


# Absence Entry by employee

All absence must be recorded in MySurrey. The details are required for reporting and for payroll.

Any absences planned or unplanned entered by the employee or proxy will workflow to the line manager for approval.

 If a line manager enters the absence for their employee into MySurrey, approval is not required.

Planned absence requests (e.g., annual leave, Jury Leave, “planned” sickness etc.)

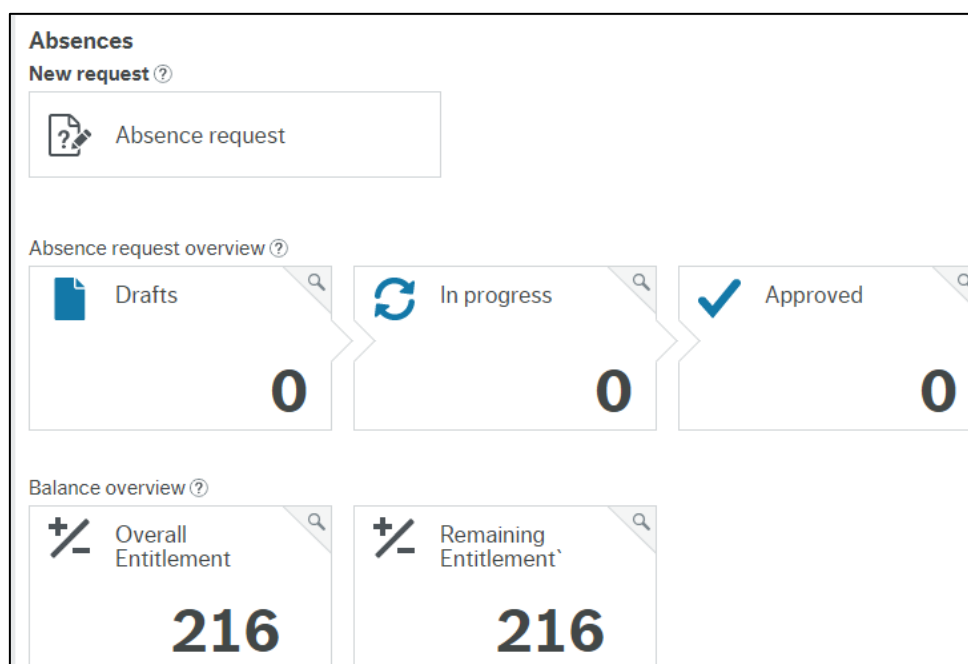
Unplanned sickness absences are mainly entered by the manager, but they can also be entered by the employee or proxy. See Absence Entry by manager Quick Card 38b

## Part 1 – Employee enters a new Absence Request via Unit4 Absences screen

### 1A – Open the Absences screen and review available details

1. Go to: **Your Employment > Start Pages > Absences**

The **Absences** screen displays:



From this screen, users can select to:

- Create a new absence request
- Review any requests
  - Open an existing “Draft” request (i.e., which has not yet been submitted), then update the draft and submit the request
  - Check on status of existing “In Progress” absence requests
  - View “Approved” absence requests
- View Annual Leave balances
  - Overall entitlement
  - Remaining entitlement
  - Taken/Booked will appear when you request and have approved leave.



The number below each of the icons in the **Absence Request Overview** section denotes how many requests are at each stage of the process (**Draft / In Progress / Approved**).

The number below each of the icons in the **Balance Overview** section denotes how many hours of annual leave entitlement are remaining in the current year.

2. Further down the screen, the **Balance Overview** section displays Annual Leave details, categorised as follows:

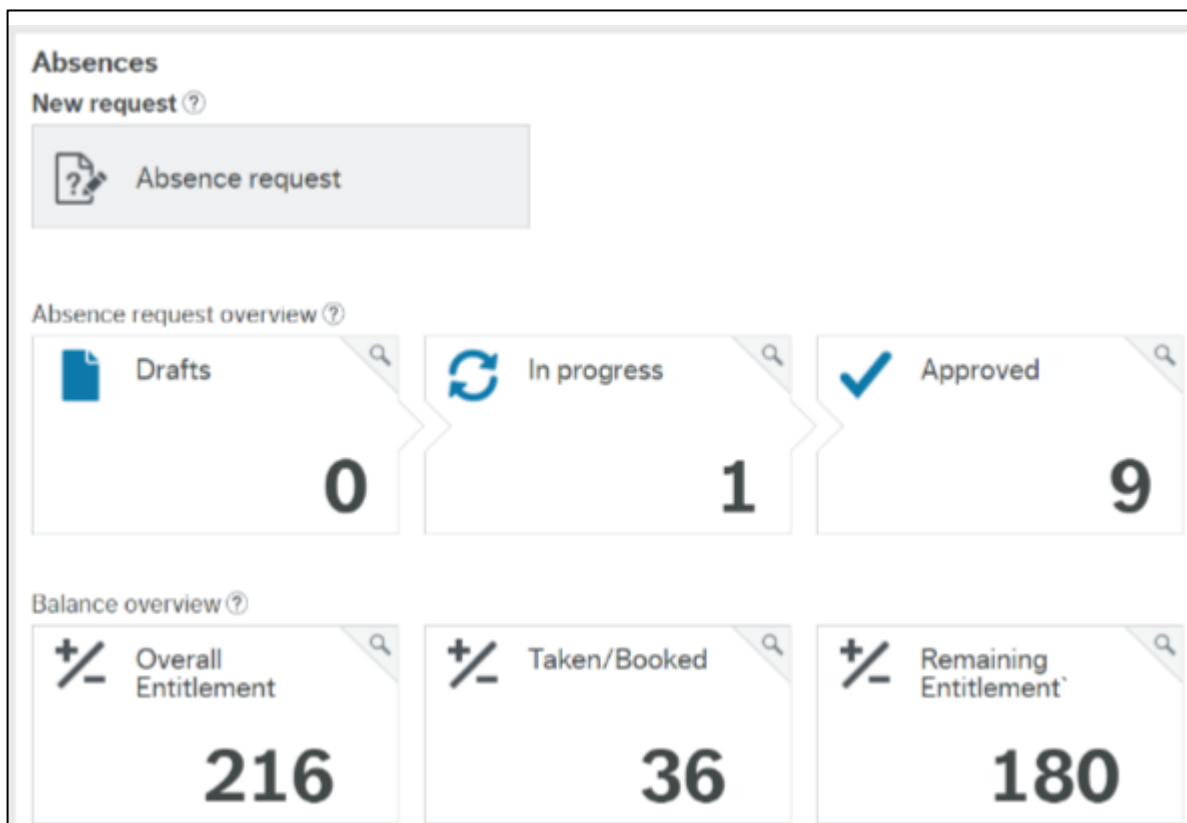
- i. **Overall Entitlement** (includes any carried forward and bought leave).  
This is pro-rated if only part of the year is worked, i.e., the number already takes into account any mid-year start date and / or leaving date where applicable, and any part time hours.
- ii. **Remaining Entitlement** (actual, accounting for already booked leave)
- iii. **Taken/Booked** when you book leave the Taken/Booked box will appear and the remaining entitlement will go down.

### Important Note:



When the system goes live in June the Overall Entitlement box will only show what the overall entitlement is left for this year.

## 1A – Open the **Absences** screen and review available details (continued...)



**Important Note:** From January next year you will see new boxes which will have carry over Annual leave and any purchased leave.



Balances are only updated after your requested Annual Leave is approved – this may be done as an automated overnight process, so should reflect by the next day after approval at the latest.



Note that Flexitime / Time in Lieu are not recorded in MySurrey and are handled off-system.

## 1B Complete a new **Absence Request**

1. Click on the **Absence Request** button in the **New Request** subsection. The **Absence Request** screen displays, with fields for data entry on the left, the calendar on the right, and action buttons at the bottom.

The screenshot shows the 'Absence request' form. On the left, there are fields for 'Reason\*' (a dropdown menu), 'First day\*' (with a calendar icon), and 'Last day\*' (with a calendar icon). Below these is a 'Summary' section with 'Number of days' set to 0 and 'Number of hours' set to 0.00. There is also an 'Additional information' text area. On the right is a calendar for May 2022. The calendar shows days from 25 to 31. The date '6' (Friday) is highlighted with a blue border. At the bottom of the form, there are three buttons: 'Send for approval' (in a blue box), 'Save as draft', and 'View requests'.

Send for approval Save as draft View requests

2. Select the relevant absence reason from the **Reason\*** dropdown list, and press **[Tab]**.

The screenshot shows the 'Reason\*' dropdown menu. The list of reasons includes: Absent Without Leave F/R - Paid, Annual Leave - Paid, Compassionate Leave - Paid, Compassionate Leave - Unpaid, Compassionate Leave - Unpaid Hours, Compassionate Leave - Unpaid Teach 100ths, Course Assessment - Paid, Covid-19 Positive - Paid, Dependents leave - Paid, Dependents leave - Unpaid, Dependents leave - Unpaid Hours, Dependents leave - Unpaid Teach 100ths, Election Duties - Paid, Foster Care Leave - Paid, and Interviews - Paid.

## 1B – Complete a new **Absence Request** (continued)

Depending on the **Reason** selected, additional fields may display to gather more information. E.g., **Military Leave** requires a main reason and more specific reason.

|                                   |
|-----------------------------------|
| <b>Reason *</b>                   |
| Military paid <span>▼</span>      |
| <b>Specify reason for request</b> |
| Reservist Leave <span>▼</span>    |

3. Enter the **First day** and **Last day** of the planned absence.

|  |  |
|--|--|
| <b>First day *</b>   | <b>Last day *</b>  |
| 11/05/2022  | 13/05/2022  |

The calendar on the right is updated. Any date conflicts are highlighted.

|                                   |    |    |    |
|-----------------------------------|----|----|----|
| 3                                 | 4  | 5  | 6  |
| 10                                | 11 | 12 | 13 |
| New absence request: Annual Leave |    |    |    |



If you do not know the last day of a planned absence, enter an estimated date and save as a draft – you will need to retrieve and update this date when you know more.

4. The **Position** field will default to your position. If you have multiple positions the system will default to **All Positions**.

|   |
|---|
| <b>Position *</b>   |
| All positions  |

## 1B – Complete a new **Absence Request** (continued)

This is generally left unchanged, however if you hold multiple positions in SCC, yet only one is to be affected by the absence, then select the relevant position that the absence will affect from the dropdown list.



If you hold several positions at SCC, and several (but not all) of those positions will be affected by an absence, then a separate Absence Request will need to be submitted for each of the specific positions that are affected.

Position \*

hrem

20000003

- For absence entry specific to an individual position, you have the option to specify '**Is this a full day?**'. The default is **Yes**.

If you click **No**, a popup window displays, in which you may enter the details of a part-time absence.



**Important Note:** If an employee enters sickness absence which is for less than a full day, they have to choose the **Sickness - Part day** option and still need to click on **No** in the '**Is this a full day?**' section in order for the below screens to appear.

There are 2 options available:

- Specify hours absent on the first (e.g., finishing early) and last day (e.g., starting late). The assumption is of full days of leave in between.
- Alternatively, click the **Apply to All Days** checkbox and enter the number of **Hours absent**, which will then apply to each day of the absence

Hours absent (first day) 3.7

Hours absent (last day) 3.7

Apply to all days

Hours absent 3.7

Apply to all days

## 1B – Complete a new **Absence Request** (continued)

6. Review the **Summary** section, which indicates the actual number of leave days being booked. This is automatically calculated into **Hours**.

| Summary              |       |
|----------------------|-------|
| Number of days       | 3     |
| Number of hours      | 22.20 |
| Actual Calendar Days | 3.00  |
| Actual Working Days  | 3.00  |

For consecutive working days (e.g. Wed to Fri in a standard working week), you can typically expect the **Number of days** figure to match the **Actual Working Days** figure (as above).

If days are split across a weekend, then you will typically note a difference between **Actual Calendar Days** and **Actual Working Days** figures, as Saturday and Sunday would not be counted in the **Actual Working Days** for most working patterns.



|                      |      |
|----------------------|------|
| Actual Calendar Days | 7.00 |
| Actual Working Days  | 5.00 |

However, note that the **Actual Days** figures do not populate if an employee with multiple positions is booking leave that applies to all positions at once, because it could potentially give a misleading calculation - e.g., 3 days leave booked for a person occupying 3 positions would display as 9 days of leave.

Instead, just the total number of hours in those days (from all positions) is displayed (e.g.,  $22.25 + 1.5 + 10 = 33.75$  hours below).

|                      |       |
|----------------------|-------|
| Number of days       | 3     |
| Number of hours      | 33.75 |
| Actual Calendar Days | 0.00  |
| Actual Working Days  | 0.00  |

7. Type any relevant **Additional Information** in the field provided.

| Additional information             |
|------------------------------------|
| Type additional relevant info here |

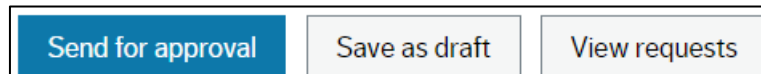
## 1C – Save as Draft

Once all details of the request have been entered, you have the option to save your request as a draft. This is required if you wish to attach supporting documentation.

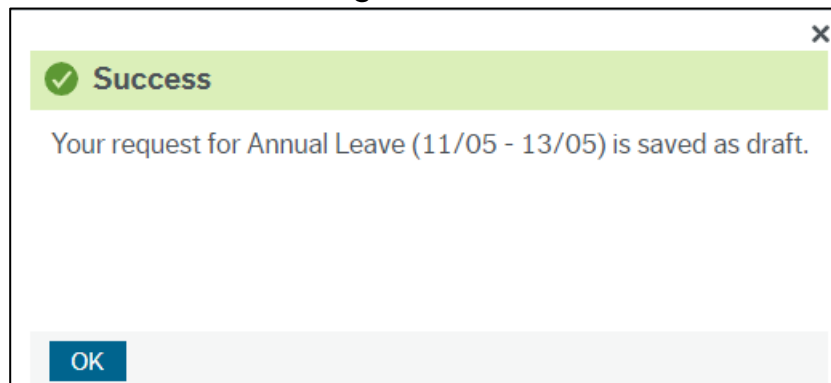


You can save as draft as often as you like throughout the process, until you eventually submit your absence request.

1. Click **Save as Draft** in the toolbar at the bottom of the screen.



2. A popup **Success** message displays, showing the date range of the absence request
3. Click **OK** to the **Success** message.



4. Proceed with completion of the rest of the absence request (Section **1F** below) or else exit and come back and retrieve your draft request later (covered in Section **1D** below), so that you can update, attach docs and eventually submit.

## 1D – Retrieve and Update a Previously Saved Draft Absence Request

Once an absence request has been saved as draft, you have the option to leave the screen and complete the request later.



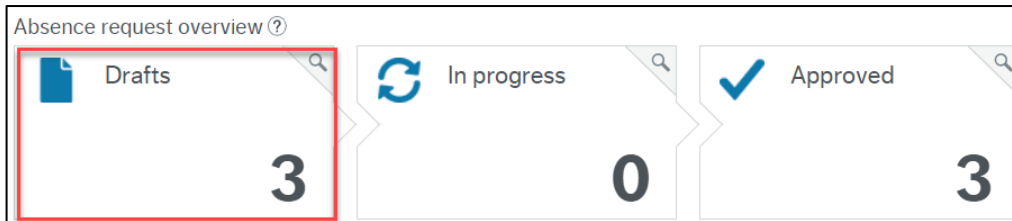
The request can be retrieved and saved again as draft multiple times if necessary, including adding more supporting documentation, before eventually submitting the request.



## 1D – Retrieve and Update a Previously Saved Draft Absence Request (cont...)

The **Absences** screen displays.

1. Go to: **Your Employment > Start Pages > Absences**
2. Click on the **Drafts** icon (the number indicates how many draft absences there currently are).



3. Click on the relevant draft absence request in the list that you wish to continue entering.

| Drafts      |             |              |        |          |  |
|-------------|-------------|--------------|--------|----------|--|
| First day   | Last day    | Description  | Status | Position |  |
| 11/05/20... | 13/05/20... | Annual Leave | Draft  | hrem     |  |
| 11/05/20... | 13/05/20... | Annual Leave | Draft  | hrhr     |  |
| 11/05/20... | 13/05/20... | Annual Leave | Draft  | hrsm     |  |

Close



Note that if you had saved a multi-position request as a draft, the system automatically splits it out into separate draft requests for you.

Each request can then be submitted individually, with its own supporting documentation (if required).

## 1D – Retrieve and Update a Previously Saved Draft Absence Request (cont...)

4. The previously created draft absence requests displays.

**Absence request**

Reason \*  
Annual Leave

First day \* 11/05/2022 Last day \* 13/05/2022

Position \*  
hrem  
20000003

Is this a full day?  Yes  No

**Summary**

|                      |       |
|----------------------|-------|
| Number of days       | 3     |
| Number of hours      | 22.20 |
| Actual Calendar Days | 3.00  |
| Actual Working Days  | 3.00  |

Calendar: Today May 2022

| mon | tue | wed | thu | fri |
|-----|-----|-----|-----|-----|
| 25  | 26  | 27  | 28  | 29  |
| 2   | 3   | 4   | 5   | 6   |
| 9   | 10  | 11  | 12  | 13  |
| 16  | 17  | 18  | 19  | 20  |
| 23  | 24  | 25  | 26  | 27  |
| 30  | 31  | 1   | 2   | 3   |

Buttons: Send for approval, Save as draft, Delete request, Create request, View requests

5. Proceed with completion of the rest of absence request (Section 1F below), whether amending / adding details, or attaching supporting documentation.



The proposed dates for a draft (yet to be approved) absence request are highlighted in yellow stripes on the calendar (as above). Approved requests display in solid yellow.

## 1E – Delete an Absence Request



Note that to cancel and delete an absence request, you click the **Delete Request** button in the toolbar at the bottom of the screen, then click OK to the popup confirmation message.

Deleting a draft or in progress request automatically removes it from the system. Deleting a previously approved request triggers workflow to the manager to approve the cancellation.

## 1F – Attach supporting documentation (where applicable)

1. Click the **Paperclip** icon in the top right corner to open the **Document archive**.
2. Click **Add a document**.
3. Select the relevant **Document Type** from the **Document type\*** dropdown.
4. Click **Upload** to navigate to the document location then click **Open**.  
The **File name** and **Document title** autofill.
5. Click **Save** in the bottom left corner of the pop up.  
The uploaded document displays as an icon in the **Document archive**.
6. Click **X** in the top right corner of the **Document Archive** window to close it.
7. The **Paperclip** icon turns blue, to highlight to the approver that there is an attachment to view.

1

2

3

4

5

6

7



If selecting **Fit Note**, you will need to provide a **Date From** and **Date To**, for the period covered by the note.

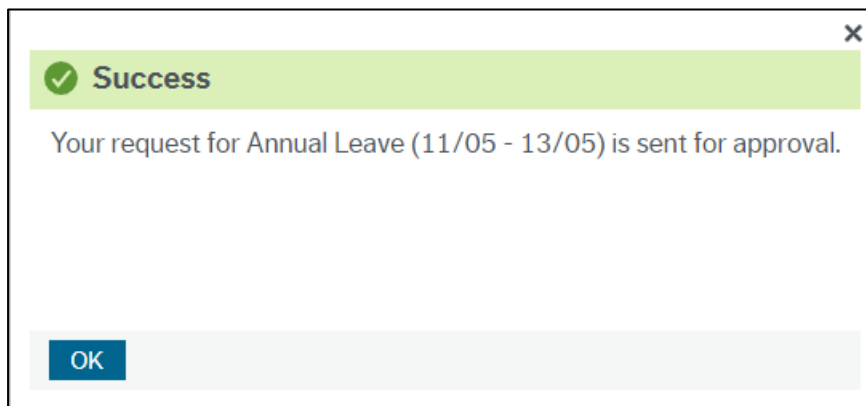
| Additional properties ? |             |            |
|-------------------------|-------------|------------|
| #                       | Name        | Value      |
| 1                       | date_from * | 11/05/2022 |
| 2                       | date_to *   | 13/05/2022 |

## 1G – Submit the Absence Request (Send for approval)

1. Click **Send for Approval** in the toolbar at the bottom of the screen.

A **Success** message displays.

Send for approval



2. Click **OK** to the **Success** message.

### Reminder:



If the employee submits their own absence request, it is routed to the Manager for approval (or rejection / suggestion of amendment or cancellation).

If the Manager enters the absence on behalf of an employee (typically unplanned absences, which are done via a different screen, covered in Quick Card 38b), then it is auto-approved.



## 1H – Handling Errors

1. If, upon clicking **Send for Approval**, an error message displays, then read the details carefully and make the necessary amendments before attempting again to send the request for approval.

In the example below, there were errors. To view details, click on the **Errors** message and an explanation displays.

 **Errors: 2**



-  First day: No personal work schedule exists in given time interval.
-  Last day: This field is required. No personal work schedule exists in given time interval.

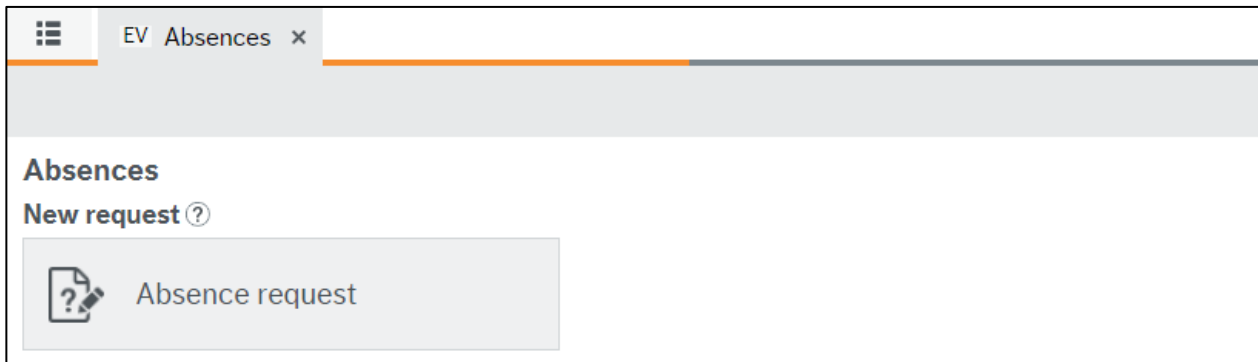
While some MySurrey error messages can be a little technical, in most cases can be deciphered without too much effort.

If you experience any difficulty resolving the errors, contact [myhelpdeskr@surreycc.gov.uk](mailto:myhelpdeskr@surreycc.gov.uk)

## 2A – View Requests

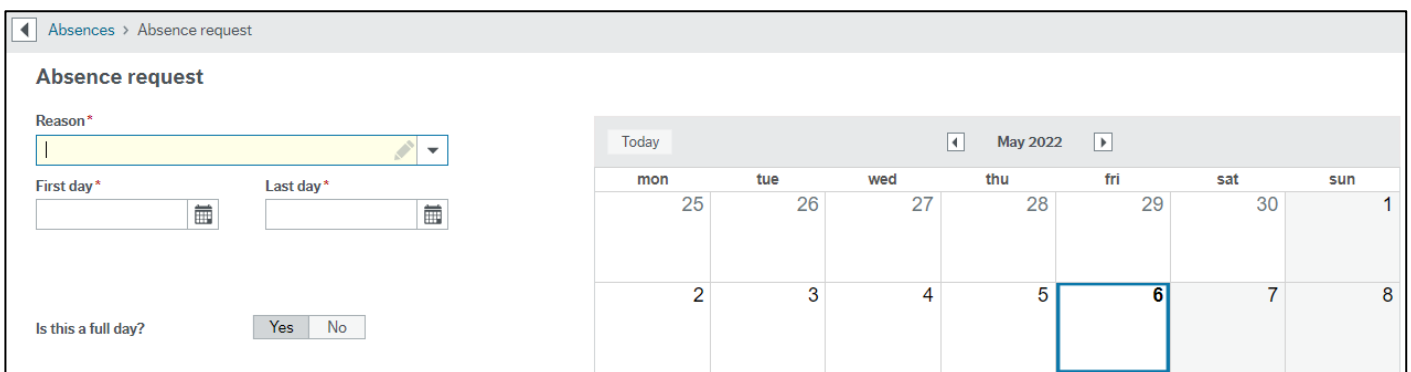
1. Go to: **Your Employment > Start Pages > Absences**

The **Absences** screen displays:



2. Click on the **Absence Request** button in the **New Request** subsection.

The **Absence Request** screen displays.



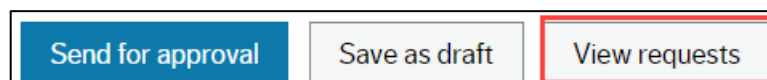
Reason\*

First day\* Last day\*

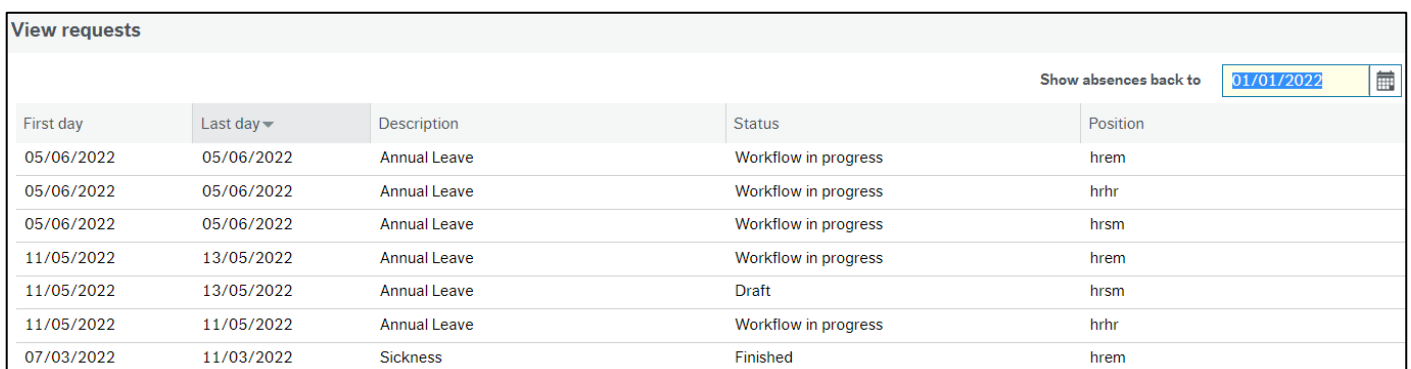
Is this a full day? Yes No

| Today | mon | tue | wed | thu | fri | sat | sun |
|-------|-----|-----|-----|-----|-----|-----|-----|
|       | 25  | 26  | 27  | 28  | 29  | 30  | 1   |
|       | 2   | 3   | 4   | 5   | 6   | 7   | 8   |

3. Click the **View requests** button in the toolbar at the bottom of the screen.



A list of **all** your own absence requests displays – all absence types, including draft, in progress and approved/finished items.



| First day  | Last day   | Description  | Status               | Position |
|------------|------------|--------------|----------------------|----------|
| 05/06/2022 | 05/06/2022 | Annual Leave | Workflow in progress | hrem     |
| 05/06/2022 | 05/06/2022 | Annual Leave | Workflow in progress | hrhr     |
| 05/06/2022 | 05/06/2022 | Annual Leave | Workflow in progress | hrsm     |
| 11/05/2022 | 13/05/2022 | Annual Leave | Workflow in progress | hrem     |
| 11/05/2022 | 13/05/2022 | Annual Leave | Draft                | hrsm     |
| 11/05/2022 | 11/05/2022 | Annual Leave | Workflow in progress | hrhr     |
| 07/03/2022 | 11/03/2022 | Sickness     | Finished             | hrem     |

## 2A – View Requests (continued...)

4. Click on any row in the list to open and view the Absence Request.

**Absence request**

Reason\*  
Annual Leave

First day\* 11/05/2022 Last day\* 13/05/2022

Position\*  
hrsm  
20000005

Is this a full day?  Yes  No

**Summary**

Number of days 2

Calendar: Today May 2022

| mon | tue | wed | thu | fri | sat | sun |
|-----|-----|-----|-----|-----|-----|-----|
| 25  | 26  | 27  | 28  | 29  | 30  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |
| 9   | 10  | 11  | 12  | 13  | 14  | 15  |
| 16  | 17  | 18  | 19  | 20  | 21  | 22  |
| 23  | 24  | 25  | 26  | 27  | 28  | 29  |

Absence request: Annual Leave  
From 11/05/2022 09:00  
To 13/05/2022 00:01  
*Type relevant info here*


5. **Draft** and **Workflow in Progress** items can be amended from this screen before clicking Send for Approval (in the same way as covered in Section 1 above).

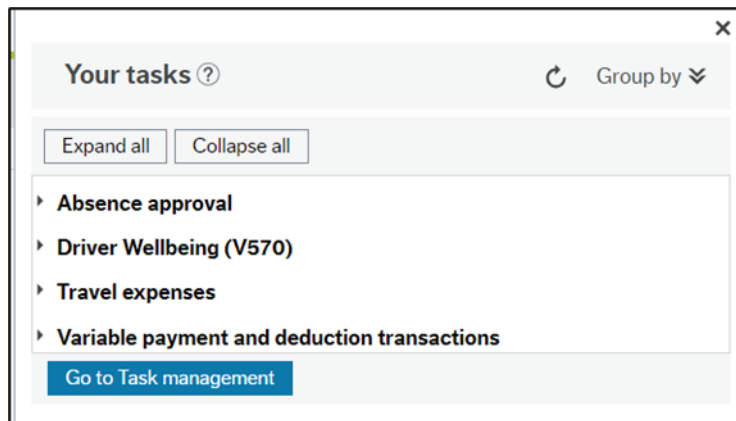
### Task Approval



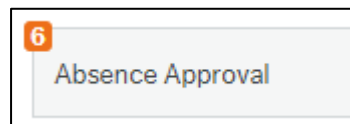
When an employee or proxy completes an absence request, it will go the manager for approval.

The Manager will then go into their tasks to approve or reject.

1. The manager will need to go to the Tasks at the top of your screen next to tick ✓.
2. The number of task you will have to approve will indicated by a number in an orange box. 



3. Go to Task Management
4. Go the group that you are going to approve.  
Tasks are grouped by payment type
3. In this case it will be Absence approval



| Client | Process name   | Workflow step   | Task data   | Due on |
|--------|----------------|-----------------|---|--------|
| EV     | Absence Req... | Absence Appr... | Resource ID: 00009385, Name: , Date from: Mon May 22 2023 00:00:00 GMT+0100 (British Summer Time), Date to: Fri May 26 2023 00:00:00 GMT+0100 (British Summ...  |        |
| EV     | Absence Req... | Absence Appr... | Resource ID: 00009385, Name: , Date from: Thu May 04 2023 00:00:00 GMT+0100 (British Summer Time), Date to: Fri May 05 2023 00:00:00 GMT+0100 (British Summe... |        |
| EV     | Absence Req... | Absence Appr... | Resource ID: 00009385, Name: , Date from: Mon May 08 2023 00:00:00 GMT+0100 (British Summer Time), Date to: Mon May 08 2023 00:00:00 GMT+0100 (British Sum...   |        |
| EV     | Absence Req... | Absence Appr... | Resource ID: 00009385, Name: , Date from: Mon May 29 2023 00:00:00 GMT+0100 (British Summer Time), Date to: Fri Jun 02 2023 00:00:00 GMT+0100 (British Summe... |        |
| EV     | Absence Req... | Absence Appr... | Resource ID: 00009385, Name: , Date from: Mon May 15 2023 00:00:00 GMT+0100 (British Summer Time), Date to: Fri May 19 2023 00:00:00 GMT+0100 (British Summ...  |        |
| EV     | Absence Req... | Absence Appr... | Resource ID: 00009385, Name: , Date from: Mon Feb 27 2023 00:00:00 GMT+0000 (Greenwich Mean Time), Date to: Wed Mar 01 2023 00:00:00 GMT+0000 (Greenwich ...    |        |



# Task Approval

- By clicking on the task this will open up the transaction for approval.
- You may have just one task with one line or one task with several lines.
- Task with one line - just click Approve if you want to go ahead with the payment.

**Absence approval**

**Personnel information**

Name  
Resource ID: 00009385

**Workflow log (row 1)**

|                  |                           |
|------------------|---------------------------|
| 05/05/2023 14:08 | IMTRACYA) - Redistributed |
| 05/05/2023 14:08 | - Auto approved           |
| 05/05/2023 13:51 | IMTRACYA) - Redistributed |
| 05/05/2023 13:51 | - Auto approved           |
| 04/05/2023 12:06 | - Auto approved           |
| 04/05/2023 12:06 | - Distributed             |

(Enter a comment)

Copy

**Balances**

**Absences**

| Map | Action | Workflow state       | Resource ID | Absence cod... | Position         | Absence re... | Description | Date from  | Date to    | Open                     | Time from | Time to | Days | Hours | Percent |
|-----|--------|----------------------|-------------|----------------|------------------|---------------|-------------|------------|------------|--------------------------|-----------|---------|------|-------|---------|
|     |        | Workflow in progress | Jenny bond  | Annual Leav... | Insight & Int... |               |             | 27/02/2023 | 01/03/2023 | <input type="checkbox"/> | 00:00     | 00:00   | 0    | 0.00  | 100.00  |

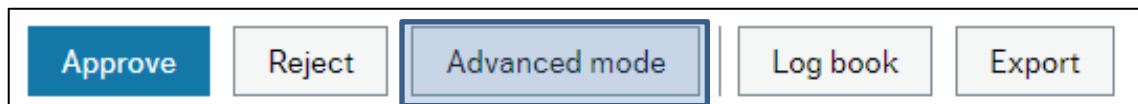
**Absence entry**

Resource ID: 00009385  
Linda Robertson  
Position: 20137590  
Insight & Intelligence Advisor

Absence code\*: Annual Leave - Paid  
AL

Status\*: Active

Approve Reject Advanced mode Log book Export



- For tasks with multiple lines, click on the **Advance mode** button. That opens all rows for approval with a box in front of each row (see below).
- Click in the box for the absence you want to approve, and a tick will appear in the box.
- Review the absence request, then press the **Approve** button below the table. The word **Approve** will appear in the Actions column against that record.
- Once you have reviewed all payment requests, scroll down to the bottom of the page and click the **Save** button.

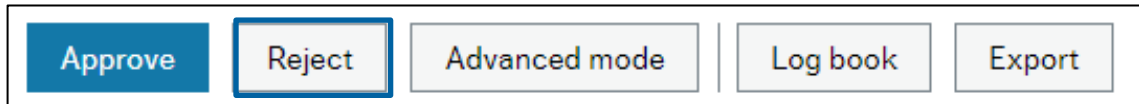
**Absences**

|                          | Map | Action | Workflow state       | Resource ID | Absence co... | Position         | Absence re... | Description | Date from  | Date to    | Open                     | Time from | Time to |
|--------------------------|-----|--------|----------------------|-------------|---------------|------------------|---------------|-------------|------------|------------|--------------------------|-----------|---------|
| <input type="checkbox"/> |     |        | Workflow in progress | Jenny bond  | Sickness      | Insight & Int... | Migraine      |             | 22/05/2023 | 26/05/2023 | <input type="checkbox"/> | 00:00     | 18:00   |
| <input type="checkbox"/> |     |        | Workflow in progress | Jenny bond  | Sickness      | Employee Se...   | Migraine      |             | 22/05/2023 | 26/05/2023 | <input type="checkbox"/> | 09:00     | 00:00   |

Approve Reject Undo

# Task Rejection

1. If you don't want to approve a task you can reject it.
2. Click on the Reject button at the bottom of the screen
3. Complete the reject comment box and explain why you are rejecting the request.



**Absence Approval - Reject**

Enter your comment

Reject

**Absence approval**

**Personnel information**

Name  
Resource ID 00009385

**Workflow log (row 1)**

18/05/2023 09:56 J0009385) - Distributed  
18/05/2023 09:56 J0009385) - Auto approved

(Enter a comment)

Copy

∨ Balances

**Absences**

| <input type="checkbox"/> | Map | Action | Workflow state       | Resource ID | Absence co... | Position         | Absence re... | Description | Date from  | Date to    | Open                     | Time from | Time to | Days | Hours | Percent |
|--------------------------|-----|--------|----------------------|-------------|---------------|------------------|---------------|-------------|------------|------------|--------------------------|-----------|---------|------|-------|---------|
| <input type="checkbox"/> |     | Reject | Workflow in progress | Jenny bond  | Sickness      | Insight & Int... | Migraine      |             | 22/05/2023 | 26/05/2023 | <input type="checkbox"/> | 00:00     | 18:00   | 2    | 18.00 | 100.00  |
| <input type="checkbox"/> |     |        | Workflow in progress | Jenny bond  | Sickness      | Employee Se...   | Migraine      |             | 22/05/2023 | 26/05/2023 | <input type="checkbox"/> | 09:00     | 00:00   | 2    | 18.00 | 100.00  |

Approve **Reject** Undo