People and Money system
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School/Department / HR Helpline/HR Operations Admin Guide- How to Adjust Absence Balances
Estimated time to complete: 6 minutes

Before you begin:
Read the Guide to Annual Leave.

Note that with effect from 1st January 2024 the system will prevent anyone going into a negative leave balance and will show an error message when this occurs. In exceptional circumstances for example where someone has started near the end of the year and won’t have accrued enough leave for the Christmas Closure days you should:

1) Refer to the Annual Leave Calculator for the balance of annual leave entitlement
2) Make a positive adjustment to the current year annual leave balance
3) Then future date a negative adjustment for the following leave year. This will ensure that any leave ‘borrowed’ will be deducted when the next annual leave year commences.

In Brief...

This 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...**

1. From the dashboard, click on **My Client Groups**, then **Person Management**
2. **Search** for and **select** the employee (by clicking on the link in 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,
   a. select the relevant **Reason**
   
   ![Reason Selection](image_url)
b. select the relevant **Date**
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.