



## People and Money system

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### HR Operations and School/Department Admin Guide- How to Adjust Absence Balances

HR Operations and School/Dept Admin

Estimated time to complete: 6 minutes

#### In Brief...

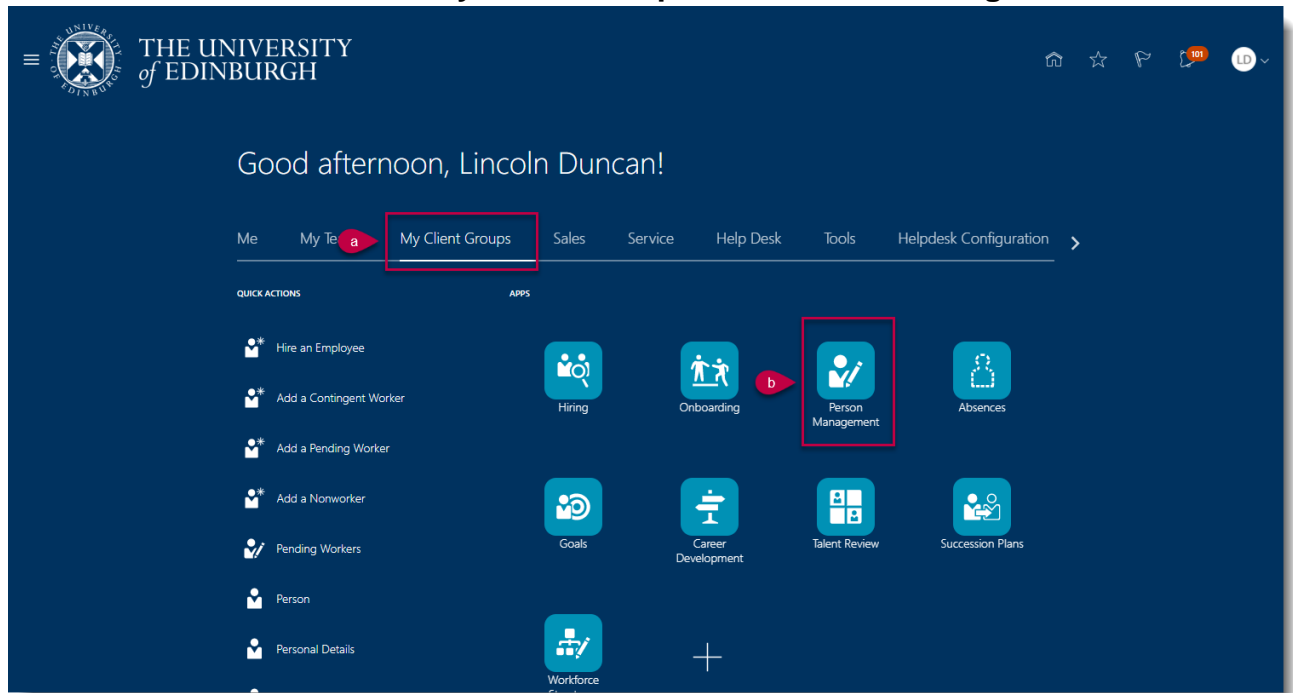
This is a simple overview of the process.

1. From the dashboard, click on **My Client Groups**, then **Person Management**
2. **Search** for and **select** the employee (by clicking on the link on their name)
3. Click on the **Tasks** icon and select **Absence Records**
4. Click on the **dropdown arrow on the Enrollments and Adjustments** button under Plan Balances and select **Adjust Balance**  
**Note:** In some instances, you might be see a >> icon. Please click on this and you will see the Enrollments and Adjustments button appear.
5. In the Adjust Balance pop up that appears, select the relevant **Reason** and **Date**, and enter the **Adjustment Amount**. In case you're looking to reduce the absence balance, ensure you **prefix a minus (-)** to the adjustment amount to get the correct figure.

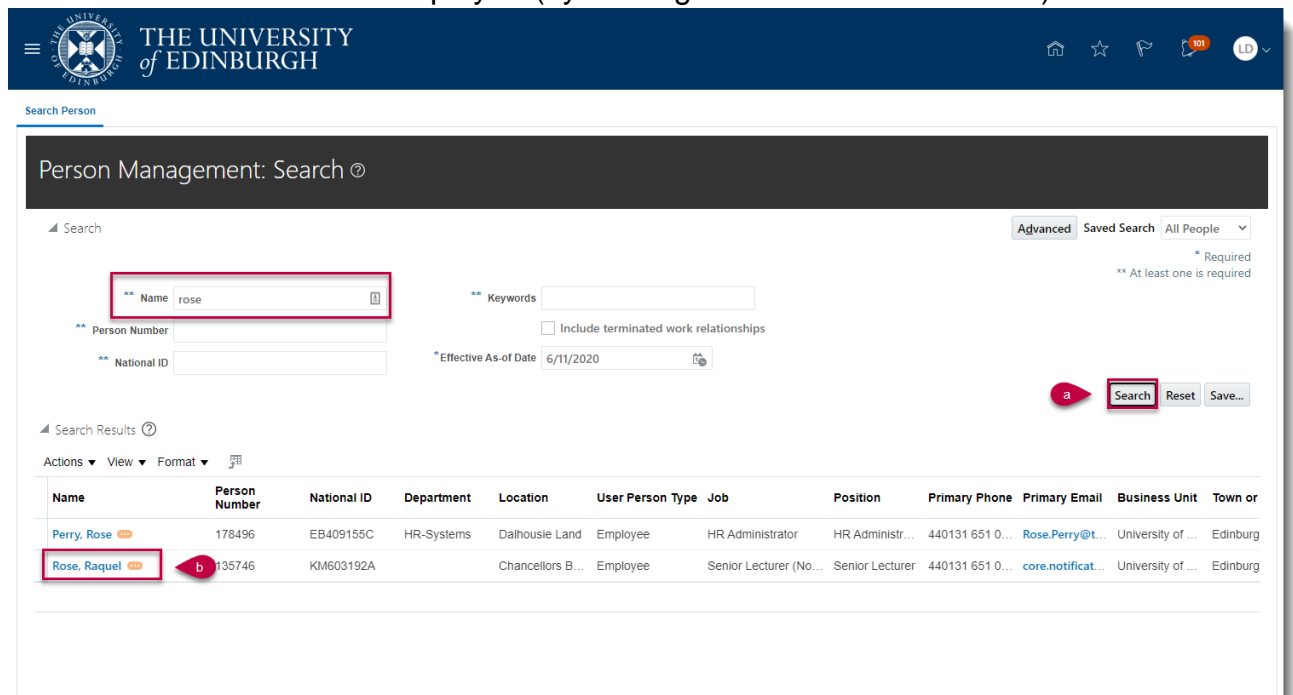
For detailed guidance, see the next section.

#### In Detail...

- From the dashboard, click on **My Client Groups**, then **Person Management**



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



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

The screenshot shows the 'Raquel Rose: Person Management' page. The 'Absence Records' menu item is highlighted with a red box and labeled 'a'. A red circle labeled 'b' is around the 'Tasks' icon in the top right navigation bar.

4. Click on the **dropdown arrow on the Enrollments and Adjustments** button under **Plan Balances** and select **Adjust Balance**

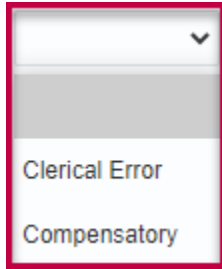
The screenshot shows the 'Manage Absences and Entitlements' page. The 'Enrollments and Adjustments' dropdown menu is open, and 'Adjust Balance' is highlighted with a red box and labeled 'a'. A red circle labeled 'b' is around the 'UoE Annual Leave' row in the table below.

Plan	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
UoE Annual Leave	Accrual	Active	1/11/2019		31/12/2020	280 Hours
UoE PH	Accrual	Active	29/09/2020			0 Hours

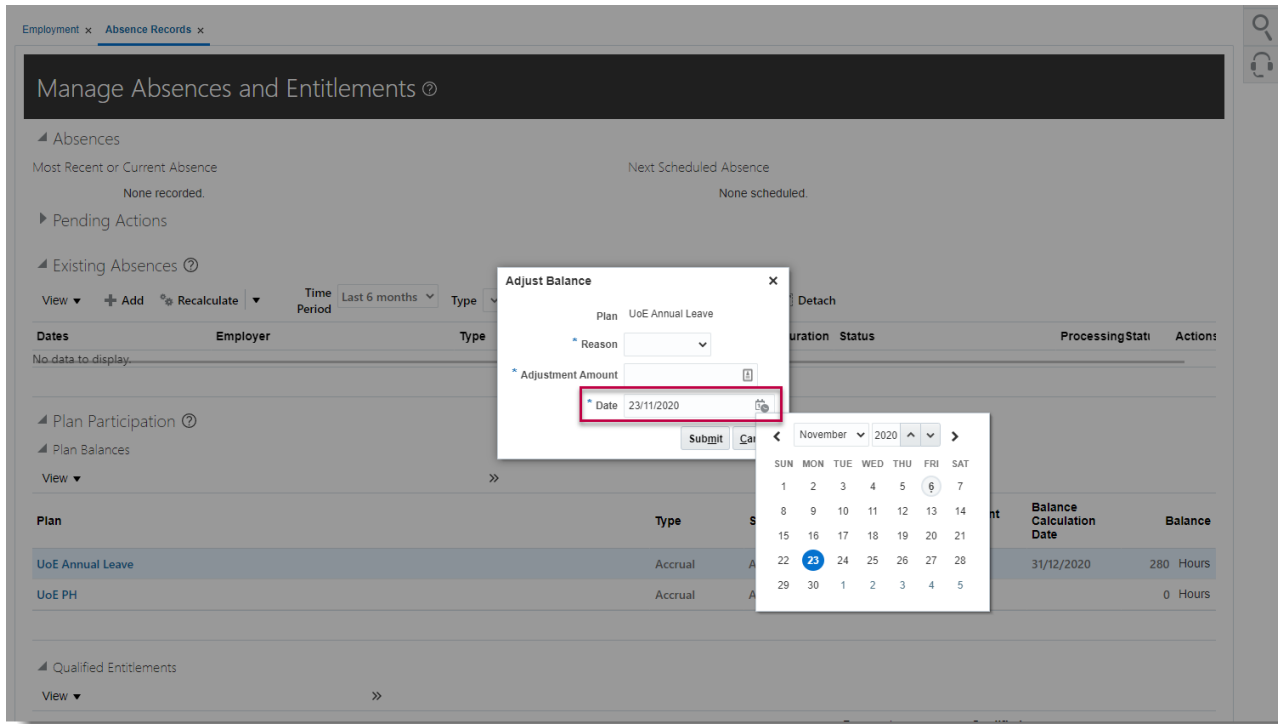
**Note:** In some instances, you might be see a >> icon. Please click on this and you will see the Enrollments and Adjustments button appear.

5. In the Adjust Balance pop up that appears,

a. select the relevant Reason



b. select the relevant Date

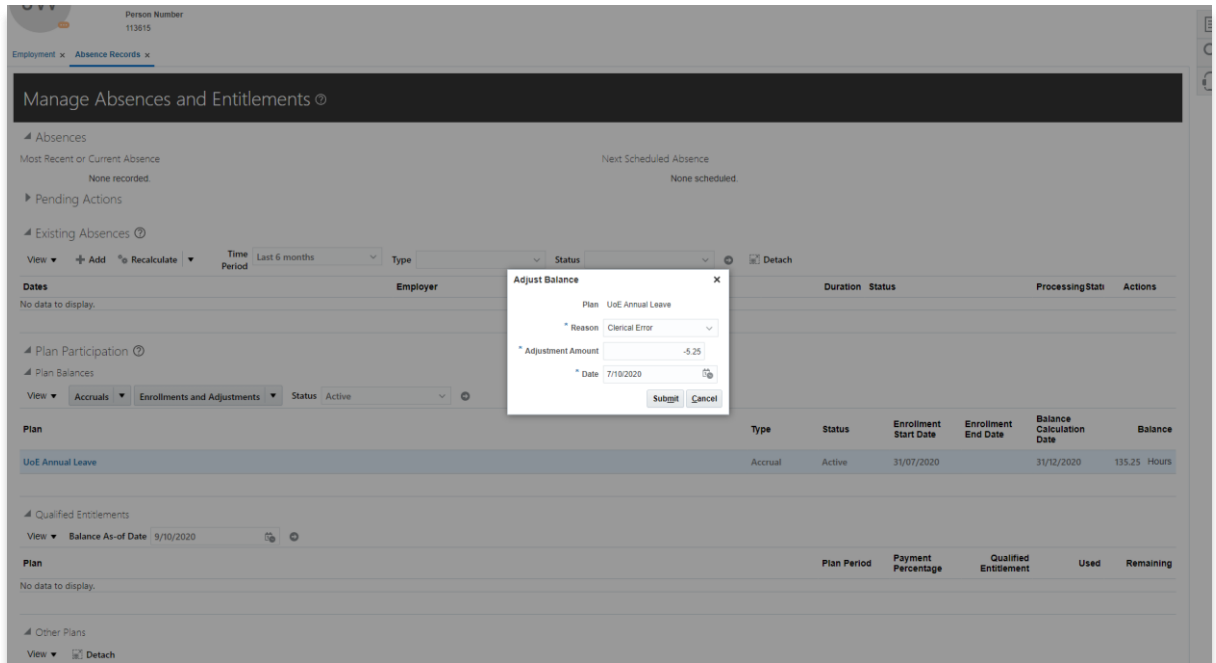
A screenshot of a web application interface titled 'Manage Absences and Entitlements'. The interface includes sections for 'Absences', 'Pending Actions', 'Existing Absences', 'Plan Participation', and 'Qualified Entitlements'. An 'Adjust Balance' dialog box is open, showing 'Plan: UoE Annual Leave', 'Reason' (dropdown), 'Adjustment Amount' (input), and 'Date' (calendar). The date '23/11/2020' is selected in the date field. A calendar for November 2020 is also visible, with the 23rd highlighted. The background shows a table with columns for 'Plan', 'Type', 'Status', 'Duration', 'Status', 'Processing Status', and 'Actions'.

Plan	Type	Status	Duration	Status	Processing Status	Actions
UoE Annual Leave	Accrual	A				
UoE PH	Accrual	A				

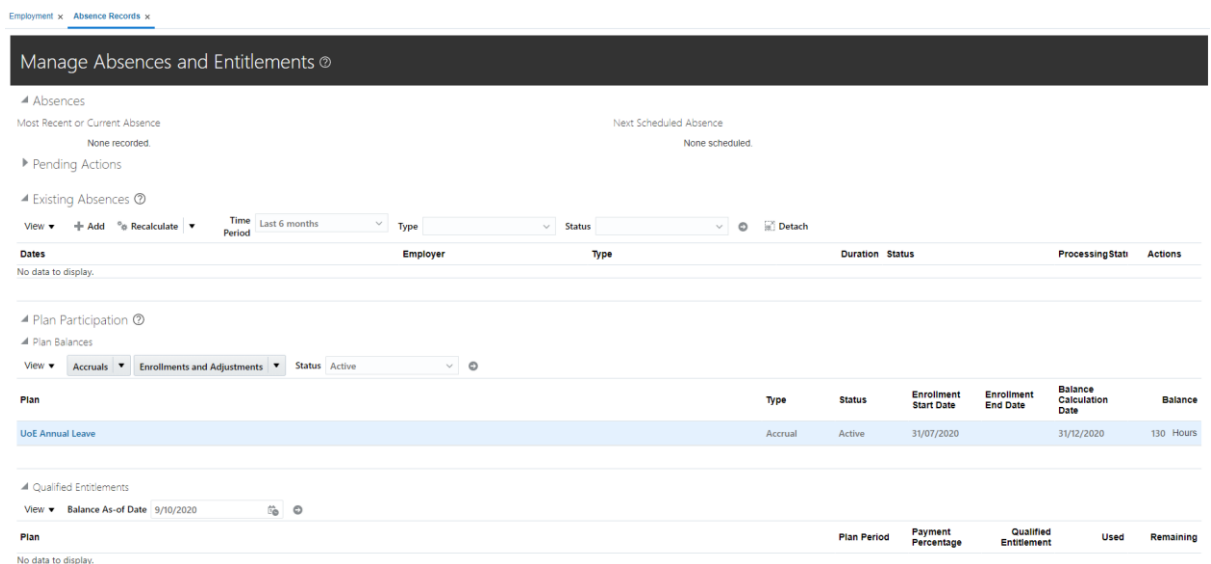
  

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

- c. Enter the **Adjustment Amount**. In case you're looking to reduce the absence balance, ensure you **prefix a minus (-)** to the adjustment amount to get the correct figure.



**Note** – Please choose the Date carefully within the Adjust balance box. It is important to note that this will be the date the adjusted balance takes effect.



E.g. in this example the employee had 135.25hrs shown in balance. It should have been 130hrs so we have deducted 5.25.

This is the result

## Glossary

Please refer to Glossary