

MANAGER GUIDE

Inputting Annual Leave

This guide offers step-by-step instructions for business managers inputting annual leave on behalf of their employees. It covers everything you need to know, from recording annual leave to creating adjustments and carry-forward entries.

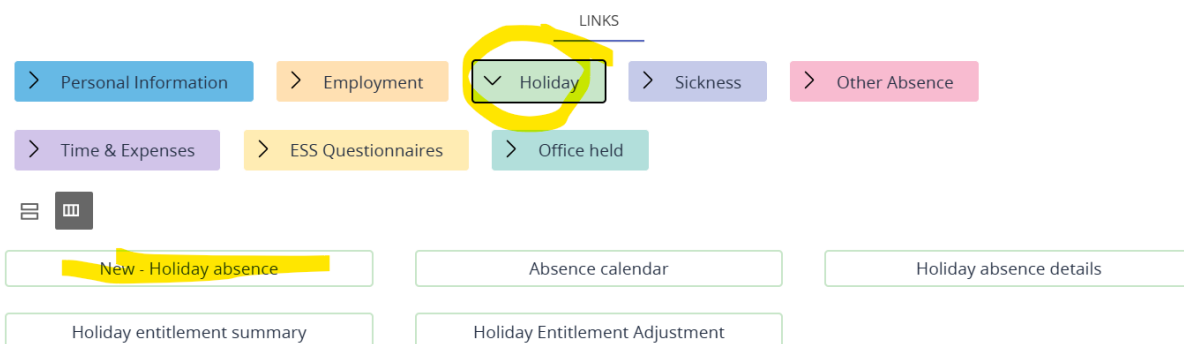
Contents

Recording Annual Leave	3
Holiday Entitlement Adjustment	5
Holiday Entitlement Summary	6

Please note that you will need to add any carry-forward balance and record any bookings made so far this year. The guides provide step-by-step instructions to support you.

Recording Annual Leave

1. From the main dashboard, click **Your Staff**.
2. In the search field, enter the employee's name. Alternatively, enter the wildcard symbol * and click the magnifying glass to display all employees.
3. Select the relevant employee from the left-hand side of the screen.
4. Scroll down to the **Holiday** section on the right-hand side of the screen.
5. Select **New – Holiday Absence**.



The following page will open:

The screenshot shows the 'Holiday absence details New' form. The form has a dark blue header with the title 'Holiday absence details New' and a 'MENU' button. The form is divided into several sections: 'Holiday period' with a dropdown menu set to 'More than one day'; 'Holiday start' with fields for 'Holiday start date' and 'Holiday start type' (set to 'Full day'); 'Holiday end' with fields for 'Holiday end date' and 'Holiday end type' (set to 'Full day'); 'Absence' with fields for 'Absence type' (set to 'Personal holiday'), 'Authorisation' (set to 'Not applicable'), and 'Position' (set to '<All jobs>'); and a '+ Holiday balances' section. A green 'Save' button is at the bottom. On the right side, there is a dropdown menu for 'More than one day' with options: 'Part day', 'Full day', 'Full day', 'Part day' (highlighted), and 'Half Day - PM'.

6. Use the drop-down arrow to select the **Holiday Period**.
 - **Note:** Depending on the option selected, some fields below may not be relevant and will disappear.
7. Enter the **Holiday Start Date**.
8. Enter the **Holiday End Date**. (if the absence is more than one day)
9. The **Absence Type** will default to **Personal Holiday**.
10. **Authorisation** is not applicable.
11. Click **Save**.

To view holiday balances, select the **Holiday Balances** button at the bottom of the screen by clicking the **+** icon. This view is read-only.

Holiday Entitlement Adjustment

Please note: If an employee is carrying forward leave from a previous holiday year, this must be entered on this screen as an **Adjustment**. When doing so, ensure **Carried Forward** is entered in the **Reason** field.

1. From the main dashboard, select **Your Staff**.
2. Enter the employee's name in the search field. Alternatively, enter the wildcard symbol * and click the magnifying glass to display all employees.
3. Select the relevant employee from the left-hand side of the screen.
4. Scroll down to the **Holiday** section.
5. Select the **Holiday Entitlement Adjustment** screen.
6. Select the correct **Position** (if more than one is listed).
7. Select the **Holiday Period Dates**.
8. The **Scheme Name** will populate automatically.
9. In the **Adjustment Type** field, select **Adjust**.
10. Enter the **Value** (this can be a positive or negative figure).
11. Enter **Carried Forward** in the **Reason** field.
12. The **End Date** will automatically populate from the selected **Holiday Period Dates**. Do not amend this field. If the date is incorrect, return to Step 7 and ensure the correct holiday period is selected.
13. Click **Save**.

To add more than one adjustment, click the + icon. To remove an adjustment, click the – icon.

The screenshot shows the 'Adjustment details' form. At the top, there is a dropdown menu for 'Adjustment type' with 'Adjust' selected. Below this is a table with the following columns: 'Date entered', 'User name', 'Value', 'Reason', 'End date', and 'Entitlement Add Remove'. The 'Value' column has an empty input field. The 'Reason' column has an empty input field. The 'End date' column has a date input field showing '31/03/2026' with a calendar icon. The 'Entitlement Add Remove' column has a yellow button with a '+' icon and a '-' icon. Below the table is a green 'Save' button.

Holiday Entitlement Summary

1. From the main dashboard, select **Your Staff**.
2. Enter the employee's name in the search field. Alternatively, enter the wildcard symbol * and click the magnifying glass to display all employees.
3. Select the relevant employee from the left-hand side of the screen.
4. Scroll down to the **Holiday** section.
5. Select **Holiday Entitlement Summary**.
6. Select the correct **Position** (if more than one is listed).
7. Select the appropriate **Holiday Period Dates**.
8. The screen will automatically populate to display the following information:
 - Entitlement for the selected period
 - Holiday and Bank Holiday start and end dates
 - Duration
 - Remaining entitlement

You should now be able to confidently record employee holiday, apply carry-forward adjustments, and view holiday entitlement summaries. Please ensure all information entered is accurate and reflects the correct holiday period before saving.