
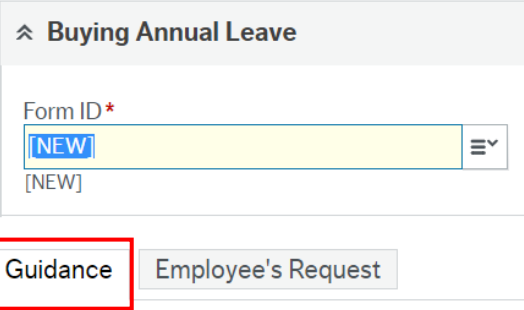
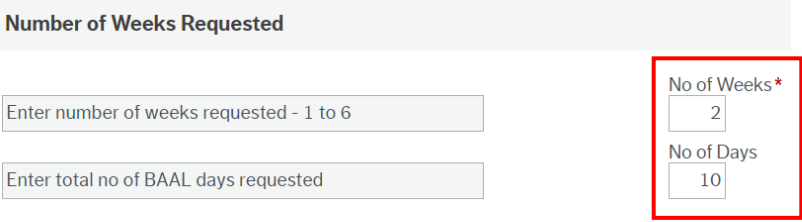


Approving & Declining your Employee’s Request to Buy Additional Annual Leave (BAAL) – Line Manager Quick Card

This quick guide will demonstrate how to access a Buying Additional Annual Leave (BAAL) form submitted by your employee(s) in Business World (BW) and to either approve, requests changes or decline the request(s). **Please check with a Senior Manager in your service to establish if requests from your employee(s) need to be discussed at a higher level, prior to you approving or declining them.**

The deadline to approve or decline your employee’s BAAL request forms in Business World is **Monday 1st February 2021**. You may decide to approve less weeks than some employees have requested, so please ensure you allow plenty time for the employee(s) to amend their request and re-submit this for you to approve 2nd time around before 1st February deadline.

<p>1</p>		<p>To access forms submitted by your employee(s), click on your Tasks at the top-right of your screen and select the form you wish to process.</p>
<p>2</p>		<p>Please read the Guidance Tab as it contains information about:</p> <ul style="list-style-type: none"> • The BAAL Policy & Salary Deductions. • The Criteria & Rules. • The maximum number of week an employee can request. • The Deadlines for submitting & approving form(s).
<p>3</p>	<p>Now click on the Employee’s Request Tab to view the number of weeks <u>and days</u> requested by the employee.</p>  <p>It is your responsibility to ensure the days are correct based on the employees work schedule/pattern. This number could be an average if the employee works a different number of shifts from week to week – see some examples below:</p> <ul style="list-style-type: none"> • if you normally work a 5 day week, this is 5 days; • if you normally work 2 days per week, this will be 2 days; • if you normally work 2.5 days, this will be 3 days for 1 week; • if you normally work 5 days on week one and 4 days on week 2 then this would be 4.5 days for 1 week. <p>You will also see the employee end date and other helpful information on the Manager’s Authorisation tab to help you, and senior management (where applicable), to make a decision whether to approve or decline the employee’s request.</p> <p>You now have 3 options – see 4a, 4b & 4c below.</p>	

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4a

Employee's Request **Manager's Authorisation**

Request Status* Date*
 [Dropdown] 11/01/2021 [Calendar Icon]

Weeks Approved / Declined* Days Approved / Declined*
 0 0.0

Cover Arrangements

Is there a requirement to cover

Approve Holiday Purchase Decline

Success
 The item is successfully processed. You are now ready to process the next item.
 OK

Approving ALL of the weeks in the employee's request, without changes

– remember, where appropriate, **discuss the request with a senior manager** in your service prior to approval. When you are happy to approve, just click on the **Manager's Authorisation** tab.

Click on the drop down triangle to update **Request Status to Approved**, enter the **date** you are approving the request (click on the small calendar icon to select the date); enter the **number of weeks you are approving** (should match what the employee has requested).

Now complete the questions relating to Cover Arrangements.

Then, click on the **Approve Holiday Purchase** button at the bottom of your screen.

You will receive a **success message**. Click **OK** to close the message. The form will now workflow to HR for some final checks.

If HR have any issues relating to the request, they may return the form to you with comments. If not, HR will process the form and the employee will receive an email and BW alert message to notify them their request has been approved.

The employee will not receive confirmation that their request has been approved until HR approve all requests for your service.

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4b

The screenshot shows the 'Manager's Authorisation' tab in the BAAL system. Key elements include:

- Request Status:** A dropdown menu with a red box around it.
- Date:** A date field set to 11/01/2021 with a calendar icon.
- Weeks Approved / Declined:** A numeric field set to 0.
- Days Approved / Declined:** A numeric field set to 0.0.
- Declined Reason:** A text input field with a red box around it.
- Comments:** A text area below the declined reason.
- Cover Arrangements:** A section with a red box around the 'Cover Arrangements' label and a sub-field 'Is there a requirement to cover'.
- Decline Holiday Purchase:** A button with a red box around it and a 'C' icon.
- BAAL - Line Manager Review - Decline Holiday Purchase:** A pop-up window with a comment 'Due to the high number of requests, I ca...' and a 'Decline Holiday Purchase' button with a red box around it.
- Success Message:** A green pop-up window with the text 'The item is successfully processed. You are now ready to process the next item.' and an 'OK' button with a red box around it.

Declining PART of the employee request and employee to make changes - remember, where appropriate, **discuss the request with a senior manager** in your service prior to approval.

Follow the steps in row 3, then click on the **Manager's Authorisation** tab.

Click on the drop down triangle to update **Request Status to Declined**; enter the **date** you are declining the request (click on the small calendar icon to select the date); enter the **number of weeks you are declining** (this should be less than what the employee had originally requested, e.g. employee may have requested 6wks and you are declining 4wks. Also enter a **Declined Reason using an option from the drop down list**.

Next, complete the questions in the **Cover Arrangements** section.

Then, click on the **Declined Holiday Purchase button** at the bottom of your screen. A pop-up message will appear. Add **comments** for the employee to read then click on the **Decline Holiday Purchase button on the pop-up message**. Example – they asked for 6 wks and you are agreeing 2 so ask them to amend their request to 2 weeks only. *(HR also expect you to discuss this with the employee please.)*

A **success message** will appear. Click **OK** to close the message.

The form will now workflow back to the employee who can either amend and resubmit their requests for the lower number of weeks, or withdraw their request. If they resubmit, the form will come back to you to agree the updated request. **Follow instructions on Row 4a to approve any amended/re-submitted requests from your employees.**

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4c

Employee's Request | **Manager's Authorisation**

Request Status*

Date* 11/01/2021

Weeks Approved / Declined*

Days Approved / Declined*

Declined Reason

Comments

Cover Arrangements

Is there a requirement to cover

Decline Holiday Purchase

BAAL - Line Manager Review - Decline Holiday Purchase

Enter your comment

Decline Holiday Purchase

Success

The item is successfully processed. You are now ready to process the next item.

Declining a Request IN FULL with no options for the employee to re-submit – Where appropriate, **discuss the request with a senior manager** in your service prior to declining.

Follow the steps in row 3, then click on the **Manager's Authorisation** tab.

Click on the drop down triangle to update **Request Status** to **Declined**; enter the **date** you are declining the request (click on the small calendar icon to select the date); enter the **number of weeks** you are declining (which will be the same amount as the employee requested) and select an appropriate **Declined Reason**.

Complete the question in the **Cover Arrangements** section by selecting N/A.

Now, click on the **Declined Holiday Purchase** button at the bottom of your screen.

Add **comments** for the employee to help them understand why it has been declined.

Then, click on the **Decline Holiday Purchase** button.

A **success message** will appear. Click **OK** to close the message.

The form will now workflow back to the employee to notify them that you have declined their request. *(HR also expect you to discuss this with the employee.)*

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What happens next? – Approved forms will workflow to HR for final checking.

- If HR have any concerns, they will return the form to you with comments.
- HR will notify Payroll of all approved requests to ensure the salary deductions start in the new financial year.
- HR will also arrange for the additional leave days, that you have checked and confirmed, to be added to the employees leave balance in Business World.
- A Line Manager's Report will be available in January for managers to view all requests made by employees reporting to you.
- In early February, the employee will receive an alert in Business World to notify them if their request has been approved.

From week commencing 18th January, you will have access to a report showing all approved and declined requests for your team. This can be run at any time during the process.