



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 [Reporting Duties for sponsored staff](#) webpage.

In Brief...

Entering 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**  Person Management
3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
4. Select the **Tasks**  button on the right side of the screen
5. Under the Absences section, select **Absence Records**
6. Click the **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**



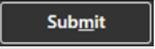
For detailed guidance, see the [next section](#).

Canceling 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**  Person Management
3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
4. Select the **Tasks**  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 [next section](#).

Amending Absence on behalf of an Employee

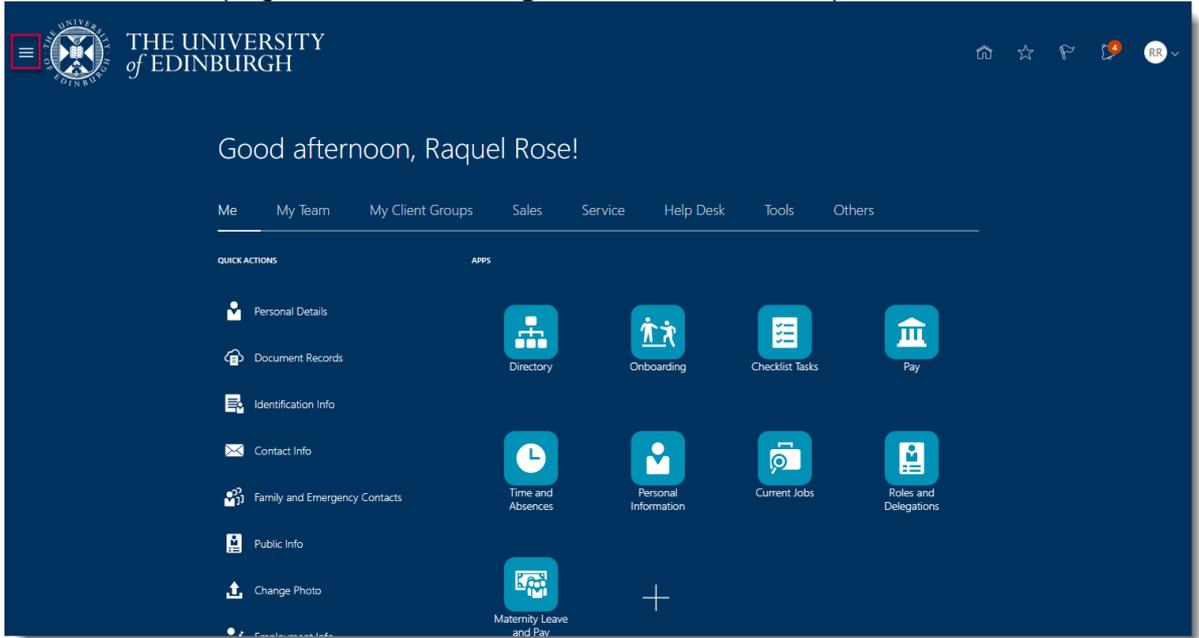
1. From the homepage select the **Navigator**  button on the top left corner
2. Expand **My Client Groups** and select **Person Management**  Person Management
3. **Search** for and **select** the employee on whose behalf you would like to apply for leave
4. Select the **Tasks**  button on the right 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 [next section](#).

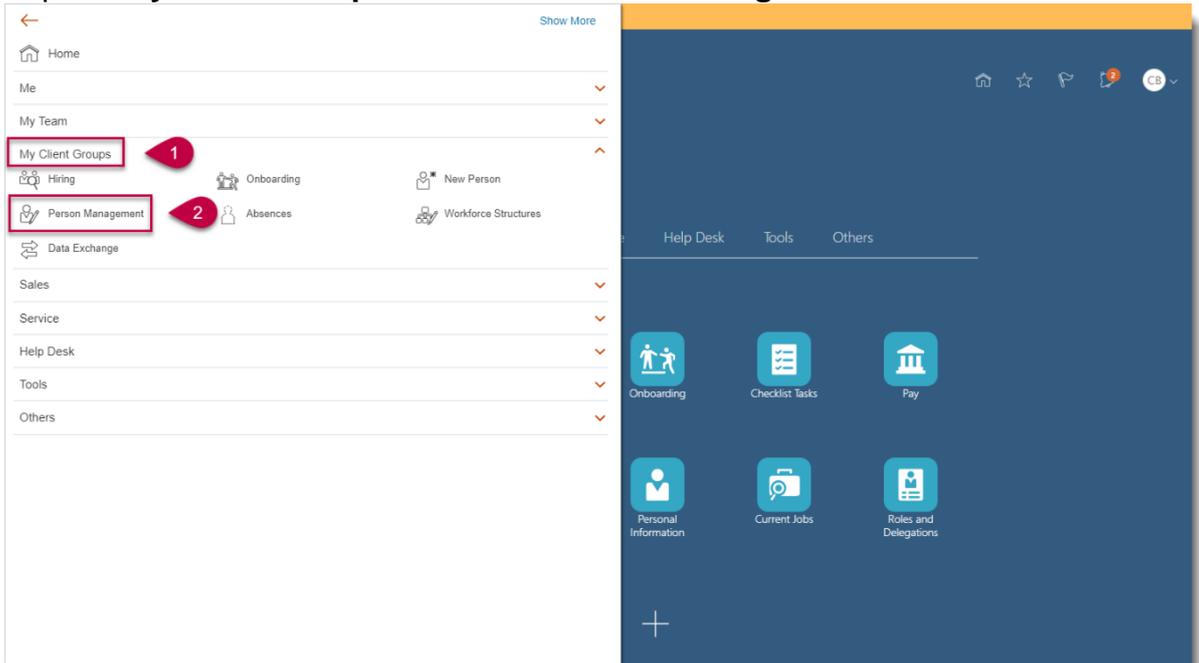
In Detail...

Entering 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

Person Management: Search

Search

Advanced Saved Search All People

** Name green

** Keywords

** Person Number

** National ID

Effective As-of Date 11/09/2020

Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson	158564	EJ872475C	Centre for Cli...	Chancellors ...	Employee	Research Nurse	Research Nu...		Emerson.Gre...	University of ...	Edinburg

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

Emerson Green: Person Management

EG

Person Number 158564

Employment

Work Relationship

Legal Employer University of Edinburgh

Worker Type Employee

Hire Date 22/09/2014

Country United Kingdom

Assignment: Research Nurse

Action Assignment Change

Action Reason Change Primary Assignment

Effective Start Date 24/08/2020 (2 of 2)

Effective End Date

Assignment Details

Assignment Number 158564

Business Unit University of Edinburgh

Person Type Employee

Assignment Status Active - Payroll Eligible

Primary Yes

Projected End Date

Tasks

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

The screenshot shows the 'Emerson Green: Person Management' interface. The 'Absence Records' option in the right-hand navigation menu is highlighted with a red rectangular box. The main content area displays 'Employment' details for a person with ID 158564, including work relationship and assignment information.

The screenshot shows the 'Manage Absences and Entitlements' page. The 'Add' button in the 'Existing Absences' section is highlighted with a red rectangular box. The page displays a table of absence records with columns for Dates, Employer, Type, Duration, Status, Processing Status, and Action.

Dates	Employer	Type	Duration	Status	Processing Status	Action
15/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled	✓	⌵
11/09/2020 - End date not de...	University of Edinburgh	Unauthorised Leave	0 Hours	In progress	✓	⌵
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn	✓	⌵

6. Click the **Add** button

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

The screenshot shows the 'Absence Administration' form. The 'Absence Type' dropdown menu is open, displaying the following options: Emergency Time off for Dependants, Industrial Action, Leave, Other Paid Leave, Special Paid Leave, and Unauthorised Leave. The form also features 'Save', 'Submit', and 'Cancel' buttons.

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

The screenshot shows the 'Absence Administration' form with the 'Absence Type' set to 'Leave'. The 'Basic Mode' section is highlighted, showing the following fields: 'Single day' (checkbox), '*Start Date' (dd/mm/yyyy), '*End Date' (dd/mm/yyyy), '*Start Date Duration' (Hours), and '*End Date Duration' (Hours). The form also features 'Save', 'Submit', and 'Cancel' buttons.

absence is logged as open ended an end date must be added when the period of absence finishes, See [Amending Leave](#) below.

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

The screenshot shows the 'Absence Administration' form. At the top, there are tabs for 'Employment' and 'Absence Records'. The form title is 'Absence Administration' with a search icon. Below the title are 'Save', 'Submit', and 'Cancel' buttons. The form is divided into sections: 'Absence Type' (set to 'Leave'), 'Advanced Mode', 'Basic Mode', and 'Details'. The 'Basic Mode' section includes 'Single day' (unchecked), 'Start Date' (16/09/2020), 'End Date' (16/09/2020), and 'Start Date Duration' (7 Hours). The 'Details' section has tabs for 'Details', 'Plan Use', and 'Action Items'. The 'Comments' field is highlighted with a red box, and below it is an 'Add Attachment' dropdown menu set to 'None'. At the bottom, there are expandable sections for 'Legislative Information' and 'Descriptive Information', and a 'Context Segment' dropdown.

10. Press **Submit**.

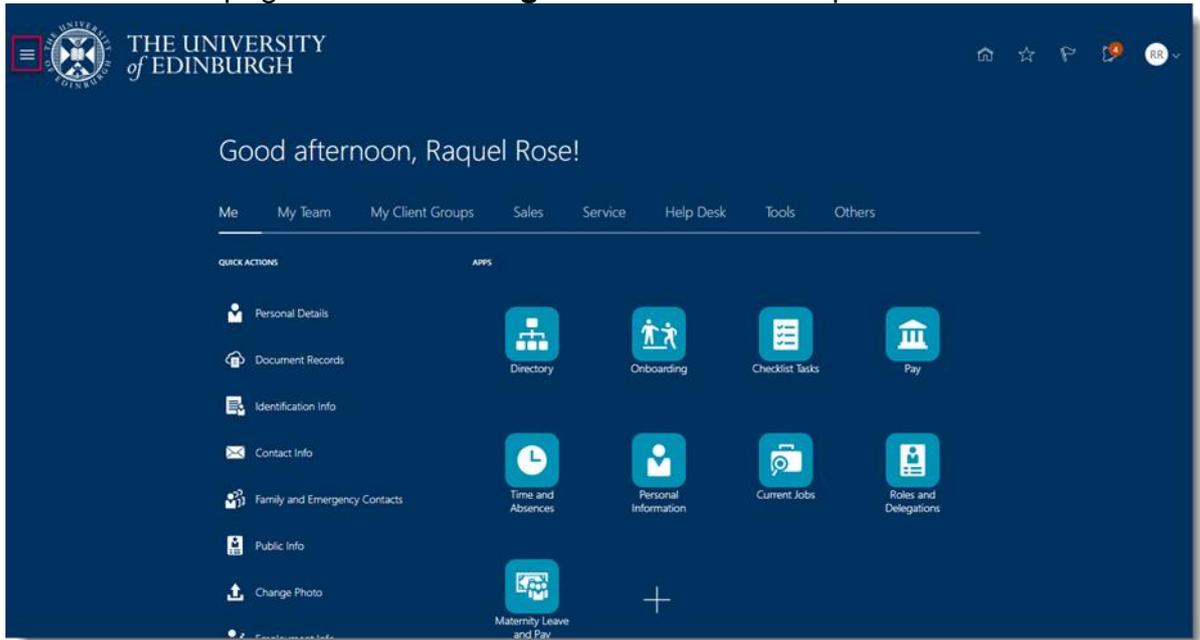
Note: Pressing **Save** will not complete the process instead it saves the

This screenshot is identical to the previous one, but the 'Submit' button in the top right corner is highlighted with a red box. The rest of the form content remains the same.

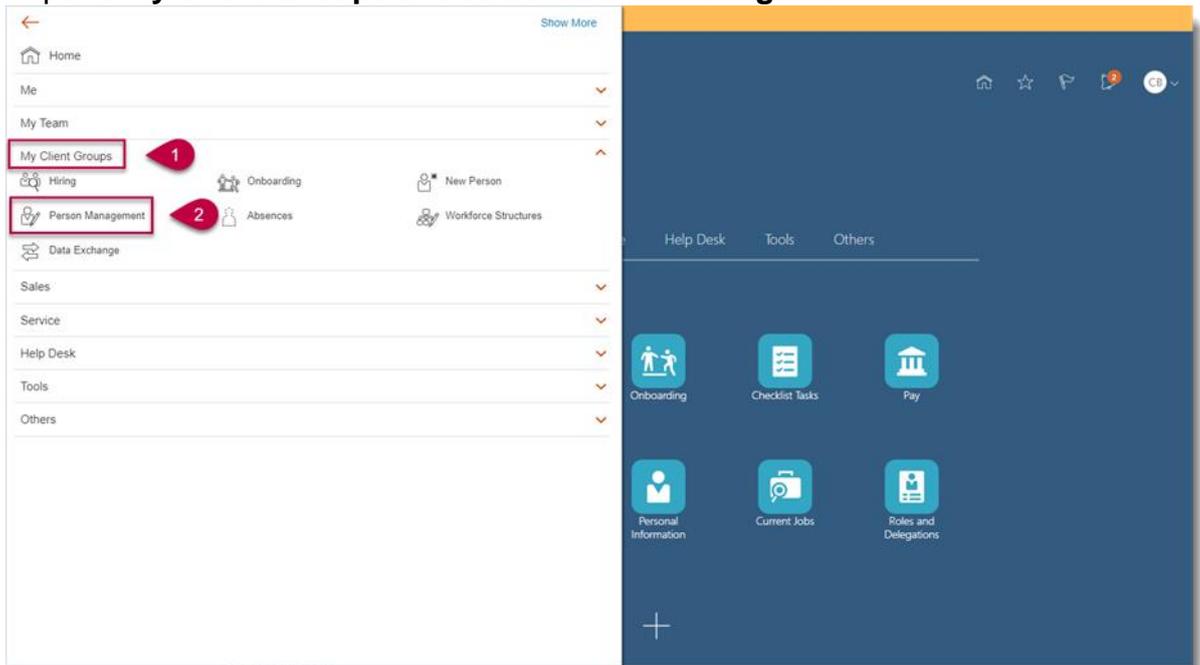
request as a draft.

Cancelling Absence on behalf of an Employee

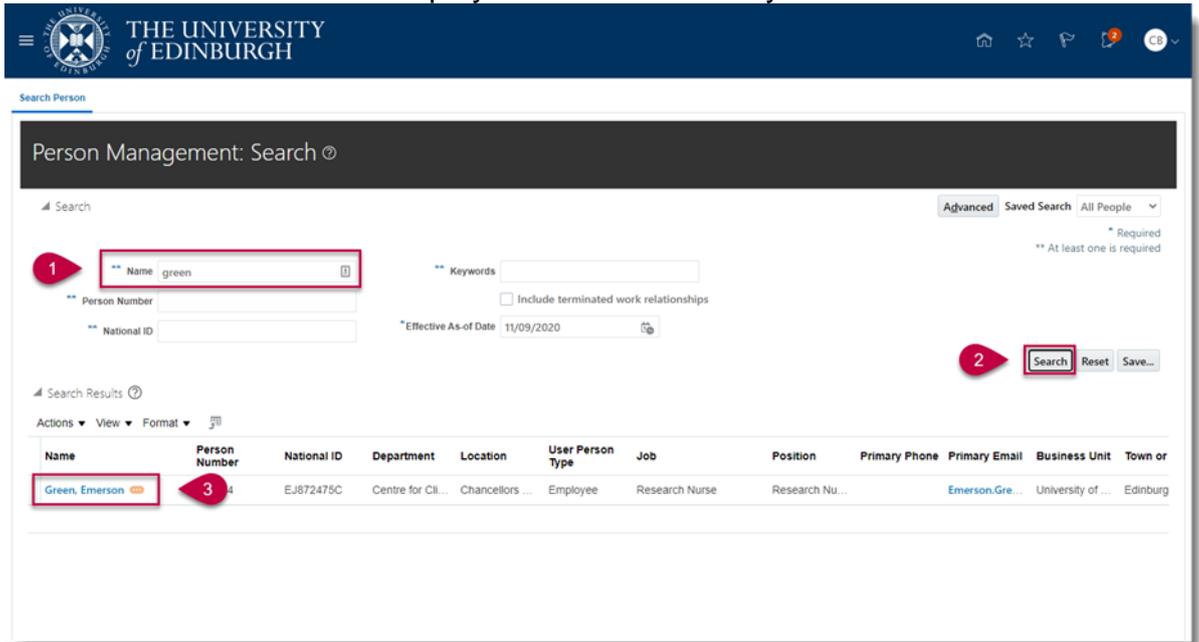
1. From the homepage select the **Navigator** button on the top left corner



2. Expand **My Client Groups** and select **Person Management**



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



Person Management: Search

Search

Advanced Saved Search All People

** Name green

** Keywords

** Person Number

** National ID

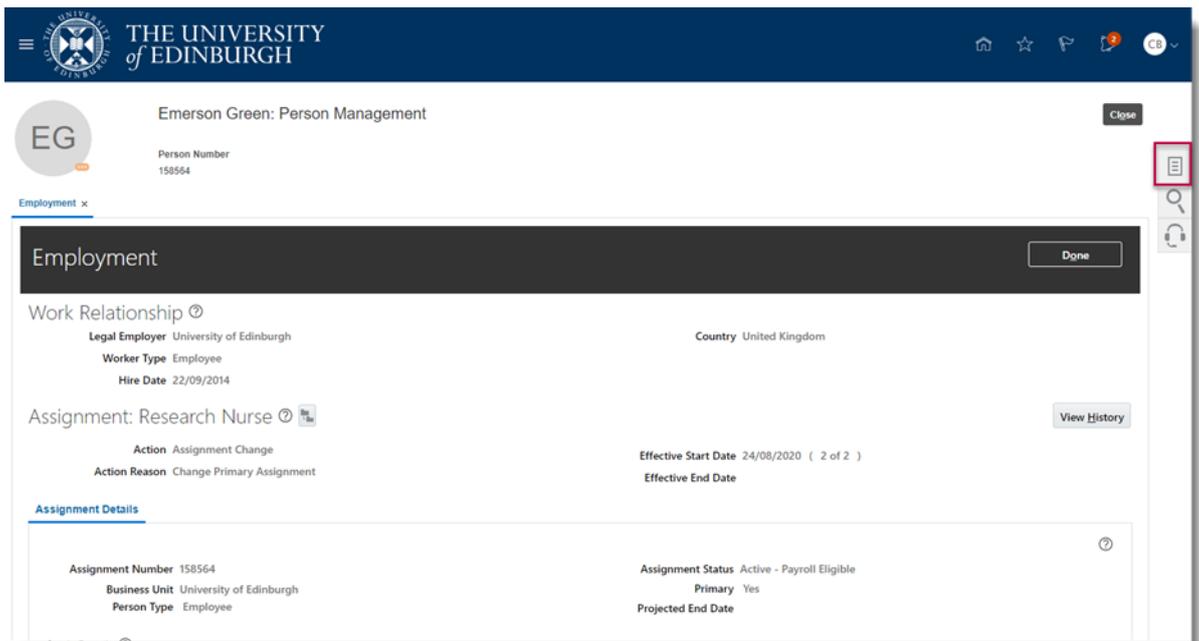
Effective As-of Date 11/09/2020

Search Reset Save...

Search Results

Name	Person Number	National ID	Department	Location	User Person Type	Job	Position	Primary Phone	Primary Email	Business Unit	Town or
Green, Emerson	158564	EJ872475C	Centre for Cli...	Chancellors ...	Employee	Research Nurse	Research Nu...		Emerson.Gre...	University of ...	Edinburg

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



Emerson Green: Person Management

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Person Number 158564

Employment

Work Relationship

Legal Employer University of Edinburgh

Worker Type Employee

Hire Date 22/09/2014

Country United Kingdom

Assignment: Research Nurse

Action Assignment Change

Action Reason Change Primary Assignment

Effective Start Date 24/08/2020 (2 of 2)

Effective End Date

View History

Assignment Details

Assignment Number 158564

Business Unit University of Edinburgh

Person Type Employee

Assignment Status Active - Payroll Eligible

Primary Yes

Projected End Date

Tasks

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

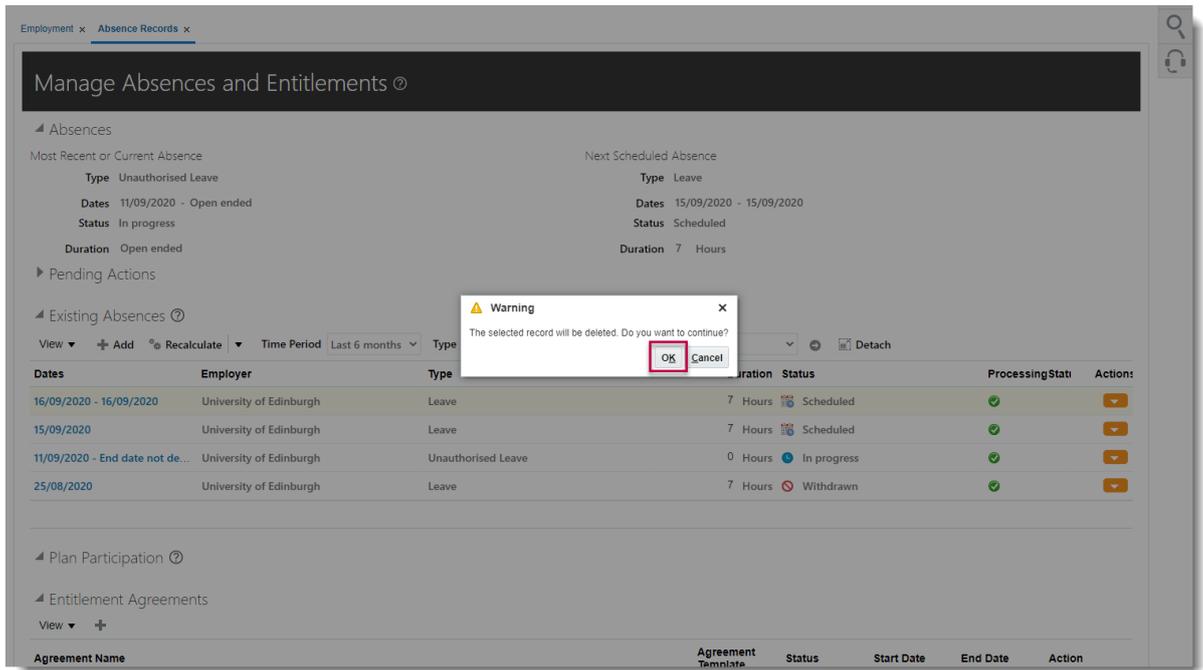
The screenshot shows the 'Emerson Green: Person Management' page. On the right-hand navigation menu, the 'Absence Records' option is highlighted with a red rectangular box. Other menu items include 'Compare', 'Absences', 'Payroll', 'Compensation', and 'Personal and Employment'.

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

The screenshot shows the 'Manage Absences and Entitlements' page. A table lists absence records with columns for Dates, Employer, Type, Duration, and Status. The record for '25/08/2020' with status 'Withdrawn' has a dropdown menu open over it. The 'Withdraw' option in the dropdown is highlighted with a red box and a red circle with the number '1'. Another red circle with the number '2' points to the 'Administer' button above the dropdown.

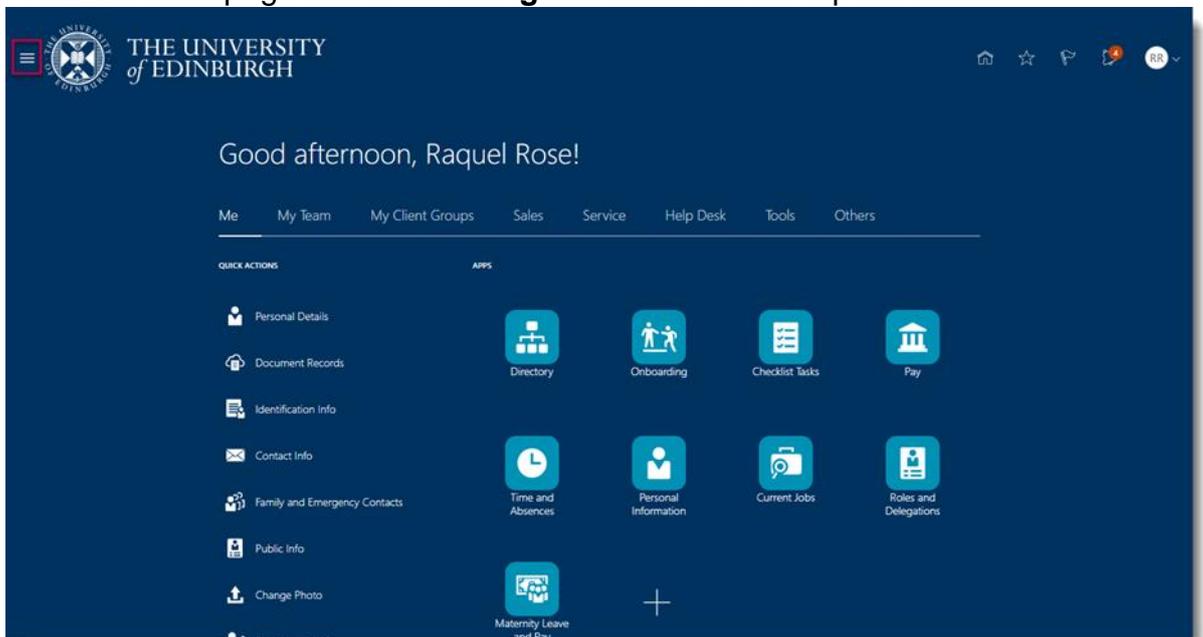
Dates	Employer	Type	Duration	Status
16/09/2020 - 16/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled
15/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled
11/09/2020 - End date not de...	University of Edinburgh	Unauthorised Leave	0 Hours	In progress
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn

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

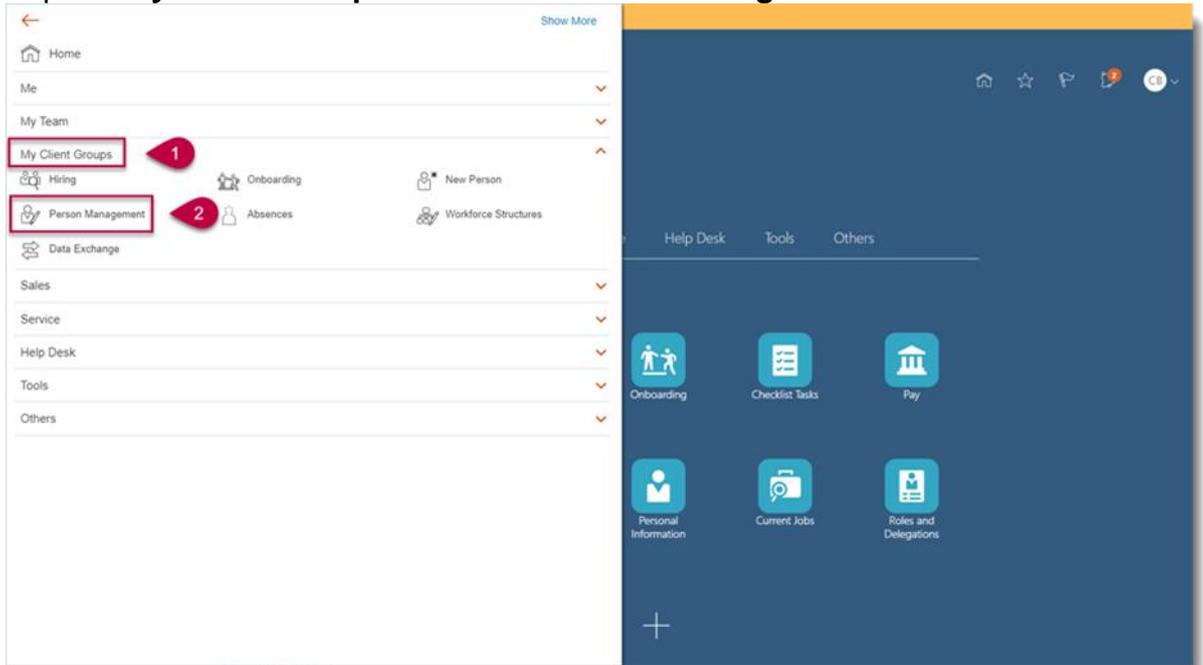


Amending Absence on behalf of an Employee

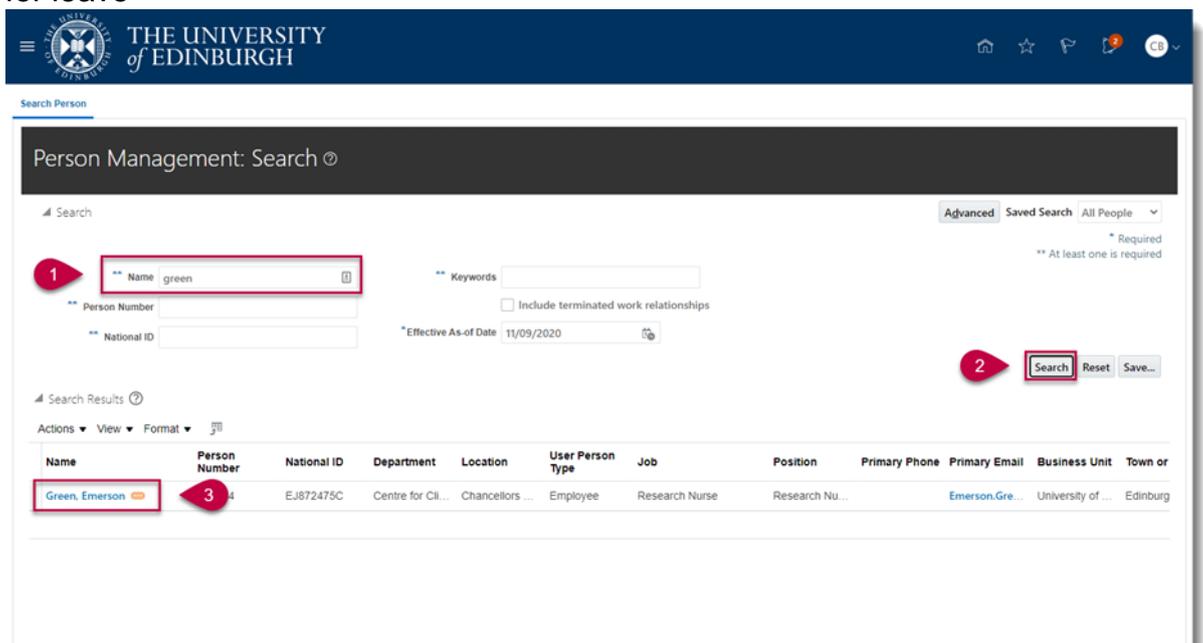
1. From the homepage select the **Navigator** button on the top left corner



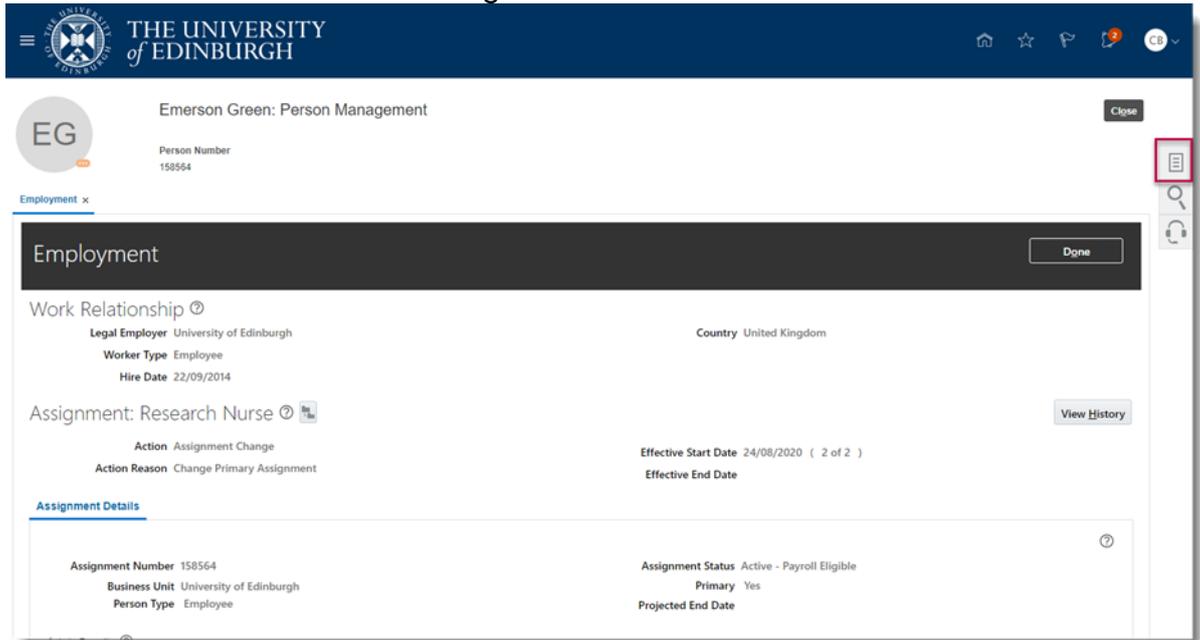
2. Expand My Client Groups and select Person Management



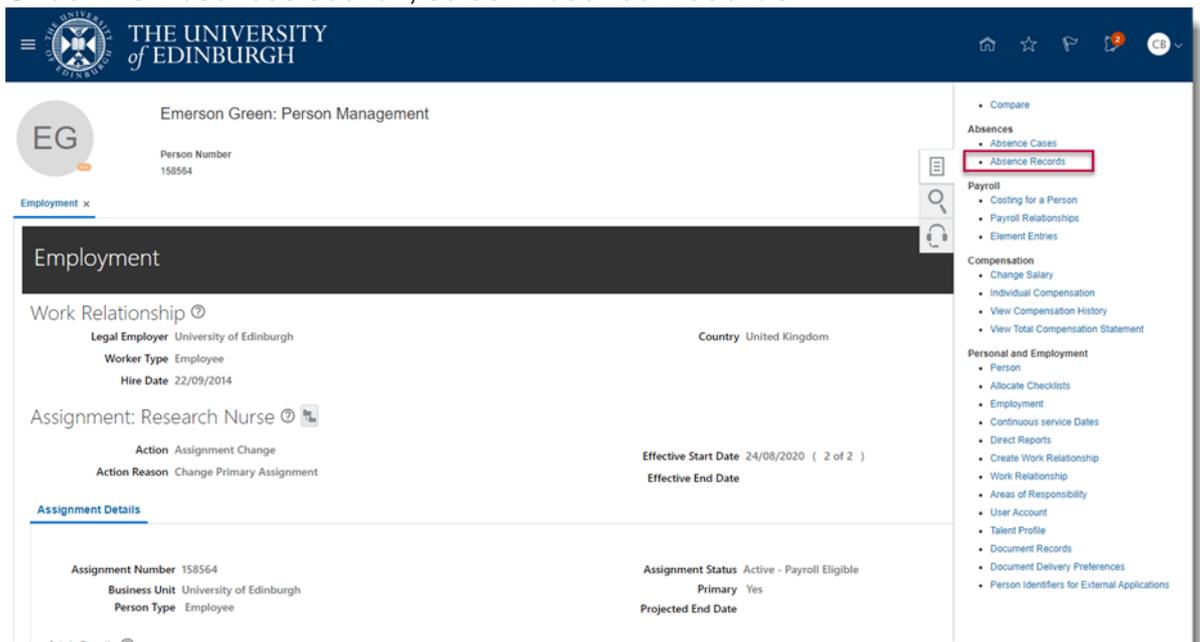
3. Search for and select the employee on whose behalf you would like to apply for leave



4. Select the **Tasks** 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

Employment x Absence Records x

Manage Absences and Entitlements

Absences

Most Recent or Current Absence
Type: Unauthorised Leave
Dates: 11/09/2020 - Open ended
Status: In progress
Duration: Open ended

Next Scheduled Absence
Type: Leave
Dates: 15/09/2020 - 15/09/2020
Status: Scheduled
Duration: 7 Hours

Pending Actions

Existing Absences

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

Dates	Employer	Type	Duration	Status	Processing Status	Action
16/09/2020 - 16/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled	✓	⌵
15/09/2020	University of Edinburgh	Leave	7 Hours	Scheduled	✓	⌵
11/09/2020 - End date not de...	University of Edinburgh	Unauthorised Leave	0 Hours	In progress	✓	⌵
25/08/2020	University of Edinburgh	Leave	7 Hours	Withdrawn	✓	⌵

Plan Participation

Entitlement Agreements

Agreement Name	Agreement Template	Status	Start Date	End Date	Action
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7. Make the necessary changes and press **Submit**. If you are ending an open

THE UNIVERSITY of EDINBURGH

Emerson Green: Person Management
Person Number: 158564

Employment x Absence Records x

Absence Administration

Save Submit Cancel

Absence Type: Leave Advanced Mode

Basic Mode

Single day

*Start Date: 16/09/2020 *Start Date Duration: 7 Hours

*End Date: 16/09/2020

Duration: 7 Hours

Details Plan Use Action Items

Comments

Add Attachment: None

ended absence untick the box and add an end date.

Appendix

Appendix 1 – **Absence Type** options

Please refer to the [Leave and absence options](#) 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	<p>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.</p> <p>Please review the Absence and Leave Options webpage and the Special Leave Policy for circumstances when this reason should be used.</p> <p>Bereavement leave can be selected under Special Paid Leave</p>
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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> UKVI – select this for a sponsored worker Unauthorised Leave
Unpaid Leave	<ul style="list-style-type: none"> 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	