



System User Guide

School/Department Administrator Guide to Absence and Leave

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Introduction

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

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

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

Reports

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

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

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

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

- The Absence review reports are also available through the Absence Report app in People and Money and can be run at any time. The reporting period will mirror the report sent to the line manager. Further details are available in the guide '[How to view Absence Reports](#)' (under the 'Reporting' heading).
- The Open Absences Report will be sent each Monday, to line managers who have a direct report flagged as being off with sickness absence (e.g. currently have the open absence box ticked) in People and Money. If an employee has more than one assignment, all line managers for the employee will be sent the report. An open-ended absence must be closed off when the employee returns to work.
- The Monthly Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period will be sent on the first day of the month where a direct report meets the review point in the reporting period.

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

Unauthorised Absence

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

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 an Absence on behalf of an Employee

1. 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.
2. **Search** for and **select** the employee on whose behalf you would like to apply for leave.
3. Click the **Add** button.
4. Select the appropriate **Absence Type** from the list of options available in the dropdown menu.
5. If the employee has more than one assignment, select the appropriate assignment from the **Personal Job Title** field or leave it blank if you want to apply the absence to all assignments.
6. In the **Dates** section click on the calendar icon and select the **Start Date** and **End Date**, or click on the **Open Ended** toggle if applicable.
7. In the **Details** section, if it applies to the absence type, choose a reason from the Reason dropdown list (e.g., if you are recording an **Unauthorised Absence** for an employee who is on a Skilled Worker or Temporary Worker Sponsored Researcher Visa, select the Reason **'UKVI'** for sponsored employees).
8. Add any **Comments** or **Attachments** if needed.
9. Click the **Submit** button at the top of the page.

Cancelling an Absence on behalf of an Employee

1. 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.
2. **Search** for and **select** the employee on whose behalf you would like to cancel leave.
3. Find and select the absence you want to cancel.
4. Click on the Withdraw button at the top of the page.

Amending an Absence on behalf of an Employee

1. 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.
2. **Search** for and **select** the employee on whose behalf you would like to amend leave.
3. Find and select the absence record you wish to edit.
4. Make the necessary changes and press **Submit**.

How to View Absence Record History

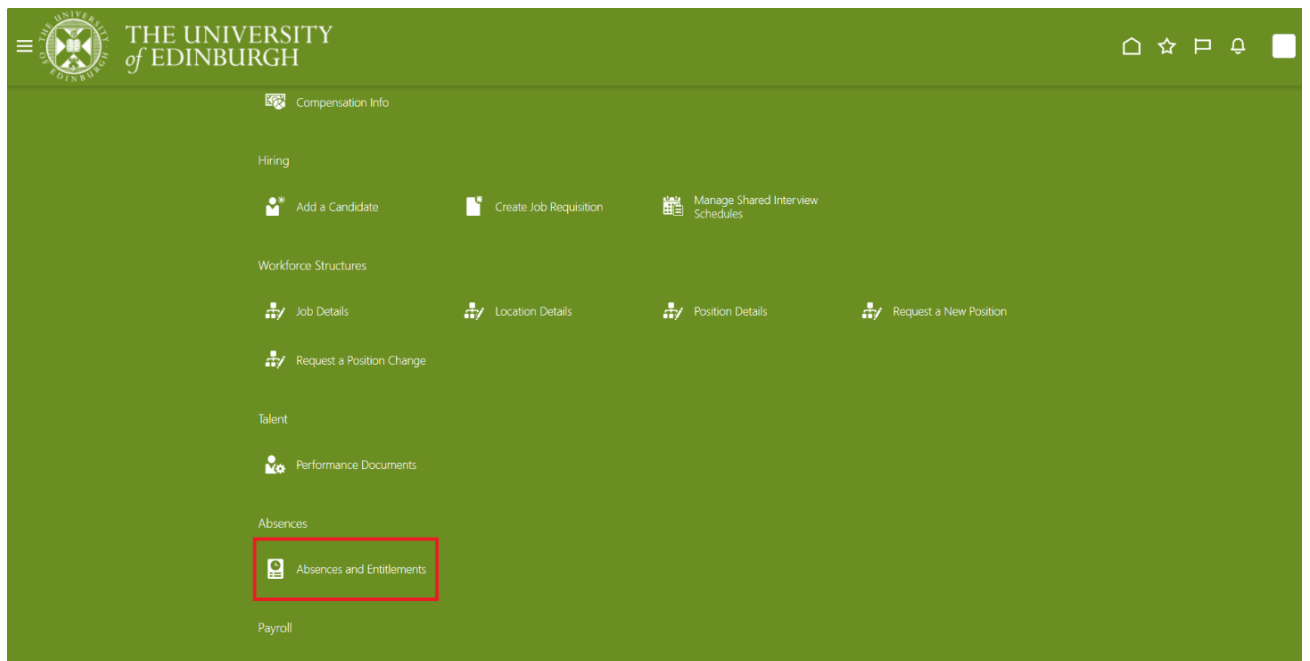
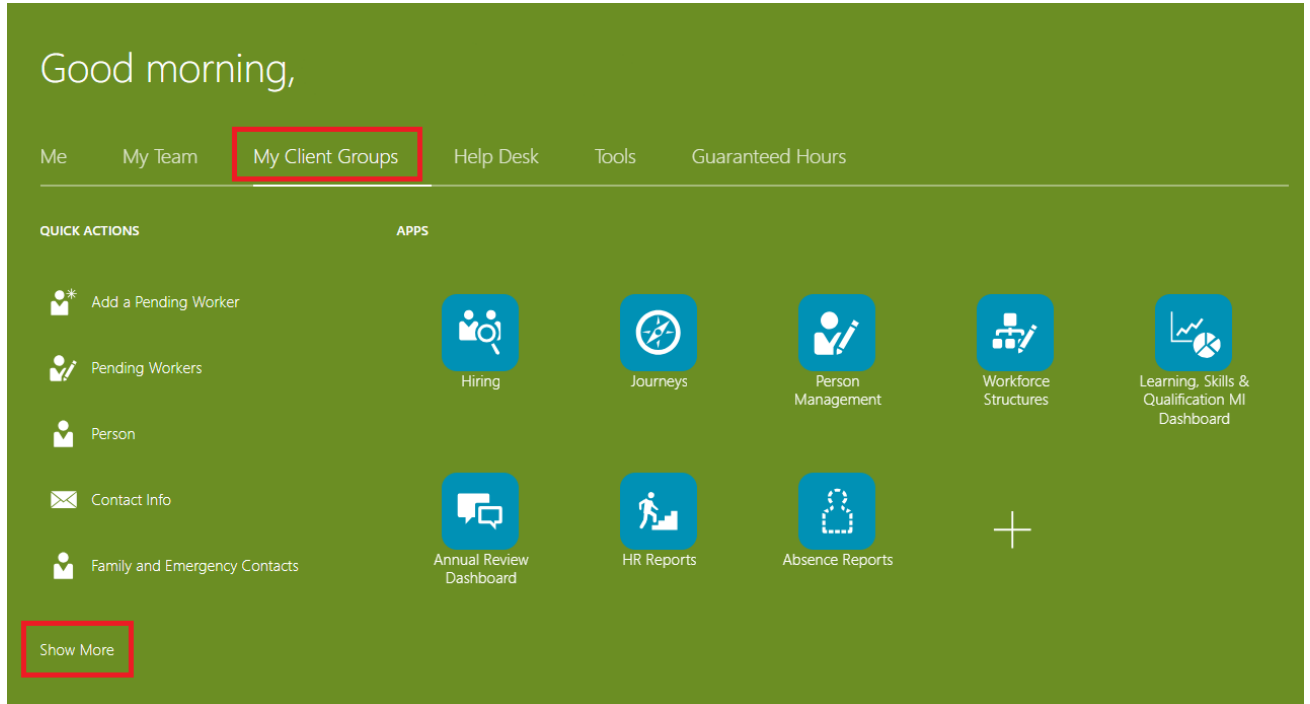
1. From the homepage, go to the **My Client Groups** tab and select the **Person Management** app.
2. Enter either the employee's **Name** or **Person Number** and click on the **Search** button. Click on their name (blue text) to open their record.
3. Click on the **Tasks** icon and select **Absence Records** under the **Absences** heading.
4. Click on the **View** button and select **About This Record**.
5. A pop up will appear in the middle of the screen providing information on who created the record, when the record was created, who updated the record last and when the record was last updated.

In Detail

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

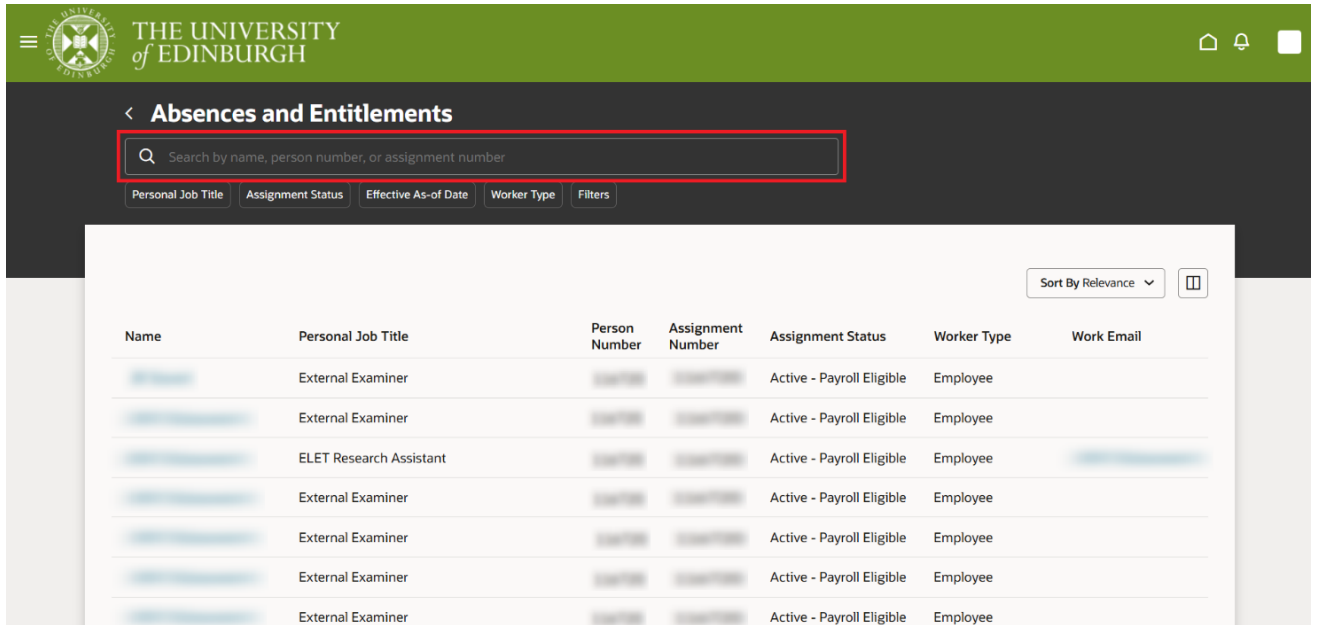
Entering an Absence on behalf of an Employee

1. 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.



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.

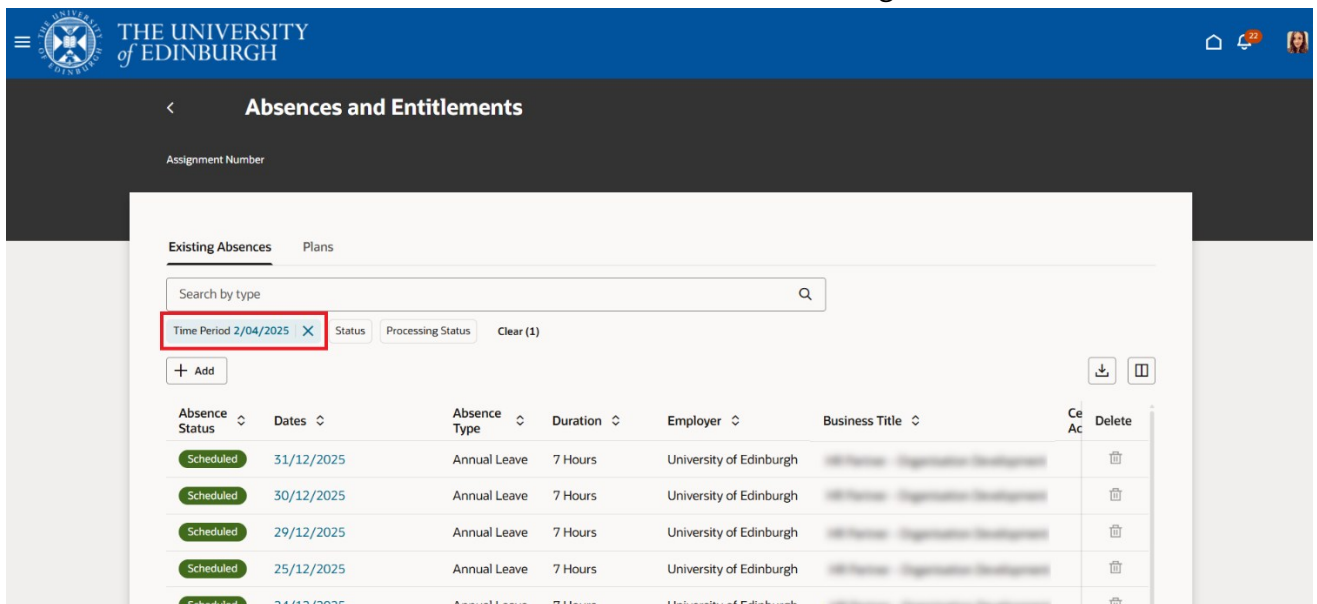
Note: Inactive assignments are visible in the **Absences and Entitlements** app. If you select an inactive assignment, an error may appear. To ensure you are selecting an active assignment, you can change the **Assignment Status** filter below the Search bar to **'Active - Payroll Eligible'**.



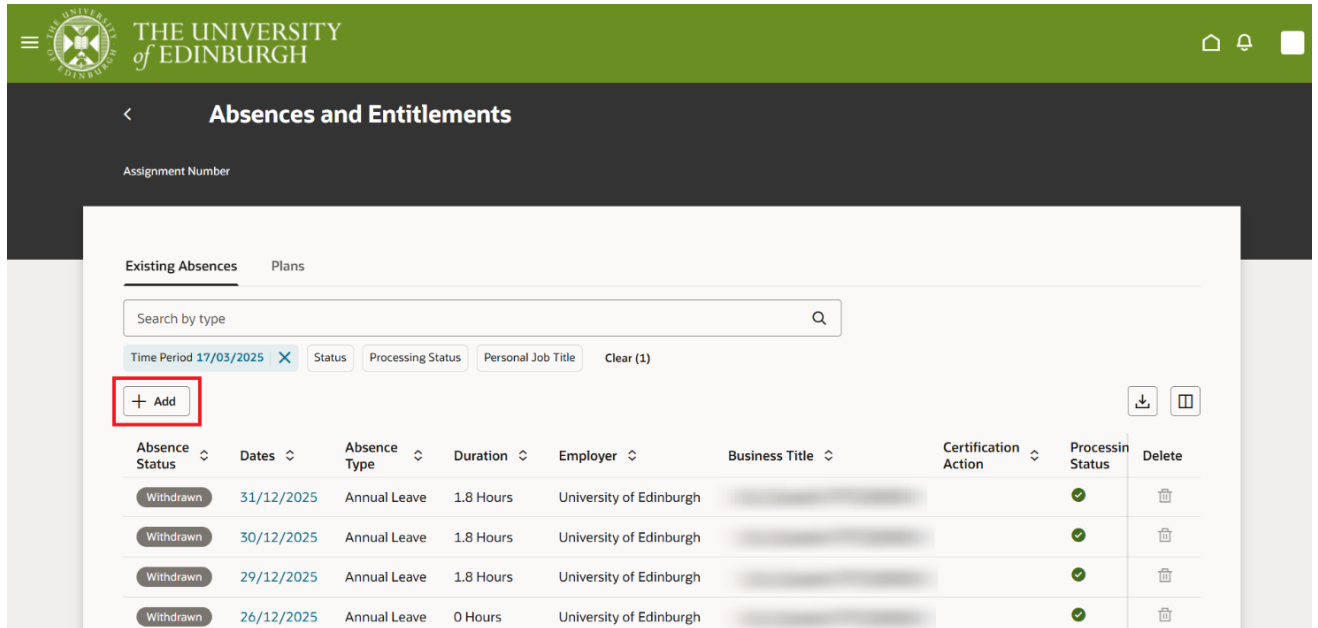
3. You will be taken to the employees **Existing Absences** tab by default.

Look for any absences that will overlap with the proposed leave dates. If you need to amend or delete an existing absence, please see the [Amending an Absence on Behalf of an Employee](#) or [Cancelling an Absence on Behalf of an Employee](#) section of this guide.

Note: The **Time Period** filter cannot be cleared but it can be changed to another date.

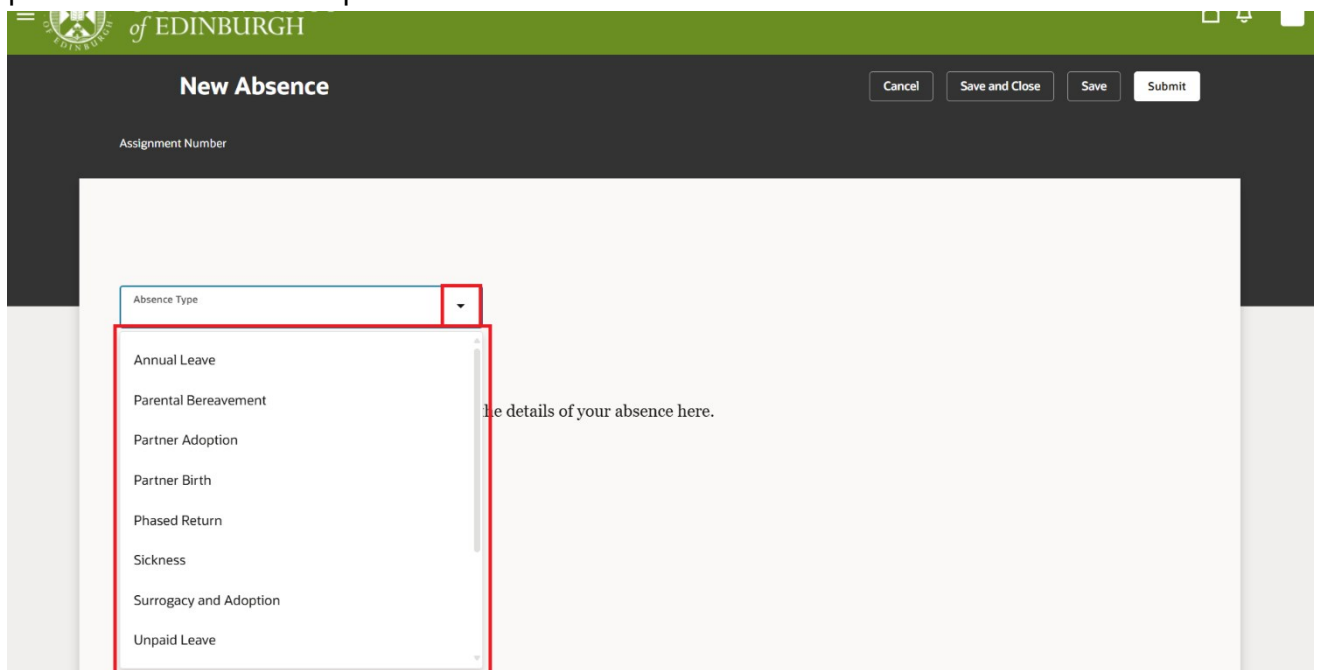


- Click on the **+ Add** button.



- Select the appropriate **Absence Type** from the list of options available in the dropdown menu. Alternatively, type the absence you are looking for in to the **Absence Type** field and select from the drop down.

Note: the absence types **Shared Parental Adoption**, **Shared Parental Birth** and **Bereaved Partner Paternity Leave** are for HR use only. If you have any queries regarding these absence types please raise a Service Request.



- If the employee has more than one assignment within your area, a **Personal Job Title** field may appear depending on the **Absence Type** you have selected. You will have two options to choose from:

- a. Leave the **Personal Job Title** field blank to submit an absence across all assignments.
OR
- b. Select a specific assignment from the **Personal Job Title** field. **Note:** Inactive assignments may appear in the drop down list, therefore, please ensure you have selected an **active** assignment.

7. If you are entering Annual Leave, the employee's **Absence Type Balance** will appear under the **Absence Type** field. This will indicate how much leave the employee has left to take.

The screenshot shows the 'New Absence' form. At the top, there is a green header with the University of Edinburgh logo and navigation icons. Below the header, the form title 'New Absence' is displayed, along with 'Cancel', 'Save and Close', 'Save', and 'Submit' buttons. The form contains several fields: 'Assignment Number' (text), 'Absence Type' (dropdown menu showing 'Annual Leave'), 'Personal Job Title' (dropdown menu showing 'Postgraduate Programme Administrator'), 'Absence Type Balance' (text field showing '98.27 Hours', highlighted with a red box), and a 'Dates' section with 'Start Date', 'End Date', and 'Start Date Duration' fields, each with a calendar icon and a 'Required' label.

8. In the **Dates** section click on the calendar icon and select the **Start Date** and **End Date**, or click on the **Open Ended** toggle if applicable. The open absence must be closed off upon return following the [Amending an Absence on Behalf of an Employee](#) section in this guide.

This screenshot is identical to the one above, showing the 'New Absence' form. In this view, the 'Start Date' and 'End Date' fields in the 'Dates' section are highlighted with a red box, indicating the step where the user should select the dates for the absence.

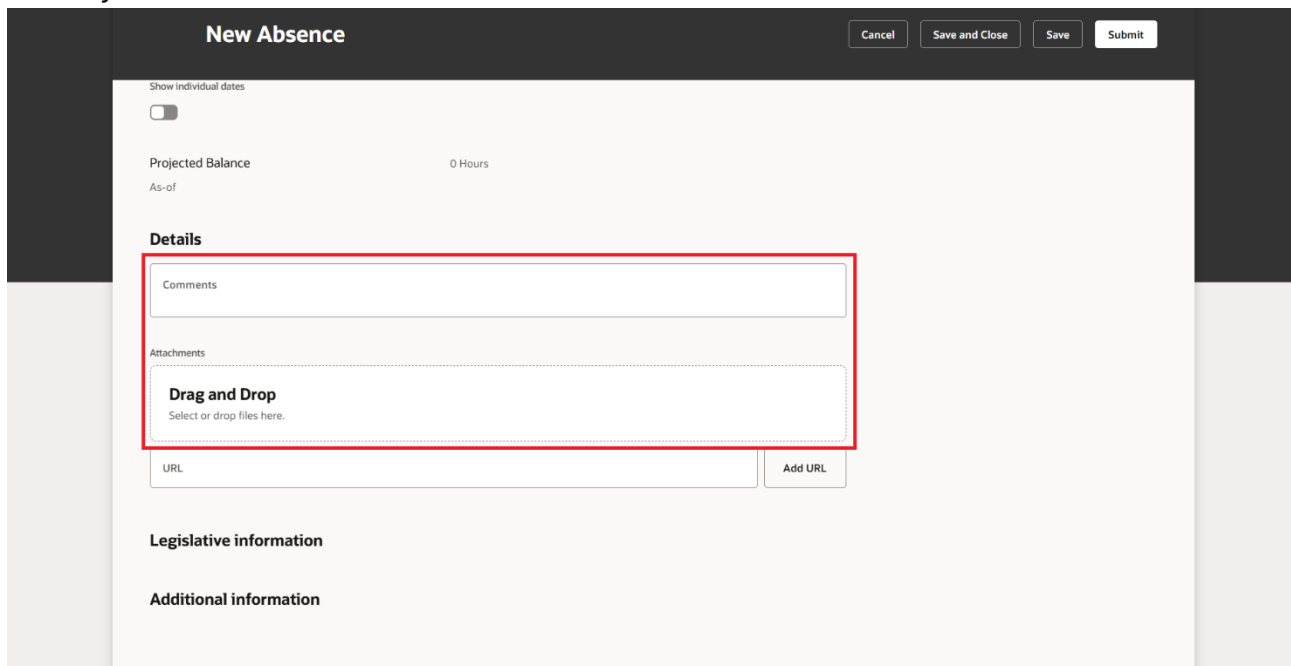
9. If you are entering **Annual Leave**, there will be a **Projected Balance** field under the **Show individual dates toggle**. This field only shows you what the employee's Annual Leave Balance is with effect from the End Date you have entered and **does not** take into account any future leave **after** the End Date you have entered.

The screenshot shows the 'New Absence' form. At the top right, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the title, there is an 'Assignment Number' field. The form contains several sections: 'Absence Type' (set to 'Annual Leave') and 'Personal Job Title' (set to 'Postgraduate Programme Administrator (Diploma)'); 'Absence Type Balance' (98.27 Hours); 'Dates' section with 'Start Date' (17/11/2025) and 'End Date' (20/11/2025), each with a calendar icon, and corresponding 'Start Date Duration' and 'End Date Duration' (both 7.75); 'Duration' (31 Hours); and a 'Show individual dates' toggle switch. At the bottom, the 'Projected Balance' is shown as 113.77 Hours, 'As-of 20/11/2025', with a 'Calculate' link. This entire section is highlighted with a red rectangular box.

10. In the **Details** section, if it applies to the absence type, choose a reason from the Reason drop-down list (e.g., if you are recording an **Unauthorised Absence** for an employee who is on a Skilled Worker or Temporary Worker Sponsored Researcher Visa, select the Reason '**UKVI**' for sponsored employees).

The screenshot shows the 'New Absence' form. At the top right, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. Below the title, there is an 'End Date' field with a calendar icon and a 'Required' label. Below that is a 'Show individual dates' toggle switch. The 'Projected Balance' is shown as 0 Hours, 'As-of'. The 'Details' section contains a 'Reason' dropdown menu, which is highlighted with a red rectangular box. The dropdown menu is open, showing 'UKVI' as the selected option. Below the dropdown menu, there is a text input field. At the bottom, there are sections for 'Legislative information' and 'Additional information'.

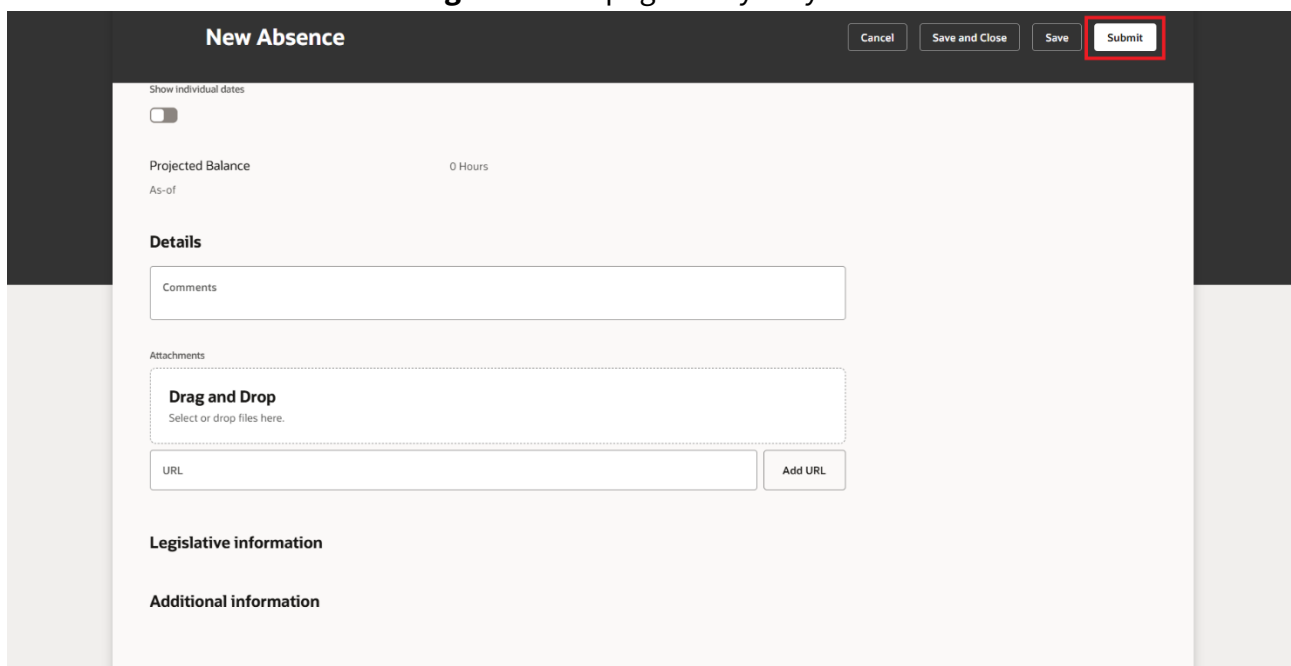
11. Add any **Comments** or **Attachments** if needed.



The screenshot shows the 'New Absence' form interface. At the top right, there are buttons for 'Cancel', 'Save and Close', 'Save', and 'Submit'. The form content includes a toggle for 'Show individual dates', a 'Projected Balance' of '0 Hours', and an 'As-of' field. Below this is a 'Details' section containing a 'Comments' text area and an 'Attachments' section with a 'Drag and Drop' area and a URL input field with an 'Add URL' button. Further down are sections for 'Legislative information' and 'Additional information'. A red rectangular box highlights the 'Comments' and 'Attachments' sections.

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

Note: Clicking **Save and Close** or **Save** will not submit complete the request, instead, the request will be saved as a draft in **Existing Absences** page ready for you to amend later.

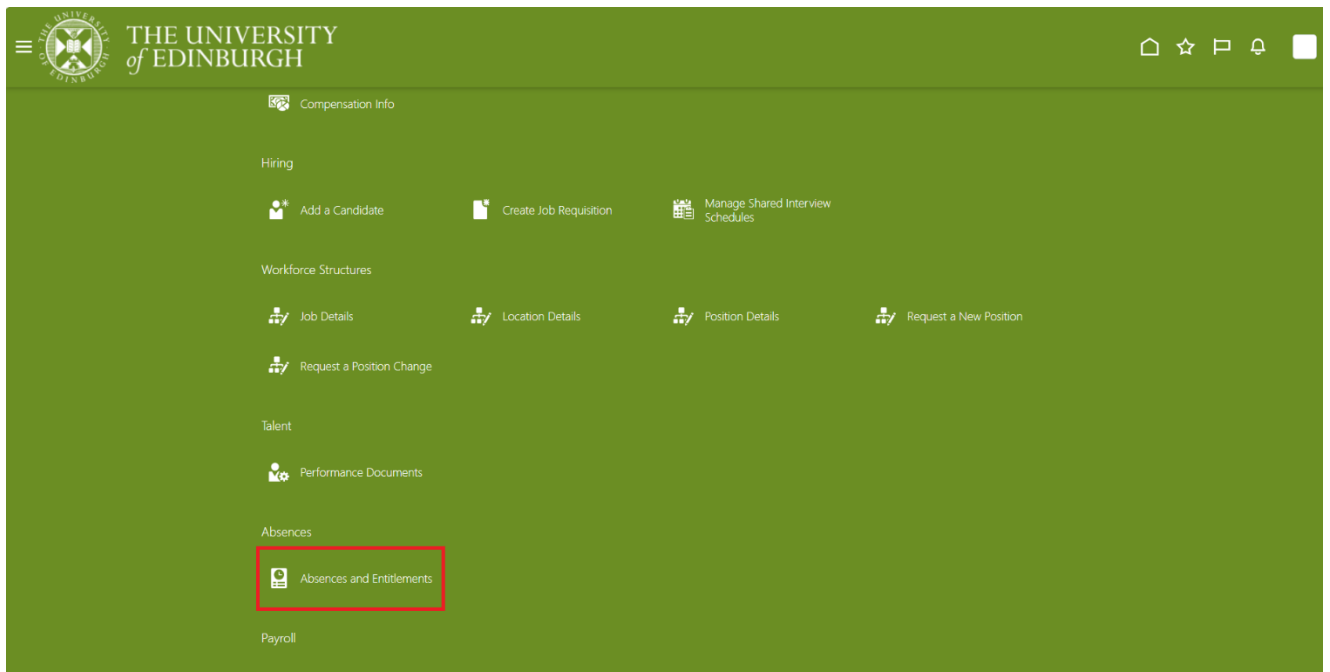
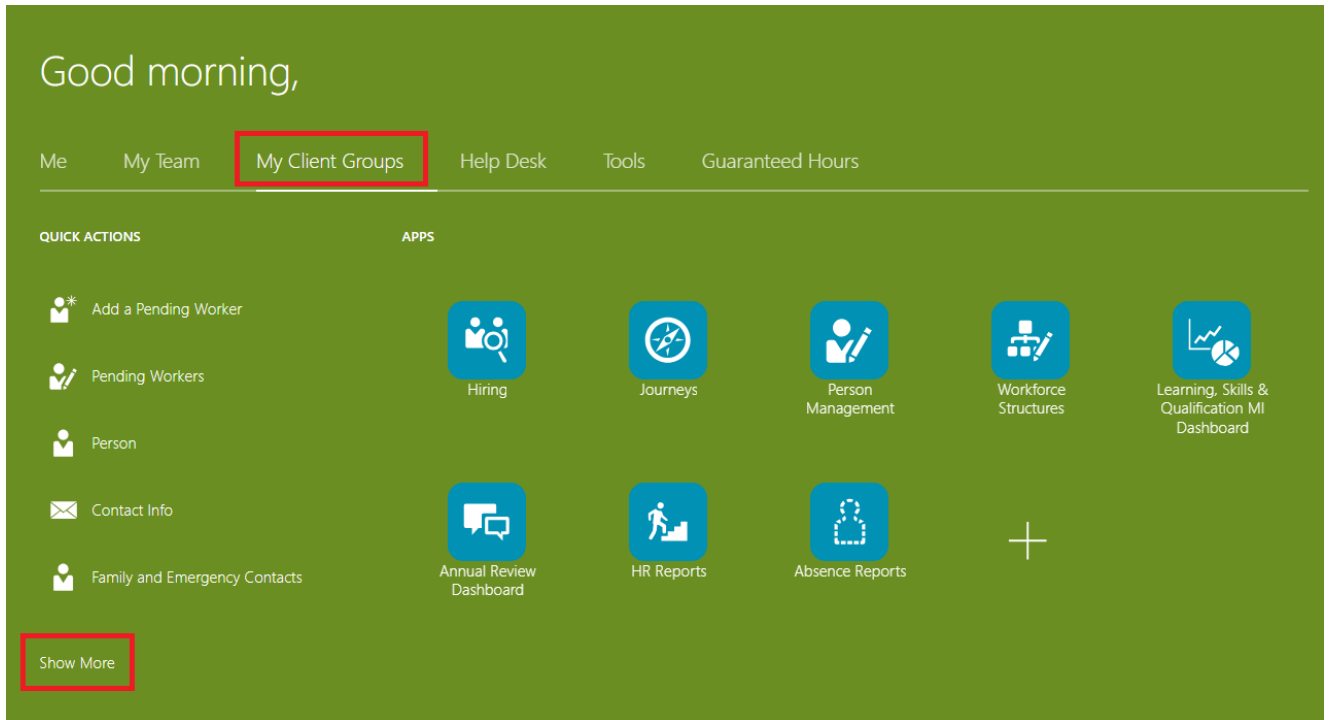


This screenshot is identical to the previous one, showing the 'New Absence' form. In this version, the 'Submit' button at the top right is highlighted with a red rectangular box.

When you create an absence record on behalf of an employee, it automatically approves and you will not receive a notification.

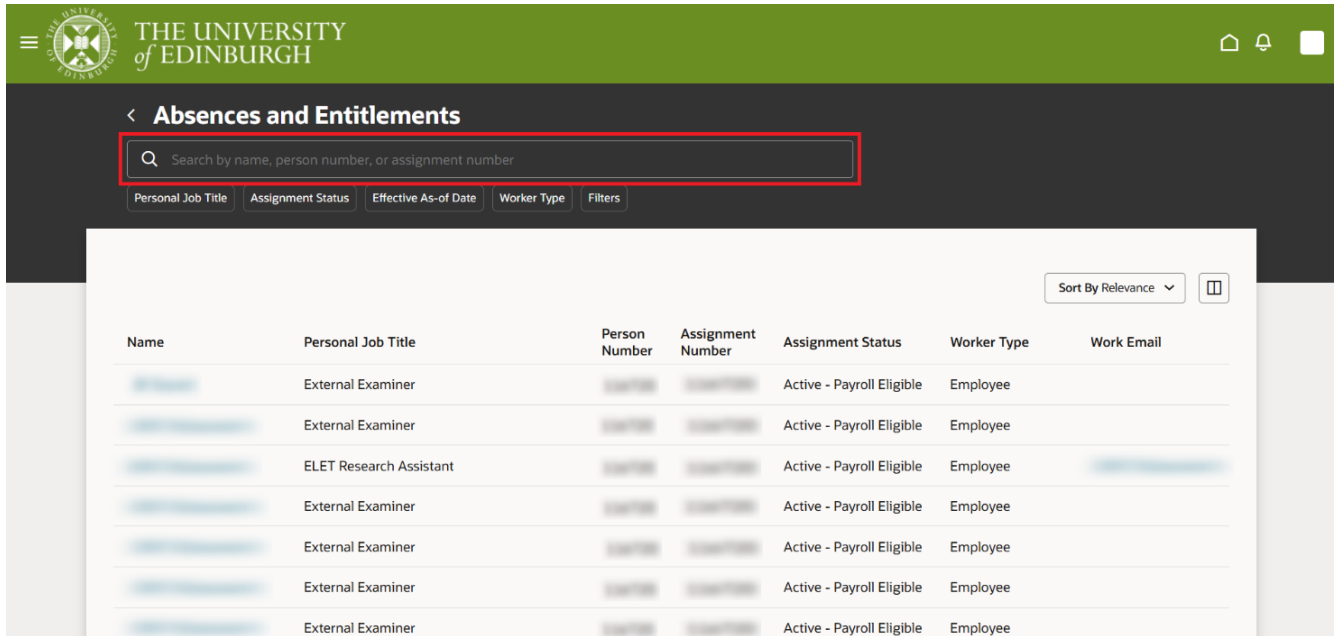
cancelling an Absence on behalf of an Employee

1. 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.



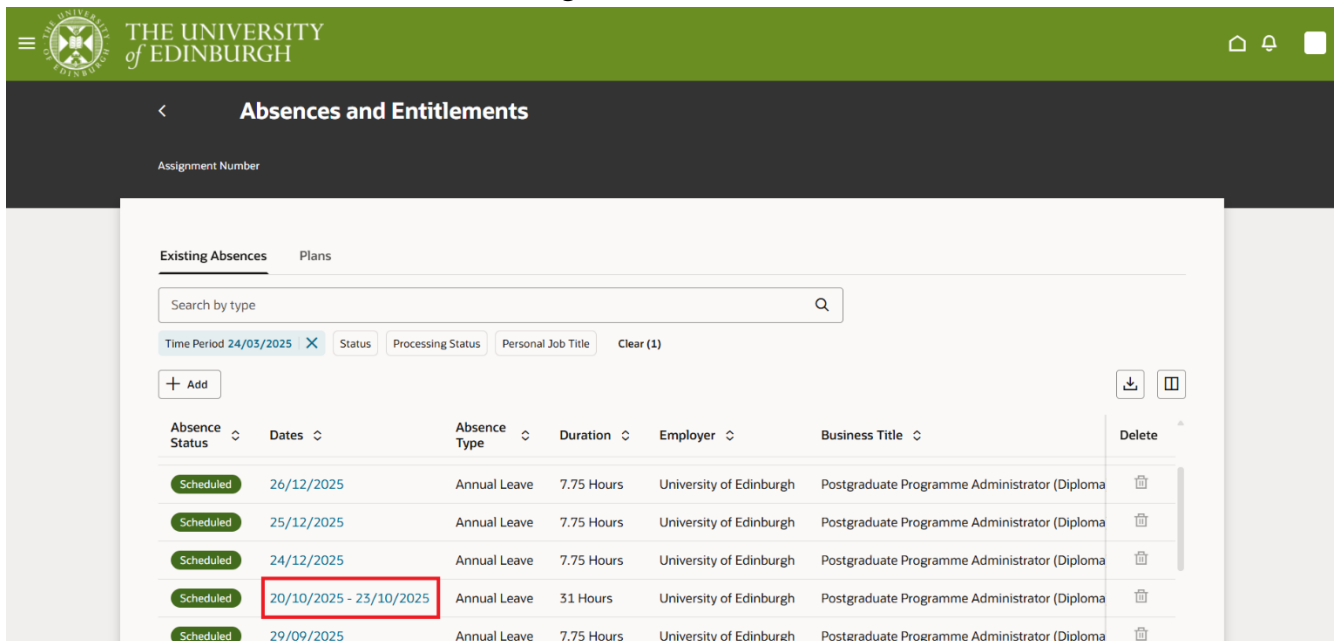
2. Type the employee's Name, Person Number or Assignment Number into the **Search bar** and click on their name to continue. You can use the **filters** below the Search bar to refine your search.

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 employees **Existing Absences** tab by default.

Find the absence you would like to cancel 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 is not in line with the University's policy.

- 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.

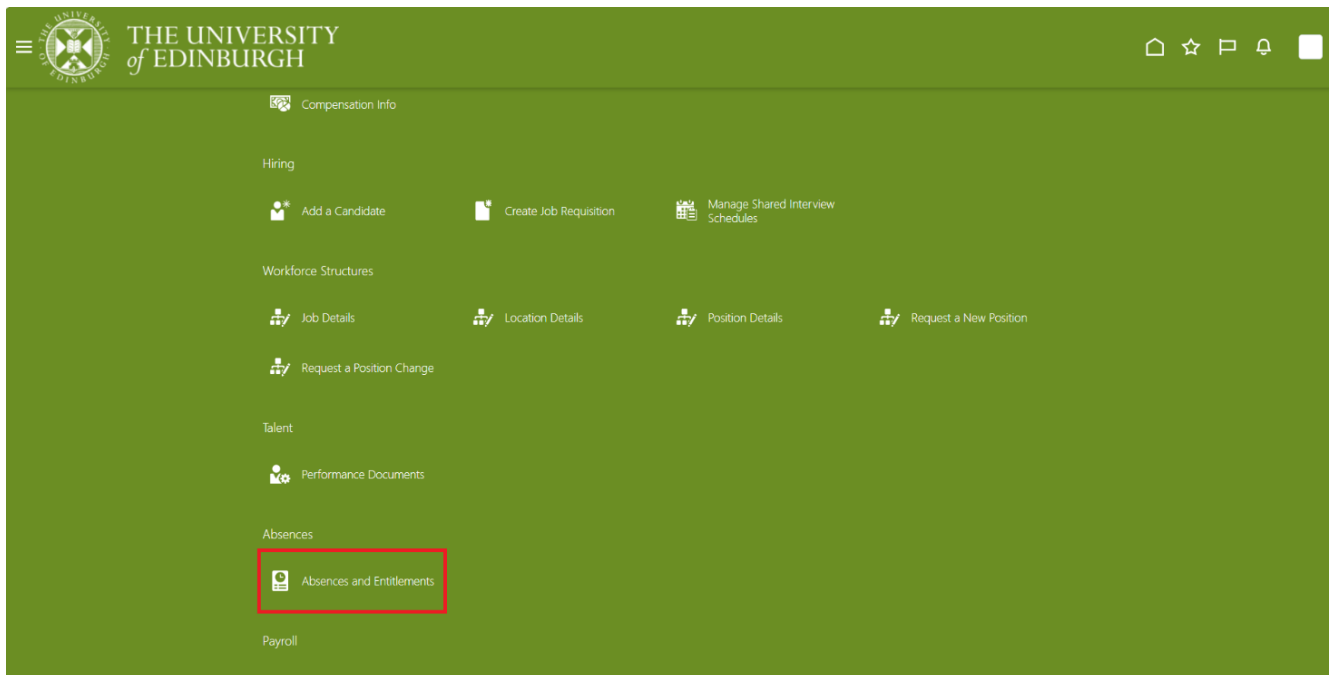
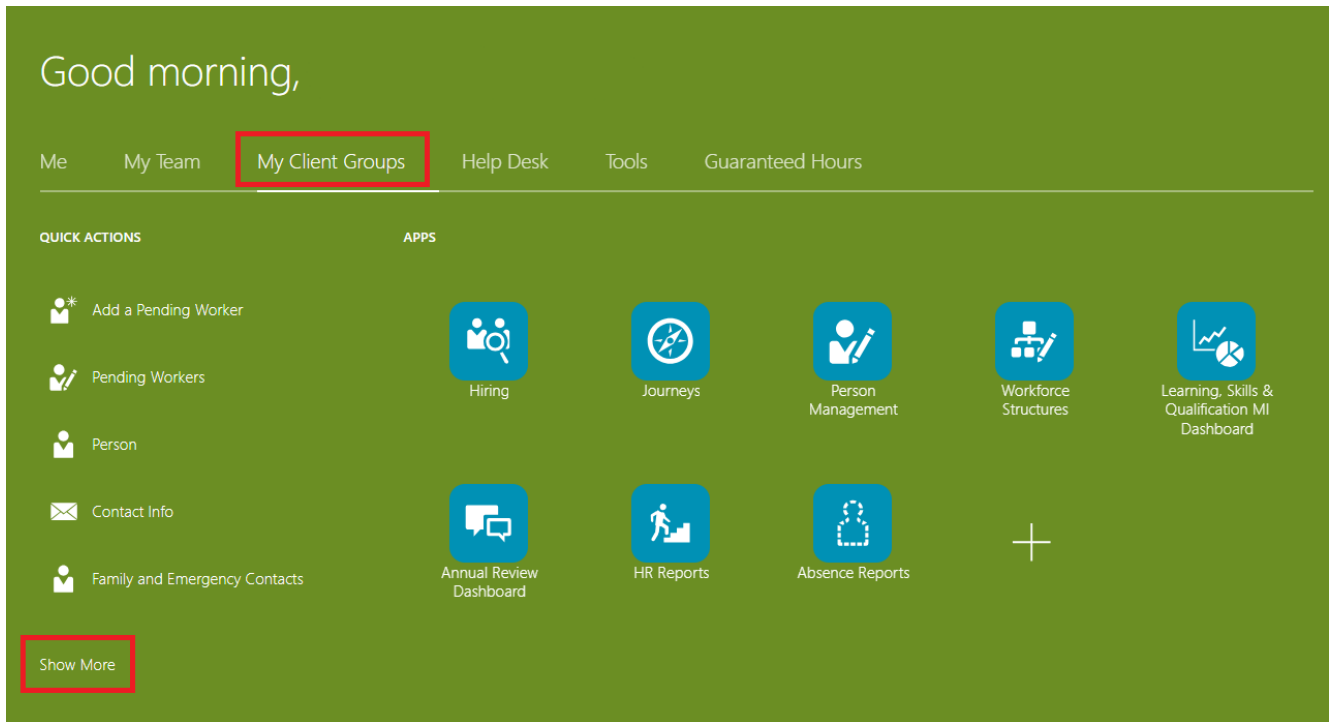
The screenshot displays the 'Edit Absence' interface. At the top, there is a green header with the University of Edinburgh logo and name. Below the header, the title 'Edit Absence' is centered. To the right of the title are three buttons: 'Cancel', 'Withdraw' (highlighted with a red box), and 'Submit'. The main content area is white and contains the following information:

- Assignment Number: (blank)
- 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.

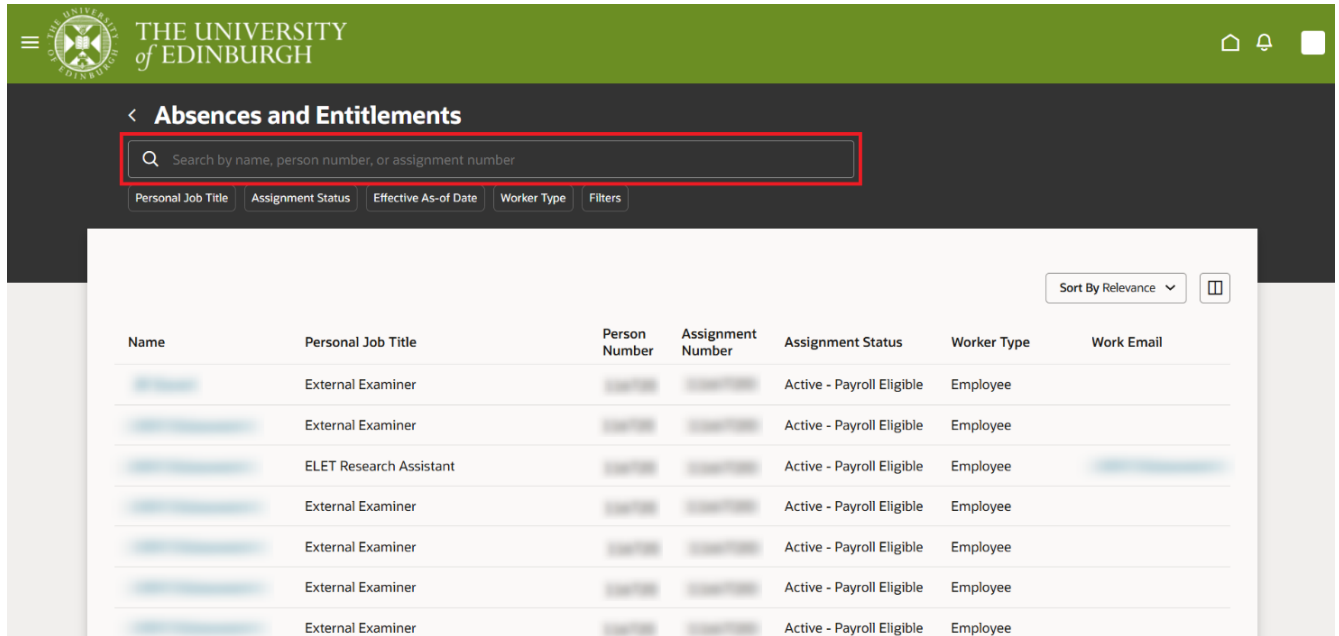
Amending an Absence on behalf of an Employee

1. 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.



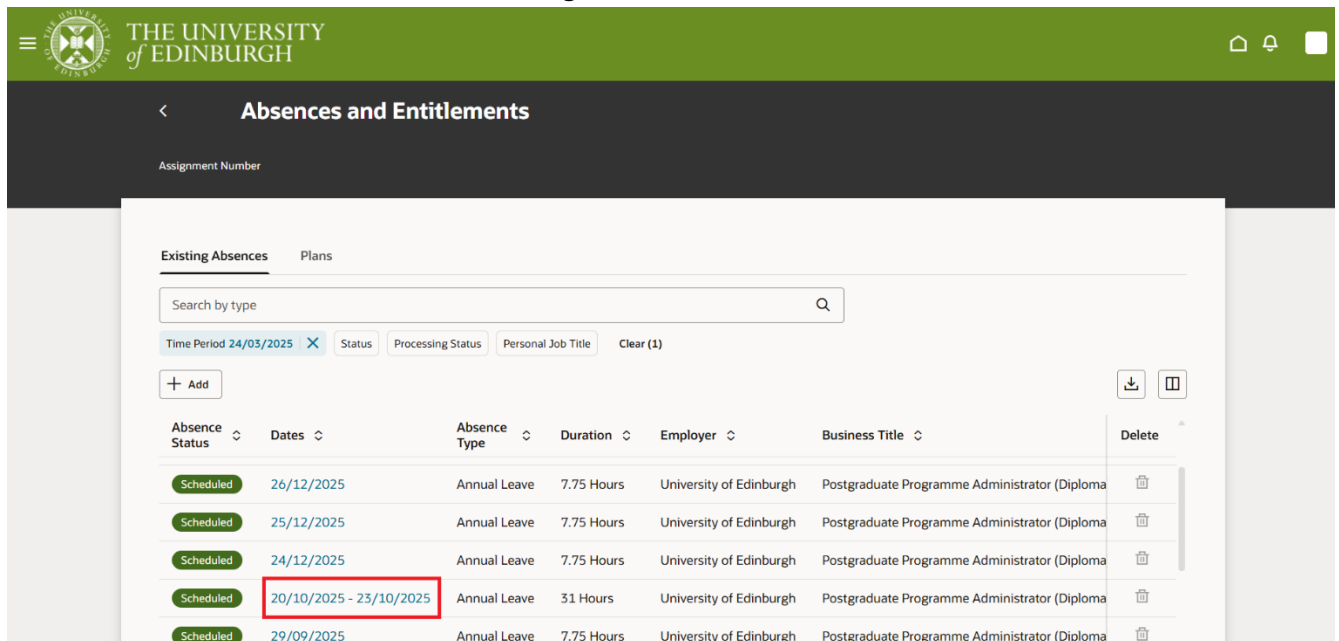
2. Type the employee's Name, Person Number or Assignment Number into the **Search bar** and click on their name to continue. You can use the **filters** below the Search bar to refine your search.

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.

Find 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.



4. 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.

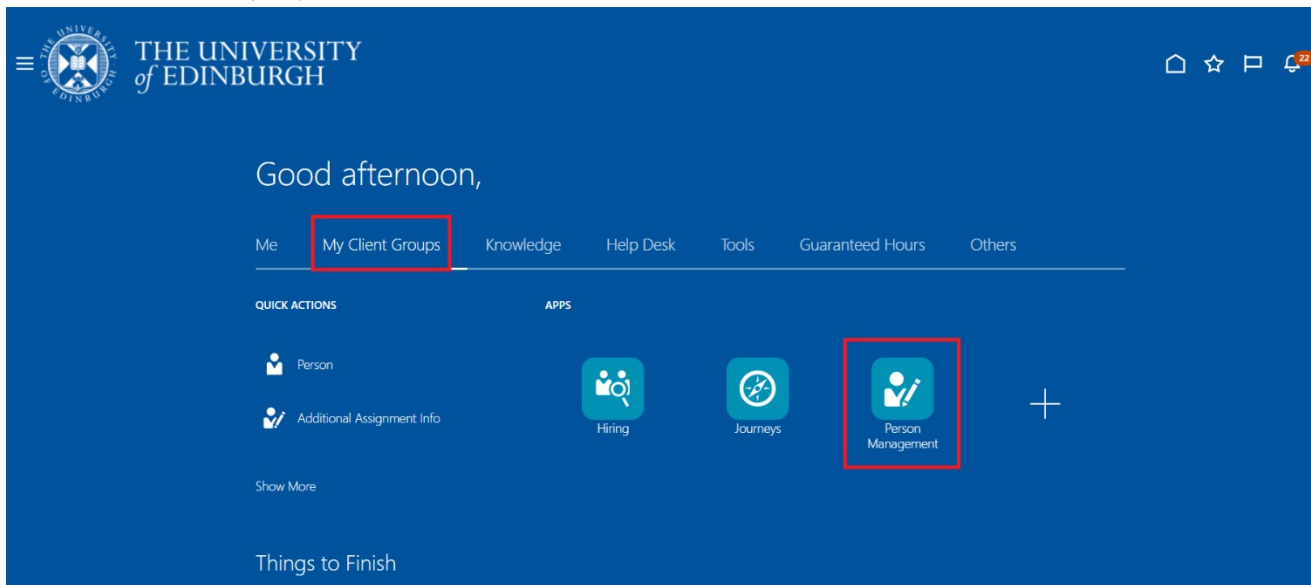
The screenshot displays the 'Edit Absence' interface. At the top, the University of Edinburgh logo and name are visible. The page title is 'Edit Absence'. In the top right corner, there are three buttons: 'Cancel', 'Withdraw', and 'Submit'. The 'Submit' button is highlighted with a red rectangular box. Below the title, there is a field for 'Assignment Number'. The main content area contains several input fields: 'Absence Type' with the value 'Annual Leave', 'Personal Job Title' with the value 'Personal Chair', 'Absence Type Balance' with the value '77 Hours', 'Start Date' with the value '24/12/2025', 'Start Date Duration' with the value '7.00', 'End Date' with the value '24/12/2025', and 'Duration' with the value '7 Hours'. Each date field includes a calendar icon.

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.

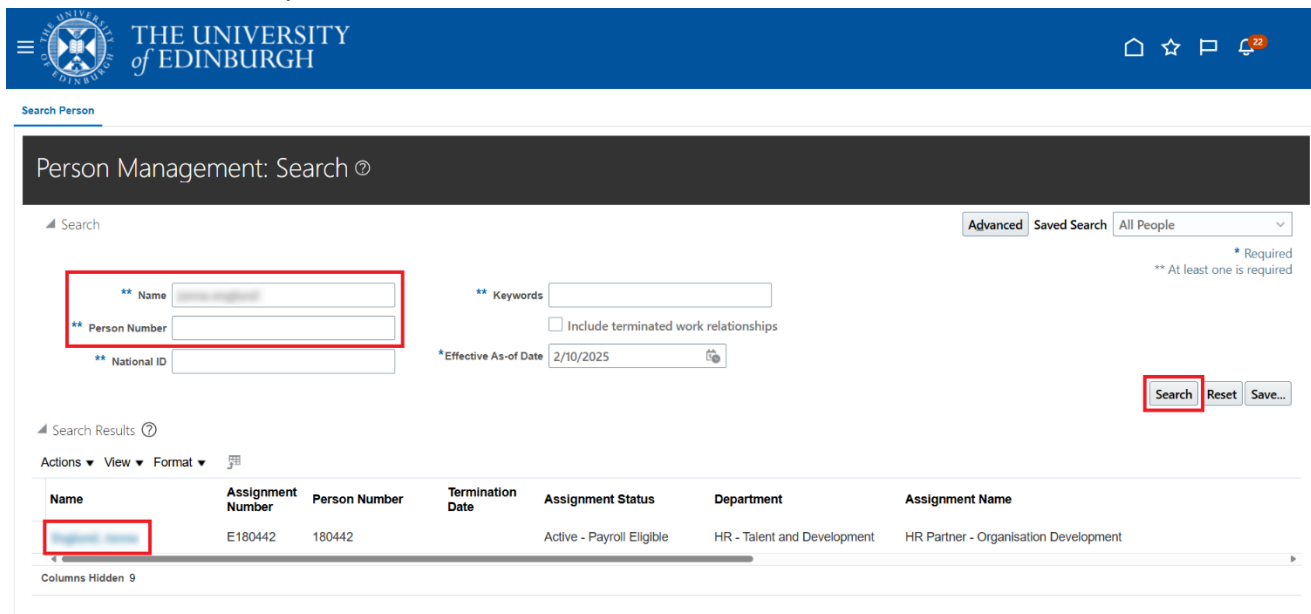
How to View Absence Record History

Note: the new Redwood Absence Admin screens do not have a record history feature, therefore, to view this you must use the ‘classic’ screens’ (see steps below).

1. From the homepage, go to the **My Client Groups** tab and select the **Person Management** app.



2. Enter either the employee’s **Name** or **Person Number** and click on the **Search** button. Click on their name (blue text) to open their record.



3. Click on the **Tasks** icon and select **Absence Records** under the **Absences** heading.

THE UNIVERSITY OF EDINBURGH

Person Management

Person Number

Employment x

Employment

Work Relationship ⓘ

Legal Employer University of Edinburgh Country United Kingdom

Worker Type Employee

Hire Date 10/10/2019

Assignment: HR Partner - Organisation Development ⓘ

Action Change of Line Manager Effective Start Date 4/08/2025 (2 of 2)

Action Reason New Hire of Manager Effective End Date

Assignment Details

- Compare
- Absences**
 - Absence Records**
 - Work Schedule Assignment
- Payroll
 - Costing for a Person
- Personal and Employment
 - Person
 - Allocate Checklists
 - Employment
 - Continuous Service Dates
 - Work Relationship
 - Areas of Responsibility
 - Talent Profile
 - Document Records
 - Document Delivery Preferences

4. Click on the **View** button and select **About This Record**.

Manage Absences and Entitlements ⓘ

Absences

Most Recent or Current Absence

Type Annual Leave

Assignment

Dates 30/06/2025 - 14/07/2025

Status Completed

Duration 77.75 Hours

Pending Actions

Next Scheduled Absence

Type Annual Leave

Assignment

Dates 24/12/2025 - 24/12/2025

Status Scheduled

Duration 7 Hours

Existing Absences ⓘ

View Add Recalculate Time Period Last 6 months Type Status Export Detach

	Employer	Type	Assignment	Duration	Status	Processing Status
	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
29/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
25/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
24/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓

5. A pop up will appear in the middle of the screen providing information on who created the record, when the record was created, who updated the record last and when the record was last updated.

The screenshot displays a web application interface for managing absences. A central pop-up window titled "About This Record" is highlighted with a red border. The pop-up contains the following information:

- Created By:** FUSION_APPS_HCM_ESS_LOADER_APPID
- Creation Date:** 11/12/2024 5:30 PM
- Last Updated By:** SCHEDULER_HCM
- Last Update Date:** 13/08/2025 12:04 PM

The background interface shows a table of absence records. The table has the following columns: Dates, Employer, Type, Assignment, Duration, Status, and Processing Status. The data rows are as follows:

Dates	Employer	Type	Assignment	Duration	Status	Processing Status
31/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
30/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
29/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
25/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓
24/12/2025	University of Edinburgh	Annual Leave		7 Hours	Scheduled	✓

Appendix

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

Please refer to the [Leave and absence options](#) webpage for information on when each 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)
Bereaved Partner Paternity Leave	For HR use only
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 Absence and Leave Options 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	
Shared Parental Adoption	For HR use only

Shared Parental Birth	For HR use only
Sickness	Select a value from the dropdown menu in people and Money to record the sickness reason.
Special Paid Leave	Army Reserves/Volunteer Reserve Forces Bereavement Leave Compassionate Leave Emergency Domestic Situations Fertility treatment Funeral Jury Service Police Statement Voluntary Public Service/Leave for public duties Volunteering Activities Witness at Court
Surrogacy and Adoption	
Unauthorised Leave	UKVI – select this for a sponsored worker Unauthorised Leave
Unpaid Leave	Academic/Sabbatical Army reserves/Volunteer Reserve Forces Authorised Absence Campaigning for Election to Parliament Carers Leave Compassionate Leave Emergency Time off for Dependents Extend Unpaid Leave Representing your Country Unauthorised Absence Voluntary Public Service/Leave for Public Duties
Unpaid Parental Leave	

Version History

Version	Date	Description	Approved By
1.1	N/A	Draft	
2.0	09 June 2025	Updated guide to new format and separated from Line Manager guide to sickness absence.	M Easton
3.0	12 October 2025	<ul style="list-style-type: none">Updated guidance and screenshots to reflect the new Redwood changes in P&M.Removed 'Entering Unauthorised Absence on behalf of an Employee' section and added guidance specific to the absence type within the 'Entering an Absence on behalf of an Employee' section.Removed 'How to Adjust Leave Balances' section as there is already a separate guide on this.	M Easton
3.1	7 May 2026	<ul style="list-style-type: none">Added a note to 'Entering an absence on behalf of an employee' section that states the Shared Parental Birth, Shared Parental Adoption and Bereaved Partner Paternity Leave absence types are for HR use only.	NM

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.