

Guidance on booking and requesting annual leave (outwith HR Self-Service)

The [Annual Leave Policy](#) applies to all employees currently employed by the University regardless of whether the employee's annual leave is managed via [HR Self-Service](#) or through alternative routes.

Schools/Units that do not currently use HR Self-Service should refer to this document for guidance on how to request annual leave and track days/hours taken outwith the Self-Service portal. The [Annual Leave webpage](#) & [policy](#) should be referred to for all other annual leave queries.

It is recommended that all Schools/Units have a formal mechanism in place for requesting and recording annual leave. The [holiday request form](#) is a recommended tool that employees can complete to request annual leave with their line manager.

Line managers are responsible for the safe and secure retention of annual leave information for their team.

How to request annual leave

1. The [holiday request form](#) should be completed for each annual leave request during the holiday year. The form should display the total annual leave hours taken and the remaining annual leave balance.
2. A new row should be completed for each annual leave request.
3. Once each annual leave request is completed, the employee should submit this to their line manager (ideally electronically via email/Teams). This ensures that there is an electronic trail and will prevent holiday forms being misplaced.

How to review and approve/decline annual leave requests

4. On receipt of the holiday request form, line managers should consider the request thoroughly, balancing employee needs along with operational requirements.
5. The line manager should complete the "Line Manager to complete" columns on the form, confirming if the leave has been approved/declined, the date the decision was made and provide a reason if the leave has been declined.
6. The line manager must return the form back to the employee (ideally electronically) within a timely manner.

Monitoring annual leave balances

7. It is recommended that line managers monitor all annual leave taken/to be taken via a spreadsheet to ensure that leave is accurately recorded and managed.