

People and Money system

We realise this formatting may not be accessible for all – to request this document in an alternative format please email or call <u>hrhelpline@ed.ac.uk</u>.

Employee Guide- How to Request, Cancel and Amend Annual Leave

Employee

Estimated time to complete: 2 minutes

Before you begin:

Read the Guide to Annual Leave.

If you hold multiple assignments, please refer to the user guide titled <u>'Employee Guide:</u> <u>How to request annual leave as a multiple assignment holder'.</u>

It is your responsibility to check that your annual leave balance is accurate and to speak to your line manager (or school/department administrator) if you think it is incorrect. Before querying anything, it is important to make sure that all annual leave dates have been entered on the system.

The <u>Annual Leave Policy</u> states you can't carry over a negative leave balance into the following year, i.e., you can't borrow leave from the next year's allowance. The system is set up to prevent anyone going into a negative balance and will show an error where this occurs.

If you have any questions about your annual leave balance please speak to your line manager or school/department administrator.

In Brief...

Requesting annual leave:

- 1. From the Home page, select the **Navigator** menu on the top left icon
- 2. Open the **Me** section, then select **Time and Absences**
- **3.** Select **Absence Balance** to check that you have enough leave remaining for the year before applying for more leave.

Note: Here you can select your Balance As-of Date as Current date or Last Calculation date (until the end of the year including pre-booked holidays such as Christmas holidays), the system defaults to Last Calculation date view.

- 4. Press **Back** and select **Team Schedule** to check department availability to check that your leave does not clash with that of other team members' where possible.
- 5. Press **Back** again and select **Add Absence**
- 6. Select the absence **Type** from drop down, and for booking annual leave, select **Leave.**
- 7. Enter the **Start Date** and **End Date**, ensuring that the **Absence Duration** correctly reflects the total number of hours of your absence at the rate of 7 working hours per day

Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments.

- 8. Then, press **Submit**
- 9. If you hold multiple assignments, you can book leave for select assignments:
 - a. Follow steps 1 & 2 and then select Add Absence
 - b. Select the Absence Type as Leave
 - c. In the When section, select Edit Entries _____, then Add _____
 - d. Select the Date and Assignment as appropriate
 - e. Then click **OK** or

Note: If you hold multiple assignments and want to apply leave to all assignments, just enter the dates on the first screen without selecting Edit Entries (please refer the user guide titled 'Employee Guide: How to request annual leave as a multiple assignment holder'_

10. If you hold multiple assignments and accidentally booked leave for all assignments, you can edit your leave request:

a. Go to Existing Absences

- b. Click on the **Pencil icon** / next to the assignment you don't want the absence record against
- a. Click on Edit Entries
- b. Then select **Delete** against each entry

11. Add any **Comments and Attachments** to the leave request and **Submit**.

For detailed guidance, see the <u>next section</u>.

Amending annual leave:

- 1. From the Home page, select the **Navigator** menu on the top left icon.
- 2. Open the Me section, then select Time and Absences
- 3. Select **Existing Absences** and click on the **Edit** *i*con next to the leave request you would like to amend

Note: To quickly find the absence you're looking for, **enter the type or status** of the absence into the keyword search bar on the absence page.

4. If the type of leave you're applying for is the same and you only wish to amend the dates, enter the new Start Date and End Date, ensuring that the Absence Duration correctly reflects the total number of hours of your absence at the rate of 7 working hours per day

Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments.

- 5. If the type of leave you're applying for is different to the original leave, Delete Delete the original absence and re-apply for the new leave as per the section above
- 6. If you hold multiple assignments, ensure you're requesting leave for the right assignment:
 - a. Go to Existing Absences
 - b. Click on the **Pencil icon** / next to the assignment you don't want the absence record against
 - c. Click on Edit Entries
 - d. Then select **Delete** against each entry

Note: please refer the user guide titled 'Employee Guide: How to request annual leave as a multiple assignment holder'

 Add any additional Comments and Attachments to the original leave request and Submit Submit. For detailed guidance, see the <u>next section</u>.

Cancelling annual leave:

- 1. From the Home page, select the **Navigator** menu on the top left icon.
- 2. Open the **Me** section, then select **Time and Absences**
- 3. Select **Existing Absences** and click on the **Edit** *i*con next to the leave request you would like to cancel
- 4. Click on **Delete** on the top bar. You see that the status against that leave request will say 'Withdrawn'.

Note: Past annual leave requests can only be deleted by your Line Manager.

For detailed guidance, see the <u>next section</u>.

In Detail...

Requesting annual leave:

- 1. From the Home page, select the **Navigator** menu on the top left icon.
- 2. Open the **Me** section, then select **Time and Absences**
- 3. Select **Absence Balance** to check that you have enough leave remaining for the year before applying for more leave

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| | Current Time Card Open your current time card. | Existing Time Cards Access all of your time cards. | Request Time Change Send a request to change your worked time. | | | | |
| | Add Absence Request an absence and submit for approval | Absence Balance Review current plan balances and absences taken or requested | Existing Absences View, change or withdraw existing absence requests | | | | |
| | Cash Disbursements | Calendar | Team Schedule | | | | |

Note: Here you can select your **Balance As-of Date** as **Current date** or **Last Calculation date** (until the end of the year including pre-booked holidays such as Christmas holidays), the default view will be Last Calculation Date.

4. Press **Back** and select **Team Schedule** to check department availability to check that your leave does not clash with that of other team members' where possible.

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| • | Current Time Card | Existing Time Cards | Request Time Change Send a request to change your worked time. |
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| [| Sell a portion of your plan balance. | Donate a portion of your plan balance to a coworker. | View your shifts, absences, and public holidays. |
| | View your team's shifts and absences. | | |

5. Press Back again and select Add Absence

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| | | | | AM Annika Massey | |
| | | ₿ | Current Time Card Open your current time card. | Existing Time Cards Access all of your time cards. | Request Time Change Send a request to change your worked time. |
| | | | Add Absence Request an absence and submit for approval | Absence Balance Review current plan balances and absences taken or requested | Existing Absences View, change or withdraw existing absence requests |
| | | | Cash Disbursements Sell a portion of your plan balance. | Calendar View your shifts, absences, and public holidays. | Team Schedule View your team's shifts and absences. |

6. Select the absence **Type** from drop down, and for booking annual leave, select **Leave**

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7. Enter the **Start Date** and **End Date**, ensuring that the **Absence Duration** correctly reflects the total number of hours of your absence at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day)

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| | Details | |
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| | Comments | |

Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments.

- 8. Then, press Submit
- 9. If you hold multiple assignments, you can book leave for select assignments:
 - a. Follow steps 1 & 2 and then select Add Absence
 - b. Select the Absence Type as Leave
 - c. In the When section, select Edit Entries

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d. Then select Add

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c. Select the Date and Assignment as appropriate

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| | *Type Leave | ~ | | Absence Type Balance 96.8 Hours | | |
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| | *Date dd/mm/yyyy Assignment Select a value | * | Absence Duration 0 Hours | | | |
| | Total Absence Duration | | | O Projected Balance Calculate | | |
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d. Then click OK

Note: If you hold multiple assignments and want to apply leave to all assignments, just enter the dates on the first screen without selecting Edit Entries.

- 10. If you hold multiple assignments, ensure you're requesting leave for the right assignment:
 - a. Go to Existing Absences

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| | | Current Time Card | Existing Time Cards Access all of your time cards. | Send a request to change your worked time. | |
| | | Add Absence Request an absence and submi approval | t for Review current plan balances absences taken or requested | Ind Existing Absences View, change or withdraw existing absence requests | |
| | | Calendar View your shifts, absences, and holidays. | public Team Schedule View your team's shifts and al | sences. | _ |

b. Click on the **Pencil icon** next to the assignment you don't want the absence record against

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| | Absences | | | | + Add | | | | |
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| | Leave: 42 Hours 16/09/2020 - 18/09/2020 | Aw | waiting approval | | 1 | | | | |
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c. Select **Edit Entries**, then click on the pencil icon against the individual entry you would like to edit/delete

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| | | Projected Balance Calculate |
| | Details | |
| | Comments and Attachments | |

- d. Select Delete against each entry
- 11. Add any **Comments and Attachments** to the original leave request and **Submit**.

| Add Abse Annika Massey | | Save and | d Close | Sub <u>m</u> it | Cancel |
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| | Comments and Attachments Comments Attachments Attachments Drag files here or click to add attachment v | | | | |
| | Legislative Information | | | | |

Note: Especially while applying for **half day leave**, mention in the comments what **time** you would like to apply leave for.

Be aware that by selecting **Save and Close** instead of **Submit** at this stage the request is <u>not</u> submitted to your Line Manager but instead it will show in the **Existing Absences page** as **Saved**.

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| | Absences | | | + Ad | dd | | | |
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| | Search by type or status | | Sort By Date | 9 | \sim | | | |
| | Maternity: 238 Calendar Days 9/06/2021 - 1/02/2022 | Scheduled | | | | | | |
| | Leave: 7 Hours 12/01/2021 - 12/01/2021 Undergraduate Medicine - Year Coordinator | Saved | | | / | | | |
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If you would like to complete the request simply click the pencil icon to the right of the saved request. You can then edit the absence, **Submit** will confirm the request with your Line Manager as normal or **Delete** will remove it completely.

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| | *Type Leave *Personal Job Title Undergraduate | Medicine - Year Coordinator | (Current) | | |
| | When | | | Edit Entries | |
| | *Start Date and Duration | 7 Hours | Absence Duration | | |
| | 12/01/2021 | 7 Hours | 7 Hours | | |
| | 12/01/2021 | | | | |
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Amending annual leave:

1. From the Home page, select the **Navigator** menu on the top left icon.

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| | Document Records | | | Onboarding | Checklist Tasks | Pay | | | | | | |
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| \bowtie | Contact Info | | B | 1¥ | | \mathbf{E} | | | | | | |
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| 4 | Public Info | | | | | | | | | | | |
| £ | Change Photo | | Learning | Benefits | Current Jobs | A Wellness | | | | | | |

2. Open the Me section, then select Time and Absences

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| Sales | | | Career and | Personal | Learning | | | |
| Service | | | ✓ Performance | Information | | | | |
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| Others | | | ✓ Benefits | Current Jobs | Wellness | | | |

3. Select **Existing Absences** and click on the **Edit** icon next to the leave request you would like to amend

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| | | AM Annika Massey | | |
| • | Current Time Card Open your current time card. | Existing Time Cards Access all of your time cards. | Request Time Change Send a request to change your worked time. | |
| ۲ | Add Absence Request an absence and submit for approval | Absence Balance Review current plan balances and absences taken or requested | Existing Absences View, change or withdraw existing absence requests | |
| | Cash Disbursements Sell a portion of your plan balance. | Calendar View your shifts, absences, and public holidays. | Team Schedule View your team's shifts and absences. | |
| | | | | |

Note: To quickly find the absence you're looking for, **enter the type or status** of the absence into the keyword search bar on the absence page.

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| K AW Existing Absence | es | | | | | | |
| Absences | | | + Add | | | | |
| Last 6 months Search by type or st | atus Q | | Sort By Date ~ | | | | |
| Leave: 6 Hours 24/12/2020 - 24/ | 12/2020 | Scheduled | / | | | | |
| Leave: 32.5 Hours 7/09/2020 - 11/0 | | Completed | / | | | | |
| Leave: 3 Hours 4/09/2020 - 4/09 | /2020 | Completed | / | | | | |
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4. If the type of leave you're applying for is the same and you only wish to amend the dates, enter the new Start Date and End Date, ensuring that the Absence Duration correctly reflects the total number of hours of your absence at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day)

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| AW Edit Abs | ence | | Dolete | Sub <u>m</u> it <u>Cancel</u> |
| | "Type Leave "Personal Job Title HR Co-ordinator (Current) | | | |
| | When | | Edit Entries | |
| | *Start Date and Duration 24/12/2020 1 24 Hours *End Date and Duration 24/12/2020 1 24 | Absence Duration 6 Hours | | |
| | | | Projected Balance Calculate | |
| | Details | | | |

Note: If the calculated Absence Duration is more than what you would expect to see at the rate of the agreed number of hours per day in your work pattern (for example, 7 hours/day), this will be a cue that the absence is being applied to multiple assignments. For example, below is applying for three days of annual leave from 1618 September but her Absence Duration shows up as 42 hours instead of 21 hours (as the work pattern dictates 7 working hours per day).

5. **If the type of leave you're applying for is different** to the original leave, **Delete** the original absence and re-apply for the new leave as per the section above

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| | When | | | Edit Entries | |
| | *Start Date and Duration 24/12/2020 (* *End Date and Duration 24/12/2020 (* | 24 Hours | Absence Duration 6 Hours | | |
| | | | | Projected Balance Calculate | |
| | Details | | | | |

- 6. If you hold multiple assignments, ensure you're requesting leave for the right assignment:
 - a. Go to Existing Absences

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|------------------|---|--|--|--|
| | | LC Lola Cowan | | |
| | Current Time Card Open your current time card. | Existing Time Cards Access all of your time cards. | Request Time Change Send a request to change your worked time. | |
| | Add Absence Request an absence and submit for approval | Absence Balance Review current plan balances and absences taken or requested | Existing Absences View, change or withdraw existing absence requests | |
| | Calendar View your shifts, absences, and public holidays. | Team Schedule View your team's shifts and absences. | | |

b. Click on the **Pencil icon** next to the assignment you don't want the absence record against

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| | | | | | _ | | | | |
| | Absences | | | + Add | = | | | | |
| | Last 6 months Leave: 42 Hours | ~ | Awaiting approval | Sort By Date | ~ | | | | |
| | 16/09/2020 - 18/09/2020 | | | | | | | | |
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c. Select **Edit Entries**, then click on the pencil icon against the individual entry you would like to edit/delete

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| | *End Date and Duration 18/09/2020 to 14 Hours | | | |
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| | Comments and Attachments | | | |

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| 17/09/2020 Administrator | 7 🖊 | |
| 18/09/2020 Clinical Tutor Associate (MBCh8 Programme) | 7 🖉 | |
| 18/09/2020 Administrator | 7 🖊 | |
| Total Absence Duration | 42 | |
| | Projected Balance Calculate | |

d. Then select **Delete** against each entry

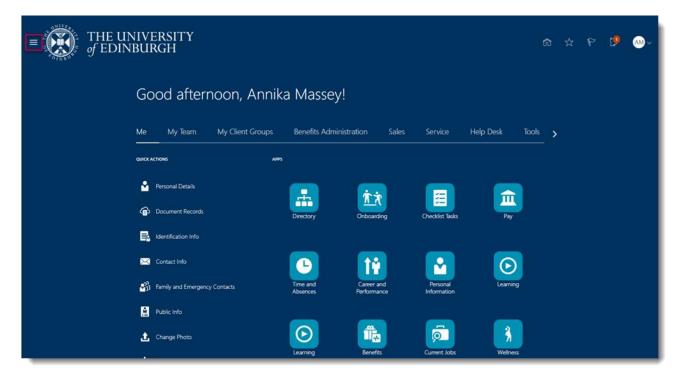
| LC Edit Abse | nce | | | De | lete | Sub <u>m</u> it | Cancel |
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| | When Duration in Hours 16/09/2020 Clinical Tutor Associate (MBChB Programme) *Date 16/09/2020 Assignment Administrator | tig v | Absence Duration 7 Hours Scheduled duration is 7 hours | Delete | 7 ⊊ancel | | |
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| | Administrator 18/09/2020 Clinical Tutor Associate (MBCh8 Programme) | | | | 7 7 | | |
| | 18/09/2020 Administrator | | | | 7 | | |
| | Total Absence Duration | | | Projected Balance | 42 Calculate | | |

7. Add any additional **Comments and Attachments** to the original leave request and **Submit**.

| Add Abse Annika Massey | | Save and Close | Sub <u>m</u> it Cancel |
|---------------------------|---|---|-------------------------------|
| | | Projected Balance Calculate | |
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Cancelling annual leave:

1. From the Home page, select the **Navigator** menu on the top left icon



2. Open the Me section, then select Time and Absences

| \leftarrow | | Show Mo | re | | | | | | | |
|-------------------------|-----------------------|-------------------------------|----------|---------------------------|-----------------|-----------|-------|-----|----|------|
| Home | | | | | | | | | | |
| Me | | | ^ | | | | | t ☆ | C) | AM ~ |
| Directory | ന്റെ Onboarding | E Checklist Tasks | | | | | | | | |
| m Pay | L Time and Absences | ြက္ခြဲ Career and Performance | | | | | | | | |
| Personal Information | ▷ Learning | ▷ Learning | | | | | | | | |
| Benefits | Current Jobs | 🖇 Wellness | | | | | | | | |
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| My Team | | | ^ | | | | | | | |
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| Talent Review | මූළු Users and Roles | New Person | | <u>ک کر</u> Onboarding | Checklist Tasks | | | | | |
| 8 Workforce Modeling | Workforce Predictions | | | Unboarding | Cheoklist lasks | Pay | | | | |
| My Client Groups | | | ~ | | | | | | | |
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| Others | | | ~ | Benefits | Current Jobs | Wellne | ss | | | |

3. Select **Existing Absences** and click on the **Edit** icon next to the leave request you would like to cancel

| < | Time and Abs | ences | | |
|---|--------------|--|--|--|
| | | | Amika Massey | |
| | | Current Time Card | Existing Time Cards Access all of your time cards. | Request Time Change Send a request to change your worked time. |
| | | Add Absence Request an absence and submit for approval | Absence Balance Review current plan balances and absences taken or requested | Existing Absences View, change or withdraw existing absence requests |
| | | Cash Disbursements Sell a portion of your plan balance. | Calendar View your shifts, absences, and public holidays. | Team Schedule View your team's shifts and absences. |

4. Click on **Delete** on the top bar. You see that the status against that leave request will say 'Withdrawn'.

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| Edit Abs Annika Mass | | | Delete Sub <u>n</u> | <u>n</u> it <u>C</u> ancel |
| œ | °Type Leave | | | |
| | When | | Edit Entries | |
| | *Start Date and Duration 2/09/2020 to II Hours *End Date and Duration 3/09/2020 to 7 Hours | Absence Duration 14 Hours | | |
| | | | Projected Balance Calculate | |
| | Details | | | |
| | Comments and Attachments | | | |