



Automatic Data Processing, Inc.

ADP Freedom

Absence – Annual Leave

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Chapter 1 – Annual Leave Plans

Overview

An annual leave plan, as defined for ADP Freedom, assumes that employees are entitled to a pre-determined number of days or hours leave per year.

ADP freedom allows any number of annual leave plans to be defined which enable employers to record the time employees have taken off work, and control the amount and rate at which annual leave entitlement is taken.

An annual leave plan essentially defines the amount of leave (absence) an employee is entitled to, based on their working hours, length of service and other factors.

Different types of plan can be defined that base their entitlements and calculations on either the employees' **working days/week** or **working hours/week**, depending on the employees' terms of contract. As a result, plans are referred to as being either *days based* or *hours based*.

Employee Terms of Contract / Leave Plan Enrolment

An employee's working days or hours per week (e.g. their shift pattern) are determined by their **Terms of Contract** which is defined on the **People > Appointment & Rates > Working Hours** page. There are four different terms of contract available, and these affect the type of occupational leave plan an employee can be enrolled into, if any. This is summarised below:

<i>Terms of Contract</i>	<i>Description</i>	<i>Annual Leave Plan Enrolment</i> (Days or hours based)
Fixed shift	Employees who are hired to work a pre-determined pattern of days and times. These patterns are defined in freedom as Shift Patterns.	Can be enrolled into days or hours based plans
Fixed shift with override	Within this class, there is a sub-class of employees - sometimes referred to as 'flexible workers' - who have the option to override the working days in their Shift Pattern.	
Contracted hours	Employees who are contracted to work an agreed number of hours in an agreed time interval (typically a week or a year), but where the days and times to be worked may vary each week.	Can be enrolled into hours-based plans only
Zero hours	Employees who have no contractual commitment to work a set number of hours to be worked, or the days and times on which to work. For example, casual workers or project staff.	Cannot be enrolled

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An employee's **Terms of Contract** also affects how the employee's absence request is processed by Freedom. This is summarised in the table below:

	Fixed shift (with or without Override) "An employee who works a fixed pattern of days and times. May be salaried or paid for hours worked."	Contracted hours "An employee who agrees to work a fixed number of hours each week/month/year, but who has no shift pattern. Days and times worked are determined by a roster. May be salaried or paid for hours worked."	Zero hours "An employee who is invited to work as needed; has no shift pattern and no agreed hours. Always paid for hours worked (never salaried)."
Annual Leave	Assumptions:	The employee is assumed to belong to an Annual Leave plan.	The employee is assumed to belong to an Annual Leave plan.
	Entitlement:	Entitlement is fixed for the year based on the weekly contracted hours/days. May be expressed in days or hours.	Entitlement is fixed for the year based on the weekly contracted hours. Always expressed in hours.
	Booking:	Employee requests a period of absence. System calculates amount of time off in hours or days (depending on plan) from Shift Pattern.	Employee requests a period of absence. Freedom calculates the time off based on the weekly contracted hours and spreads this over an assumed 7-day week. The line Manager (or Pay Admin) may subsequently alter the spread of hours.
	Payment:	Calc to automatically pay holiday pay to unsalaried employees. Fixed rate of 'Holiday pay', defined by reference to an Earning (or collection of Earnings).	Calc to automatically pay holiday pay to unsalaried employees. Rate of 'Holiday pay' may be fixed or may be an average of previous weeks' earnings (excl. current period).
		No Annual Leave plan.	Entitlement is assumed to be managed by external system (e.g. HR.net). Freedom only pays the hours it is told to pay Number of hour's annual leave to pay will be advised to payroll via PDE. User can key in via PDE or it can be generated from timecard data uploaded to freedom from HR or ezLM. Calc to pay the specified number hours. Rate of 'Holiday pay' may be fixed or may be an average of previous weeks' earnings (excl. current period).

Figure 1 - 1 Terms of Contract effect on annual leave processing

Leave plan status

An Annual leave plan is assigned a status that controls the actions that can be taken on the plan :

- **In planning** - A leave plan is considered to be **In planning** when it is initially created. While at this status, no employees can be enrolled into it
- **Ready for use** - Once the leave plan has been created and the required options (described later in this guide) have been configured, then the status can be changed to **Ready for use**. Once a leave plan is **Ready for use**, then employees can be enrolled into it
- **Active** - Once employees have been enrolled into a leave plan then it automatically becomes **Active**
- **No active members** - When the system detects that there are no employees that are currently enrolled, or scheduled to be enrolled at some future date, then the status of the leave plan is changed to **No active members**

When the system detects that there are no employees that are currently enrolled, or scheduled to be enrolled at some future date, then the status of the leave plan is changed to **No active members**.

Note: Other than when changing from **In planning** to **Ready for use**, the status of a leave plan is maintained automatically by the system based on whether employees are, or have been enrolled. The only time a user can change the status of a leave plan is when changing from **In planning** to **Ready for use**, to do this the user must select the new

*status from the drop-down list on the **Company > Leave plans > Enrolment > Enrolment Rules** page.*

Defining Annual Leave Plans

Note: *Only users with the role of HR Administrator are permitted to configure annual leave plans.*

An annual leave plan is defined using the following Freedom options:

- **Company > Leave Plans > Annual Leave > Details**
- **Company > Leave Plans > Annual Leave > Entitlement**
- **Company > Leave Plans > Annual Leave > Carry Forward**
- **Company > Company Setup > Rules > Length of Service**

Annual Leave Plan Details

Each plan is identified by a name and code. The Details page allows you to configure the following details:

- A unique code and name by which the plan can be identified within ADP Freedom.
- The date and month of each year the plan start, the default being the 1st January. Alternatively this date may be the anniversary of the employee's starting date.
- How the annual entitlement should be pro-rated when an employee joins the plan mid-term and the rate at which it is accrued (these are typically the same). If leave is pro-rated for each whole month worked, then leave is accrued in monthly increments. A range of pre-supplied methods, representing the more common practices used, are provided with the application.
- A definition of whether the plan includes an annual entitlement that increases, at least initially, with service. It may also define where a pre-condition of the plan is that an employee serves a minimum period before any entitlement is granted.
- The number to use when calculating the rate to pay in lieu of untaken leave when an employee leaves. This formula is applied to the annual basic rate of pay. For example, if an employee works 260 days each year and their annual pay is £26,000, then each day of untaken leave would be valued as £100.

Entering the Annual Leave Plan details

The page is accessed from the application menu via this path:

Company > Leave Plans > Annual Leave > Details

When viewing or editing, the user is required to select the Annual Leave Plan from a pick-list populated with the descriptions of each plan ordered alphabetically.

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Users wishing to set up a new plan must click on the button in the pick-list labelled **New Details** or select **New Leave Plan** from the foot of the **Details** page.

Company - Leave Plans - Annual Leave - Details

Holiday Plan 01 (HOLPLAN)

In planning **Ready for use** **In use**

Plan code:

Plan description:

Members: 920 current; 50 past; 0 future

Plan year

Plan recycles on:

Plan year starts on:

Accrual

Entitlement will accrue at regular intervals over the plan year.

Accrual frequency:

Rounding rule:

Length of Service

Choose a rule that describes how service should be measured.

LOS rule:

When booking time off

This is optional. If you do not specify a rounding rule here, the Absence Category definition will be used.

Rounding rule:

When employee starts mid-year

The entitlement an employee receives under this plan may be pro-rated if he or she is enrolled partway through the plan year.

Pro-rate based on:

Rounding rule:

When an employee leaves

Make payment in lieu of unused entitlement:

Make deduction in lieu of excess leave taken:

Compute daily/hourly rate based on either:

Shift pattern worked at time, or

Fixed divisor of days/hours per year.

Figure 1 - 2 Configuring an Annual Leave plan

Details page field descriptions

Table 1 - 1 Field Descriptions – Leave Plans – Details

Field	Description
Plan Status	<p>This status bar identifies the current status of the plan. The plan can be In planning, Ready for use or In use. The status that applies to the selected plan is highlighted.</p> <p>An In use plan either has employees currently enrolled, or once had employees enrolled but now does not. You cannot change the plan details once it is in use.</p> <p>The plan membership numbers are summarised in the Members field below.</p>
Plan code	A unique user defined code up to 10 characters long.
Plan Description	The description can be up to 40 characters long and should be sufficiently expressive to ensure that other users can easily identify its intended usage.
Members	<p>The number of members currently enrolled in the plan, that have been enrolled in the past but are no longer members, and those due to become members on a date in the future.</p> <p>You cannot alter a plan once members have been enrolled.</p>
Plan year	
Plan recycles on	<p>The recycling day is the day, each year, the annual leave entitlement begins. The options to choose from are:</p> <ul style="list-style-type: none"> • The same day and month of each year, for example 1st January. • Anniversary of employment start date, for example 10th August. • First day of month in which employment started, for example 1st August.
Plan year starts on	The actual date that the new leave year begins for employee’s who are enrolled with this particular leave plan. This option is disabled if the plan recycle date is based on the employee’s anniversary start date.
Accrual	
Accrual frequency	The interval at which annual leave is accrued is selected from a drop-down list. This list gives you the option of selecting daily, weekly or

Field	Description
	<p>monthly interval.</p> <p>For example, if leave accrues in monthly intervals then 1/12th of the annual leave entitlement will be awarded to the employee on the first day of each calendar month.</p>
Rounding rule	<p>Accrued entitlement will be rounded according the rounding rule that is selected. Several options are provided to round up or down to quarter, half or whole days or hours. The default is, as per the working time directive, Days, rounded up to half day.</p>
Length of service	
Use this LOS rule	<p>If length of service is a factor in determining the amount of leave an employee is entitled to, then the rule that is to apply can be selected from the Use this LOS rule drop-down list. These rules are defined on the Length of Service page.</p>
When booking time off	
Rounding rule	<p>When an employee books part of a day off, this rounding rule will be used to round the entitlement up or down. If this is left blank, the rounding rule specified in the Measured in field on the Absence Category is used.</p>
When employee starts mid-year	
Pro-rate based on	<p>If an employee joins an annual leave plan mid-term their entitlement must be proportionally reduced because they will have less than a year before the end of the term. The following are examples of different scenarios:</p> <p>Example 1</p> <p>An employee joins the plan on the 1st July. The annual entitlement is 24 days, and runs from the 1st Jan to 31st Dec each year.</p> <p>The elapsed time between the 1st July and the 31st Dec (inclusive) is 184 days. Each calendar day is worth 1/365th of the annual entitlement. Hence the pro-rated entitlement is 0.0657534 x 184 days = 12.10 days.</p> <p>Example 2</p> <p>Same dates as Example 1 but the employee receives 1/260th of the annual entitlement for every day worked, on the assumption that they notionally work 5 days per week, from Monday to Friday.</p> <p>The count of working days (ignoring any company or bank</p>

Field	Description
	<p>holidays) between the 1st July and the 31st December is 131 days, so the pro-rated entitlement is $0.0923076 \times 131 \text{ days} = 12.09 \text{ days}$.</p> <p>Example 3</p> <p>Same dates as Example 1 but the employee receives $1/52^{\text{nd}}$ of the annual entitlement for every whole week worked, where each week is assumed to commence on a Sunday.</p> <p>The count of whole weeks between the 1st July and the 31st December is 26 weeks. Each week worked is worth 0.4615384 days. Hence the pro-rated entitlement is $0.4615384 \times 26 = 11.99 \text{ days}$.</p> <p>Likewise, when an employee exits a plan mid-term, this too will require that the entitlement be pro-rated.</p> <p>Where the contract of employment is terminated it is also necessary to translate unused leave entitlement in a monetary value. This requires pro-rating their entitlement up to the point of leaving and then comparing this with the actual amount of leave taken.</p>
Rounding rule	<p>Using the examples above, it can be seen that the pro-rate calculations leave fractions of days that it would not be practical to administrate. To ensure that employees leave allowances are consistent, a rounding rule is applied. Regardless of which pro-ration method is chosen, the user must also select the rounding method to be applied. Several options are provided to round up to down to quarter, half or whole days or hours. The default is, as per the working time directive, Days, rounded up to whole day.</p>
<p>When an employee leaves</p>	
Pay in lieu of unused entitlement	<p>If the employer has elected to pay an employee in lieu of days of leave that are not taken, then this box should be ticked.</p>
Make deduction in lieu of excess taken	<p>Tick this option to charge an employee who is leaving their employment, for any days leave they have taken in excess of their entitlement once proration is taken into account.</p>
Compute daily rate based on	<p>Finally, in this section, the user must enter the number of days that are normally worked in the year, this number is used in calculating the daily rate of pay.</p>

Details page action buttons

Note: *Once an annual leave plan has had employees enrolled into it, the plan cannot be amended or deleted. If it is necessary to make changes, a new plan should be created and the employees transferred into it.*

The **Details** page provides the following four action buttons:

New Leave Plan – Selecting this button allows the user to create a new Annual Leave plan.

Delete Leave Plan – Selecting this button allows the user to delete the currently displayed annual leave plan. This button will only be enabled for leave plans that are not yet in use, that is no employees are, or have been, enrolled in this leave plan. The plan cannot be deleted even if employees that were enrolled in the plan have been moved to another plan, this ensures that historical information is retained.

Cancel Changes– Selecting this button will delete any entries that have been made on the page that have not yet been saved.

Save Leave Plan – If the leave plan has been amended in any way, then clicking the Save button will write the changes to the database.

Annual Leave - Entitlement

Once a leave plan has been created and the various options have been configured, the next step is to define the entitlements. Entitlements may be based on length of service and granted as either a number of days or hours, depending on the leave plan.

Note: *The “length of service” period can differ from one leave plan to another. See Length of Service definition on page 14.*

The following table shows a possible permutation of entitlement that varies with length of service and weekly contracted work days.

Table 1 - 2 Example of leave entitlement permutations

Minimum service (years)	Contracted days per week				
	1	2	3	4	5
0	4	8	12	16	20
2	4	8	12.5	16.5	21
5	4	8.5	13	17.5	22
10	5	10	15	20	25

Defining annual entitlement

The annual entitlement for each plan is defined on the **Entitlement** page. The page is accessed by first selecting **Company > Leave Plans > Annual Leave > Entitlement** from the main menu and then selecting the relevant leave plan from the centre frame pick-list.

Company - Leave Plans - Annual Leave - Entitlement

Holiday Plan 01 (HOLPLAN)

Show entitlement applicable to employees working: days per week

Minimum service	Contracted days	Annual Entitlement	Accrue before use
0 Years	5.00	20	No
5 Years	5.00	22	No
10 Years	5.00	25	No

Minimum service: Service is measured in:

Contracted days per week:

Annual entitlement: Day(s)

Accrue before use:

New Rule Delete Rule Previous Rule Next Rule Cancel Changes Save Rule

Figure 1 - 3 Setting the entitlement for annual Leave plans

To add, or create an initial entitlement row for this leave plan, click on **New Rule** from the buttons at the foot of the page.

Note: *Mandatory fields have a blue background.*

Entitlement plans are constructed row by row. Each row indicates the entitlement that an employee will receive if they fit the criteria identified in that particular row. An employee can only be a match for one row at any one time.

This is determined by the minimum service column. Once an employee qualifies as having served a minimum length of service that is longer than the length of service that they were previously at, then the new row takes precedence.

Enter the minimum service, contracted days per week and annual entitlement that will apply to an employee who fits this work criteria.

The annual entitlement is defined in either days or hours, depending on whether the annual leave plan is based on contracted working hours or days (which is determined by the Rounding Rule that applies to the plan).

Click **Save** to save the new row.

Repeat this for each variant of leave entitlement for the plan, until the whole plan is complete.

Entitlement page field descriptions

Table 1 - 3 Field Descriptions – Leave Plans – Entitlement

Field	Description
<p>Show entitlement applicable to employees working ... days per week</p>	<p>This drop-down list provides a filter that limits the content of the grid to show only the entitlement details for a specific number of contracted working days per week. The options are from 1 working day to 7 working days or alternatively, selecting Any from the drop-down list provides an unfiltered list that displays the entitlement for all variations of contracted days.</p> <p>The default is 5.</p>
<p>Minimum service</p>	<p>The minimum length of time that the employee must have been employed within the organisation before they are eligible for the associated annual entitlement. This column, along with the Contracted days column, provide the criteria for the Annual entitlement.</p> <p>An employee can only qualify for one Minimum service period at any one time, once they qualify for a higher level they cease to be associated with the lower Minimum service criteria.</p> <p>The length of service period is typically defined in years, but this is determined by the Length of Service set on the Leave Plan Details.</p>
<p>Contracted days</p>	<p>The number of days per week that the employee is contracted to work. This column, along with the Minimum services column, provides the criteria for the Annual entitlement.</p>
<p>Annual entitlement</p>	<p>The number of days or hours leave to which an employee is entitled if they meet the Contracted days and Minimum service criteria.</p>
<p>Accrue before use</p>	<p>If the employee has to work a proportional number of days or hours before they can begin to take their leave, then ensure that the Accrue before use check-box is checked.</p>

Entitlement page action buttons

Note: *Once the Entitlement has been associated with a plan that has had employees enrolled into it, the plan, and therefore by default the Entitlement, cannot be amended or deleted. If it is necessary to make changes, a new plan should be created and the employees transferred into it.*

The **Entitlement** page provides the following six action buttons:

New Rule – Selecting this button allows the user to create a new row in the Entitlement grid.

Delete Rule – Selecting this button allows the user to delete the currently displayed annual leave plan. This button will only be enabled for entitlements associated with leave plans that are not yet in use, that is no employees are, or have been, enrolled in the leave plan. The entitlement cannot be deleted even if employees that were enrolled in the plan have been moved to another plan, this ensures that historical information is retained.

Previous Rule – The **Previous** and **Next** options are navigation buttons that allow the user to select rows above or below the current selection in the grid. Details of the row that is currently selected will be displayed in the fields below the grid. If the top row in the grid is currently selected then the **Previous Rule** button is disabled.

Next Rule - The **Previous** and **Next** options are navigation buttons that allow the user to select rows above or below the current selection in the grid. Details of the row that is currently selected will be displayed in the fields below the grid. If the bottom row in the grid is currently selected then the **Next Rule** button is disabled.

Cancel Changes – Selecting this button will delete any entries that have been made on the page that have not yet been saved.

Save Rule – If the entitlement page has been amended in any way, then clicking the **Save** button will write the changes to the database.

Annual Leave – Carry Forward

The next step in creating a leave plan is to configure the carry forward element. In essence, this page allows the user to define the number of days that an employee can carry over from one leave year to the next. The details entered on this page will act the restrictions that apply to this leave plan. If the carry forward page for a leave plan is empty, then this means there are no restrictions and an employee is able to carry forward all of their leave for one year into the following year.

The carry-forward entitlement for each plan is defined on the **Carry Forward** page. The page is accessed by first selecting **Company > Leave Plans > Annual Leave > Carry Forward** from the main menu and then selecting the relevant leave plan from the centre frame pick-list.

Chapter 1 – Annual Leave Plans

Company - Leave Plans - Annual Leave - Carry Forward

PlanA for Warehouse (1112)

Minimum service	Rule No	Carry up to	Use within
0 Years	1	3 Day(s)	30 Day(s)
5 Years	1	2 Day(s)	45 Day(s)
5 Years	2	3 Day(s)	30 Day(s)

Minimum service: Service is measured in:

Rule No.

Carry up to: Day(s)

Use within:

New Rule Delete Rule Previous Rule Next Rule Cancel Changes Save Rule

Figure 1 - 4 Setting the carry forward element for annual Leave plans

The carry forward element of a leave plan is based on length of service, and more than one rule can be applied to each defined **Minimum service** period.

Carry forward page field descriptions

Table 1 - 4 Field Descriptions – Leave Plans – Carry Forward

Field	Description
Minimum Service	<p>The minimum length of time that the employee must have been employed within the organisation before they are eligible for the associated annual entitlement. This column is the control column for the carry-over entitlement.</p> <p>An employee can only qualify for one Minimum service period at any one time, once they qualify for a higher level they cease to be associated with the lower Minimum service criteria.</p> <p>The length of service period is typically defined in years, but this is determined by the Length of Service set on the Leave Plan Details.</p>
Rule No	<p>For any given amount of Minimum service there may be more than one rule in operation. Rules are numbered from 1 to 9, the default being 1. The order in which the rules are numbered is not significant as all relevant rules apply.</p> <p>For example:</p>

Field	Description
	<p>Using the details displayed in Figure 1 - 4, it can be seen that an employee enrolled in Plan A for Warehouse who has completed more than five years service will have two rules applied to their carry over entitlement. The first rule restricts the number of carry over days to 3 but specifies that these 3 days must be used within the first 30 days following leave year. The second rule restricts the number of carry over days to 2 days but allows those 2 days to be taken within 45 days of the new leave year starting.</p> <p>If the employee matches both rules, then the entitlement is cumulative, that is, using the above example, the employee would be able to carry five days over but must use three of those days within thirty days and the remaining two would have to be taken within forty five days of the new leave year starting.</p>
Carry up to	<p>The number of hours or days that an employee can carry over if they are enrolled in this leave plan and have reached the Minimum service duration for which this rule applies.</p> <p>Note: <i>An employee can only qualify for one Minimum service period, the longest having the priority, but more than one rule can apply, see the example in the Rule no description.</i></p>
Use within	<p>If an employee is allowed to carry leave hours or days over into the following leave year and a rule has been configured, then this column specifies when the carried over leave must be used by. Note: <i>If no carry over rules have been configured then by default, all leave can be carried over and there is no time limit as to when it has to be used by.</i></p>

Carry forward page action buttons

Note: *Once a **Carry forward** rule has been associated with a plan that has had employees enrolled into it, the plan, and therefore by default the **Carry forward** rule, cannot be amended or deleted. If it is necessary to make changes, a new plan should be created and the employees transferred into it.*

The **Carry forward** page provides the following six action buttons:

New Rule – Selecting this button allows the user to create a new row in the **Carry forward** grid.

Delete Rule – Selecting this button allows the user to delete the currently displayed **Carry forward rule**. This button will only be enabled for rules that are either not associated, or, associated with leave plans that are not yet in use. That is no employees are, or have been, enrolled in the leave plan. The rule cannot be deleted even if employees that were enrolled in the plan have been moved to another plan, this ensures that historical information is retained.

Previous Rule – The **Previous** and **Next** options are navigation buttons that allow the user to select rows above or below the current selection in the grid. Details of the row that is currently selected will be displayed in the fields below the grid. If the top row in the grid is currently selected then the **Previous Rule** button is disabled.

Next Rule - The **Previous** and **Next** options are navigation buttons that allow the user to select rows above or below the current selection in the grid. Details of the row that is currently selected will be displayed in the fields below the grid. If the bottom row in the grid is currently selected then the **Next Rule** button is disabled.

Cancel Changes – Selecting this button will delete any entries that have been made on the page that have not yet been saved.

Save Rule – If the **Carry forward** page has been amended in any way, then clicking the **Save Rule** button will write the changes to the database.

Length of Service

Length of service may be a factor in determining an employee's entitlement to occupational leave (and may also be used in pension calculations). A Length of Service rule determines how the length of service is measured.

Individual rules are set up in isolation and then referenced by leave plans or pension calculations, as required.

A Length of Service Rule defines the following:

- the units in which the employee's service is measured.
- whether or not the length of service is rounded up or down.
- how service is measured.
- the date that the length of service is measured up to.
- any offset that is to be applied to the result of the calculation.

The length of service rules are defined on the **Length of service** page. This is accessed by selecting **Company > Company Setup > Rules > Length of Service** from the main menu and then selecting the relevant rule from the centre frame pick-list. Alternatively, to create a new rule, the user can click on the **New Length of Service Rule** button.

Company - Leave Plans - Rules - Length of Service

Years service to date

Code:

Description:

Units

Measure:

In units of:

Rounding:

Point in time

Calculate as of:

Date:

Month:

Day:

Add a fixed time period

Amount:

Units:

Figure 1 - 5 Length of service rules

Length of service page field descriptions

Table 1 - 5 Field Descriptions – Leave Plans – Length of service

Field	Description
Code	A unique, user defined, code up to 10 characters in length.
Description	The description can be up to 80 characters long and should be sufficiently expressive to ensure that other users can easily identify its intended usage.
Units	
Measure	<p>This is a drop-down list that provides options that decide how length of service is to be measured. The options are:</p> <ul style="list-style-type: none"> • This employment (Default) • This employment since probation completed • Continuous service

Field	Description
	<ul style="list-style-type: none"> • Adjusted service • Actually worked • Adjusted service
In units of	These can be expressed in Weeks, Months or Years.
Rounding	Since an employee's length of service, when calculated, may not be an exact number of years, months or weeks, the rule also dictates how the result must be rounded up or down.
Point in time	
Calculate as of	This is the date that the length of service is calculated up to. It may be a specific day of the month , each month, or a specific day of the year , each year. It could also be a fixed point in time, for example 1 st January 2002. The default is The evaluation date which is the date on which the calculation is made, meaning that if the calculation was run today it would calculate the employees length of service up to today's date.
Date	<p>If a fixed point in time has been selected from the options in the Calculate as of list then this field is enabled and the relevant date should be entered.</p> <p>Otherwise this field is disabled.</p>
Month	<p>If a specific day of the year has been selected from the options in the Calculate as of list then this field is enabled and the relevant month should be selected from the drop down list. The actual day of the month should be entered into the Day field.</p> <p>If The evaluation date, a fixed point in time or a specific day of the month have been selected from the options in the Calculate as of list then this field will be empty and disabled.</p>
Day	If either a specific day of the month , or a specific day of the year have been selected then this field will be enabled and the actual day should be entered.
Add a fixed time period	
Amount	Used in conjunction with the Units field to add, or subtract, a fixed period from length of service that has been calculated. A negative number will mean that the period is subtracted from

Field	Description
	<p>the calculated length of service.</p> <p>Note: The option to either add, or even subtract, a fixed period of time from the calculated length of service may be used to differentiate between employees who have served the majority of a year compared to those that have only a small fraction of the year.</p> <p>Example:</p> <p>A company’s length of service rules are recalculated each January 1st to assess employee entitlement. Employee’s with one year’s service qualify for one extra day of leave per year.</p> <p>At the 1st January Employee A will have served 11 months and Employee B will have served 2 months, if the length of service rule was implemented as it stands, neither employee would be entitled to the extra day of leave for the coming leave year. The company has decided that this policy is unfair to Employee A who would have to serve nearly two years to qualify for the extra day of leave. To address this problem, the company use a 6 month offset which is added to the calculated length of service of each employee. The effect of this offset is that any employee who has served more than 6 months when the entitlements are recalculated on 1st January will qualify for the extra day of leave, while those that have served less than six months will not.</p>
Units	<p>Used in conjunction with the Amount field, this is the unit of measure to be used when calculating the offset. For example, if 6 is entered into the Amount field, and Months is selected from the Units drop-down list then the offset would be 6 months.</p>

Length of Service page action buttons

Note: Once a *length of Service* rule is associated with a plan that has had employees enrolled into it, the plan, and therefore by default the **Length of Service rule**, cannot be amended or deleted. If it is necessary to make changes, a new plan should be created and the employees transferred into it.

The **Length of Service** page provides the following action buttons:

New LOS Rule – Selecting this button allows the user to create **Length of Service** rule.

Delete LOS Rule – Selecting this button allows the user to delete the currently displayed **Length of Service** rule. This button will only be enabled for rules that are either not associated, or, associated with leave plans that are not yet in use. That is no employees are, or have been, enrolled in the leave plan.

Cancel Changes– Selecting this button will delete any entries that have been made on the page that have not yet been saved.

Save LOS Rule – If the **Length of Service** page has been amended in any way, then clicking the **Save** button will write the changes to the database.

Testing the Rule

Finally, the length of service rule can be tested against individual employees by clicking on the **Test This Rule** button.

Rules Tester -- Web Page Dialog

Service at end of current month

You must choose a person against whom to test this rule. If you know their Person ID you can type it in, otherwise click on the button to find a person.

Person ID:

Surname:

Forenames:

Date of birth:

The employee's length of service will be evaluated up to and including the date you specify here:

Evaluation date:

Figure 1 - 6 Test length of service rules

Once the button is clicked, the **Rules Tester** pop-up page activates. From this page a user can either enter the Person ID of an employee, against whom the rule is to be tested, or use the **Find person** button to activate an assistant from where criteria can be entered to produce a list of employees.

Chapter 1 – Annual Leave Plans

The screenshot shows a dialog box titled "Person Selection Assistant -- Web Page Dialog". Inside, there is a section titled "Search for a Person" with three radio button options: "By Last Name" (selected), "By Business Unit", and "By Job Title". Below the options is a search input field containing the letter "j". At the bottom right of the dialog are "Next" and "Cancel" buttons, and a "Help" icon at the bottom left.

Figure 1 - 7 Selection assistant – first page

The first page of the assistant, illustrated above, allows user to determine how they wish to search for the employee to test the rule against. There are three search options:

- **Last name**
- **Business Unit**
- **Job Title.**

If the user elects to search **By last Name** then they have to provide either the full last name or some portion of it, for example the first letter, first two letters etc. they click the **Next** button are able to select from the list of employees matching the entered criteria.

The screenshot shows the second page of the dialog, titled "Selection Assistant -- Web Page Dialog". It displays a table with the heading "Select the employee from the following list:". The table has four columns: "Last Name", "First Name", "BU Name", and "Job Title". The data rows are as follows:

Last Name	First Name	BU Name	Job Title
Jabbar	Shimair	Assembly Line 2	Assembler
Jackson	Pamela	Order Processing	Order Process
James	Christopher	Packaging	Senior Packer
Jefford	Chris	Production	General Mana
Jenkins	Henry	Assembly Line 1	Assembler
Jenkins	Mary	Assembly Line 1	Production Su
Jones	Alison	Assembly Line 1	Assembler
Jones	Amanda	HR	HR Administra
Jones	Mark	Warehouse	Forklift Driver

At the bottom of the dialog are "Back", "Finish", and "Cancel" buttons, and a "Help" icon at the bottom left.

Figure 1 - 8 Selection assistant – second page

Chapter 1 – Annual Leave Plans

If the user elects to search by **Business Unit** or **Job Title** then click the **Next** button, ADP Freedom displays a list of Business Units or Job Titles from which to select, once the selection is made ADP Freedom then displays a list of personnel from whom to choose.

Highlight the relevant employee from the grid and click on **Finish**, the selection assistant will close and the selected employee's details will have been entered into the relevant fields on the **Rules Tester** page.

If necessary, enter the date that the employee's length of service is to be measured into the **Evaluation date** field (the entry is defaulted to the current date, but can be overwritten).

Clicking on **Next** will display the results page that will provide the length of service that this employee will have completed as at the date entered on the previous page.

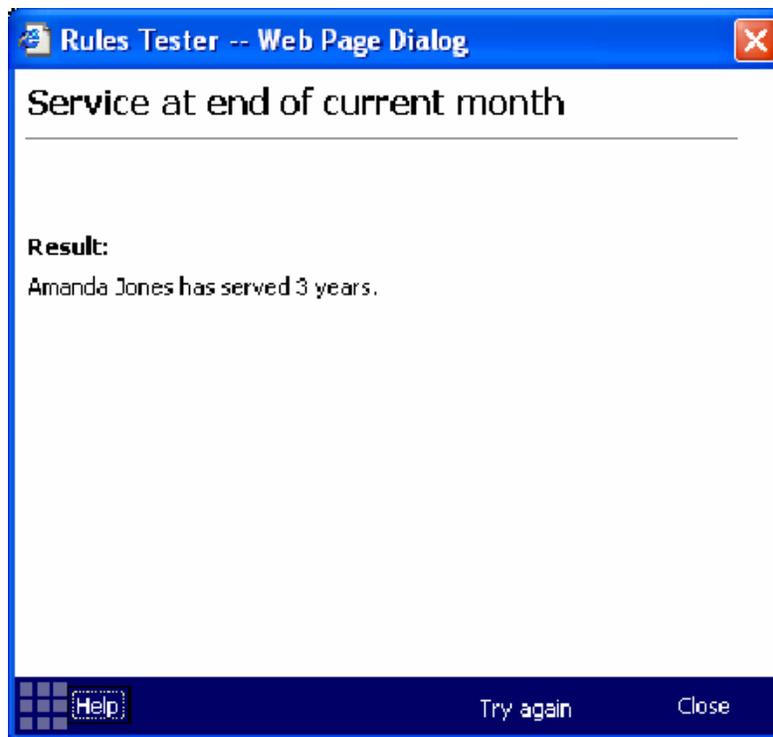


Figure 1 - 9 Rules Tester – Results page

If the user would like to enter a different date to calculate length of service up to then clicking on **Try again** will return the user to the first page of the assistant.

Having set up the required annual leave plans, these need to be made available for employees to enrol in, until this happens, the plan is deemed to be *In planning*. A plan is made available by changing the status from **In Planning** to **Ready to use** on **Company > Leave plans > Enrolment > Enrolment Rule** page.

Enrolling Employees into Leave Plans

Employees can be enrolled into leave plans automatically once the **Status** of the plan is set to **Ready to use**.

The **Enrolment Rule** page is used to set the status of a plan and to control which plans an employee is enrolled into by assigning a **Membership Profile** to the plan.

Effective from	Effective to	Plan	Rank
01/01/2004		Holiday Plan 01	1

Plan:

Effective from:

Effective to:

Ranking:

Membership profile:

Status:

Figure 1 - 10 Enrolling employees into a leave plan

This page is accessed by first selecting **Company > Leave Plans > Enrolment > Enrolment Rule** from the main menu and then selecting the relevant leave plan from the centre frame pick-list.

*Refer to the **Membership Profiles & Plan Enrolment** user manual for further information on how to define membership profiles and enrolment rules, and how to enrol employees automatically into plans.*

Managing & Reviewing Enrolments

Once a plan is switched from **In planning** to **Ready to Use**, then the **Enrolment Review Assistant** is invoked to enrol those employees that meet the membership profile criteria.

Any changes that are made to the employees plan memberships will activate the **Enrolment Review Assistant** from where you can elect to activate the review process immediately, or manually invoke a review at a later date.

The enrolment assistant is also launched automatically when specific employment details are changed. Examples of changes that would activate the enrolment assistant are:

- New appointment
- Changes to existing appointment
- New pay rates

Chapter 1 – Annual Leave Plans

- Changes to pay rates
- Changes to appointment working hours or shift pattern
- Creating new plans
- Decommissioning plans

You can also choose to manually run the Enrolment Review Assistant at any time for an individual employee using the **People > Leave Plans > Review Enrolment** option, or for all employees using **Company > Leave Plans > Enrolment > Enrol Employees**.

*Refer to the **Membership Profiles & Plan Enrolment** user manual for further information on how to review enrolments.*

Chapter 2 – Viewing & Recording Holiday Absences

Annual leave can be recorded by the following employee roles:

- **Admin** - This encompasses any user that logs into ADP Freedom via the main application interface, as opposed to logging in via Self-Service. An absence is recorded using the **People > Absence Management > Absences** page.
- **Line Manager** - Any employee that logs in via Self-Service and has one or more employees who currently report to him/her can record an absence using the **My Team > Absence > Absences** option.
- **Employee** - Any employee that logs in via Self-Service can record an absence using the **About Me > Absence > Absences** option.

The **Absences** page is the same in each case.

Freedom makes some assumptions on how absences are recorded based on the employee's terms of contract (agreed work hours) and this is summarised below:

Figure 2 - 1 Booking annual leave summary

Booking Annual Leave (or any other planned absence)

Terms of Contract (Agreed work hours)	 Employee *	 Line Manager *	 Administration
Always works the same shift pattern	Requests absence by entering the start and end dates. System calculates time off for each day using Shift Pattern.	Reviews & approves request for absence.	May change any details
Shift pattern with option to override	Requests absence by entering the start and end dates. By default system calculates time off for each day using Shift Pattern, but user can override this.	Reviews & approves request for absence.	May change any details
Contracted hours agreement	Requests absence by entering the start and end dates. User may enter time off for each day, or may leave it to Line Manager to complete these details.	Reviews & approves request for absence. Enters time off for each day if not input by employee (or incorrect).	May change any details
Zero hours contract or casual worker	This type of employee is not expected to request time off via Self Service.	Can record an absence to represent unavailability for work. Time off is not calculated or input.	May change any details

* Assumes that time off is requested using ADP freedom Self Service.

About the Absences Page

The **Absences** page provides a host of features that enable you to manage an employee's absences. You use the Absences page to:

- log new absences
- maintain existing absences
- review an employee's previous absence details
- identify any absences the employee has booked but not taken
- view the employee's annual leave entitlement balance
- check the employee's working hours.

The Absences page exists in both the main Freedom application and also in Self Service.

In Freedom it accessed from the **People > Absence Management > Absences** option and you should choose the employee you required in the centre pane in the usual way.

When you access this page for an employee it lists the employee's absence records for the last 12 months and provides a series of buttons that allow you to focus on the absences you wish to view, and view other absence related information.

Note: You cannot use the Absences option to add or maintain Shared Parental Leave absences. These are added and maintained using the Shared Parental Leave Assistant.

Refer to the **Absences – Sickness Benefits** manual for information on how to view an employee's absences in more detail using the **View Summary** and **View Working Hours** options on the Absences page.

Logging an absence through the main application

An employee absence can be recorded by an administrator, through the main application page **People > Absence Management > Absences**.

Attercliffe, Pennie (A637) CONTACT INFO

[Last 12 months](#) [Coming up](#) [In date range](#)

Start	Finish	Reason	Time off
09/09/2010	10/09/2010	Short-term Sick	2.00 days
16/08/2010	16/08/2010 11:00	Ante-natal Appointment	2.00 hours
12/05/2010 11:30	12/05/2010	Compassionate Leave	6.00 hours
15/02/2010	19/02/2010	Holiday	5.00 days

[View balance of annual leave](#) [View working hours](#)

[New Absence](#) [Delete Absence](#) [Change Absence](#) [View Summary](#)

Figure 2 - 2 The Employee Absences page

The Absences page lists an employee's existing absence records and provides a series of buttons that allow you to focus on the absences you wish to view. By default it lists all of the absences for the last 12 months.

Refer to *Chapter 3 – Reviewing & Adjusting Annual Leave Balances* for further information on the Absences page.

Recording an absence using the Absence assistant

From the foot of the Absences dashboard, select **New Absence**. The Reason for Absence dialog appears.

Figure 2 - 3 The Absence Assistant – Reason for Absence

Complete the Reason for absence details. If necessary, refer to the table below for assistance.

Table 2 - 1 Field descriptions – Reason for absence

Field	Description
Reason for absence	This is a mandatory field. The list of reasons for absence that are available for selection is taken from the Absence Reason lookup table.
Request/notified on	For new entries this defaults to today’s date but the user can type in, or select via the calendar pop-up, an earlier date if they prefer. To activate the calendar pop-up, click on the calendar icon  to the right of the date field.

Field	Description
<p>Caused by accident at work</p>	<p>If the absence is a consequence of an accident at work the checkbox should be populated. (Any injuries that result in more than 3 days absence from work must be reported to the appropriate authorities).</p> <p><i>Note: This relates to sickness absences rather than annual leave. The resulting screen is described in the Absence – Sickness Benefits manual.</i></p>

Once the details on the above page have been entered, then clicking **Next** will progress the assistant to the next stage.

Identifying the period absent from work

The screenshot shows the 'Absence' assistant interface. The title bar reads 'Absence' and 'Request or record a period of time off work' with the ADP logo. A yellow sidebar on the left is titled 'When absent?' and contains the following text: 'Enter the dates of the first and last days of the absence.', 'If you don't know when the absence is going to end, but you have a rough idea, you can enter an expected end date.', and 'For night workers these are the calendar dates on which the shift began and ended.' The main area has two rows of input fields: 'Absent from: Start of shift on 24/11/2010 at 09:00' and 'Absent until: Part way through shift on 25/11/2010 at 11:00'. At the bottom, there are 'Help', 'Back', 'Next', and 'Cancel' buttons.

Figure 2 - 4 The Absence Assistant – When Absent from work

This second page of the assistant is used to identify when the employee will be on leave. You can enter the start and end date for the absence. If the employee is leaving or returning part way through a day, you can also record the relevant times.

For all absences other than sickness, the **Absent until** details must be completed.

Note for Night-time workers: These are absolute dates and times, i.e. the actual calendar date and time the absence began and finished. For night-workers this means that a single missed shift will result in an absence that ends the day after it began. The assistant will work out the hours/days absent.

Chapter 2 – Viewing & Recording Holiday Absences

Enter the **When Absent** details. If necessary, refer to the table below for assistance.

Table 2 - 6 Field descriptions – When absent?

Field	Description
Absent from	<p>This is the time of day the employee starts their absence on the first day of the absence. It defaults to the Start of shift option (and the At time is disabled) assuming the absence is starting at the beginning of the first day.</p> <p>If the employee is only going to absent for part of the first day i.e. is leaving some time during the first day, the selection list provides the following alternative choices:</p> <ul style="list-style-type: none"> • Half way through shift - this should be chosen if the employee is leaving half way through their shift and half a day's absence is to be recorded. The From time displays the time the system determines is exactly mid-way through the employee's working day for information purposes only. • Part way through shift - this should be chosen if the employee is leaving at a specific time of the day (which must be entered in the time field alongside).
On date	<p>This is the first day the employee is absent from work. It defaults to today's date, but can be set to any past or future date.</p> <p>If the first day absent falls on a public/company holiday or on a weekend, a warning is issued.</p>
At time	<p>This represents the time of day the employee started their absence from work. This field is enabled and must be entered, if Part way through shift has been selected from the Absent from drop-down list.</p> <p>If the Absent from drop-down list is set to Half way through shift this displays the time the system calculates is mid-way through the person's day (or shift). This time is purely for information and half a day's absence will be booked.</p>
Absent until	<p>This identifies the time of day the employee's absence ends on the last date of the absence. It defaults to the End of shift option (and the time field is disabled) assuming the employee is absent until the end of the shift (i.e. is returning to work at the start of the following shift).</p> <p>If the employee is returning during the last day of their absence, the selection list provides the following alternative choices:</p>

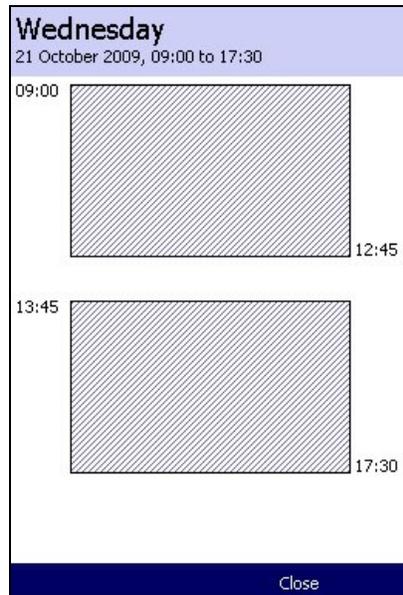
Chapter 2 – Viewing & Recording Holiday Absences

Field	Description
	<ul style="list-style-type: none"> • Half way through working day (shift) - this should be chosen if the employee is returning half way through the day i.e. they have taken off the first half of the day and half a day's absence is to be recorded. (The time is disabled although once the absence is saved it displays the time at the end of the working day for information purposes only.) • Part way through shift - this should be chosen if the employee is returning at a specific time of the day (which must be entered in the time field alongside). <p>If the absence is the result of sickness, a Don't know yet option is provided. If this option is chosen, the Expected to be Absent until date field is displayed.</p>
On date	<p>This is the last day the employee was absent (for all or part of the day). It is NOT the day the employee returns to work unless they return part way through the day.</p> <p><i>For example: If an employee phones in sick on Monday 12th June and returns to work for the start of his shift on Thursday 15th June, the Last day absent is Wednesday 14th June.</i></p>
At time	<p>The end time for an employee's absence is optional, unless the absence is due to end part way through the employee's working day.</p> <p>If a time is not input, the absence is assumed to finish at the end of the employee's working day.</p>
Expected to be Absent until	<p><i>Sickness absences only</i></p> <p>The date can only be entered if the Absent Until option is set to 'Don't know yet' day absent is left blank. If the absence occurs unexpectedly and the end date cannot be accurately predicted, you can record an expected end date for information purposes only.</p>

Chapter 2 – Viewing & Recording Holiday Absences

A  symbol is displayed that alongside the **Time** field. You can click this icon to view a representation of the employees working pattern for the shift/day.

For example:



Once the details on the above page have been entered, then clicking **Next** will progress the assistant to the next stage.

Identify the time off work

The next stage of the assistant identifies the amount of working hours/days the employee has booked as leave, based on the dates you have just entered and the employee's Terms of Contract.

The employee's Terms of Contract determine their working day/hours per week. This is identified in the **Terms of Contract** field on the **People > Appointment & Rates > Working hours** page.

There are four terms of contract options and each has a different affect on how the employee's time off is determined. This is summarised below:

Terms of contract	Time off work calculation
Always works the same shift pattern	Time off in days or hours is calculated automatically based on the employee's shift pattern and cannot be changed. The calculated time off is displayed on the final page of the assistant. The time off page is bypassed in this case and the next, Additional comments page on appears (see page 2 - 12).
Shift pattern with option to override	Time off in days or hours is calculated and displayed on the Time off work page. See the Time off work page section below.

Terms of contract	Time off work calculation
Contracted hours agreement	<p>The Timesheet input page appears automatically and you can enter the time the employee has taken off each day of the absence.</p> <p>See the Time off work – Timesheet input section on page 2 - 10.</p>
Zero hours contract or casual worker	<p>For sickness absences only, the timesheet input page appears automatically and you can enter the time the employee has taken off each day of the absence. This is because the employee may be eligible for SSP payments.</p> <p>See the Time off work – Timesheet input section on page 2 - 10.</p>

Time off work page

This page appears for employee’s with Terms of Contract of **Shift pattern with option to override**, as is explained above.

Figure 2 - 5 The Absence Assistant –Time off work page

You can click **Next** to accept the calculated time off and move to the [Additional comments](#) page (see page 2 - 12).

Alternatively, you can choose to override the employee’s shift pattern and therefore adjust the time off work, by unticking **Calculate time off work from shift pattern?** option. If you do so, the timesheet input page appears.

Time off work – Timesheet input

The **Timesheet input** page is primarily designed for workers who do not work a regular shift pattern i.e. those with a Contracted or zero-hours terms of contract, or those employees whose shift pattern sometimes changes. It allows you to accurately identify the employee’s time off for each day of their absence.

Tip: See the table in previous section for a description of when this page appears.

Date absent	Day	Scheduled to work?	Hour(s) absent	Day part absent
21 Nov 2008	Fri	Work day	7 : 00	1.00
22 Nov 2008	Sat	Non-work day	0 : 00	0.00
23 Nov 2008	Sun	Non-work day	0 : 00	0.00
24 Nov 2008	Mon	Work day	7 : 00	1.00
25 Nov 2008	Tue	Work day	7 : 00	1.00
26 Nov 2008	Wed	Work day	7 : 00	1.00
27 Nov 2008	Thu	Work day	7 : 00	1.00
28 Nov 2008	Fri	Work day	3 : 50	0.50
			66 : 50	9.50

Figure 2 - 6 The Absence Assistant – Time off work timesheet input

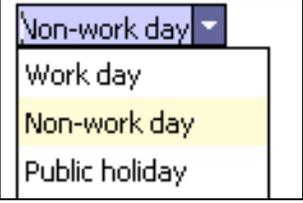
This page automatically displays a row for every day in the absence period. For a long absence, a scroll bar appears to allow you to scroll down to view and adjust all of the days.

You should enter the employee’s time off and click **Next** to continue.

Table 2 - 7 Field descriptions – Which days were you absent

Field	Description
Date absent	Each day the employee has been absent, as identified on 2 nd page of the assistant in the Absent From and Absent Until fields.
Day	The day of the week that each absence date corresponds to.
Scheduled to work?	Whether or not the employee is scheduled to work on the day, according to their Shift Pattern (if applicable) or the qualifying days set on their Working Hours. You can alter this to indicate whether or not the employee was due to work on each day or to identify public holidays.

Chapter 2 – Viewing & Recording Holiday Absences

Field	Description
	
Hour(s) absent	<p>The length of time, in hours, the employee was absent from work each working day.</p> <p>For an employee with a contracted hours agreement, the hours and minutes shown against each day by default are the contracted weekly hours divided by the number of Qualifying Days in the week. You can overwrite the hours and minutes shown if required.</p> <p>Where these do not divide equally, Freedom displays the closest result. For example, if an employee works 20 hours per week with 7 Qualifying Days, Freedom will show the Hours absent each day as 2 hours 51 minutes. The total hours worked over 7 days in this case be 19 hours 57 minutes, not exactly 20 hours. In this case, you would probably choose to adjust the calculated values manually.</p>
Day part absent	<p>The portion of the day the employee was absent. For example, 1.00 indicates an entire day, 0.50 half a day.</p>
Totals	<p>The total number of hours and days absent is calculated and displayed at the bottom (except for open-ended absences).</p>

Once the details on the above page have been entered, then clicking **Next** will progress the assistant to the next stage.

Additional notes

Absence
Request or record a period of time off work

Add notes

Use this space to add comments.

Note that comments can be seen by both employees and their line managers.

If it is your company's policy to ask the employee to complete a return to work form (or to conduct a return to work interview) then you can use the checkbox to record that this took place.

Employer's notes:

Employee has confirmed that this absence took place

Employee comments:

Back Next Cancel

Figure 2 - 7 The Absence Assistant – Add notes page

This page is used to add any employee or employer comments that may be associated with this absence. Note that the comments can be seen by both the employee and their line manager.

The Employee confirmation check-box should be selected for absences that have been agreed by the employee.

Once the details on the above page have been entered, then clicking **Next** will progress the assistant to the final stage.

Check & save details

Absence
Request or record a period of time off work

Check & save

Check the details and then, if you're happy with them, click on 'Finish'.

If there are any errors reported here you will not be allowed to finish.

Reason for absence: Holiday
Absent from: Start of shift on 05/11/2010
Absent until: End of shift on 18/11/2010
Time off work: 12.00 Days, rounded up to half day

Errors and warnings

No errors or warnings.

help Back Finish Cancel

Figure 2 - 8 The Absence Assistant – Check & save page

This final page displays a summary of the absence that has just been recorded or amended. Ensure the details are correct.

If the absence contains errors, click on the **Back** button to return to the relevant page and correct the error. If the details are correct, clicking on **Finish** will close the assistant and commit the details to the database.

Once the absence is saved, the system analyses the data that has been entered and updates any associated data and processes. The new absence details appear on the Absences page, as illustrated below.

Attercliffe, Pennie (A637)

CONTACT INFO

Last 12 months Coming up In date range

Start	Finish	Reason	Time off
21/09/2010	23/09/2010 11:00	Holiday	2.50 days
09/09/2010	10/09/2010	Short-term Sick	2.00 days
16/08/2010	16/08/2010 11:00	Ante-natal Appointment	2.00 hours
12/05/2010 11:30	12/05/2010	Compassionate Leave	6.00 hours
15/02/2010	19/02/2010	Holiday	5.00 days

[View balance of annual leave](#) [View working hours](#)

New Absence Delete Absence Change Absence View Summary

Figure 2 - 9 The Absences page summarising the employee's absence history

Tip: In this example above, the **Partway through shift** option was selected in the **Absent To** field for the new Holiday absence and this is indicated by the (11:00) that appears alongside the Finish date for the absence. Similarly, if the **Halfway through shift** option had been selected, then (half) would be displayed alongside the Finish date.

Line manager recording employee absence through Self Service

Note: For a line manager to be able to add an absence through Self Service, the absence category must be identified as [allow line manager input](#).

A line manager records their employees' absences via Self Service by selecting **My Team > Absence > Absences**.

The lower portion of middle pane of the Self Service window displays a list of employees who report to this line manager, the relevant employee should be selected from this list.

To record an absence through Self Service follow the same procedure as described in [Recording an employee absence using the Absence assistant](#).

An employee recording their own absence through Self Service

Note: For an employee to be able to record their own absence through Self Service, the absence category must be identified as [allow employee input](#).

An employee records their own absence via Self Service by selecting **About Me > Absence > Absences**.

To record an absence through Self Service follow the same procedure as described in [Recording an employee absence using the Absence assistant](#).

Deleting an Absence

To delete an absence from the main application, select **People > Absence > Management > Absences** from the main menu.

From the centre frame pick-list, select the payroll company and the pay group that the relevant employee belongs.

From the resulting list of employees, select the employee whose absence is to be deleted. When the Absences page appears, select the absence. Then select the **Delete Absence**, button. The system will issue a confirmation message which when accepted will delete the absence.

From Self Service by the line manager

The line manager can delete an absence from Self Service in the same way that an administrator deletes an absence from the main application but only if the absence category has been identified as [allow line manager input](#).

To delete an absence via Self Service select **My Team > Absence > Absences**.

The lower portion of middle pane of the Self Service window displays a list of employees who report to this line manager, the relevant employee should be selected from this list.

When the Absences page displays, select the relevant absence from the section heading that is applicable.

From the action buttons at the foot of the page, select **Delete Absence**, the system will issue a confirmation message which when accepted will delete the absence.

From Self Service by the employee

The employee can delete an absence from Self Service in the same way that a line manager deletes an absence, but with two restrictions:

- An employee cannot delete an absence that they have already agreed with.
- An employee cannot delete an absence belonging to an absence category that does not [allow employee input](#) e.g. a sickness absence

To delete an absence via Self Service select **About Me > Absence > Absences**.

When the Absences page displays, select the relevant absence from the section heading that is applicable.

From the action buttons at the foot of the page, select **Delete Absence**, the system will issue a confirmation message which when accepted will delete the absence.

Chapter 3 – Reviewing & Adjusting Annual Leave Balances

Employees are typically allocated a fixed typical number of days annual leave each year, and often wish to review the leave they have taken and their remaining entitlement.

An employee’s historical absence details and current annual leave balance can be viewed using the **Absences** page at any time, from either the ADP Freedom main application or using ESS.

Viewing Absences through the main application

To view absences records through the main application Absence dashboard, select **People > Absence Management > Absences** from the main menu.

From the centre frame selection list, select a company and an employee to view.

BUSINESS UNIT | **COMPANY**

Current Payroll Company:

Current Pay Group:

Ambridge, Gerard (A558) CONTACT INFO

Last 12 months | **Coming up** | **In date range**

Start	Finish	Reason	Time off
25/10/2010	29/10/2010 (Exp)	Short-term Sick	
21/09/2010	23/09/2010 11:00	Holiday	2.50 days

[View balance of annual leave](#) | [View working hours](#)

Choose a Letter:

A	B	C	D	E	F	G
H	I	J	K	L	M	N
O	P	Q	R	S	T	U
V	W	X	Y	Z	#	ALL

SEARCH | **FILTER** | **ABC PAD**

New Absence | Delete Absence | Change Absence | View Summary

Figure 3 - 10 The Employee Absences page

By default the Absences dashboard lists all of the employee’s absences in the last 12 months, with the most recent absences at the top.

For each absence it displays the Start and Finish dates, the reason for the absence and the amount of time that was taken off. If the absence is for part of a day, it displays the start or finish time alongside the start or finish date. Similarly, if half a day's absence was

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booked it displays (half) alongside either the start or end date depending on whether absence started or ended half way through the day.

It provides a series of buttons at the top that allow you to change or refine this view:

- **Coming up** – which lists any future absence requests/bookings
- **In date range** – which allows you to focus on particular types of absence, in a selected date range.

You can use the **In date range** option to limit the Absences list to those with a Holiday absence reason.

The table below describes the various elements on the Absences dashboard.

Table 3 - 1 Field descriptions – Absences

Field	Description
Last 12 months	This button displays the absences that started in the 12 months up to and including today's date. It includes open ended absences. This is the list that appears by default when you first open the dashboard.
Coming Up	This button lists absences that have been booked but are scheduled to start in the future.
In date range	<p>When you click this button a set of selection fields are displayed that allow you to restrict the list to:</p> <ul style="list-style-type: none"> • absences for a particular category e.g. sickness absences only. • absences taken wholly or partially between a range of dates (inclusive). <div data-bbox="673 1329 1295 1512" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div>
Absence details	
Start Date	The first day of the absence. If the absence started part way through this day, the start time appears alongside.
Finish Date	The last day of the absence. If the employee returned part way through this day, the time appears alongside.
Reason for absence	The type of absence i.e. the absence category.

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Field	Description
Time Off	The length of time the employee was absent.
Links	
View balance of annual leave	<p>This link will open an assistant from where you can select the relevant leave plan and view details of the leave taken and leave remaining.</p> <p>See the Viewing an Employee’s Annual Balance section on page 3 - 4 below.</p>
View working hours	<p>Clicking this link will open an assistant from where you can view details of the employee's associated shift pattern and working hours.</p> <p>Refer to the <i>Absences – Sickness Benefits</i> manual for further information on this option.</p>
View summary	<p>The View Summary button displays the details for a selected absence in a read-only format. It provides a simple, safe way of viewing the details of an absence without any fear of updating it by mistake.</p> <p>You should select the absence you require on the Absences page and then click this button to display the further details available for this absence on a separate dialog. This identifies the type of absence and the absence start and end dates at the top of the page and provides a set of buttons that display the further details where they are available.</p> <p>Refer to the <i>Absences – Sickness Benefits</i> manual for further information on this option.</p>

Viewing an Employee's Annual Leave Balance

You can view an employee's annual leave balance using any of the following options:

- From the **People > Absence Management > Absences** dashboard in the main application by clicking on the **View balance of annual leave** link
- From the **People > Absence Management > Annual leave > Balances** option in the main application
- In ESS, if you are a line manager, using the **My Team > Absence > Annual Leave > Balances** option.

In each case you must first select the employee you require from the centre pane.

When you select any of these options the first page of the Leave Balances assistant appears.

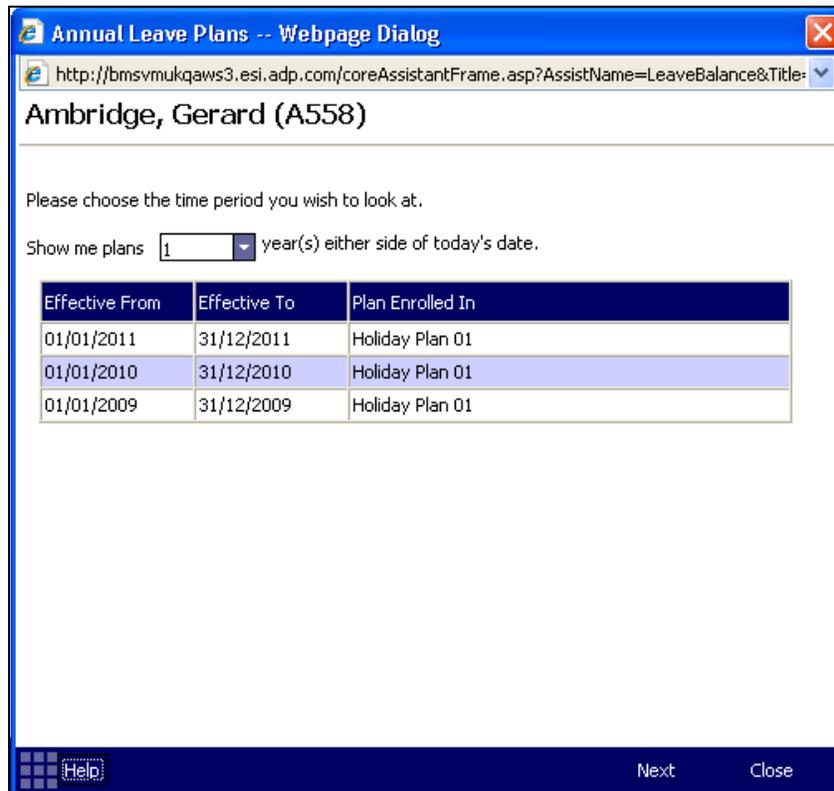


Figure 3 - 11 Viewing leave balances – selecting the period to view

The first page of the assistant provides a grid that shows the periods for which leave balances can be viewed.

Select the relevant period and click **Next** to progress to the **Balances** page.

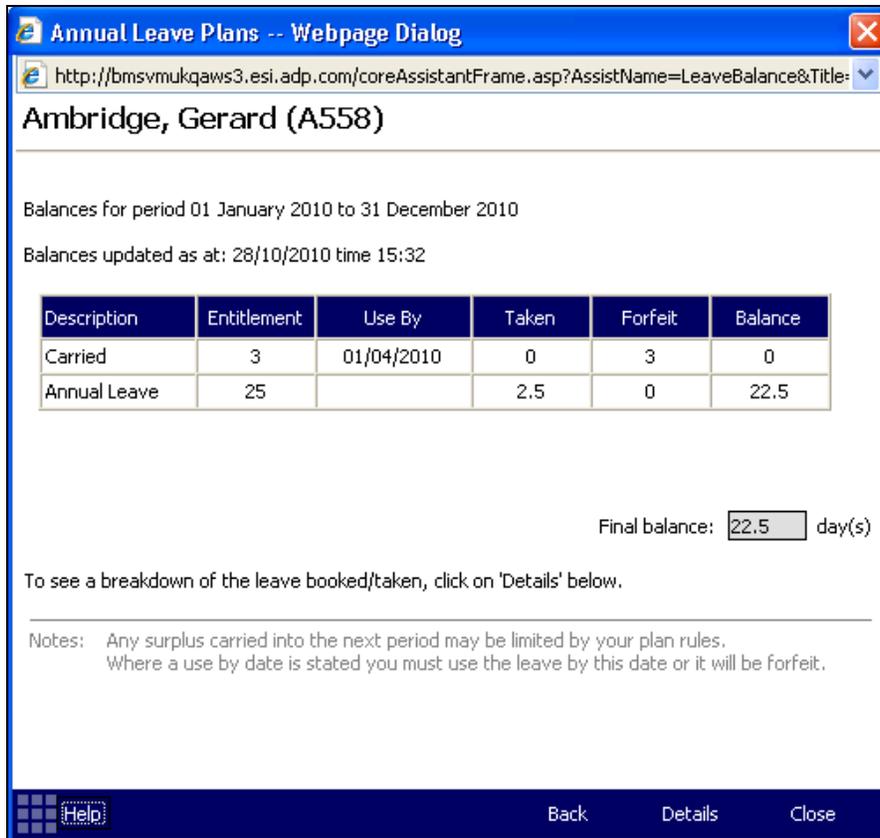


Figure 3 - 12 Viewing leave balances through the dashboard

Note: *If leave balances have been affected by any other processes, for example by leave adjustments, then this page will display an **Update Balances** button and the balances may not be up to date. Clicking this button will close the assistant and the system will process the update. Once the update has been processed a message will be sent to the home page.*

Table 3 - 2 Field descriptions – Leave Balances page

Fields	Description
Description	<p>This is a description of the element of leave for which the rest of the grid row applies. This will normally be broken down into the constituent parts of the leave plan such as:</p> <ul style="list-style-type: none"> • A carried forward element that has to be used by a certain date. • A carried forward element that can be used at any time. • The Name of the leave plan that the entitlement applies. <p>It should be noted that the grid may contain more or less elements than described above, depending on how the leave plan has been configured.</p>

Fields	Description
	<p>The grid is sorted by the order in which the leave should be taken, that is the carried forward element that should be used by the earliest date is listed first, followed by any other carried forward elements in date use order, and then followed by the leave plan entitlement for the selected year.</p>
<p>Entitlement</p>	<p>This is a entitlement for the element of leave that is named in the description column. The entitlement may be dependant on a use by date that will be identified in the Use By column of the grid, if this date has passed then this particular entitlement will be forfeit and will appear in the Forfeit column of the grid.</p> <p>Note: When leave is taken, it is automatically deducted from any entitlement in any Use by date order that may exist.</p>
<p>Use By</p>	<p>The Use By date will normally only apply to carried over elements of annual leave. When a leave plan is set up, it may have been configured with rules to allow a number of days to be carried over for use in the following leave year. These carried over leave days may have a restriction applied to ensure that they are used by a nominated date in the following leave year, if they are not taken by that date they are forfeit. There may be more than one carry forward rule applied to any leave plan and so there may be more than one Carried element with associated Use By date in the grid.</p> <p>Example:</p> <p style="padding-left: 40px;">An employee has a minimum service of 2 years and is a member of Leave plan A. There are two carry forward rules that are applicable to Leave plan A for an employee with a minimum service of 2 years. The first rule restricts the number of carry over days to 3 but specifies that these 3 days must be used within the first 30 days following leave year. The second rule restricts the number of carry over days to 2 days but allows those 2 days to be taken within 45 days of the new leave year starting.</p> <p>In the above example the grid will contain two elements of Carried leave, the first with a Use By date of 30 days after the start of the leave plan leave year and the second with a Use By date of 45 days after the start of the leave plan leave year.</p> <p>Note: When leave is taken, it is automatically deducted from any entitlement in any Use by date order that may exist.</p>

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Fields	Description
Taken	<p>This column of the grid identifies how many days of the associated entitlement have already been taken.</p> <p>Note: When leave is taken, it is automatically deducted from any entitlement in any Use by date order that may exist.</p>
Forfeit	<p>If an employee’s carried over leave is not used by the specified Use By date it may be forfeit.</p> <p>The Use By date will normally only apply to carried over elements of annual leave. When a leave plan is set up, it may have been configured with rules to allow a number of days to be carried over for use in the following leave year. These carried over leave days may have a restriction applied to ensure that they are used by a nominated date in the following leave year, if they are not taken by that date they are forfeit. There may be more than one carry forward rule applied to any leave plan and so there may be more than one Carried element with associated Use By date in the grid.</p>
Balance	<p>This is the Balance of leave remaining of the entitlement for the element of leave that is named in the description column. The entitlement may be dependant on a use by date that will be identified in the Use By column of the grid, if this date has passed then this particular entitlement will be forfeit and will appear in the Forfeit column of the grid.</p> <p>The total of the rows in the Balance column is displayed in the Final balance field that is displayed below the grid</p>
Final Balance	<p>This is the sum of the Balances for all of the entitlement elements, as shown in the grid.</p>

If the employee has taken leave then extra details can be viewed by clicking on the **Details** button at the foot of the page.

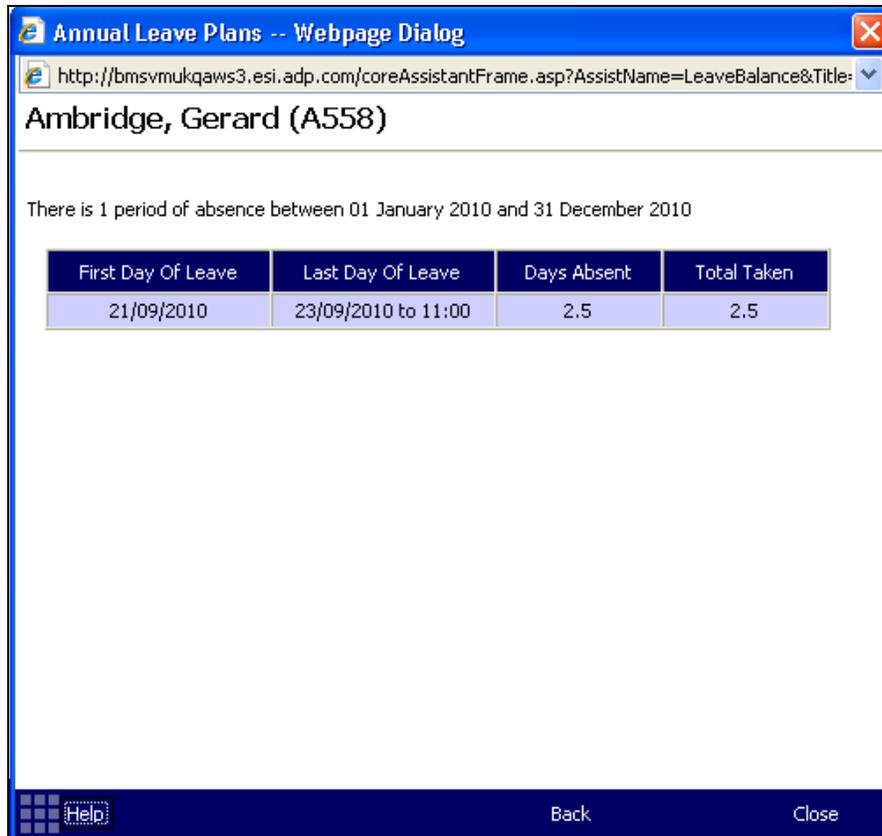


Figure 3 - 13 Viewing leave balances through the dashboard– the Details page

Adjusting Leave Balances

Occasionally, it may be necessary to adjust employees leave balances. There could be many reasons for this, for example an employee may be awarded extra days leave in lieu of overtime.

Adjustments can be made in two ways:

- Through the main application.
- Through ESS by the line manager.

Making adjustments to leave balances through the main application

The following procedure describes how to adjust an employee's leave balance through the main application pages:

- From the main menu options, select **People > Absence Management > Annual Leave > Adjustments**.
- From the centre frame pick-list, select the **Payroll company** and the **Pay group** to which the relevant employee belongs.
- From the resulting list of employees, select the employee who is to have their leave balance adjusted.

Note: Adjustments can be either negative or positive but not zero.

People - Absence Management - Annual Leave - Adjustments CONTACT INFO

Copeland, Vicky (EE069)

Apply on	Adjustment amount	Reason
13/07/2005	-1.00 day(s)	
22/05/2005	1.50 day(s)	

Apply on:

Adjustment amount: Day(s)

Date logged:

Reason:

Figure 3 - 14 Adjusting leave balances

- From the buttons at the foot of the **Adjustments** page, select **New Adjustment**.
- Enter the date that the adjustment is to take effect into the **Apply on** field.
- Enter the adjustment amount, either positive or negative, into the **Adjustment amount** field. The field will accept any values between the limits of -99.99 to 99.99.
- The **Date logged** field will default to the present date but can be overwritten by an earlier date if necessary.
- Optionally, enter the reason why the employee’s leave balance is being adjusted.
- Once all of the relevant details have been completed, click **Save Adjustment** from the buttons at the foot of the page.

Adjusting leave balances through ESS

The following steps outline how to adjust an employee’s leave balance through the ESS pages:

- From the main menu options, select **My Team > Absence > Annual Leave > Adjustments**.
- From the centre frame pick-list, from the employees who report to you, select the employee who is to have their leave balance adjusted.

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Note: Adjustments can be either negative or positive but not zero.

My Team - Absence - Annual Leave - Adjustments CONTACT INFO

Farrow, Mick (EE041)

Apply on	Adjustment amount	Reason

Apply on:

Adjustment amount: Day(s)

Date logged:

Reason:

New Adjustment Delete Adjustment Previous Adjustment Next Adjustment Cancel Changes Save Adjustment

Figure 3 - 15 Adjusting leave balances

- From the buttons at the foot of the **Adjustments** page, select **New Adjustment**.
- Enter the date that the adjustment is to take effect into the **Apply on** field.
- Enter the adjustment amount, either positive or negative, into the **Adjustment amount** field. The field will accept any values between the limits of -99.99 to 99.99.
- The **Date logged** field will default to the present date but can be overwritten by an earlier date if necessary.
- Optionally, enter the reason why the employee's leave balance is being adjusted.
- Once all of the relevant details have been completed, click **Save Adjustment** from the buttons at the foot of the page.