

# CH15 - Sabbaticals/Dispensation from prescribed duties

Where sabbatical leave is granted, the employee's appointment must be updated at the start and end of the period, and relevant details captured. For CUF appointments, depending on the nature of the dispensation it may be full or partial (i.e. where the individual has partial dispensation from duties and is effectively reducing their hours). Sabbatical leave and Dispensation may be paid or unpaid.

Note: Special leave is covered separately. Refer to **QRG: CH23\_Manage Changes: Special Leave.**

### What's changed?

Screenshots replaced following the implementation of Self-Service and note added for Manager Self-Service access.

**September 18**



**Note:** If the individual has Manager Self-Service access and it is not appropriate for them to retain view of their team's records (i.e. Work Group), departments will need to raise a Service Request (available from the [HRIS Service Catalogue page](#)) asking for the employee's Manager Self-Service access to that particular Work Group to be removed. When the employee returns from their sabbatical their department will need to raise another Service Request for them to be set up as the Self-Service Manager of that Work Group again.

This guide covers the following process steps:

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**Navigate to: Personnel > Maintenance > Personal Profile**

## A. Start Sabbatical Leave

### A1. Paid Sabbatical Leave

1. Search for the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted.

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**Note:** For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

3. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:

4. Enter the appointment change details as relevant:

Field Name	Description
<b>Effective Date</b>	Enter the date that the change will take place.
<b>Target End Date</b>	For fixed term posts, reapply the current target end date (noted previously), to confirm it still correct.
<b>Action</b>	Enter <b>Sabbatical</b> .
<b>Reason Code</b>	Enter <b>Sabbatical Leave Paid</b> .
<b>Comments</b>	Enter any relevant comments.

5. Click **OK**. The *Amend Appointment Details* window closes. A message confirms that changes have been made. Click **OK**. Exit all windows back to the Personnel main screen.

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## A2. Unpaid Sabbatical Leave

For unpaid sabbatical leave (whether or not the individual is not going to be employed by another organisation during the sabbatical period), follow the steps as above, selecting **Reason Code: Sabbatical Leave Unpaid**. Then update the salary as below.

1. Go to **Selection > Amend Pay Rate**.

2. Update the employee's pay record:

Field Name	Description
<b>Effective Date</b>	Start of pay change.
<b>Multiplier</b>	Select as <b>0</b> .
<b>Reason</b>	Select <b>Sabbatical Leave Unpaid</b> .
<b>Comments</b>	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll.

3. Click . The *Add Salary Amendment* window closes.

4. A message confirms that changes have been made. Click .

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5. If you have Salary Approval access and it is appropriate to do so you can approve the salary change straight away. Exit all windows back to the Personnel main screen.

**NEXT STEPS:** Unless at **5** above you were able to approve the salary change, it will now appear in your approver's list for approval. Approvers should refer to **QRG: FD5\_Approve (or Reject) Salary/ Allowances** for guidance on approving.

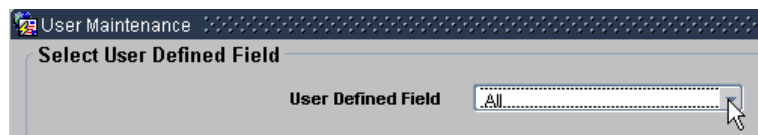
## A3. Partial Dispensation from Duties


Where the individual has partial dispensation from duties (i.e. is effectively reducing their hours) follow the steps for A1 above, selecting **Reason Code: Sabbatical Leave Partial Dispensation**. Then update the salary following steps for A2 above.

Specifically:

Field Name	Description
Effective Date	Start of pay change.
Multiplier	Select as appropriate e.g. 0.5.
Reason	Select <b>Sabbatical Leave Partial Dispensation</b> .
Comments	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll.

## B. Logging Sabbatical Details



1. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.
2. Click to display **User Defined Field** List of Values.
3. Select **Appt: Sabbatical Leave part 1**.
4. Click :


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5. Complete relevant details as below:

Field Name	Description
<b>Date From*</b>	Start date of the appointment
<b>Date To</b>	Leave blank
<b>Date of Application</b>	Date request received.
<b>Qualifying Service</b>	Enter number of terms accumulated.
<b>Type of Leave</b>	Select relevant leave type from list.
<b>Acad year applied 1</b>	Start date of academic year in which leave is related to.
<b>MT/HT/TT</b>	Select relevant term(s) with Yes or No.
<b>Acad year applied 2</b>	If relevant, select start date of second academic year in which leave is related to.
<b>MT/HT/TT</b>	Select relevant term(s) with Yes or No.
<b>Balance</b>	Balance of accumulated terms.

6. Click .

7. Select **Appt: Sabbatical Leave part 2**.

8. Click .

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9. Complete relevant details as below:

Field Name	Description
<b>Date From*</b>	Start date of the appointment
<b>Date To</b>	Leave blank
<b>College Approved</b>	Select Yes or No as appropriate for college approval.
<b>Granted</b>	Select Yes or No as appropriate for university approval.
<b>Date Granted</b>	Enter date university approval granted.
<b>Substitute Provision 1/2</b>	Note comments where a replacement required.
<b>Outside Appointment</b>	Select Yes or No as appropriate.
<b>Letter Sent</b>	Select Yes or No as appropriate (relates to letter requesting report).
<b>Statement Returned</b>	Capture date statement returned.
<b>Money Returned</b>	Note: when the individual has been financially compensated and monies are to go back to the University.
<b>Report Received</b>	Capture date report received.
<b>Record Complete</b>	Select Yes or No as appropriate. Will show closed files for reporting purposes.
<b>Comments</b>	Additional relevant information, e.g. Where there is deemed or advance entitlement.

10. Click  .

11. Select **Appt: Sabbatical Leave part 3 CUF**.

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12. Click

13. Complete relevant details as below:

Field Name	Description
<b>Date From*</b>	Start date of the appointment
<b>Date To</b>	Leave blank
<b>CUF</b>	Select Yes or No as appropriate.
<b>Academic Year 1</b>	Start date of academic year in which leave is related to.
<b>No of courses 1</b>	Number of courses due during period of dispensation.
<b>Academic Year 2</b>	If relevant, select start date of 2nd academic year the leave is related to.
<b>No of courses 2</b>	Number of courses due during period of dispensation.
<b>Additional Comments</b>	Additional relevant information.

14. Click . A 'transaction complete' message will appear. Click .

15. Exit all windows back to the Personnel main screen.

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## C. Return from Sabbatical Leave

### C1. Paid Leave

1. Search for the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:


3. Enter the appointment change details as relevant:

Field Name	Description
<b>Effective Date</b>	Enter the date that the change will take place.
<b>Action</b>	Enter <b>Sabbatical</b> .
<b>Reason Code</b>	Enter <b>Sabbatical Leave Return</b> .
<b>Comments</b>	Enter any relevant comments.

4. Click **OK**. The *Amend Appointment Details* window closes.



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5. A message confirms that changes have been made. Click .

6. Exit all windows back to the Personnel main screen.

## C2. Unpaid Sabbatical Leave & Partial Dispensation

For unpaid sabbatical leave and partial dispensation, follow the steps in C1, then update the salary as follows:

1. Go to **Selection > Amend Pay Rate:**

2. Update the employee's pay record:


Field Name	Description
<b>Effective Date</b>	Start of pay change
<b>Multiplier</b>	Update to previous rate.
<b>Reason</b>	Select <b>Sabbatical Leave Return</b> .
<b>Comments</b>	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll.

3. Click . The *Add Salary Amendment* window closes.

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4. A message confirms that changes have been made. Click .
5. If you have Salary Approval access and it is appropriate to do so you can approve the salary change straight away.
6. Exit all windows back to the Personnel main screen.

**NEXT STEPS:** Unless at **5** above you were able to approve the salary change, it will now appear in your approver's list for approval. Approvers should refer to **QRG: FD5\_Approve (or Reject) Salary/ Allowances** for guidance on approving.