

People and Money system

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School/Department Admin Guide: How to Enter Leave on behalf of an Employee

School/Department Administrator

Estimated time to complete: 5 minutes

Before you start

Familiarise yourself with the leave and absence options webpage.

Sponsored Workers - If you are entering a period of unauthorised absence for more than 10 consecutive working days or unpaid leave for more than 4 weeks 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 <u>Reporting Duties for</u> <u>sponsored staff</u> webpage.

In Brief...

Entering Absence on behalf of an Employee

- 1. From the homepage select the **Navigator** E button on the top left corner
- 2. Expand My Client Groups and select Person Management
- 3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
- 4. Select the **Tasks** ^I button on the right side of the screen
- 5. Under the Absences section, select Absence Records
- 6. Click the **Add** + Add button
- 7. Select the appropriate **Absence Type** from the list of options available in the dropdown menu
- 8. Fill in the **Start Date**; then the **End Date**, **Start Date Duration**, and **End Date Duration** if known. You can also check the **Single day** box if applicable
- 9. In the Details section, add any Comments or Attachments if needed

10. Press Submit

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

Cancelling Absence on behalf of an Employee

- 1. From the homepage select the **Navigator** = button on the top left corner
- 2. Expand My Client Groups and select Person Management
- 3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
- 4. Select the **Tasks** ^I button on the right side of the screen
- 5. Under the Absences section, select **Absence Records**
- 6. Against the absence you wish to cancel, click on the **Actions** dropdown and select **Withdraw**
- 7. A warning message asking if you want the selected record to be deleted will appear. Press **OK**

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

Amending Absence on behalf of an Employee

- 1. From the homepage select the **Navigator** E button on the top left corner
- 2. Expand My Client Groups and select Person Management
- 3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
- 4. Select the **Tasks** ^I button on the right side of the screen
- 5. Under the Absences section, select **Absence Records**
- 6. Select the absence record you wish to edit
- 7. Make the necessary changes and press **Submit**

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

In Detail...

Entering Absence on behalf of an Employee

Person Management

1. From the homepage select the **Navigator** button on the top left corner

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2. Expand My Client Groups and select Person Management

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3. **Search** for and **select** the employee on whose behalf you would like to apply for leave

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Green, Emerson 🚥	34	EJ872475C	Centre for Cli	Chancellors	Employee	Research Nurse	Research Nu		Emerson.Gre.	Uni	versity of	Edinburg

4. Select the **Tasks** button on the right side of the screen

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5. Under the Absences section, select Absence Records

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6. Click the Add button

7. Select the appropriate **Absence Type** from the list of options available in the dropdown menu

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8. Fill in the **Start Date**; then the **End Date**, **Start Date Duration**, and **End Date Duration** if known. You can also check the **Single day** box if applicable. If the

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absence is logged as open ended an end date must be added when the period of absence finishes, See <u>Amending Leave</u> below.

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9. In the Details section, add any Comments or Attachments if needed

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10. Press Submit.

Note: Pressing Save will not complete the process instead it saves the

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request as a draft.

Cancelling Absence on behalf of an Employee

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2. Expand My Client Groups and select Person Management

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3. Search for and select the employee on whose leave you would like to cancel

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4. Select the **Tasks** button on the right side of the screen

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5. Under the Absences section, select **Absence Records**

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6. Against the absence you wish to cancel, click on the **Actions** dropdown and select **Withdraw**

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7. A warning message asking if you want the selected record to be deleted will appear. Press **OK**

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Amending Absence on behalf of an Employee

1. From the homepage select the **Navigator** button on the top left corner



2. Expand My Client Groups and select Person Management

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3. **Search** for and **select** the employee on whose behalf you would like to apply for leave

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Green, Emerson 🚥 🦪 4 EJ872475C	Centre for Cli Chancellors	Employee Research Nu	se Research Nu	Emerson.Gre	University of E	dinburg

4. Select the Tasks button on the right side of the screen

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5. Under the Absences section, select Absence Records

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Assignment Number 158564 Business Unit University of Edinburgh Person Type Employee	Assignment Status Active - Payroll Eligible Primary Yes Projected End Date	Talent Profile Document Records Document Delivery Preferences Person identifiers for External Applications

6. Select the absence record you wish to edit

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25/08/2020	University of Edinburgh	Leave		7 Hours	S Withdrawn		۲		
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7. Make the necessary changes and press **Submit.** If you are ending an open

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EG	Emerson Green: Person Management				Clos	
Employment × Abser Absence	Administration ®	Sub <u>m</u> it		<u>C</u> ance	A	Q ()
*Absence Le Type Basic Mode	ave V Advanced Mode					
Single day *Start Date *End Date	16/09/2020 (a) *Start Date Duration 7 Hours					
Duration Details Plan	7 Hours DUse Action Items					
Comment	s					
Ad Attachmen	^d None ♣					

ended absence untick the box and add an end date.

Appendix

Appendix 1 – Absence Type options

Please refer to the <u>Leave and absence options</u> webpage for when the 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)
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	
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