

Annual Leave FAQ's for Managers

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1. How will I know I have annual leave requests that require action?

- An email will be sent to you to confirm a request is pending:
- “A holiday request has been submitted for JOE BLOGGS (EMPNO) from DD/MM/YYYY to DD/MM/YYYY. Please log in to your MyView Dashboard to action.”
- When you log into MyView Dashboard the request will be pending in the Authorisation widget.

2. What is planned work time?

- The planned work time is extremely important as it a method of capturing the actual hours an employee works on a specific day. Falkirk Council does not hold detailed work pattern information for employees. This means there is no automatic way for MyView to know how many hours an employee would be due to work on a specific day. For example a full-time 37 hour employee would work 7 hours 24 minutes each day for 5 days but a part-time 20 hour employee may work 5 hours each day for 4 days. As the annual leave entitlement is in hours the planned work time is essential to ensure the correct number of hours is recorded against each annual leave request.
- **If the planned work time is not correct, the incorrect number of hours could be deducted from the employees’ entitlement so it is essential that this is verified and amended as appropriate for each leave request.**

3. The planned work time information is incorrect in the request

- If the planned work time information is incorrect for an employee the request should be rejected – the manager cannot amend this information.
- The employee will need to edit the request to amend the planned work time and resubmit it for authorisation.
- If the planned work time is not correct the incorrect number of hours could be deducted for the annual leave request so it is essential that this is correct.

4. How do I authorise a leave request?

- To authorise a leave request log into MyView Dashboard
 - The pending request will appear in the **Authorisation widget** under the heading **Time Mgmt Absence**
 - The details of the pending request can be viewed by moving the mouse pointer onto the particular request – this can be useful if you have more than one pending request and want to authorise a particular one
 - To authorise click on the pending request
 - The leave entry screen will appear
 - The details of the request should be carefully checked
 - The planned work time details should be checked
 - If the details of the request are accurate click on the purple **Authorise** button
 - The employee will receive an email to confirm their request has been authorised and their entitlement balance will reduce accordingly.

5. How can I view what leave an employee has requested?

- To view the leave requests for a particular employee log into MyView Dashboard
 - Click on the **My People** near the top left hand corner of the screen
 - The Team Selector screen will appear
 - **Do not select an employee at this stage**
 - Click on the **My Team Absence** option found at the left hand side of the screen

- The **Time Management Team Selection** screen will appear
- Select the appropriate employee by clicking in the circle field which appears before the employees name
- Click on the purple **Next** button found in the bottom right hand corner of the screen
- The events calendar will appear for that specific employee
- Any authorised and pending leave will appear on the calendar
- If you move the mouse cursor over a leave entry on the calendar a pop up box will appear with further details
- To see the leave details in a list click on the **Open ANNUAL History** option found below the events calendar (if you wanted to look at flexi details you would select **Open FLEXI History**)
- A list will appear of all the annual leave requests.
- The purple **View** button found at the right hand side of each request can be used to look at the detail of the leave and to check the planned work time information.

6. I have an annual leave request to authorise but want to check the employees entitlement before proceeding is there a quick way to do this?

- Yes, an employees entitlement can be checked easily before authorising a request.
 - The pending request will appear in the **Authorisation widget** under the heading **Time Mgmt Absence**
 - To authorise click on the pending request
 - The leave entry screen will appear
 - To check the employee entitlement click on the purple **View Entitlement Details** button found in the bottom right hand corner of the screen
 - The employees entitlement information will appear and can be checked before proceeding with the authorisation
 - To return to the leave entry screen click on **Cancel**
 - The request can then be authorised

7. Can I check what leave the rest of my team have before authorising a pending leave request?

- Yes, the team calendar can be viewed before authorising a leave request
 - The pending request will appear in the **Authorisation widget** under the heading **Time Mgmt Absence**
 - To authorise click on the pending request
 - The leave entry screen will appear
 - Click on the purple **View Team Calendar**
 - The **Team Calendar** will appear for your team
 - The calendar will automatically move to the date(s) the leave request relates to
 - The pending request will appear in green
 - You can then check if any other team members have leave requested for the same period of time
 - To return to the leave entry screen click on the purple **Return** button
 - The request can then be authorised if appropriate

8. How do I reject a leave request?

- To reject a leave request log into MyView Dashboard
 - The pending request will appear in the **Authorisation widget** under the heading **Time Mgmt Absence**
 - Click on the pending request
 - To reject the request click on the purple **Reject** button
 - The employee will receive an email to say their request has been rejected

9. How can I view the team planner to see my teams leave?

- To view the team planner log into MyView Dashboard
 - Click on the **My People** near the top left hand corner of the screen
 - The Team Selector screen will appear
 - **Do not select an employee at this stage**
 - Click on the **My Team Absence** option found at the left hand side of the screen
 - The **Time Management Team Selection** screen will appear
 - Select **any employee** by clicking in the circle field which appears before the employees name
 - Click on the purple **Next** button found in the bottom right hand corner of the screen
 - The events calendar will appear for selected employee
 - Click on the purple **View Team Calendar** button
 - The team calendar will appear
 - The calendar will default to today's date
 - You can navigate to any particular date by using the arrows next to year and month in the top left hand corner of the calendar

10. Can I enter annual leave on behalf of an employee?

- Yes a manager can enter annual leave on behalf of an employee.
 - Click on the **My People** near the top left hand corner of the screen
 - The Team Selector screen will appear
 - **Do not select an employee at this stage**
 - Click on the **My Team Absence** option found at the left hand side of the screen
 - The **Time Management Team Selection** screen will appear
 - Select the appropriate employee by clicking in the circle field which appears before the employees name
 - Click on the purple **Next** button found in the bottom right hand corner of the screen
 - The events calendar will appear for that specific employee
 - Select the **Request New** option found next to the Annual leave type
 - The **Create Annual Leave Entry** will open and the details of the request can be entered in the normal way.

11. A member of my team is due to change hours during the leave year – when will their entitlement be amended?

- When an employee changes hours entitlements will automatically be updated by the system. As soon as the change has been applied in the Resourcelink system the entitlement value will be adjusted. This will only happen if the appropriate HR forms online notification has been completed and this has been actioned by payroll. Employees should allow 10 working days after a change in hours for the system to be updated.
- If an employee knows their hours will be changing and wants to work out what their entitlement will be after the change the annual leave calculator tool found on the intranet can be used. The link to the MyView page is below:
- <http://inside.falkirk.gov.uk/systems/my-view.aspx>

12. Can I delegate my teams annual leave authorisation to another manager if I am going to be on leave?

- Yes, the authorisation of annual leave can be delegated to another manager.
- To create a delegation rule log into MyView Dashboard
 - Click on **My Delegations** found at the left hand side of the screen
 - Click on the purple **Add New** button
 - The delegation creation screen will appear
 - To delegate the authorisation of annual leave two delegation rule types need to be created an **authorisation** one and a **responsibilities** one.
 - Select Authorisation
 - In the **description** field enter the reason for the delegation i.e. Holiday Cover 07/11/2016-18/11/2016.
 - In the **delegate to field** click the purple **Search button** to find the appropriate manager to delegate to
 - Enter the name or employee number then click search.
 - A list should appear with this person included, select appropriate person, then click continue. **Please note that you should only delegate to managers on the appropriate hierarchy level (same as yourself or above, and with appropriate authorisation responsibility).**
 - In the **delegate for field** click the purple **Select** to find the appropriate team members you would like to delegate annual leave authorisations for
 - Select the appropriate option of whether you would like to select individuals, people who directly report to you, or your whole team
 - If you have chosen to select individuals select the relevant employees from the list, then click continue.
 - **Module / Process Group / View** - Click **Select** to then choose from list of options
 - To delegate annual leave authorisation select **Time Management**
 - In the **From** and **To Date** fields enter the dates you would like to start and end the delegation
 - **Absence** - Do not tick this functionality this is currently being tested.
 - **Suppress Authorisations and Emails** - Tick this to stop you receiving emails whilst you are off. The person you have delegated to **will not** receive any emails so will need to ensure they check system.

- Click on the purple **Submit** button to save the delegation rule
- Repeat the above steps but with the delegation rule type set to **Responsibilities**
- If a manager is off unexpectedly a delegation rule can be created by the MyView project team by emailing MyView-SelfService@falkirk.gov.uk

13. How quickly do I need to authorise annual leave requests?

- Annual leave requests follow the same escalation rules as expenses and overtime in the MyView system. If the annual leave request is not authorised or rejected within 10 days it will be escalated to the next manager in the post to post chain with the authorisation rights. This manager will have the same options as the original manager to reject, authorise or ignore.

14. What happens with abatement of leave?

- For SJC and Craft employees, where an employee has a sickness absence which lasts over three months the annual leave will be limited to an amount pro-rated to the period of actual service given during the year, provided:
 - The period of annual leave granted in a full leave year does not fall below the statutory minimum (currently 28 days – pro rata for part-time, which can include public holidays which fall outwith the period of sickness absence), and
 - Annual leave which would otherwise have been lost because of the sickness absence may be reinstated if required to facilitate a phased return.
- In abatement situations employees annual leave entitlement will need to be amended by the Payroll section. Please use the abatement template within “Annual_Leave_Hours_Table.xlsx” found on the MyView intranet page <http://inside.falkirk.gov.uk/systems/my-view.aspx> Details of the abatement calculation should be sent to payroll@falkirk.gov.uk

15. A member of my team is on a temporary contract and will only be working part of the leave year – what happens with their entitlement?

- If an employee has a temporary contract the system will calculate an annual leave entitlement for them up to their projected end date.
- Any employees in this position will only be able to request annual leave on MyView up to their contract end date. If the employees contract is extended the system will automatically recalculate the annual leave entitlement accordingly.
- If an employee would like to work out what their entitlement will be for the whole annual leave year the annual leave calculator tool found on the intranet can be used. The link to the MyView page is below:
- <http://inside.falkirk.gov.uk/systems/my-view.aspx>

16. Can an employee request leave for more hours than they have left?

- No, the system will not allow a negative entitlement balance to occur. If an employee tries to submit an annual leave request for a higher number of hours than their remaining balance they will receive an alert **“Insufficient holiday balance available for this absence”** and they will be unable to submit the request.

17. I have full-time employees who work a shift pattern and normally have public holidays included in their annual leave entitlement – how will this work in MyView?

- MyView will not normally include public holidays for full-time employees. Where there is a business need for this amendments can be made.
- If an employee is full-time but works a shift pattern and may be required to work public holidays a public holiday entitlement can be added to their annual leave entitlement.
- If the employee chooses to take the public holiday which falls on a scheduled working day they should apply for this as leave via MyView.
- Services will have the opportunity to inform Payroll of these types of employees along with the carryover information which will be gathered in December/early January.

18. When should part-time employees request their public holidays?

- Part-time employees will have a pro-rated allowance of public holidays included in their entitlement.
- Part-time employees must request any public holidays which fall on scheduled working days based on their working pattern.
- This should be done at the **start of each leave year** and it will be the managers responsibility to check that the relevant public holidays have been requested and approved.

19. What happens with employees who work a compressed working week?

- Employees who work on a full-time basis but on a compressed working pattern will need to have public holidays included into their entitlement calculation. This information will be gathered in an annual exercise and updated by the payroll team.
- Employees will then be required to request any public holidays which fall on scheduled working days based on their compressed working week pattern.

20. How do I delete an authorised annual leave request on behalf of an employee?

- To delete an authorised request for an employee's holiday log into **MyView Dashboard**
 - Select **My People** Tab
 - Select **My Team Absence**
 - Select the employee whose record is to be changed
 - Select the Blue **Next** button on the right hand side of the screen
 - The events calendar for that employee will appear
 - Scroll down the screen and select **Open Annual History** found next to the annual leave type
 - Scroll down to the bottom of the screen and a full list will appear of all authorised annual leave requests
 - Find the appropriate request and click on the blue **Delete** button found at the right hand side of the screen

- The Delete Annual Entry Screen will open. Select the **View planned work time** button and check the record, once satisfied click on the blue **Cancel** button
- You will then return to the Delete Annual Leave Entry screen, please select **Submit**.
- You should then receive a message saying that you have successfully submitted the absence deletion. Select **Close**
- The employee's Events calendar screen should now be showing. The annual leave that had been submitted and authorised should no longer be shown on the calendar and the employee's entitlement balance will automatically increase.