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.

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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:

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.
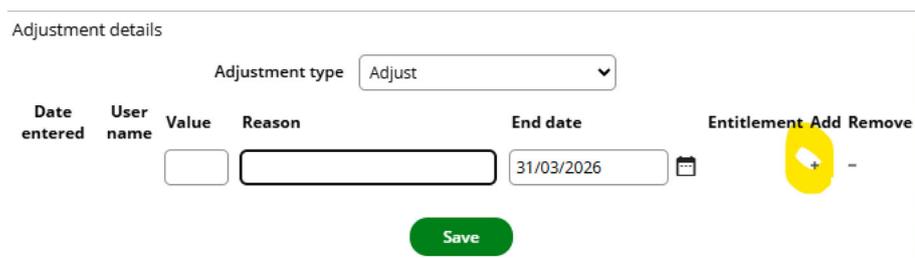
Holiday Entitlement Summary

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.