How to Guide – Request & Approve Flexi-Leave / TOIL

Introduction:

All eligible employees should use HR Connect Self Service to book Flexi Leave and Time off in Lieu (TOIL).

Flexi-Leave

To be eligible to apply for flexi-leave an employee must have contractually defined hours and must have completed and sent an opt into the flexi leave scheme to their manager. There will be some roles with contractually defined hours which will, for operational reasons, not be eligible to join the scheme.

Flexi-leave spreadsheets must be maintained. For further details refer to the flexitime scheme document available on the [intranet.](#)
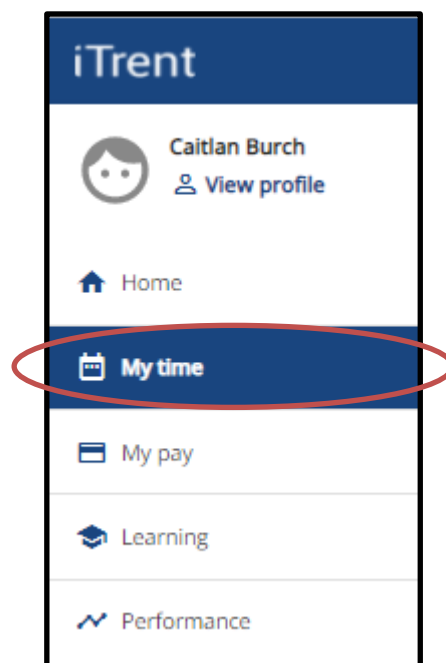
Time of in Lieu (TOIL)

To be eligible to apply for TOIL an employee must have contractually defined hours. Or, in line with the [travel and expenses policy](#) , if an employee is required to complete extensive overseas travel over a weekend, they can, in agreement with their manager, claim this back as TOIL . The accrued TOIL should be taken within the first 2 weeks of an employees return from travel to help their return to work following overseas travel.

The accrual of TOIL must be agreed in advance with your manager.

A record of the hours earned as TOIL must be recorded manually on the TOIL spreadsheet. This document should be updated and maintained by both employee and manager.

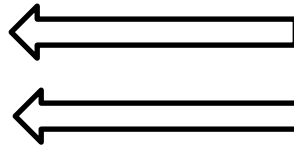**How to Request Flexi-Leave or TOIL on HR Connect Self Service**

Once logged onto HR Connect Self Service, on the right-hand side of the screen click on 'My Time'.

Within the 'Other absence' card click on 'Add other absence'.
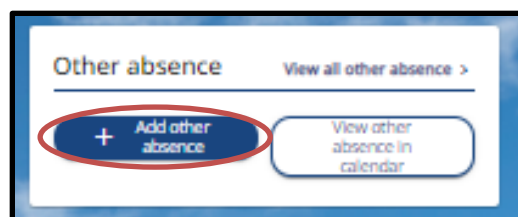
Select the absence type (either flexi-leave or Time off in lieu (TOIL)).

Complete all the details, noting that date and time fields will appear differently depending on the leave period selected.

Record the appropriate dates and, if booking less than a part day, times of leave. Then click save. An email will then be sent to an employee's manager who will either approve or reject the request

Confirmation e-mails and Outlook calendar entries

When a leave request is authorised the employee will receive a confirmation email and both employee and manager will receive an email with an Outlook calendar entry attached.

Please note that as this is sent as an attachment the Outlook calendar entry will not be updated or removed if the leave record is updated or cancelled. As such any old calendar entries must be manually removed.

An employee will also receive a calendar entry email when a change to leave is authorised, and an email reminder to remove calendar entries when a leave request is cancelled.

If a request is rejected an employee will receive a notification email that this is rejected.

Amending future dated Flexi-Leave/ TOIL

An employee can amend or delete only future dated Flexi-Leave or TOIL. Any amendment to a record today's date or earlier must be done by the manager.

To update a leave request, click into the record due to be amended and update the detailswith the new request. Then click save. An email will be sent to the manager with the updated request.

To cancel a request, click on . An email will be sent to the manager to advice that therequested was deleted.

Remember to remove all cancelled or amended requests from the outlook diary.

How to approve Flexi-Leave or Time off in Lieu on HR Connect People Manager

When an employee requests Flexi-Leave or TOIL in HR Connect Self Service, the manager will receive a leave request email.

A similar authorisation email, with similar action options will be sent if the employee requests a change to the date of the Flexi-leave or TOIL date.

From this e-mail the manager should click the authorise button. This will take them to HR Connect People Manager.

On the home page the manager should click on 'my to do list'.

From there you can authorise or decline any requests that have been assigned.

Clicking on the arrow button will open up the 'other absence details screen'.

The leave dates and times cannot be modified by a manager.

The Authorisation section allows the manager to 'Authorise' or 'Not Authorise' the leave request. Notes can also be recorded, which will be included in the automated response to the employee. Once a manager has either approved or rejected the request click on the save button.

Managers should review either the Flexi-time or TOIL spreadsheets to ensure the requested hours have already been accrued, before approving the leave.

Confirmation e-mails and Outlook calendar entries

If a leave request is 'not authorised' the employee will receive a confirmation email.

When a leave request is authorised the employee will receive a confirmation email and both the employee and manager will receive an email with an Outlook calendar entry attached.

Please note that as this is sent as an attachment the Outlook calendar entry will not be updated or removed if the leave record is updated or cancelled. As such the manager and employee will need to remove any old calendar entries in these circumstances.

Viewing, Amending and Creating Holiday and Leave Records

Managers have access to view, create, amend and delete all leave records for their direct reports. In most cases a manager will not need to create or modify leave records, as the member of staff will do this through HR Connect Self Service. However, in exceptional circumstances, or where the dates of the leave have passed a manager may need to add, modify or remove a leave record from the system.

Once you have logged onto HR Connect People Manager select the employee whose leave information you would like to view or amend.

Click on **⌄ Sickness Holidays and Other Absence** tab, then click on **Other absence details**. A summary of other absences dates is displayed on the left hand side.

⌃ OTHER ABSENCE LIST ⋮
Show all
24/08/2020
18/03/2020
21/01/2020
23/08/2019
20/08/2019
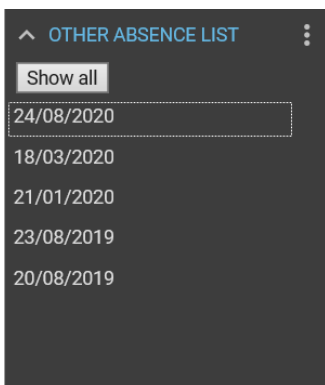
This will include all 'other absences' as well as TOIL (Time off in Lieu) and Flexi Hours (Flexi-leave).

 Note: To look at the type of absence on an employee's record a manager can export the information onto excel by clicking on this icon ⋮ *. Then you click on 'export to excel'.*

Select one of the dates on the left hand panel.

From here a manager can update the record (click **SAVE** to save your changes), create a **NEW** leave record, or **DELETE** this leave record.

When creating or amending a record a manager must complete the absence period, absence start, absence end date and 'Absence reason' (TOIL or Flexi-Leave).

If the member of staff is taking leave for a part day you can change the 'Type' on the 'Start Date' and / or 'End Date' to be 'Part Day', 'Half Day – am' or 'Half Day – pm'. For all of these options you can also record the Time and / or Number of hours lost.

Please note that the Half day options will assume that the member of staff was on leave for half of their contracted working hours for that day. For example if the employee is part time and contracted to work for 3.5 hours in the morning recording the absence as 'Half Day – AM' will book 1.75 hours holiday.

HR Connect People Manager Help and Support

If you need any help, advice or assistance with HR Connect please contact the HR Services Team by emailing us at humanresources@napier.ac.uk.