical to the previous one, but the 'Submit' button at the top right is now highlighted with a red rectangle, indicating the final step to complete the absence.

How to Record Partner Leave

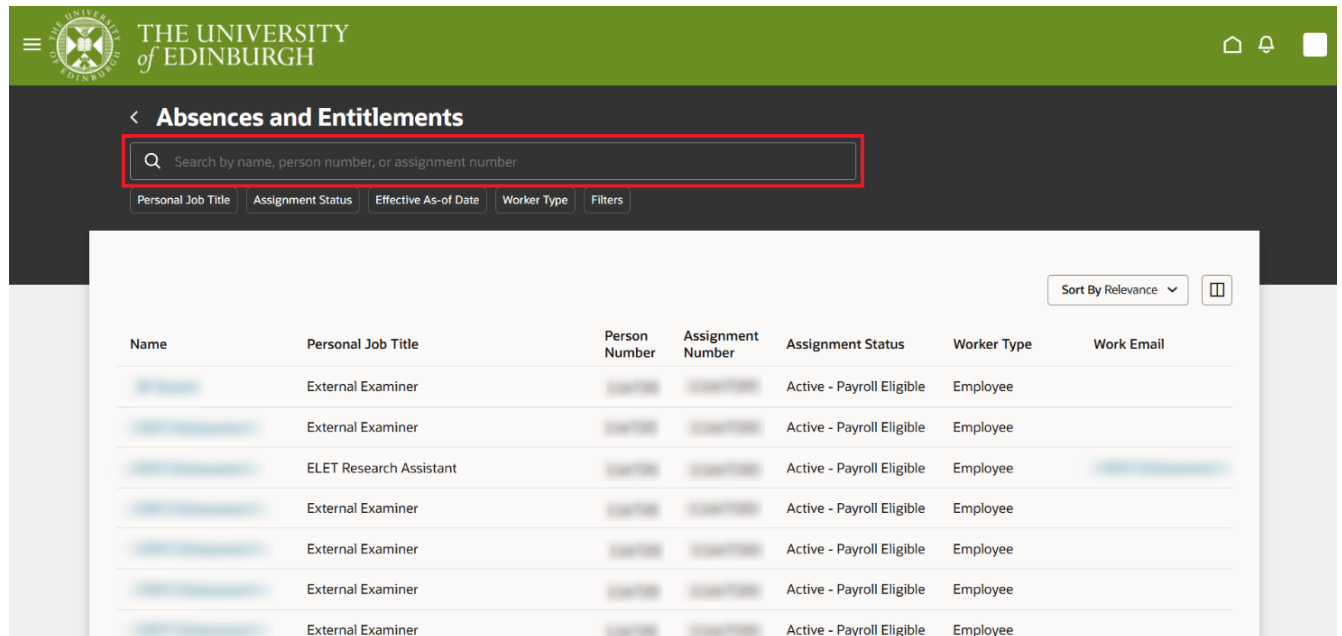
Partner Adoption

- 1. From the home page, click on the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and 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**'.



3. You will be taken to the **Existing Absences** tab by default.

Check whether there are any existing absences that are scheduled to happen during the proposed **Partner Birth** dates. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.

If there are any existing absences during that period:

- a. Click on the dates of the absence(s) (blue text) to open it.
- b. The **Edit Absence** screen will open. Click on the **Withdraw** button at the top of the page to cancel the absence.

Please note, a warning message **will not** appear. Once you click on **Withdraw**, the absence will be cancelled.



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Absences and Entitlements

Assignment Number

Existing AbsencesPlans

Search by type

Time Period 24/03/2025
Status
Processing Status
Personal Job Title
Clear (1)

Add

Download
Print

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Delete
Scheduled	26/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	25/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	24/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	20/10/2025 - 23/10/2025	Annual Leave	31 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	29/09/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	



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Edit Absence

Assignment Number

CancelWithdrawSubmit

Absence Type
Annual Leave

Personal Job Title
Postgraduate Programme Administrator

Absence Type Balance
98.27 Hours

Dates

Start Date
20/10/2025

Start Date Duration
7.75

End Date
23/10/2025

End Date Duration
7.75

Duration
31 Hours

You will be taken back to the **Existing Absences** tab. As you are cancelling an absence on behalf of an employee, the withdrawal is automatically approved and the **Absence Status** will change to **Withdrawn**. If the **Absence Status** is showing as **Pending Approval**, please exit and re-enter the **Absences and Entitlements** screen after a few minutes.

Repeat this step until all of the absences that are scheduled during the proposed period of Partner Adoption leave have been withdrawn.

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

The screenshot shows the 'Absences and Entitlements' page with the 'Existing Absences' tab selected. A red box highlights the '+ Add' button. Below the button is a table of existing absences.

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Certification Action	Processing Status	Delete
Withdrawn	31/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	30/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	29/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	26/12/2025	Annual Leave	0 Hours	University of Edinburgh			✓	

5. Select **Partner Adoption** from the **Absence Type** drop-down menu. Alternatively, you can type 'Partner Adoption' in the **Absence Type** field and select from the drop down.

The screenshot shows the 'New Absence' page. The 'Absence Type' drop-down menu is open, and 'Partner Adoption' is highlighted with a red box. The menu options are: Annual Leave, Emergency Time off for Dependents, Maternity, Other Paid Leave, Parental Bereavement, Partner Adoption, Partner Birth, and Phased Return.

6. In the **Dates** section, enter the **Expected** or **Actual Placement Date**, the **Placement Match Date**, the **Planned** or **Actual Start** and **End Dates**, as known. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

The screenshot shows the 'New Absence' form. At the top, there's a header bar with the title 'New Absence' and buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the header, there's a dropdown menu for 'Absence Type' with 'Partner Adoption' selected. The 'Dates' section is highlighted with a red box and contains the following fields: 'Expected Placement Date', 'Actual Placement Date', 'Planned Start Date', 'Actual Start Date', 'Planned End Date', 'Actual End Date', and 'Placement Match Date'. Each field has a calendar icon. Below the 'Dates' section is the 'Details' section, which includes a checkbox for 'Late notification waived' and a text input field for 'Special Conditions'.

7. Add any appropriate **Comments** or click on **Drag and Drop** section under **Attachments** to upload any documents.

The screenshot shows the 'New Absence' form. At the top, there's a header bar with the title 'New Absence' and buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the header, there's a text input field for 'Assignment Number'. The 'Details' section includes a checkbox for 'Late notification waived' and a text input field for 'Special Conditions'. The 'Comments' section is highlighted with a red box and contains a text input field. The 'Attachments' section is also highlighted with a red box and contains a 'Drag and Drop' area with the text 'Select or drop files here.' Below the 'Attachments' section is a 'URL' input field and an 'Add URL' button. The 'Legislative information' section includes a 'Matching Week' input field, a checkbox for 'Northern Ireland Employee', a 'Partner Name' dropdown menu, and an 'Override Average Weekly Earnings' input field.

- Click on the **Submit** button at the top of the page.

Note: The **Save** and **Save and Close** buttons will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

New Absence

Assignment Number

Details

☐ Late notification waived

Special Conditions

Comments

Attachments

Drag and Drop
Select or drop files here.

URL Add URL

Legislative information

Matching Week

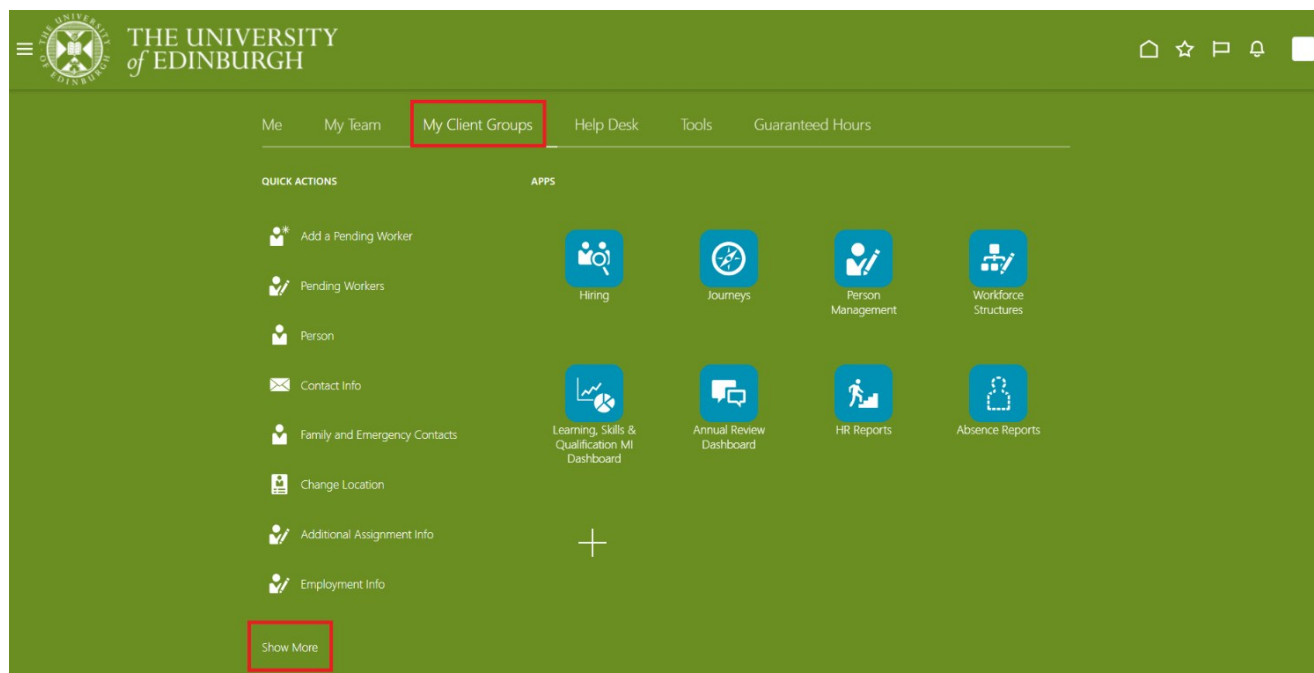
Northern Ireland Employee ☐

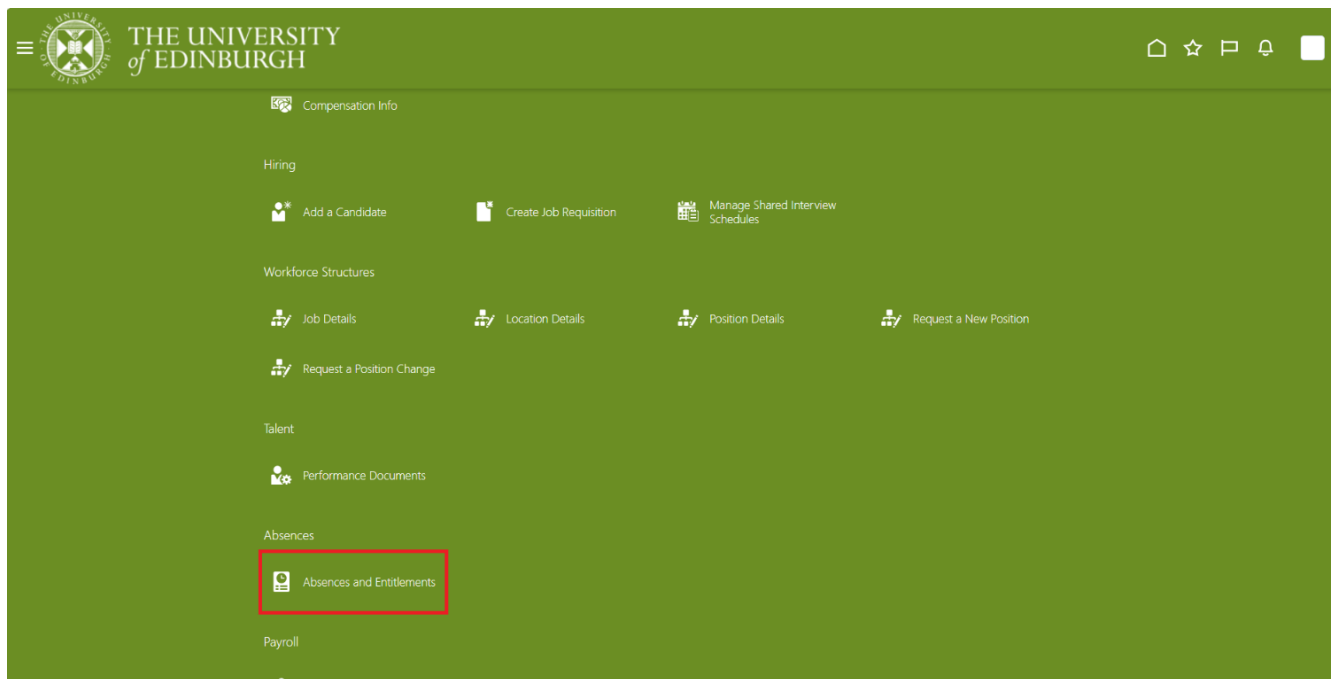
Partner Name

Override Average Weekly Earnings

Partner Birth

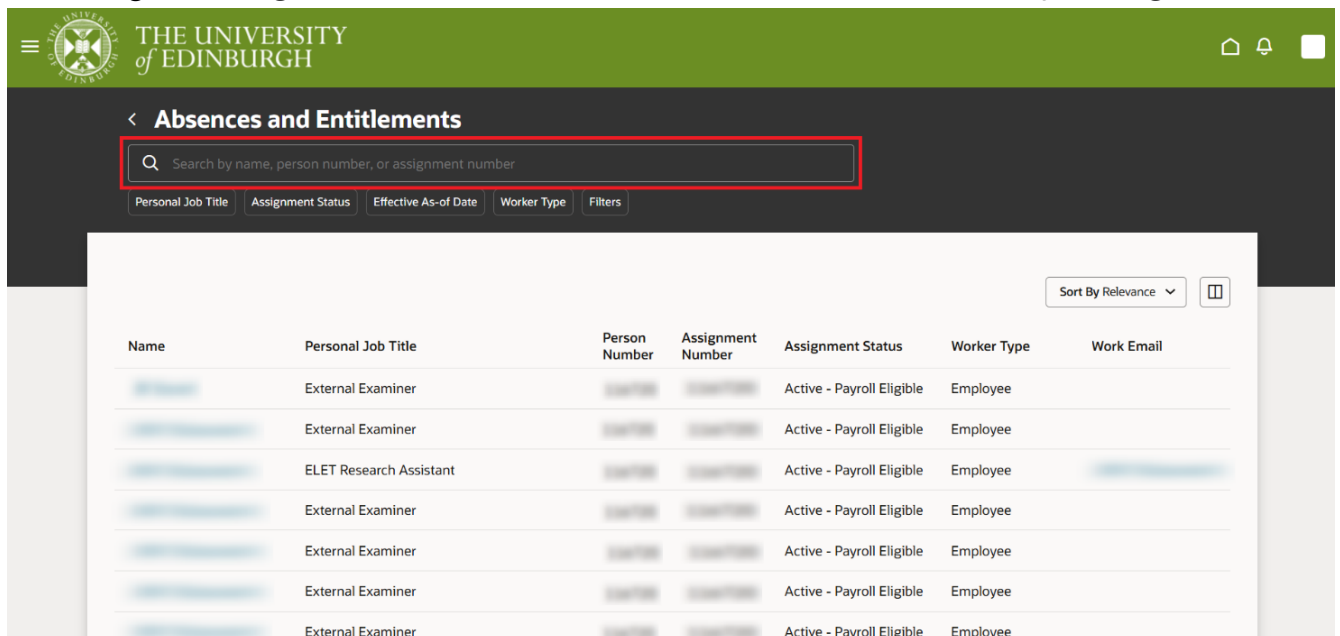
- From the home page, click on the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and select **Absences and Entitlements**.





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**'.



3. You will be taken to the **Existing Absences** tab by default.

Check whether there are any existing absences that are scheduled to happen during the proposed **Partner Birth** dates. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.

If there are any existing absences during that period:

- a. Click on the dates of the absence(s) (blue text) to open it.
- b. The **Edit Absence** screen will open. Click on the **Withdraw** button at the top of the page to cancel the absence.

Please note, a warning message **will not** appear. Once you click on **Withdraw**, the absence will be cancelled.

The screenshot shows the 'Absences and Entitlements' page for The University of Edinburgh. It features a search bar and filters for 'Time Period', 'Status', 'Processing Status', and 'Personal Job Title'. A table lists existing absences with columns for 'Absence Status', 'Dates', 'Absence Type', 'Duration', 'Employer', and 'Business Title'. The date '20/10/2025 - 23/10/2025' is highlighted in red in the 'Dates' column.

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Delete
Scheduled	26/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	25/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	24/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	20/10/2025 - 23/10/2025	Annual Leave	31 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	29/09/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	

The screenshot shows the 'Edit Absence' page for The University of Edinburgh. It displays the 'Absence Type' as 'Annual Leave' and the 'Personal Job Title' as 'Postgraduate Programme Administrator'. The 'Absence Type Balance' is 98.27 Hours. The 'Dates' section shows the 'Start Date' as 20/10/2025 and the 'End Date' as 23/10/2025. The 'Duration' is 31 Hours. The 'Withdraw' button is highlighted in red.

Edit Absence

Cancel Withdraw Submit

Assignment Number

Absence Type: Annual Leave

Personal Job Title: Postgraduate Programme Administrator

Absence Type Balance: 98.27 Hours

Dates

Start Date: 20/10/2025 Start Date Duration: 7.75

End Date: 23/10/2025 End Date Duration: 7.75

Duration: 31 Hours

You will be taken back to the **Existing Absences** tab. As you are cancelling an absence on behalf of an employee, the withdrawal is automatically approved, and the **Absence Status** will change to **Withdrawn**. If the **Absence Status** is showing as **Pending Approval**, please exit and re-enter the **Absences and Entitlements** screen after a few minutes.

Repeat this step until all of the absences that are scheduled during the proposed period of Partner Birth leave have been withdrawn.

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

The screenshot shows the 'Absences and Entitlements' page for The University of Edinburgh. The 'Existing Absences' tab is active. A search bar is at the top, and filters for 'Time Period 17/03/2025', 'Status', 'Processing Status', and 'Personal Job Title' are visible. The '+ Add' button is highlighted with a red box. Below it is a table of existing absences.

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Certification Action	Processing Status	Delete
Withdrawn	31/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	30/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	29/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	26/12/2025	Annual Leave	0 Hours	University of Edinburgh			✓	

5. Select **Partner Birth** from the **Absence Type** drop-down menu. Alternatively, you can type 'Partner Birth' in the **Absence Type** field and select from the drop down.

The screenshot shows the 'New Absence' page for The University of Edinburgh. The 'Absence Type' drop-down menu is open, and 'Partner Birth' is selected and highlighted with a red box. The page also shows buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'.

6. Enter the **Expected** or **Actual Childbirth Date** and **Planned** or **Actual Start** and **End Dates**, as known. These dates are only provisional and can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave Dates](#)'.

The screenshot shows the 'New Absence' form. At the top, there's a header with the title 'New Absence' and buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the header, there's a field for 'Assignment Number'. The main form area has a section for 'Absence Type' with a dropdown menu set to 'Partner Birth'. Below this is the 'Dates' section, which is highlighted with a red box. It contains six date input fields arranged in two columns: 'Expected Childbirth Date', 'Actual Childbirth Date', 'Planned Start Date', 'Actual Start Date', 'Planned End Date', and 'Actual End Date'. Each field has a calendar icon. Below the 'Dates' section is the 'Details' section, which includes a 'Special Conditions' text area.

7. Add any appropriate **Comments** or click on the **Drag and Drop** section under **Attachments** to upload any documents.

The screenshot shows the 'New Absence' form, focusing on the lower sections. The 'Details' section includes a 'Special Conditions' text area. Below this is the 'Comments' section, which is a large text area highlighted with a red box. Underneath the comments is the 'Attachments' section, also highlighted with a red box. It features a 'Drag and Drop' area with the text 'Select or drop files here.' and a URL input field with an 'Add URL' button. At the bottom, there's a 'Legislative information' section with fields for 'Qualifying Week', 'Partner Name', and 'Override Average Weekly Earnings', along with a checkbox for 'Northern Ireland Employee'.

8. Click on the **Submit** button at the top of the page.

Note: The **Save** and **Save and Close** buttons will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

New Absence

CancelSave and CloseSaveSubmit

Details

Special Conditions

Comments

Attachments

Drag and Drop

Select or drop files here.

URLAdd URL

Legislative information

Qualifying Week

Northern Ireland Employee

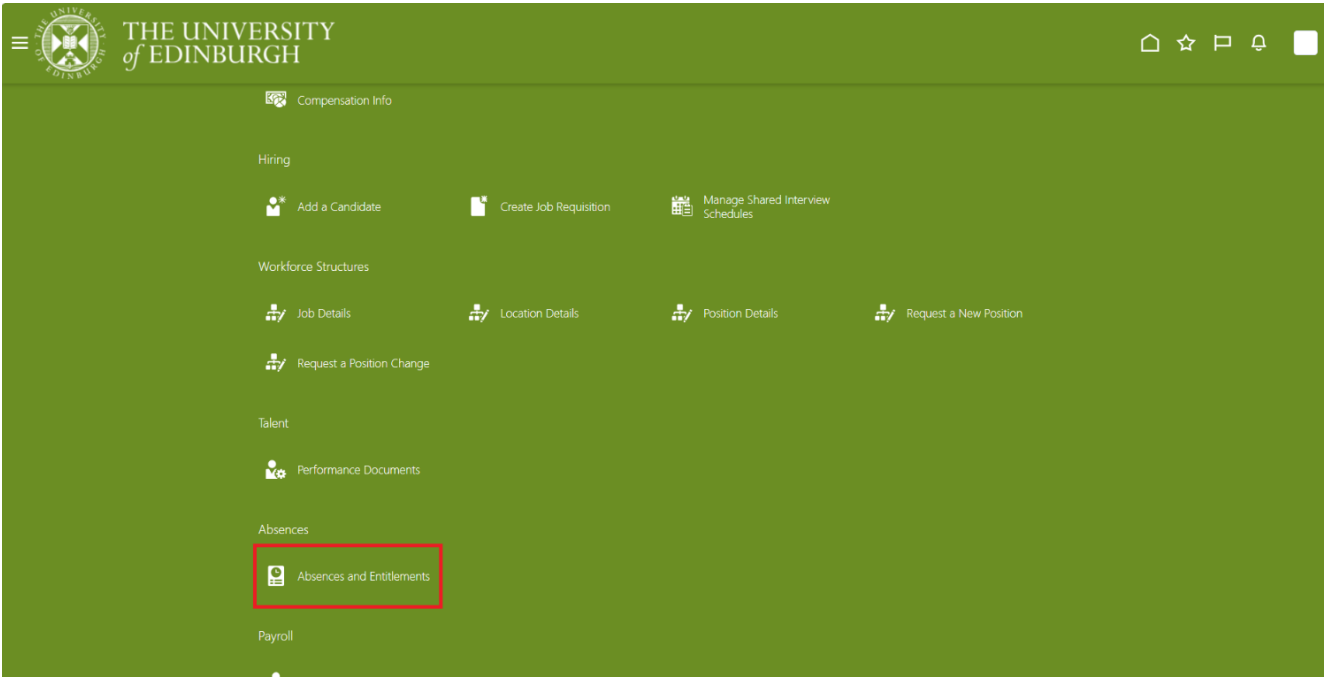
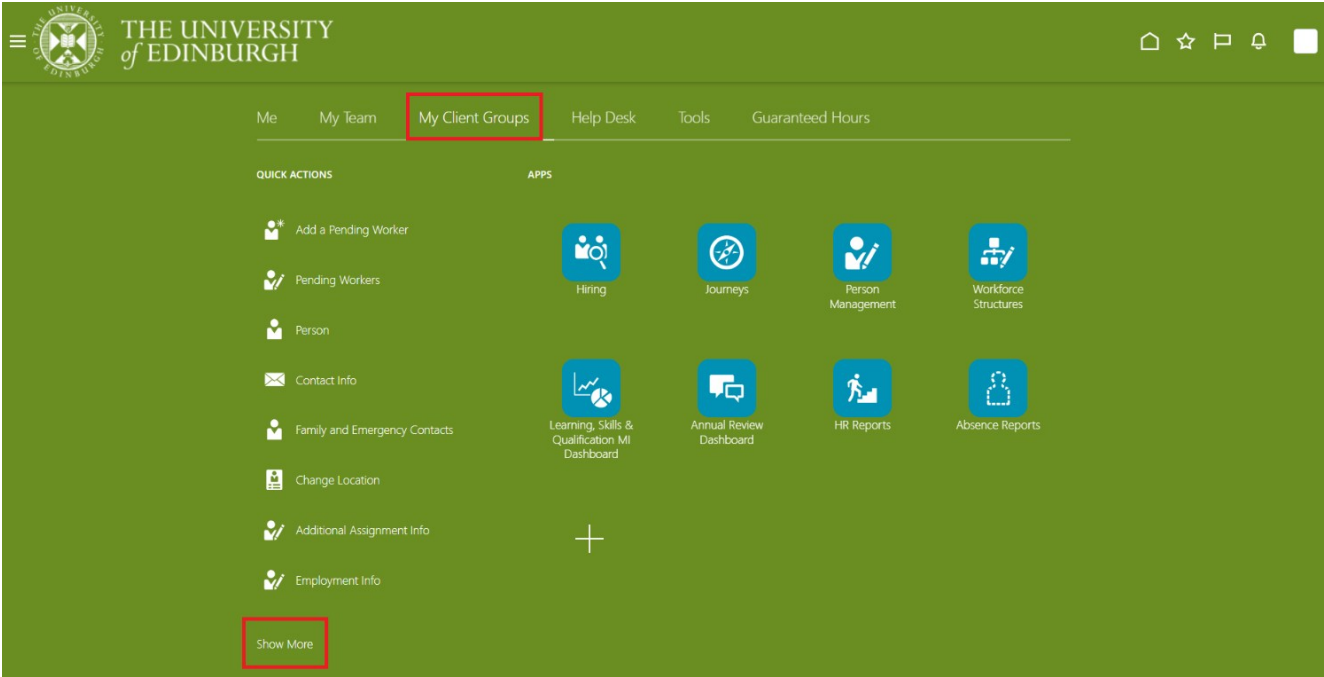
☐

Partner Name

Override Average Weekly Earnings

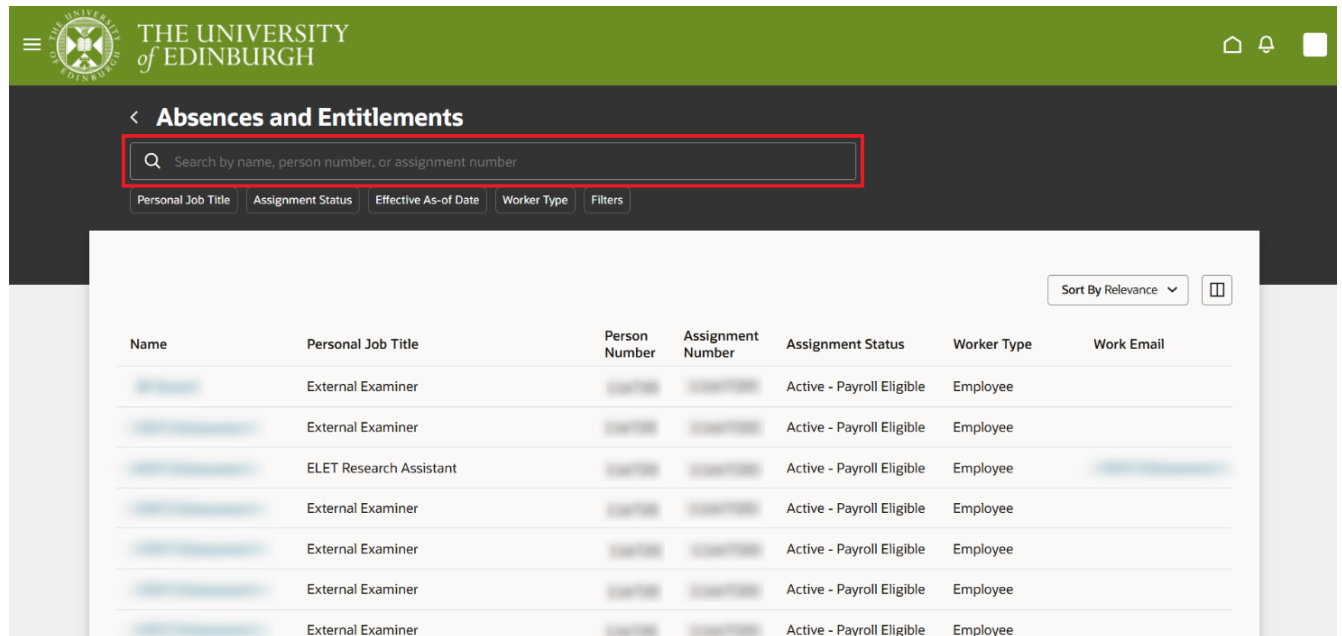
How to Record Unpaid Parental Leave

- 1. From the home page, click on the **My Client Groups** tab, **Show More**, scroll down to the **Absences** section and 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**'.



3. You will be taken to the **Existing Absences** tab by default.

Check whether there are any existing absences that are scheduled to happen during the proposed **Unpaid Parental Leave** dates. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.

If there are any existing absences during that period:

- a. Click on the dates of the absence(s) (blue text) to open it.
- b. The **Edit Absence** screen will open. Click on the **Withdraw** button at the top of the page to cancel the absence.
Please note, a warning message **will not** appear. Once you click on **Withdraw**, the absence will be cancelled.

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<
Absences and Entitlements

Assignment Number

Existing Absences

Plans

Search by type

Time Period 24/03/2025

Status

Processing Status

Personal Job Title

Clear (1)

+ Add

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Delete
Scheduled	26/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	25/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	24/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	20/10/2025 - 23/10/2025	Annual Leave	31 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	29/09/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	

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Edit Absence

Cancel
Withdraw
Submit

Assignment Number

Absence Type
Annual Leave

Personal Job Title
Postgraduate Programme Administrator

Absence Type Balance
98.27 Hours

Dates

Start Date
20/10/2025

Start Date Duration
7.75

End Date
23/10/2025

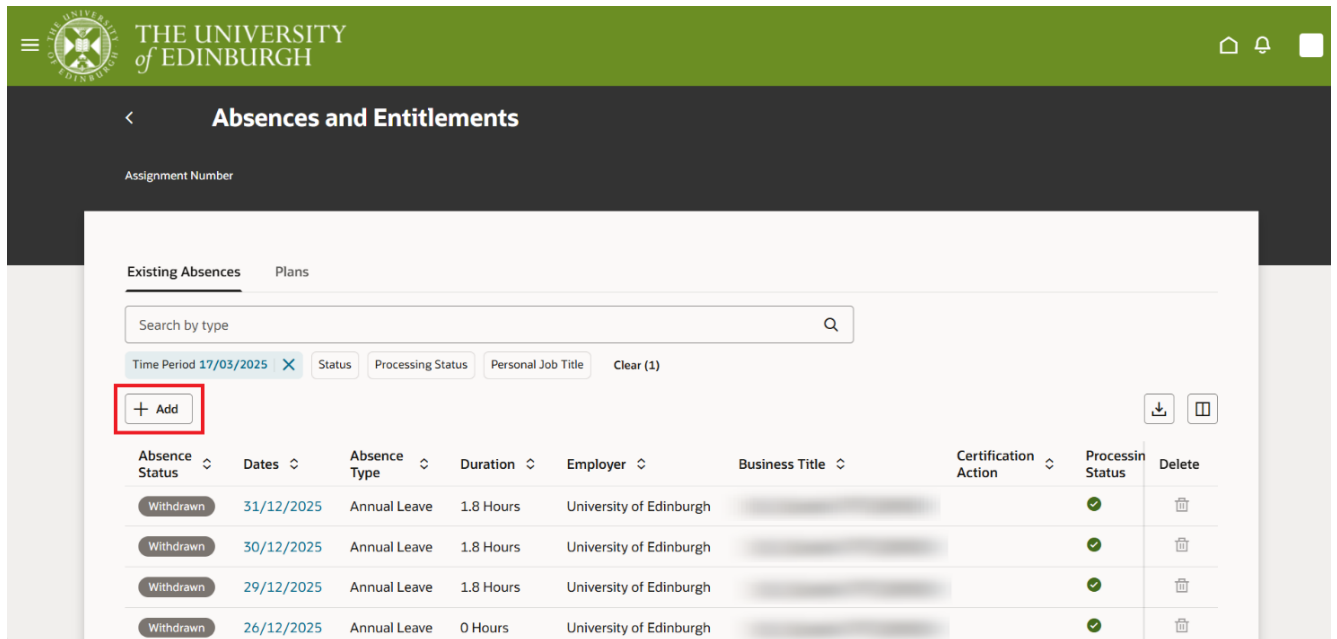
End Date Duration
7.75

Duration
31 Hours

You will be taken back to the **Existing Absences** tab. As you are cancelling an absence on behalf of an employee, the withdrawal is automatically approved, and the **Absence Status** will change to **Withdrawn**. If the **Absence Status** is showing as **Pending Approval**, please exit and re-enter the **Absences and Entitlements** screen after a few minutes.

Repeat this step until all of the absences that are scheduled during the proposed period of Unpaid Parental Leave have been withdrawn.

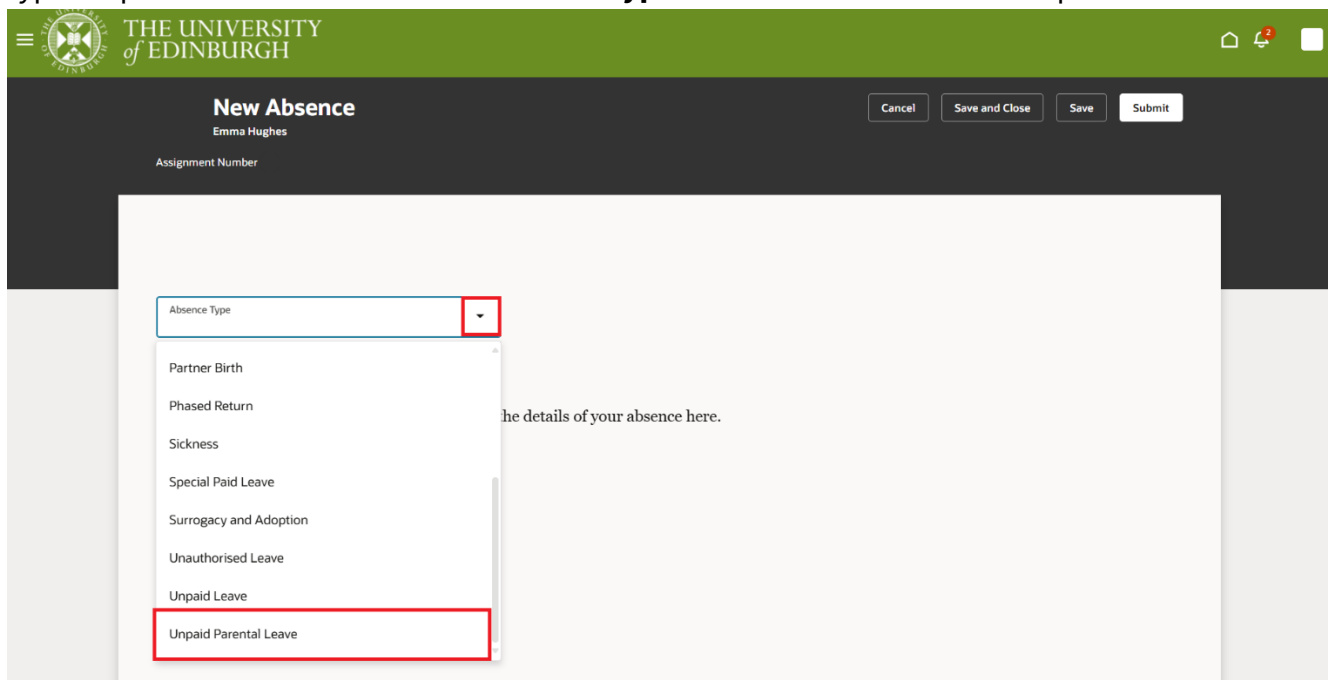
4. Click on the **+ Add** button.



The screenshot shows the 'Absences and Entitlements' page. At the top, there's a green header with the University of Edinburgh logo. Below it, a dark grey bar contains the title 'Absences and Entitlements' and a search bar. The main content area is white and contains a table of existing absences. A red box highlights the '+ Add' button in the top left corner of the table area.

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Certification Action	Processing Status	Delete
Withdrawn	31/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	30/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	29/12/2025	Annual Leave	1.8 Hours	University of Edinburgh			✓	
Withdrawn	26/12/2025	Annual Leave	0 Hours	University of Edinburgh			✓	

5. Select **Unpaid Parental Leave** from the **Absence Type** drop-down menu. Alternatively, you can type 'Unpaid Parental Leave' in the **Absence Type** field and select from the drop down.



The screenshot shows the 'New Absence' page. At the top, there's a green header with the University of Edinburgh logo. Below it, a dark grey bar contains the title 'New Absence' and a search bar. The main content area is white and contains a form for adding a new absence. A red box highlights the 'Absence Type' drop-down menu, which is open, showing a list of options. 'Unpaid Parental Leave' is highlighted at the bottom of the list.

Partner Birth

Phased Return

Sickness

Special Paid Leave

Surrogacy and Adoption

Unauthorised Leave

Unpaid Leave

Unpaid Parental Leave

6. In the **Dates** section, enter the **Start Date** and the **End Date**. These dates can be updated, if required. For further details on how to do this, please refer to the section of the guide, '[How to Amend Leave](#)'.

Note: Parental leave can only be taken in periods of 7 days. Please refer to the [policy](#) for further details.

The screenshot shows the 'New Absence' form. At the top, there's a dark header with the title 'New Absence' and buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the header, there's a section for 'Assignment Number'. The main form area has a dropdown for 'Absence Type' set to 'Unpaid Parental Leave'. The 'Dates' section is highlighted with a red box and contains 'Start Date' and 'End Date' fields, each with a calendar icon and a 'Required' label, and a 'Start Date Duration' field. Below this, the 'Projected Balance' is shown as '0 Calendar Days' 'As-of'. The 'Details' section has a 'Comments' text area.

7. Add any relevant notes in the **Comments** section.

This screenshot is identical to the previous one, showing the 'New Absence' form. However, the 'Comments' text area in the 'Details' section is now highlighted with a red box, indicating where to add relevant notes.

8. Click on the **Submit** button.

New Absence

Cancel

Save and Close

Save

Submit

Assignment Number

Absence Type

Unpaid Parental Leave

Dates

Start Date

Required

End Date

Required

Start Date Duration

Projected Balance

0 Calendar Days

As-of

Details

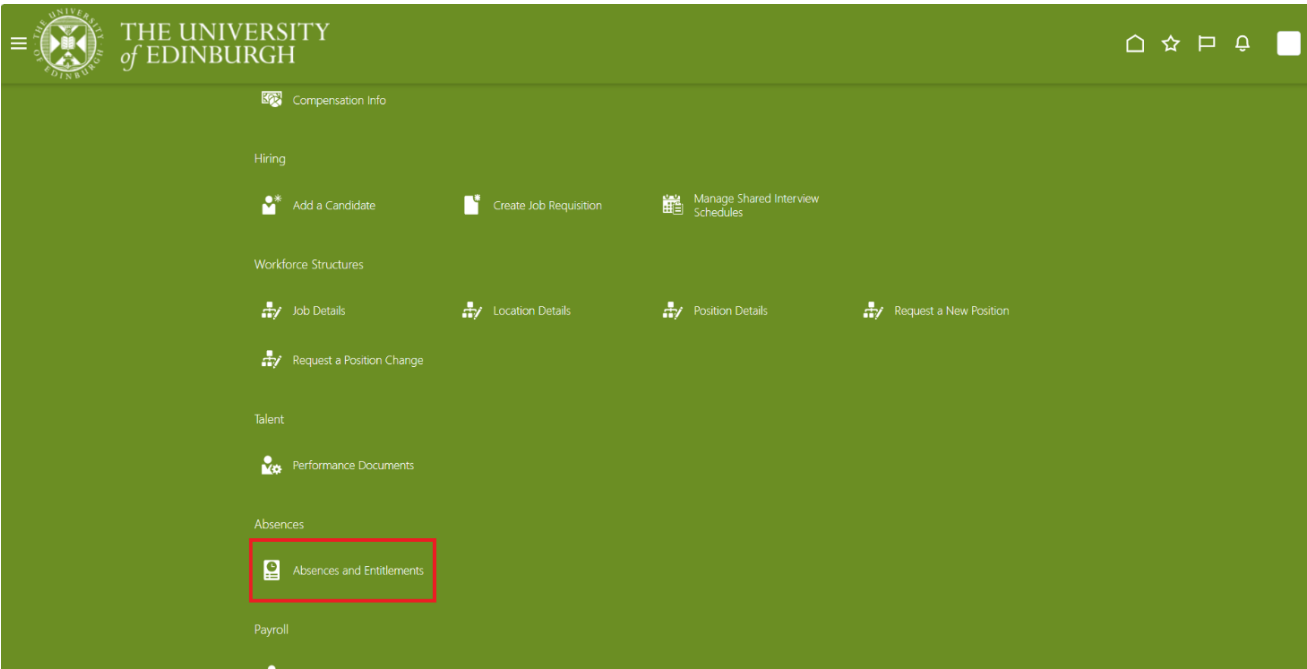
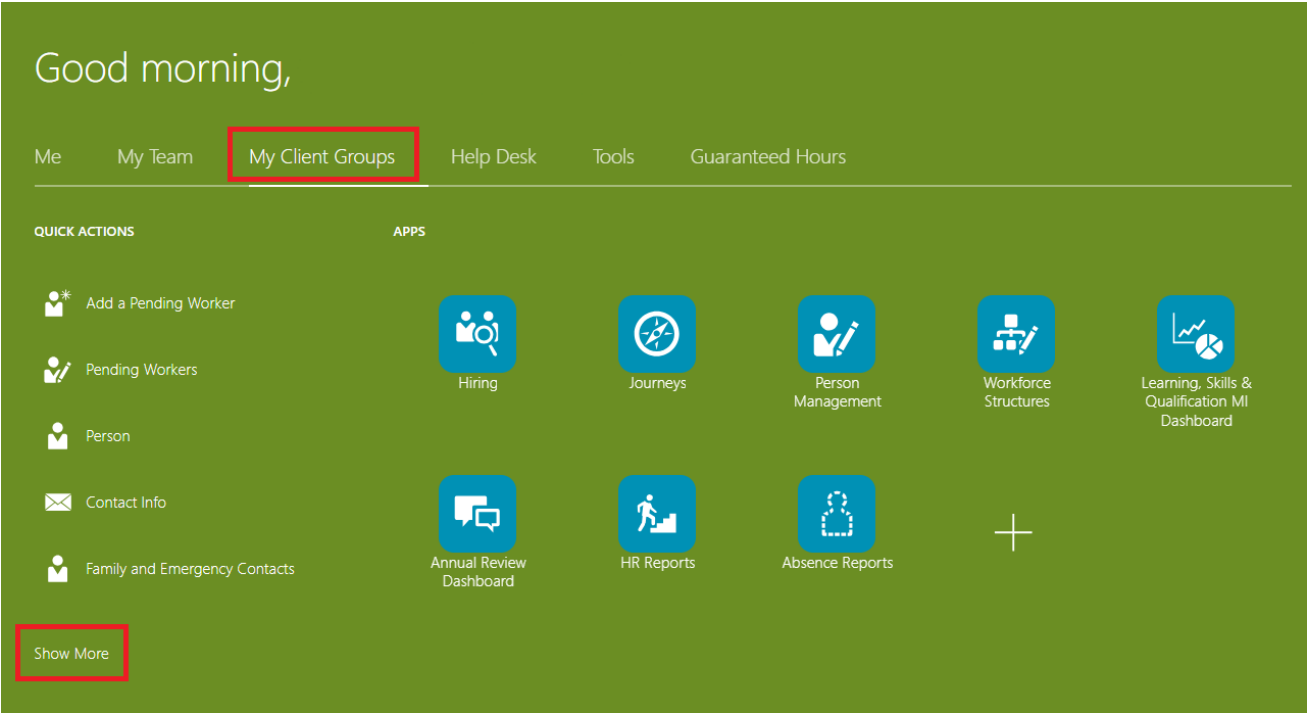
Comments

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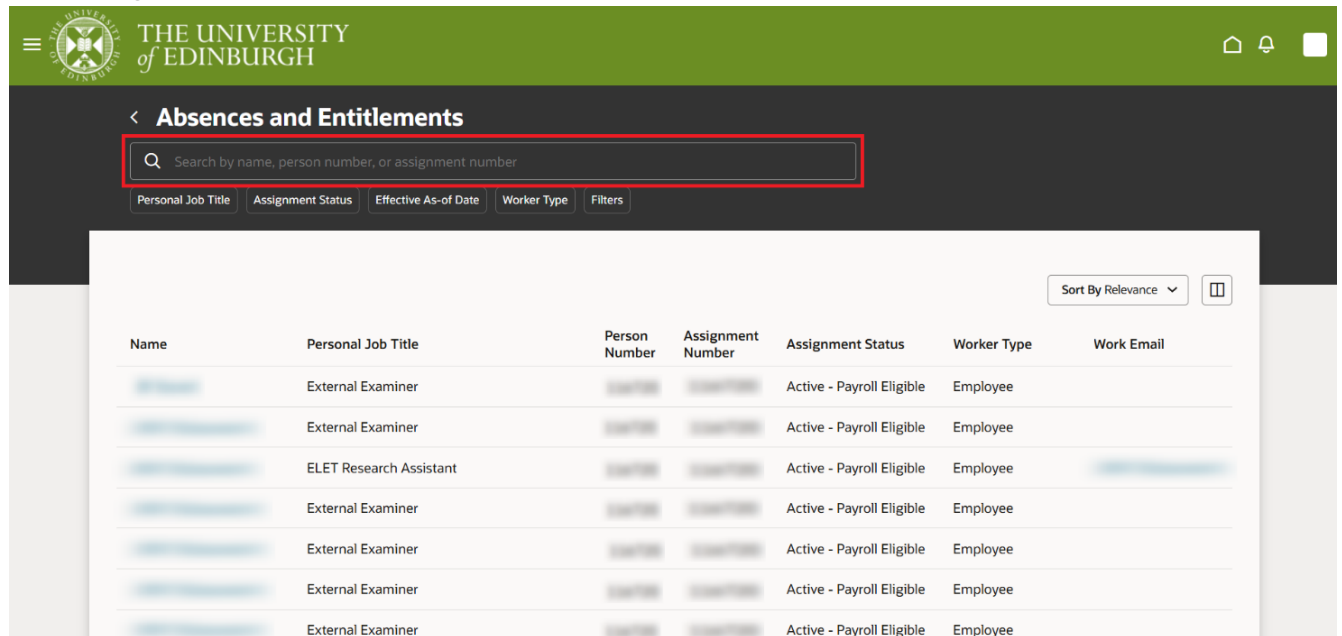
How to Amend Leave

- 1. From the homepage select the **My Client Groups** tab > **Show More**, scroll down to the **Absences** section and click on **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**'.



3. You will be taken to the employee's **Existing Absences** tab by default.

Select the absence record you wish to edit and click on the dates (blue text) to open it. You can use the **Search bar** or the **filters** below the Search bar to refine your search. **Note:** The **Time Period** filter cannot be cleared but it can be changed to another date.

Note: the bin icons in the **Delete** column are greyed out as deleting an absence does not align with the University's policy. If you wish to cancel an absence, please move on to the next step in this guide.

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Absences and Entitlements

Assignment Number

Existing Absences Plans

Search by type

Time Period 24/03/2025 Status Processing Status Personal Job Title Clear (1)

+ Add

Absence Status	Dates	Absence Type	Duration	Employer	Business Title	Delete
Scheduled	26/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	25/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	24/12/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	20/10/2025 - 23/10/2025	Annual Leave	31 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	
Scheduled	29/09/2025	Annual Leave	7.75 Hours	University of Edinburgh	Postgraduate Programme Administrator (Diploma	

- The **Edit Absence** screen will open. Make the necessary changes and press **Submit**. If you are ending an open ended absence, click on the **Open ended toggle** so that it changes to from blue to grey and add an end date.

If you would like to cancel the absence, click on the **Withdraw** button at the top of the page.

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Edit Absence

Assignment Number

Cancel Withdraw **Submit**

Absence Type
Annual Leave

Personal Job Title
Personal Chair

Absence Type Balance
77 Hours

Dates

Start Date
24/12/2025

Start Date Duration
7.00

End Date
24/12/2025

Duration
7 Hours

You will be taken back to the **Existing Absences** screen. As you are amending an absence on behalf of an employee, the amendment is automatically approved.

Appendix

Appendix 1

We are aware that the field names within the Adoption and Surrogacy Leave screens may not fit your individual circumstances. Below is a table that outlines what information you should input into the fields, to suit your type of leave, and outlines the timeframe for submission within P&M.

**Rows in Blue are Optional Fields and can be input later if your circumstances change*

Field in P&M	Adoption	Overseas Adoption	Surrogacy
Expected Date of Placement	Expected Date of Placement	Estimated Date of Arrival in the UK	Expected Due Date of Baby
Placement Match Date	Expected Date of Placement? ¹	Official Notification Date	Expected Due Date of Baby
Planned Start Date	Planned Start Date of adoption leave	Planned Start Date of adoption leave	Planned Start Date of surrogacy leave
Planned End Date	Planned End Date of adoption leave	Planned End Date of adoption leave	Planned End Date of surrogacy leave
Reason – Option	Option 1, 2 or 3	Option 1, 2 or 3	Option 1, 2 or 3
Actual date of placement	Date of Placement if different from Expected Date	Actual Date of Arrival in the UK	Actual Birth Date of Baby
Actual start date	Actual start date if different from planned	Actual start date if different from planned	Actual start date if different from planned
Actual end date	Actual end date if different from planned	Actual end date if different from planned	Actual end date if different from planned
Time Frame for submission within P&M	This information should be input and submitted within seven days of being matched with a child, and at least 28 days in advance	This information should be input and submitted within 28 days of getting notification of the estimated date of arrival in the UK.	This information should be input and submitted at least 15 weeks before the baby's due date.

	of your anticipated leave start date.	The actual date the child arrives in the UK can be input later, within 28 days of the arrival date.	
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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 family leave.	M Easton
3.0	13 October 2025	Updated guidance and screenshots to reflect the new Redwood changes in P&M.	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.