

Holiday allowances are calculated automatically, based on the University's holiday calculator and appointment work schedule. The relevant departmental fixed closure and public holidays are assigned to each appointment and long service leave rules applied.

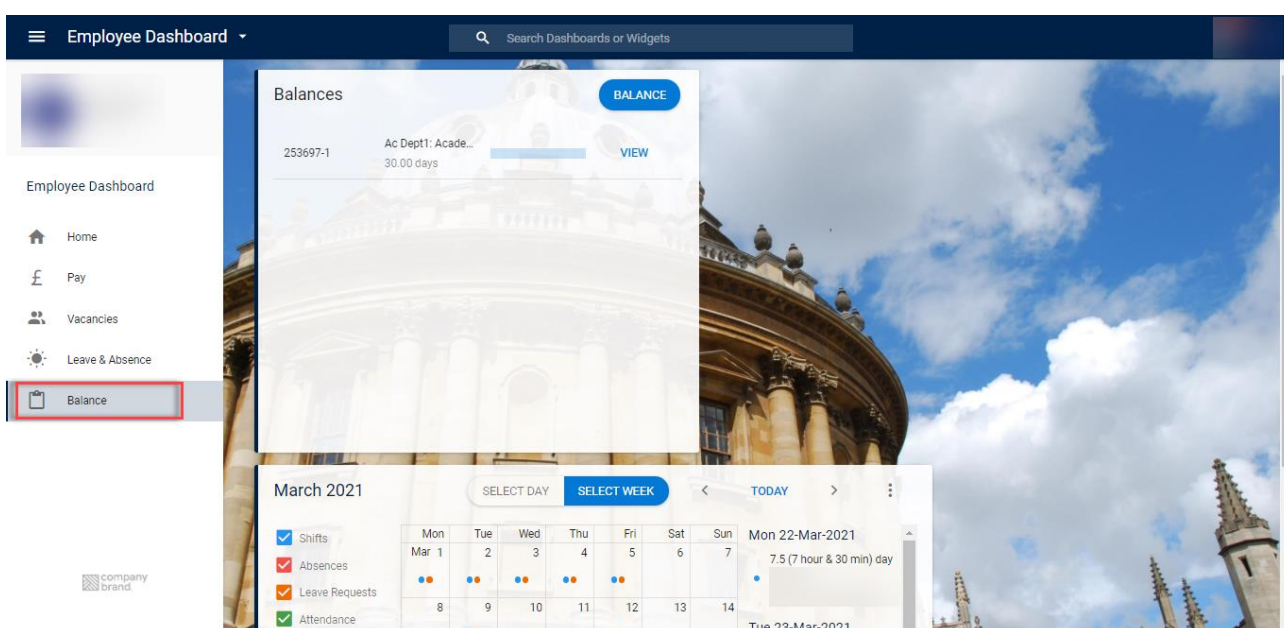
Who is this guide aimed at?	This guide is for employees who need to request annual leave or TOIL in HR Self-Service.
Useful links and other supporting materials	HR Self-Service guidance and FAQs: www.ox.ac.uk/hrss Staff Handbook (inc. University leave policy): https://hr.admin.ox.ac.uk/staff-handbooks#/

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1. Check your leave entitlement

Starting point: Log in to HR Self-Service > Employee Dashboard

1. Click the **Balance** icon on the left-hand side navigation bar.



1. Select VIEW in the balance widget of the correct appointment ID. The current leave balance is displayed.

My Balances
Employee Dashboard > My Balances

Balance Type * Ac Dept1:

Entitlement 32 days Carried 0 days Taken 0 days Booked 2 days Balance 30 days

Floating

Balance Type	Date	days	
Opening Values	01st October 2020	32	
PH FTE Entitlement	01st October 2020	6	VIEW NARRATIVE
PH FTE Reserved	01st October 2020	-6	VIEW NARRATIVE

2. Check that the correct appointment ID has been selected.
3. Click the **Entitlement Days** tab to view your entitlement details (starting balance in days/hours).
4. Click the **Carried Days** tab to view details of your carried days (days/hours carried across from the previous year - up to 5 days).
5. Click the **Taken Days** tab to view annual leave days/hours already taken.
6. Click the **Booked Day** tab to view details of your Approved leave (days/hours) in the future.
7. Click the **Balance** tab to view your Entitlement, Carried, Taken and Booked details.



Note * Days that have been requested but not yet approved are not factored into the balance.

2. Request leave



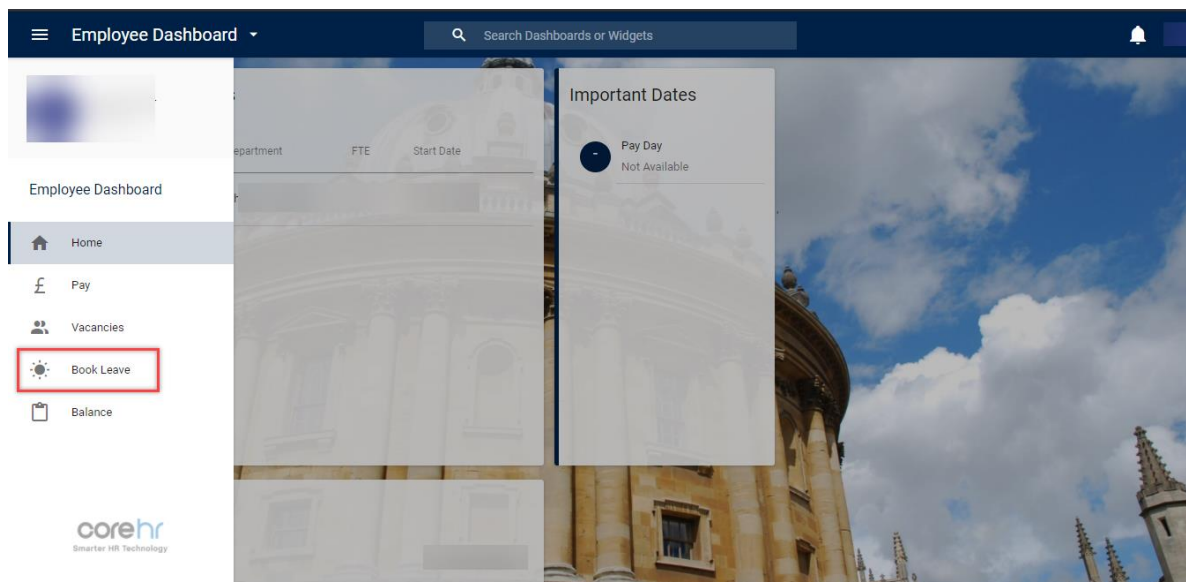
Note * If booking leave in the future annual leave year, please note that the public holidays and any fixed closure dates will not have been entered yet. If you book one of these days, your balance for the future annual leave year will not be adjusted correctly.

1. Click the **Book Leave** icon on the left-hand side navigation bar.

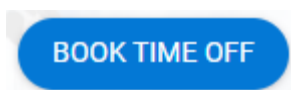
Balances

Ac Dept1: Academ... 30.00 days

[BALANCE](#) [VIEW](#)



2. Click on **BOOK TIME OFF** (top right corner). The **Book Time Off** screen opens.



3. Complete the tabs for **Leave/Absence Details**.

Field Name (* mandatory)	Description
Appointment * Appointment Select An Appointment	Using the drop-down arrow, select the correct appointment against which you want to take leave.
Leave Type* Leave Type *	Using the drop-down arrow, select the appropriate leave type (eg Annual Leave, TOIL). For information about other types of leave, please refer to the Staff Handbook and/or consult with your HR administrator.
Start Date* Start Date * 17-Feb-2021	Using the calendar icon, select the start date of your leave.
End Date* End Date * 18-Feb-2021	Using the calendar icon, select the end date of your leave.
Comments Comments *	Click in the comments tab to leave a comment. The Reason tab can be ignored as you have entered your comments for leave.

Submit*

SUBMIT

Click **SUBMIT**. A success message will appear - wait for the dark green line to fill. You have now submitted your Leave Request for approval. The submitted request is visible in your **Employee Dashboard**, in the **My Requests** screen. Click on the white arrow to go back to your **Employee Dashboard**.

3. Request leave for part of a day

Leave/Absence Details

The screenshot shows the 'Leave/Absence Details' form. It includes a dropdown for 'Appointment' set to 'Technician', a 'Select An Appointment' link, a 'Leave Type*' dropdown set to 'Annual Leave', and a 'Part Day' toggle switch (callout 1). Below this is a 'Start Date*' field set to '03-May-2021' and a 'Choose a Time' toggle switch (callout 2). At the bottom is a 'Time of Day' dropdown menu with 'Morning' and 'Evening' options (callout 3).

1. Click on the **Part Day** slider.
2. Click on the **Choose a Time** slider. This is optional - by selecting **Part Day**, you can choose to take a half-day without specifying the number of hours and minutes. which will half your day based on your shift pattern on the day in question, or choose to book in specific hours/minutes.
3. Use the drop-down arrow to select the **Time of Day** of your Leave.

This screenshot shows the lower portion of the form. It features 'Hours' and 'Minutes' spinners set to 2 and 30 respectively (callouts 4 and 5). Below these is a 'Reason' dropdown set to 'Annual Leave - No reason required' (callout 6). A 'Comments' text area is below that (callout 7). At the bottom right is a green 'SUBMIT' button (callout 8). A watermark 'access PeopleX' is visible in the background.

4. Using the up and down arrows, select the total **Hours** of your leave.
5. Using the up and down arrows, select the total **Minutes** of your leave.
6. Select a **Reason** from the drop-down arrow.
7. Enter your Comments in the **Comments** tab.

- Click **SUBMIT**. A success message will appear - wait for the dark green line to fill. You have now submitted your **Leave Request** for approval. The submitted request is visible in your Employee Dashboard in the My Requests screen. Click on the white arrow to go back to your Employee Dashboard.

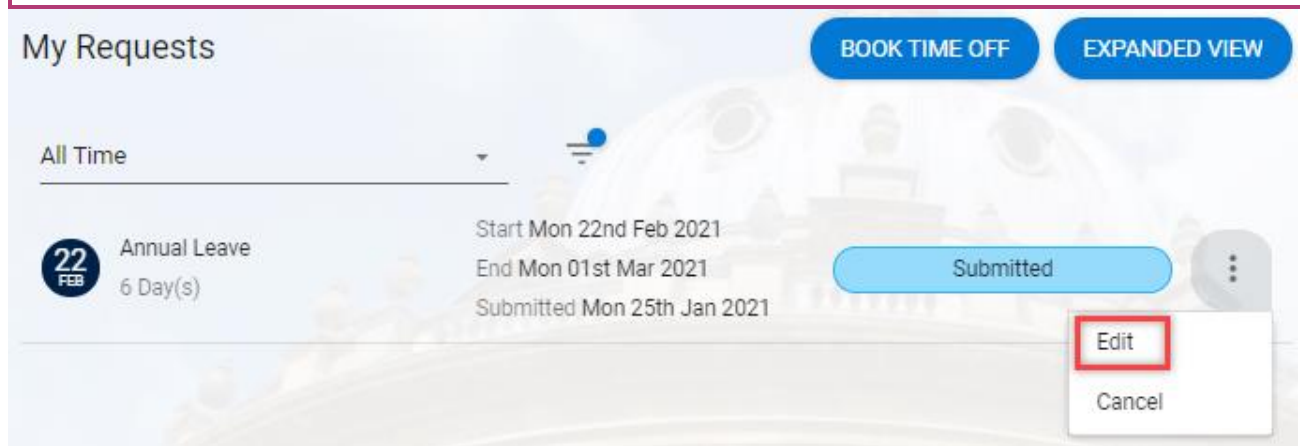


Note * If a part-time employee is due to work 10 hours on a given day, and requests a half day, 5 hours of their balance will be used. The system will not restrict the number of hours/minutes to the employee's scheduled working hours on that day. Employees should take care to check their shift pattern and not overbook. Eg if an employee works 3 hours, they should book less than 3 hours.

4. Edit a submitted leave request and resubmit for approval

If you have submitted a leave request, you can edit it and resubmit it for approval.

Starting point: Log in to HR Self-Service > Employee Dashboard > Book Leave > My Requests > Submitted

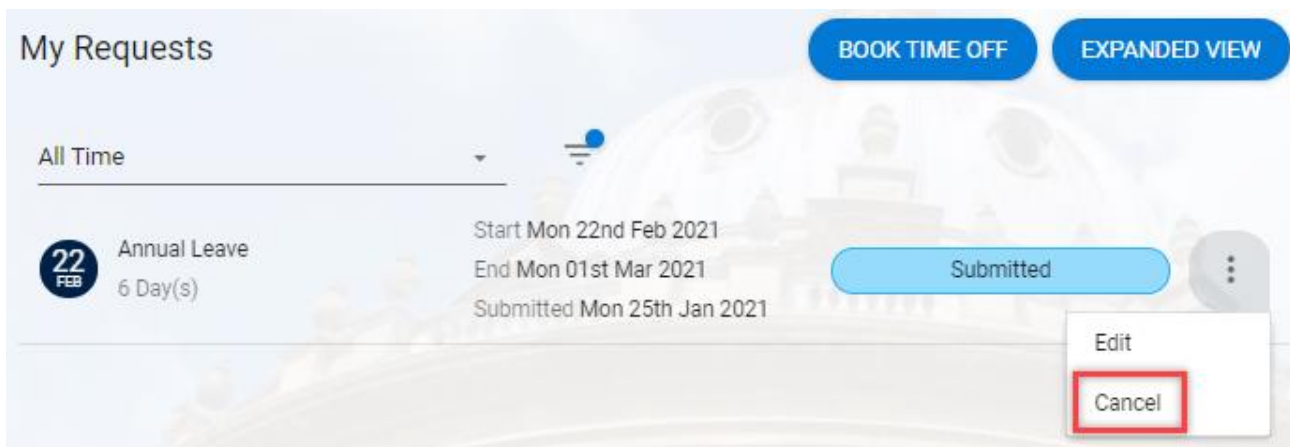


- Click on the ellipsis- (three dots) on the right-hand side and click **Edit**. The **Book Time Off** screen opens.
- Edit your leave request and check it is correct in the **Create New Leave Request**.
- Click **SUBMIT**. A success message will appear - wait for the dark green line to fill. You have now submitted your **Leave Request** for approval. The submitted request is visible in your **Employee Dashboard** in the **My Requests** screen. Click on the white arrow (top left), to go back to your **Employee Dashboard**.

5. Cancel a submitted leave request

If you have submitted a leave request that is no longer required, you can cancel it.

Starting point: Log in to HR Self-Service > Employee Dashboard > Book Leave > My Requests > Submitted

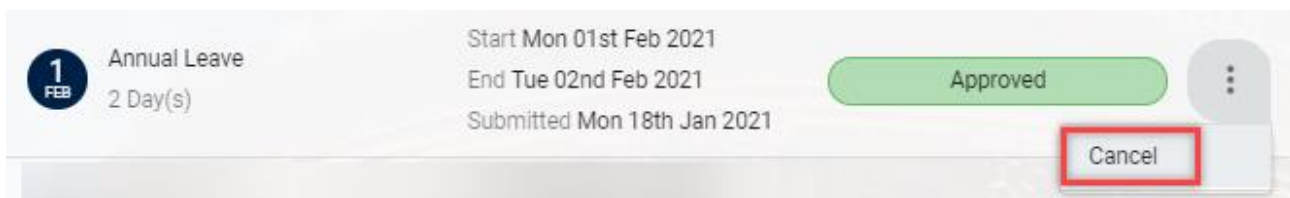


1. Click on the ellipsis - (three dots) on the right-hand side and click **Cancel**. A success message will appear - wait for the dark green line to fill. You have now cancelled your leave request.
2. This will immediately show on your **Employee Dashboard** in the **My Requests** screen.

6. Cancel an approved leave request

If your leave request has been approved and is no longer required, you can cancel the leave before the start date.

Starting point: Log in to HR Self-Service > Employee Dashboard > Book Leave > My Requests > Approved



1. Click on the ellipsis- (three dots) on the right-hand side and click **Cancel**. A success message will appear - wait for the dark green line to fill. You have now Cancelled your leave request.

