

Manager Guide - Adding Carry Forward Annual Leave

Once you have logged in to Aston Staff Portal you will be taken directly to the **Manager Dashboard**.

James Butcher
Training Manager, Human Resources

My Team

Team Scheduler

Search for an Employee

1

From the Manager Dashboard, Click on Team Scheduler.

corehr Quick Jump JAMES BUTCHER

Team Scheduler Scheduler Balances

Previous Next Days Months Go To Date Add New Filter Team Member

15th August 2016 to 21st August 2016

Team Member	Mon 15th	Tue 16th	Wed 17th	Thu 18th	Fri 19th	Sat 20th	Sun 21st
Alice Fisher Trainer Human Resources							

2

Select Balances.

3

Find your employee, click on the dots at the end of the row and select 'Balance Information'.

Balances Scheduler Balances

Team Member

Team Member	Annual Leave Remaining
Alice Fisher Trainer Human Resources	25 DAYS
Michael Weaver Trainer Human Resources	30 DAYS

Balance Information

4

Click on the dots next to the employees annual leave balance and select 'Balance Adjustment'.

Balance Information

Balances for Michael Weaver

Balance	Appointment	Allowan...	Carried Ov...	Tak...	Balan...	Book...	Available balan...
Annual Lea...		30.00	0.00	0.00	30.00	0.00	30.00
Sickness (D...		0.00	0.00	0.00	0.00	0.00	0.00

Balance Adjustment

5

Complete the Balance Adjustment Form:

- Select the period **2016**
- Select **Carried Forward** only. Do not use any other type of adjustment.
- Enter the **amount of days or hours** to carry forward.
 - Enter this in Days for employees who are full time
 - Enter this in Hours for employees who are part time
- All carry forward of more than 5 days / 36.5 hours will be reviewed by HR. Please include a **reason** for carrying forward in excess of this.
- Click **Save**

Balance Adjustment ✕

Please select the period the adjustment is relevant for

What do you want to adjust?

Please enter the amount you want to adjust by

Please enter a reason for the adjustment

2016

Carried Forward

1

If your employee is carrying forward more than 5 days annual leave, please put the reason here. This will be reviewed by HR.

Save

6

You will see your balance adjustment and the carry forward days added to the employees balance.

Balance Information ✕

Balances for Michael Weaver

Balance	Appointment	Allowan...	Carried Ov...	Tak...	Balan...	Book...	Available balan...	
Annual Lea...		30.00	1.00	0.00	31.00	0.00	31.00	...
Sickness (D...		0.00	0.00	0.00	0.00	0.00	0.00	...
Sickness (H...		0.00	0.00	0.00	0.00	0.00	0.00	...

Transactions for Annual Leave (September Days) 01-Sep-2015 to 31-Aug-2016

Date	Description	Reser...	Annual...	Accru...	Carried	Taken	Balance	
01/09/2015	Open	0.00	30.00	0.00	0.00	0.00	0.00	Q
19/08/2016	Balance Adjusment				1.00			Q