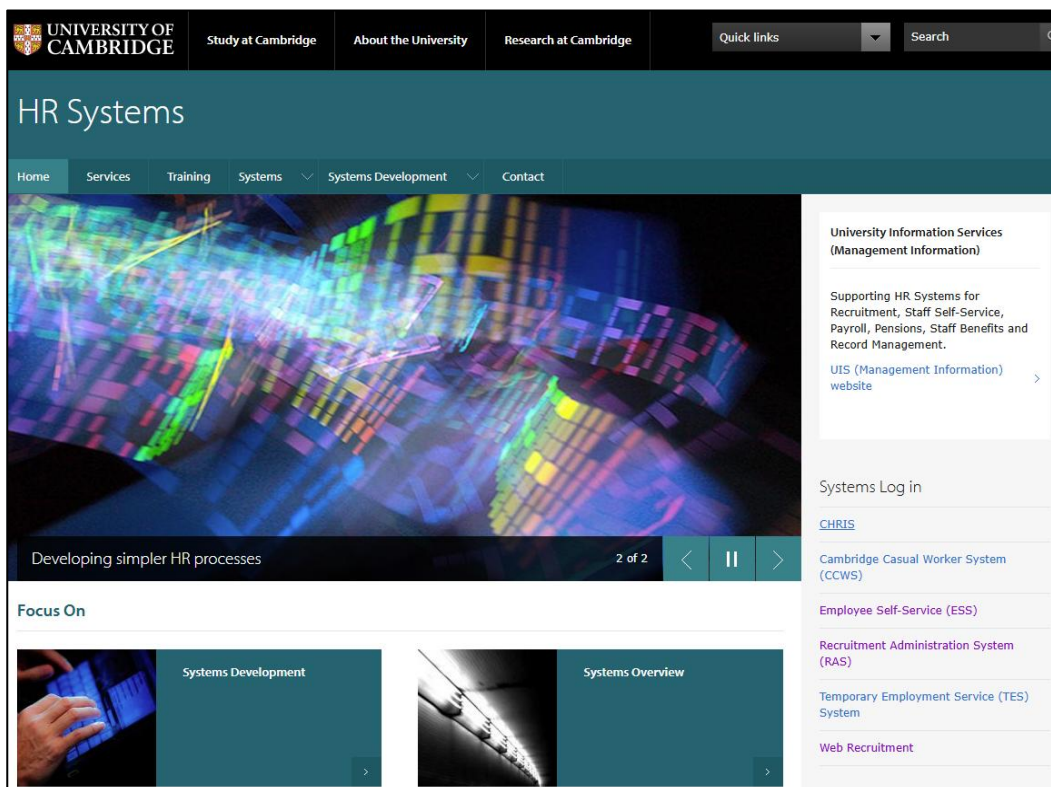

Contents

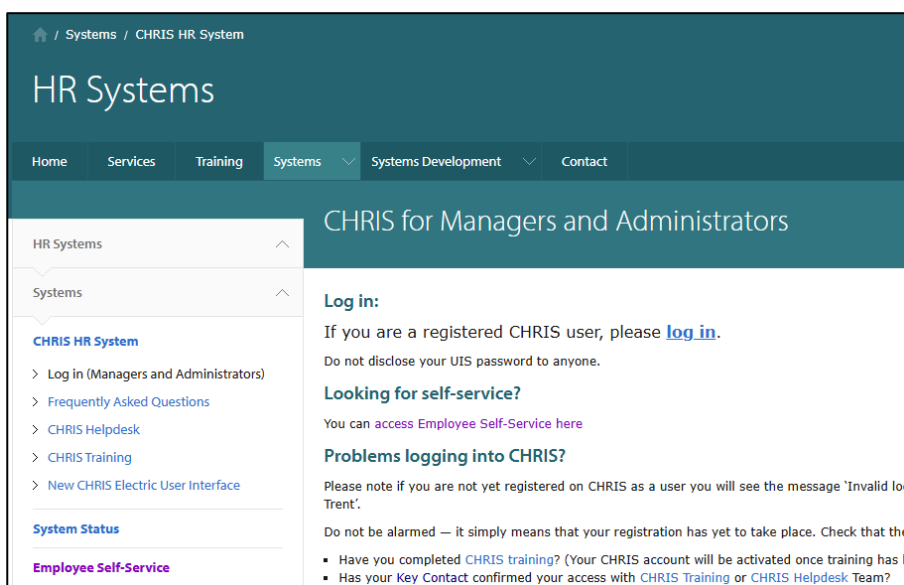
| | |
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1. The Login screen

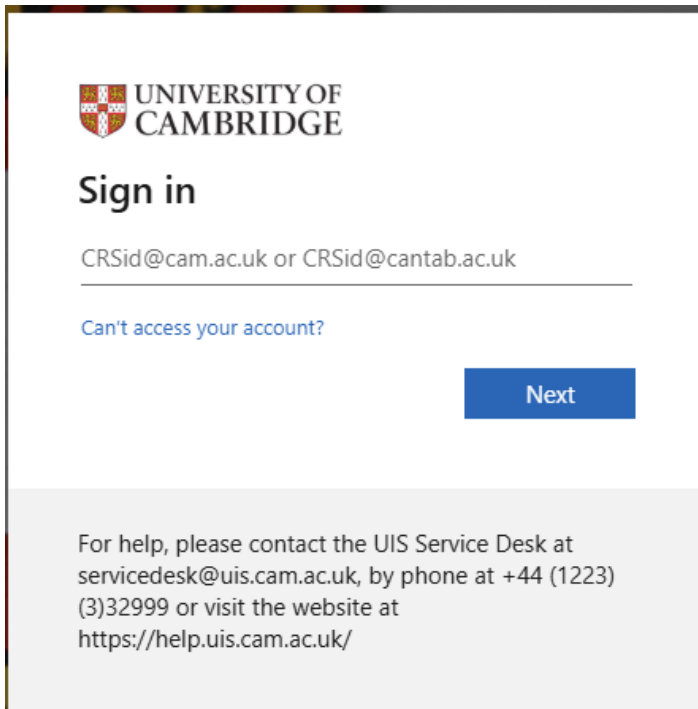
1. Locate the HR Systems Home page at <https://www.hrsystems.admin.cam.ac.uk>



2. Log in to CHRIS from the Systems Log in section on the right-hand side.

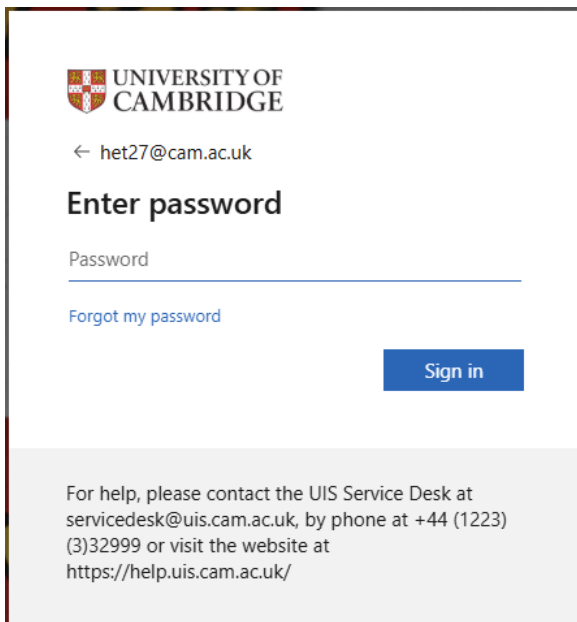


3. The Login screen will be displayed.



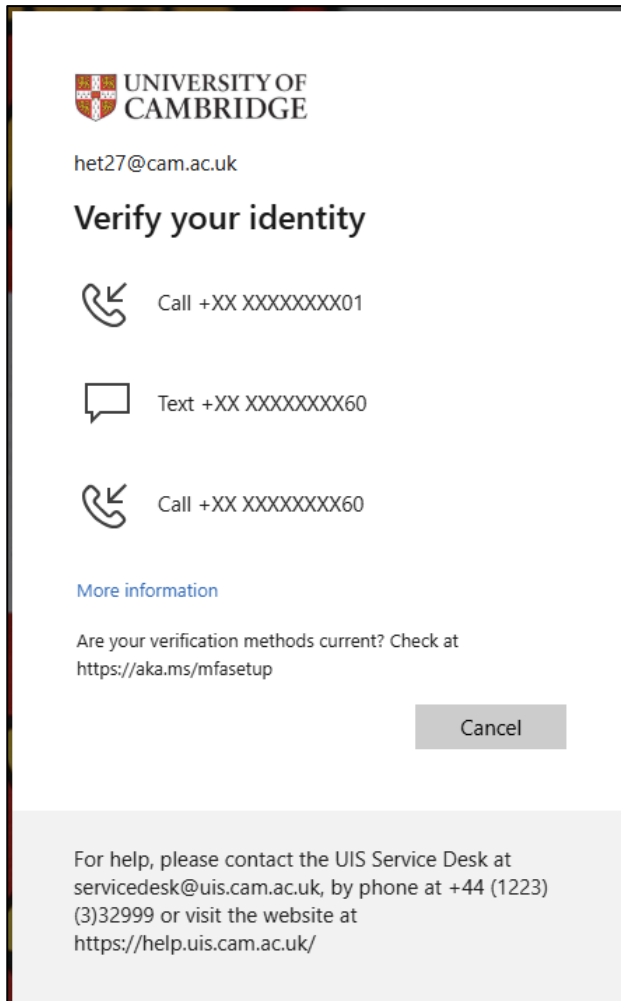
The screenshot shows the 'Sign in' page for the University of Cambridge. At the top left is the University of Cambridge crest and name. Below it is the heading 'Sign in'. A text input field contains the email address 'CRSid@cam.ac.uk or CRSid@cantab.ac.uk'. Below the input field is a blue link that says 'Can't access your account?'. To the right of the input field is a blue button labeled 'Next'. At the bottom of the page, there is a grey box containing contact information for the UIS Service Desk: 'For help, please contact the UIS Service Desk at servicedesk@uis.cam.ac.uk, by phone at +44 (1223) (3)32999 or visit the website at https://help.uis.cam.ac.uk/'.

4. Enter your sign in details and password



The screenshot shows the 'Enter password' page for the University of Cambridge. At the top left is the University of Cambridge crest and name. Below it is the heading 'Enter password'. Above the password input field is a back arrow and the email address 'het27@cam.ac.uk'. The password input field is labeled 'Password'. Below the input field is a blue link that says 'Forgot my password?'. To the right of the input field is a blue button labeled 'Sign in'. At the bottom of the page, there is a grey box containing contact information for the UIS Service Desk: 'For help, please contact the UIS Service Desk at servicedesk@uis.cam.ac.uk, by phone at +44 (1223) (3)32999 or visit the website at https://help.uis.cam.ac.uk/'.

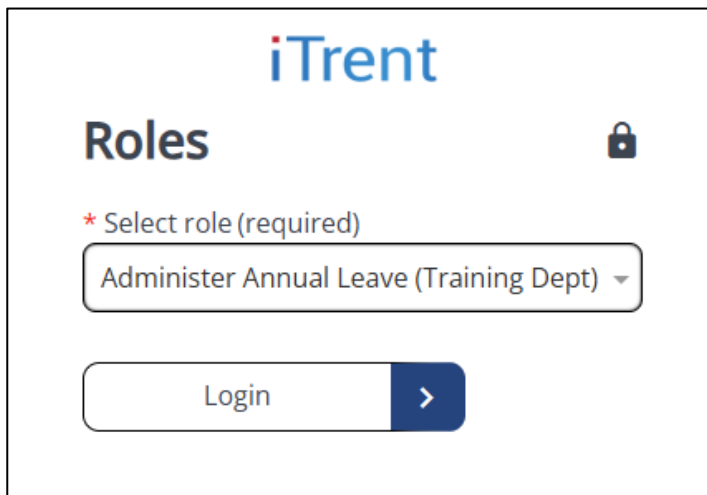
5. Then click on Sign in
6. Verify your identity using the Multifactor authentication



Information regarding setting up Multi-Factor authentication is available here:

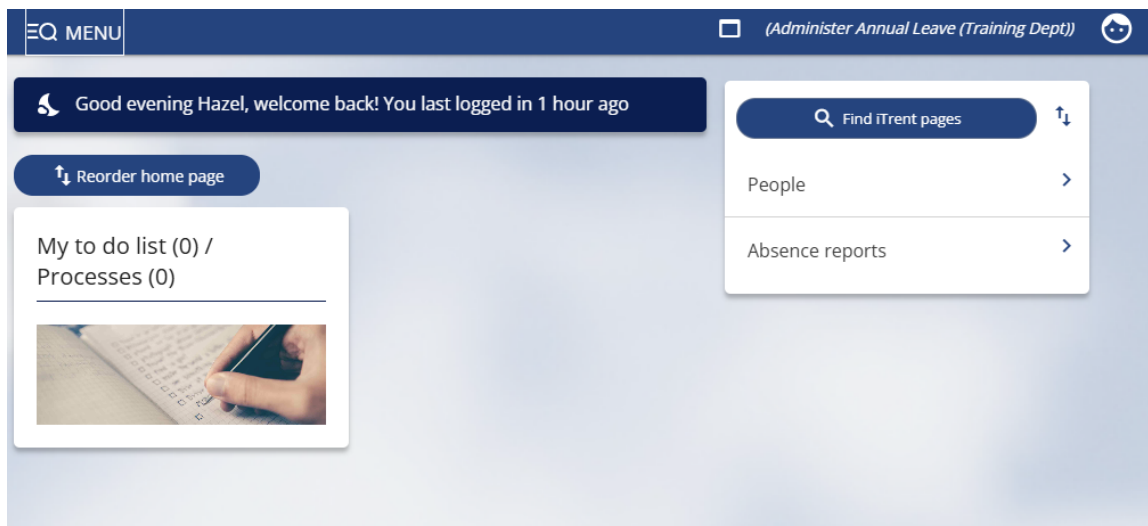
[Employee Self Service \(ESS\) and CHRIS: new way to log in from 3 February 2022 | IT Help and Support](#)

7. Select your Administer Annual Leave Role



The screenshot shows the iTrent 'Roles' page. At the top, the iTrent logo is displayed. Below it, the word 'Roles' is shown with a lock icon to its right. A red asterisk indicates a required field: '* Select role (required)'. A dropdown menu is open, showing 'Administer Annual Leave (Training Dept)' with a downward arrow. Below the dropdown is a 'Login' button with a right-pointing arrow.

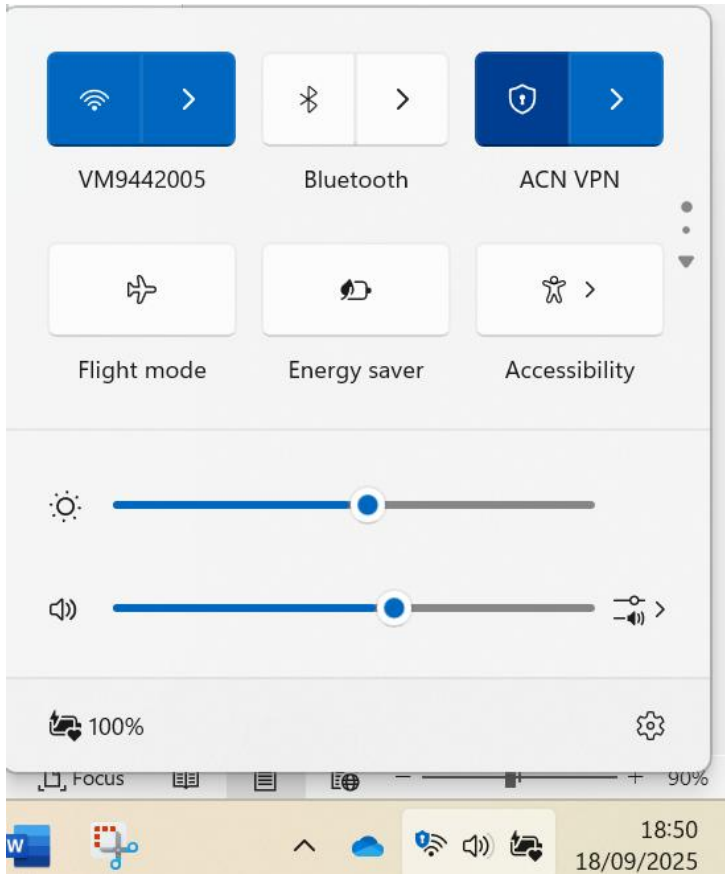
8. The following page will be displayed.



The screenshot shows the iTrent dashboard. At the top, there is a dark blue header with 'EQ MENU' on the left, a search icon, the text '(Administer Annual Leave (Training Dept))', and a user profile icon. Below the header, a dark blue banner displays a welcome message: 'Good evening Hazel, welcome back! You last logged in 1 hour ago'. To the right of the banner is a search bar labeled 'Find iTrent pages' with a search icon and a dropdown arrow. Below the search bar are two menu items: 'People' and 'Absence reports', each with a right-pointing arrow. On the left side, there is a 'Reorder home page' button with a double-headed arrow icon. Below that is a 'My to do list (0) / Processes (0)' section with a small image of a hand typing on a keyboard.

1.1. Connecting to the Virtual Private Network (VPN)

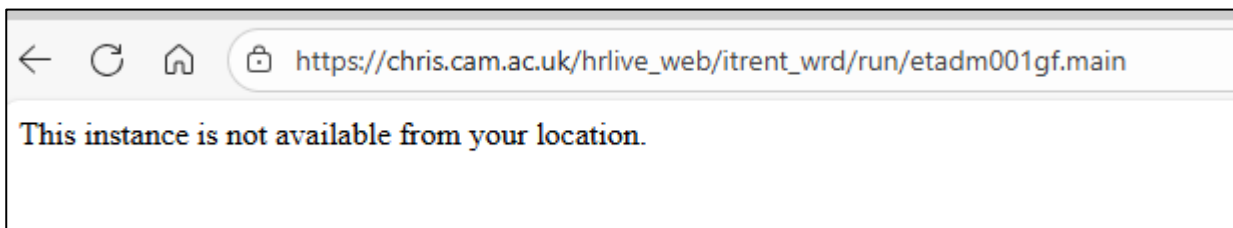
Please note that if you are working from home or in an un-networked location you will need to be logged into the Virtual Private Network (VPN) to use the CHRIS System



Instructions for setting up a Virtual Private Network (VPN) can be found here:

[Remote access when working away from the University | IT Help and Support](#)

If you see this message displayed when you attempt to log in, then you need to connect to the VPN

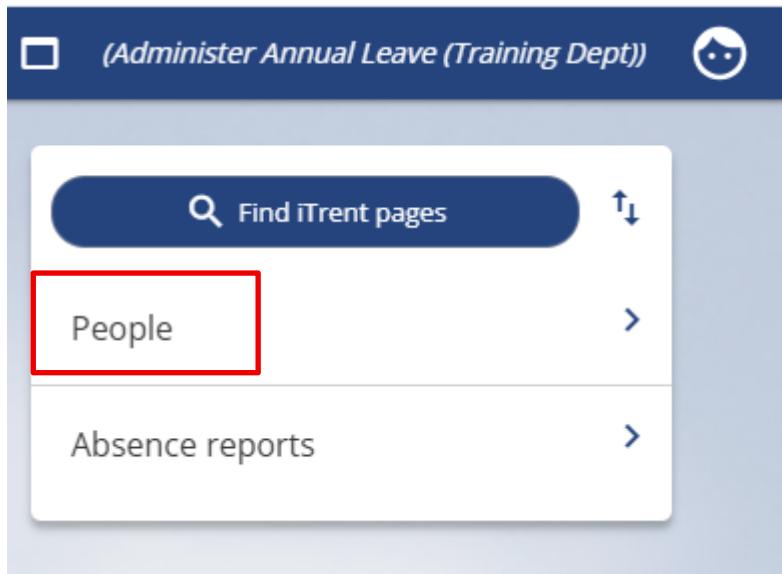


2. Viewing Annual Leave entitlement and balances

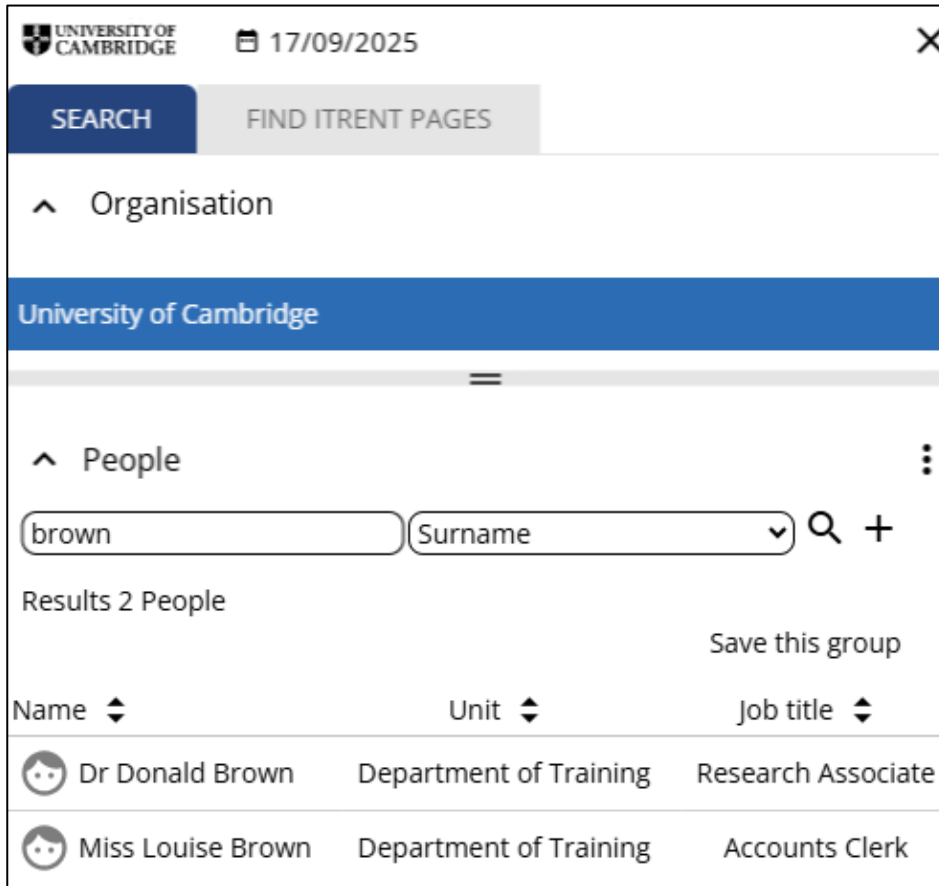
Annual leave in CHRIS is calculated in line with contractual entitlement. Where employees work fewer than 5 days per week or are not employed for the whole of an annual leave year, their entitlement is pro-rated as set out in: [CHRIS Annual Leave Calculations v2 - March 2026.pdf](#)

2.1 Viewing an employee's annual leave entitlement



1. Select People



2. Search for the employee



The screenshot shows the CHRIS search interface. At the top, it displays 'UNIVERSITY OF CAMBRIDGE' and the date '17/09/2025'. Below this are two tabs: 'SEARCH' (active) and 'FIND ITRENT PAGES'. The search results are organized into sections. The first section is 'Organisation', with 'University of Cambridge' selected. The second section is 'People', which includes a search input field containing 'brown' and a dropdown menu set to 'Surname'. Below the search input, it says 'Results 2 People' and 'Save this group'. A table lists the search results:

| Name | Unit | Job title |
|---|------------------------|--------------------|
|  Dr Donald Brown | Department of Training | Research Associate |
|  Miss Louise Brown | Department of Training | Accounts Clerk |

3. Select the employee whose record you wish to view. A summary will be displayed, including a dial showing their current remaining holiday entitlement. This dial is updated when the employee's absence is recalculated (which happens overnight). Where a person is eligible for annual leave in two (or more) separate positions at the same time, the value shown will be the total entitlement for those two (or more) positions.

UNIVERSITY OF CAMBRIDGE 17/09/2025

SEARCH FIND ITRENT PAGES

Organisation

University of Cambridge

People

Brown Surname

Results 2 People

Select all Save this group

Name Unit Job title

Dr Donald Brown Department of Training Research Associate

Miss Louise Brown Department of Training Accounts Clerk

Personal

Known as Donald born on 17/11/1988

7 Year(s) 7 Month(s) Reckonable service

80000084 (Personal ref.)

Employment

Research Associate (70000092) | Not specified | Department of Training | Non Clinical Researcher

Occupancy started on 01/02/2018

Reporting manager Professor Lawrence McGregor Director and Head of Department

Calendar

VIEW FULL CALENDAR

17 - 30 September 2025

17 18 19 20 21 22 23 24 25 26 27 28

1 Oct 2024 - 30 Sep 2025

16 of 41 days

Holidays remaining (as of last calculation)

LINKS

Annual leave summaries Enter / view individual leave periods

Absence calendar Holiday entitlement summary Holiday entitlement adjustment

4. From the Annual Leave summaries link select Holiday Entitlement Summary.

LINKS

Annual leave summaries Enter / view individual leave periods

Absence calendar **Holiday entitlement summary** Holiday entitlement adjustment

The Holiday entitlement Summary screen will be displayed showing dates for Annual Leave, Bank Holiday and Company Holiday and the remaining entitlement.

Holiday entitlement summary

 ▼ MENU

Employment details

Position

Period details

Holiday period dates

Length of service at relevant date

Scheme name

Membership dates

Entitlement for period

| From | To | Duration | Remaining entitlement | Type |
|------------|------------|----------|-----------------------|-----------------|
| 25/12/2024 | 25/12/2024 | 1 | 40 | Bank holiday |
| 26/12/2024 | 26/12/2024 | 1 | 39 | Bank holiday |
| 27/12/2024 | 27/12/2024 | 1 | 38 | Company holiday |
| 30/12/2024 | 31/12/2024 | 2 | 36 | Company holiday |
| 01/01/2025 | 01/01/2025 | 1 | 35 | Bank holiday |
| 18/04/2025 | 18/04/2025 | 1 | 34 | Bank holiday |
| 21/04/2025 | 21/04/2025 | 1 | 33 | Bank holiday |
| 05/05/2025 | 05/05/2025 | 1 | 32 | Bank holiday |
| 26/05/2025 | 26/05/2025 | 1 | 31 | Bank holiday |
| 14/07/2025 | 14/07/2025 | 1 | 30 | Annual Leave |
| 25/08/2025 | 25/08/2025 | 1 | 29 | Bank holiday |
| 01/09/2025 | 05/09/2025 | 5 | 24 | Annual Leave |
| 15/09/2025 | 15/09/2025 | 1 | 23 | Annual Leave |
| 19/09/2025 | 19/09/2025 | 1 | 22 | Annual Leave |
| 22/09/2025 | 22/09/2025 | 1 | 21 | Annual Leave |
| 24/09/2025 | 24/09/2025 | 1 | 20 | Annual Leave |
| 25/09/2025 | 30/09/2025 | 4 | 16 | Annual Leave |

2.2 Important points to note when viewing annual leave in CHRIS

- **Fixed-term contracts**

- CHRIS will pro-rate entitlement for the leave year a fixed-term contract is due to end
- Fixed-term employees will still be able to book annual leave after their expected end date but without it being deducted from their balance.
- It is vital to monitor fixed-term contract end dates via the monthly burst report to institutions (see [Limit of Tenure/Funding Control | Human Resources](#)) and to submit fixed-term contract extension requests ([CHRIS/50 or CHRIS/53 form](#)) as soon as an extension is confirmed. CHRIS will update an employee's annual leave entitlement and balance overnight after an extension has been processed.

- **Secondments**

- Book leave in both positions:
It is recommended that employees on secondment book annual leave against both their substantive (home) and secondment (host) positions (if both use CHRIS annual leave). This ensures managers in both areas can see their bookings, and their record stays accurate even if their secondment dates change. Only the position they are in at the time the leave is taken will have a balance deduction.
- Pro-rated entitlement for the secondment (host) position:
While an employee is on secondment, CHRIS will pro-rate their annual leave entitlement in line with their secondment end date (for the leave year in which the secondment is due to end).
- Entitlement for the substantive (home) position:
If an employee's home institution uses CHRIS annual leave, annual leave entitlement for their substantive (home) position will also appear pro-rated in line with their secondment end date. However, when their secondment ends and they return to their substantive role, the remaining correct entitlement for that leave year will be updated automatically. They can continue booking leave against their substantive position throughout.

- **Leavers**

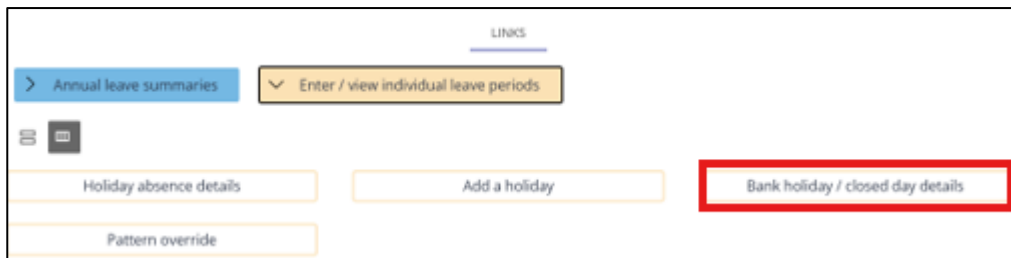
Once you have processed an employee is processed as a leaver, their annual leave entitlement will pro-rate automatically in an overnight process.

- **Adjustments, overrides and carryover**

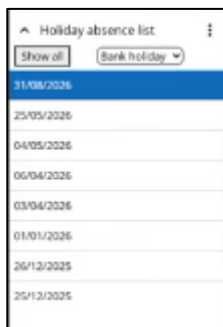
- If the entitlement has been adjusted or overridden then the "Entitlement for period" field will show the revised balance and the word "adjustment" or "override".
- If the employee has had any leave carried over automatically from the previous annual leave year then the "Entitlement for period" field will contain "[number of days] brought forward".

- **Christmas closure days and bank holidays**

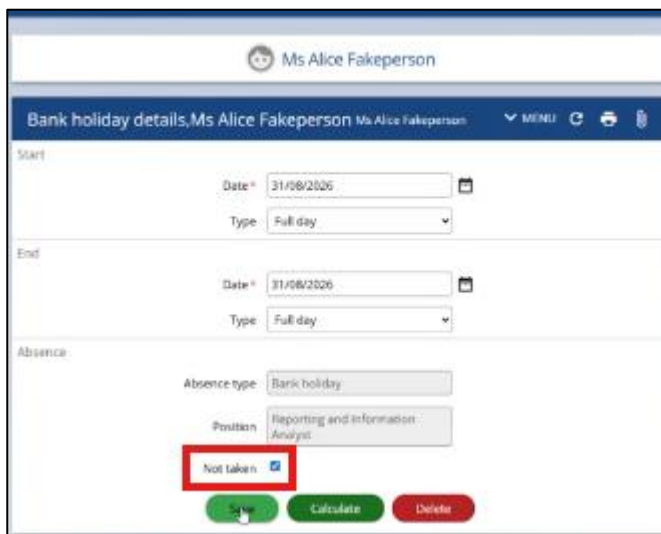
- Standard University Christmas closure days are displayed as 'Company Holiday'. These, along with bank holidays, are pre-booked in the system automatically.
- If your institution has additional Christmas closure days which apply to everyone, please contact chris.helpdesk@admin.cam.ac.uk for central support on adding these to CHRIS.
- If an employee in your institution works on standard closure days or bank holidays, these should be marked as not taken so that the employee's balance is credited with the unused entitlement. This can be done by searching for the employee and then selecting Enter / view individual leave periods from the links.



Select bank holiday / closed day details and then select the relevant day.

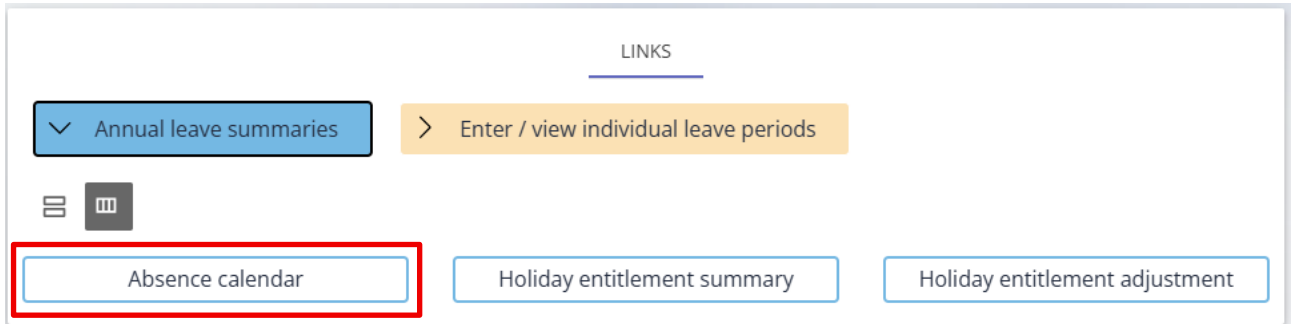


Tick the box next to 'Not taken' and click Save.

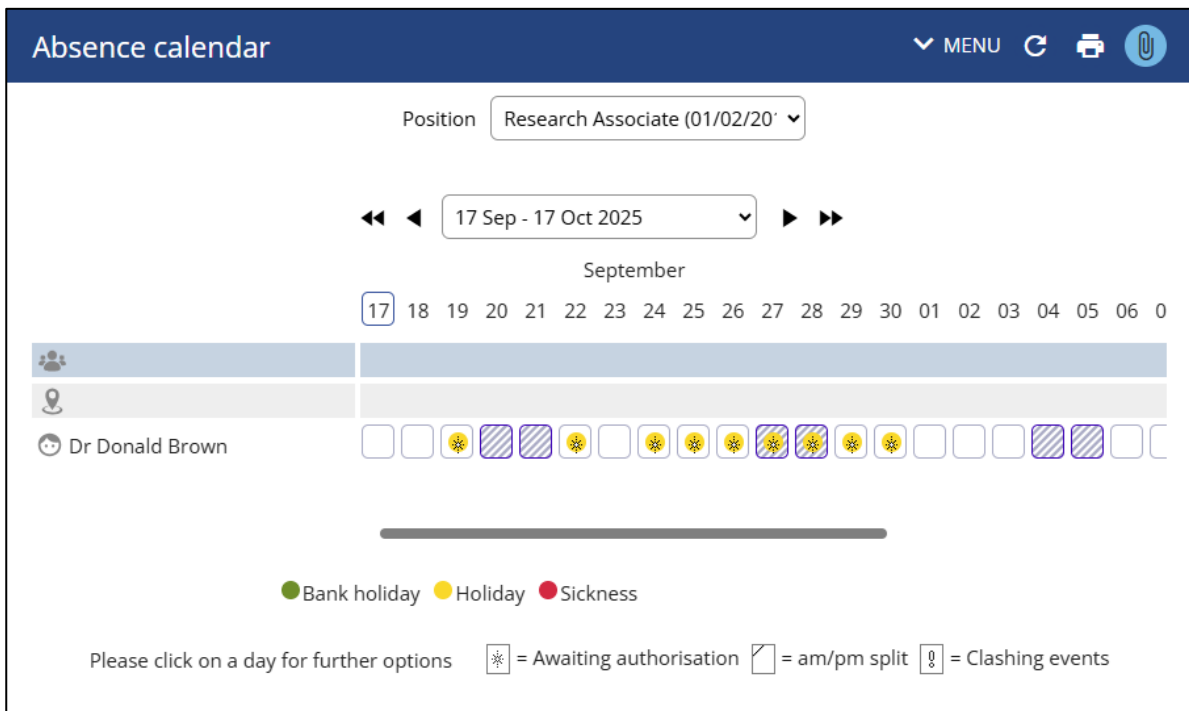


3. Viewing Annual Leave using the Calendar

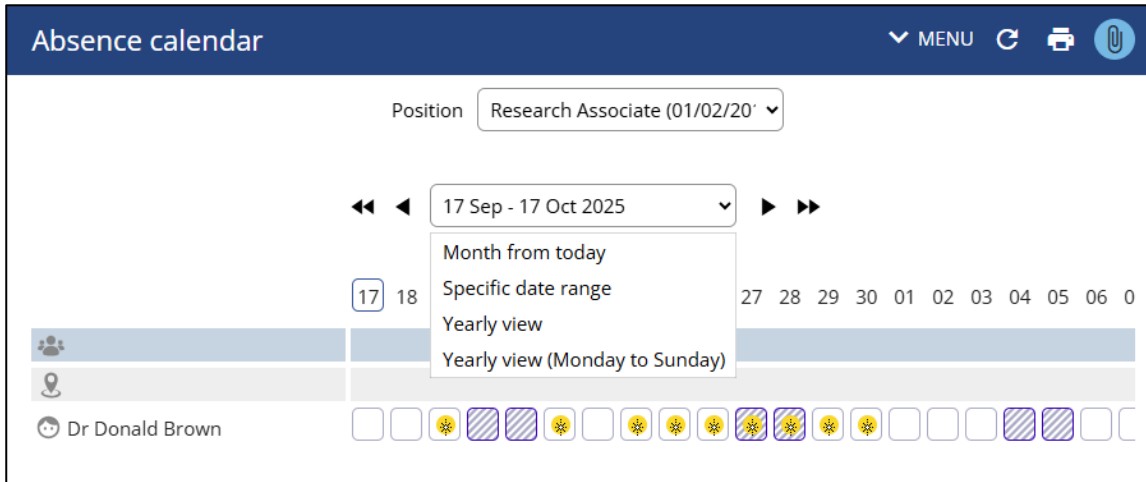
1. Select Absence Calendar from the Annual Leave summaries Link



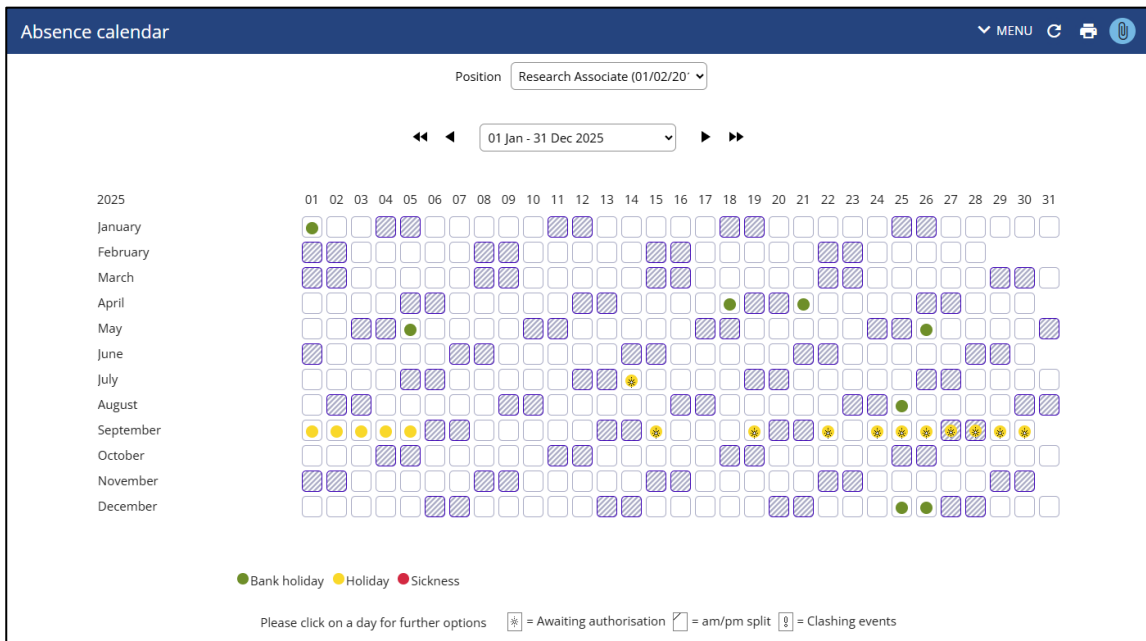
2. The Absence Calendar will be displayed showing absence from today's date for the next month.



- Use the drop down arrow to the right-hand side of the date range to change the dates viewed from Month from today to either a Specific Date range, or Yearly View.

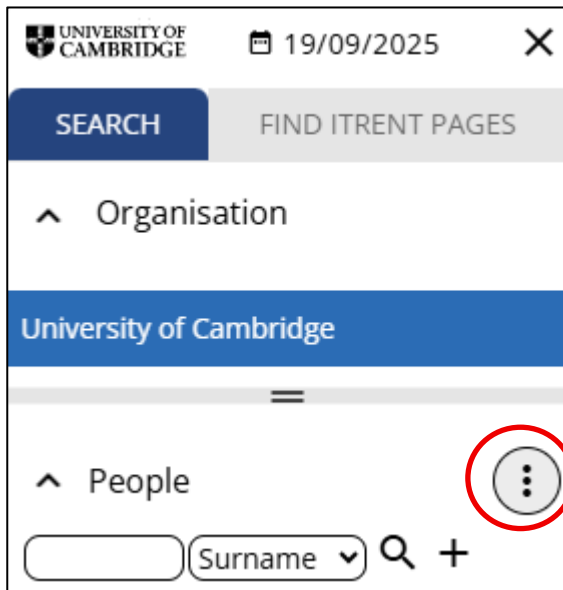


- Choosing Yearly View will display the screen below.

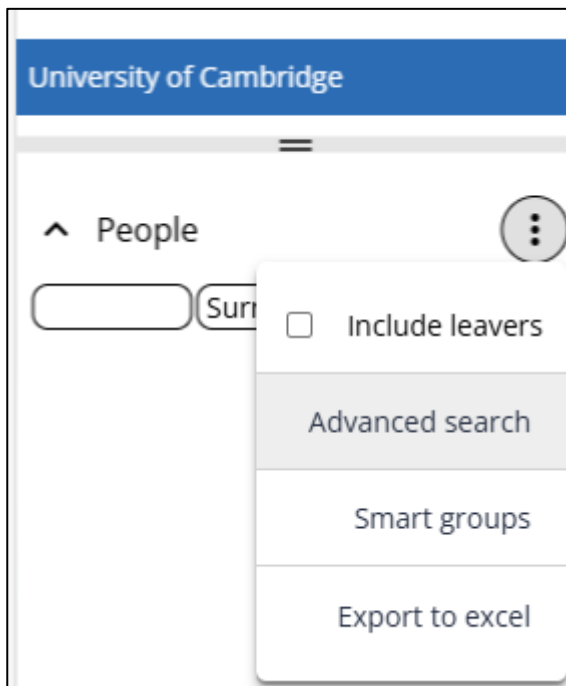


4. Viewing Annual Leave for more than one employee

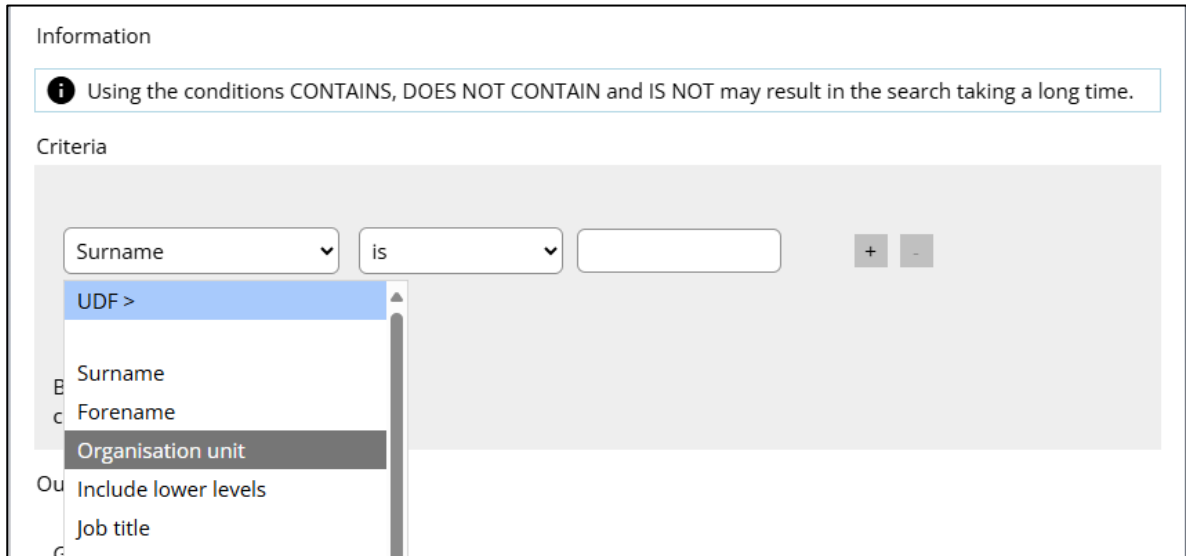
1. You can view annual leave for the department, or for a group of employees by using the Advanced Search.
2. Click the 3 dots to the right of the search bar



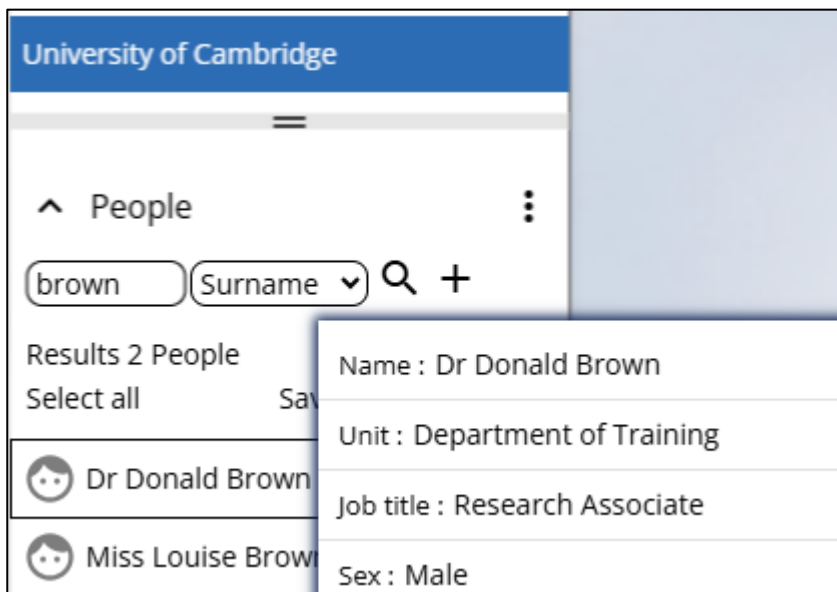
3. Select Advanced search



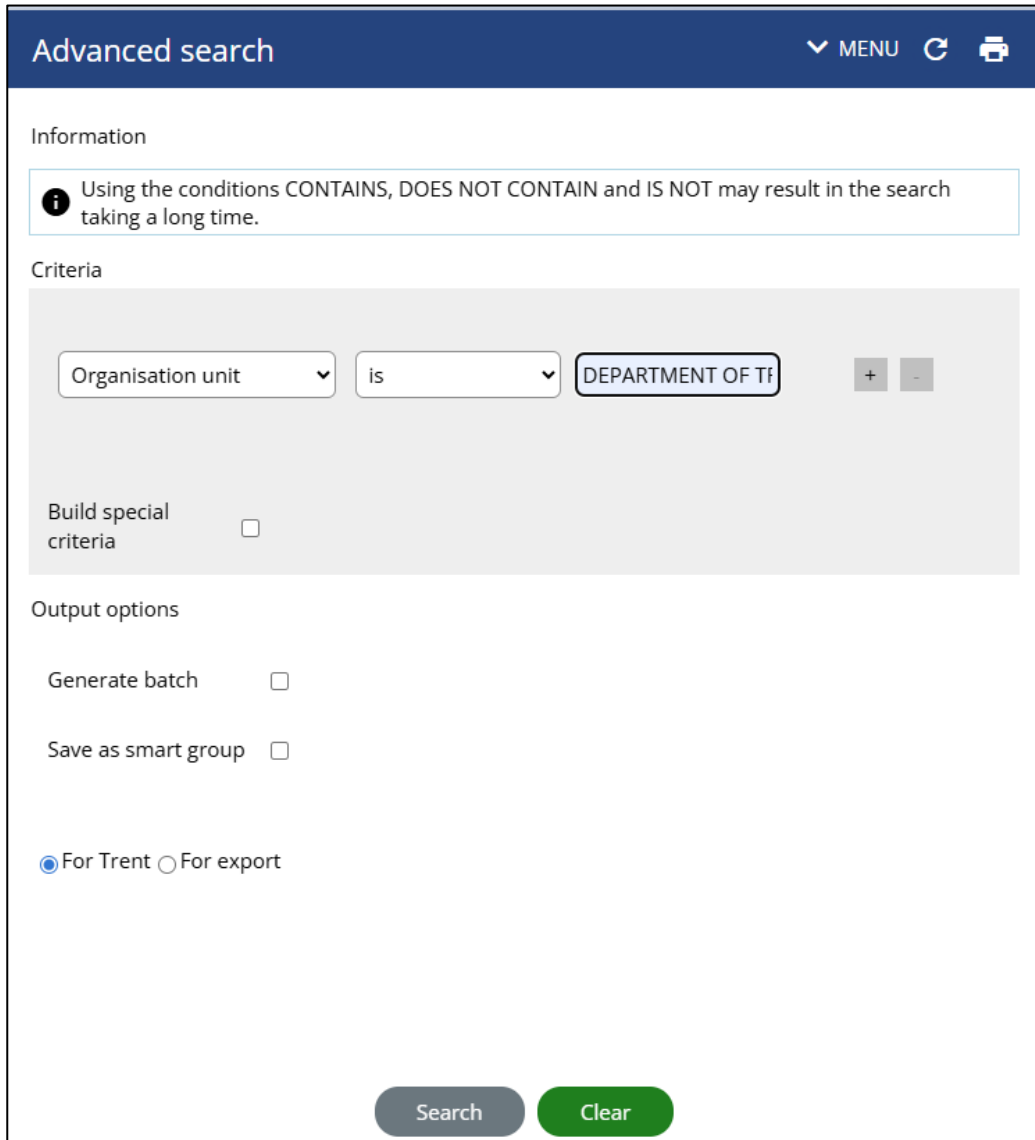
4. Change the search criteria from Surname to Organisation Unit.



5. Enter the Department Name. This must be the full name, including the word Department, as it appears by Unit when you search for a person. e.g. Department of Training



6. In the Output Options 'For Trent' will automatically be selected. Click on the Search button.



Advanced search

Information

Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.

Criteria

Organisation unit is DEPARTMENT OF Tf

Build special criteria

Output options

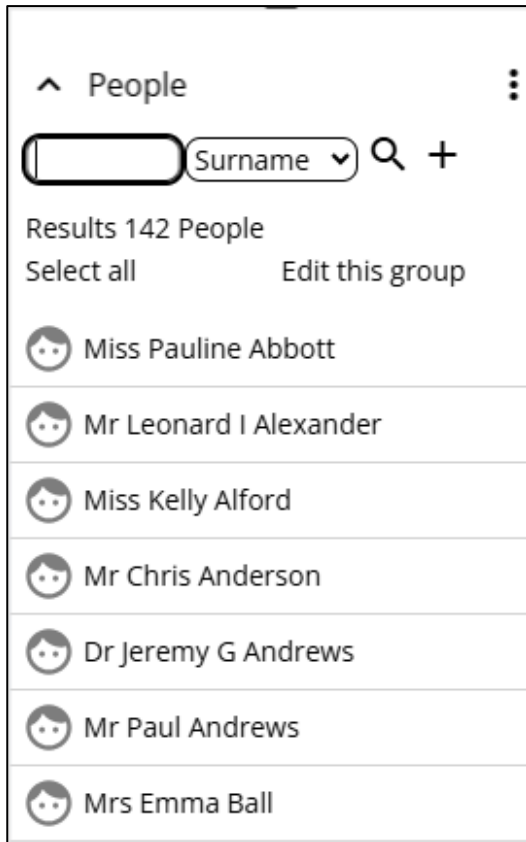
Generate batch

Save as smart group

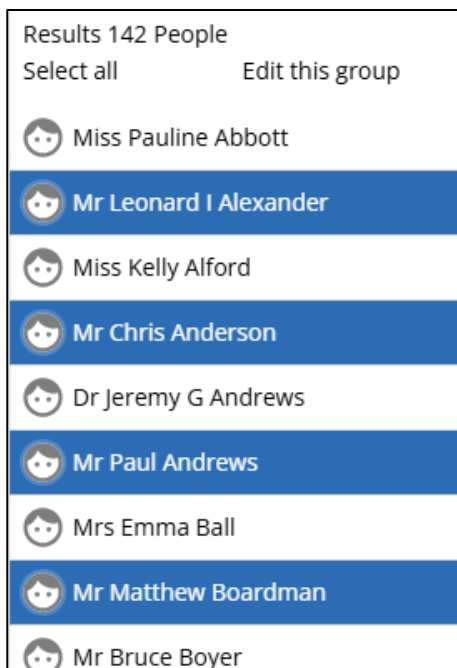
For Trent For export

Search Clear

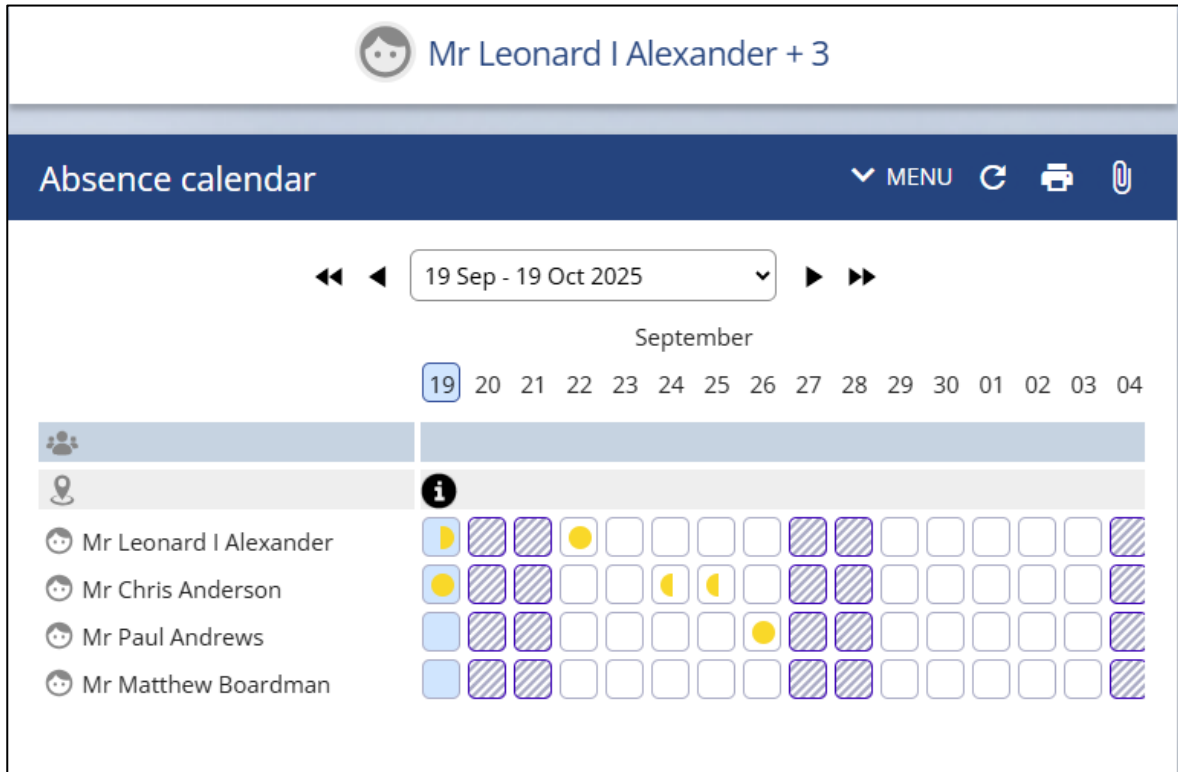
7. All employees in the Department will be displayed alphabetically in the left-hand pane.



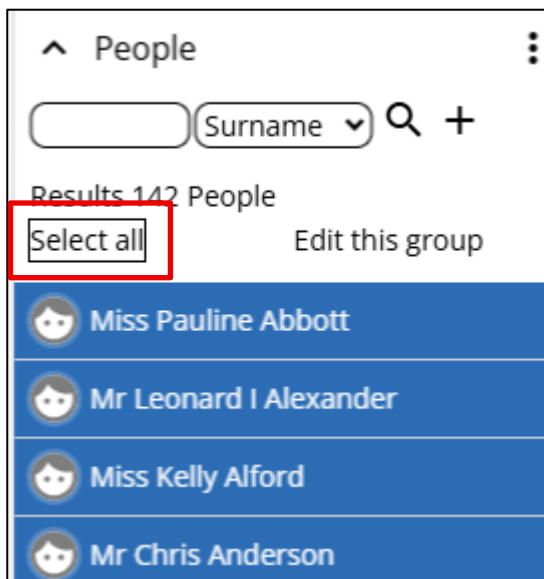
- To select a group of employees, select the first employee and then use the Control (Ctrl) key to select additional employees.



9. Then select Absence Calendar. The selected employees will be displayed.



10. To display the calendar for all employees, choose Select all.



Administering Annual Leave in CHRIS



UNIVERSITY OF CAMBRIDGE 19/09/2025 (Administer Annual Leave (Training Dept))

SEARCH FIND ITRENT PAGES

Organisation

University of Cambridge

People

Surname

Results 142 People

- Miss Donna Webber
- Mr Grant Weeks
- Dr Patricia Westmoreland
- Mr Stuart Weston
- Dr Colin R Wilkinson
- Mr Jack Wilkinson
- Mr Charles Williamson
- Dr Rex P Williamson
- Dr Marlon Willis
- Mr Simon Willmott
- Dr Barbara Woods
- Mr Peter Yates

Miss Pauline Abbott + 141

Absence calendar

19 Sep - 19 Oct 2025

September

| | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Miss Pauline Abbott | Bank holiday | Awaiting authorisation | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Mr Leonard I Alexander | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Miss Kelly Alford | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday |
| Mr Chris Anderson | Holiday | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Dr Jeremy G Andrews | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday | Holiday |
| Mr Paul Andrews | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Mrs Emma Ball | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Mr Matthew Boardman | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Mr Bruce Boyer | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Dr Donald Brown | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |
| Miss Louise Brown | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation | Awaiting authorisation |

● Bank holiday
 ● Holiday
 ● Sickness

Please click on a day for further options * = Awaiting authorisation ☐ = am/pm split ⏸ = Clashing events

5. Adding Annual Leave Booking on behalf of employees

1. Search for the Employee for whom you wish to add Annual Leave and select Enter/view individual leave periods from the Links

The screenshot shows the 'LINKS' section of the CHRIS interface. At the top, there are two buttons: 'Annual leave summaries' (highlighted in blue) and 'Enter / view individual leave periods' (highlighted in yellow). Below these are several other buttons: 'Holiday absence details', 'Add a holiday', 'Bank holiday / closed day details', and 'Pattern override'. The 'Add a holiday' button is highlighted with a red box in the subsequent screenshot.

2. Select Add a holiday

This screenshot is identical to the previous one, but the 'Add a holiday' button is now highlighted with a red box, indicating it has been selected.

3. Enter the date(s) for the annual leave and click on the save button.

The screenshot shows the 'Holiday absence details' form for Dr Donald Brown. The form includes the following fields:

- Holiday period:** A dropdown menu set to 'Full day'.
- Holiday start:** A date field set to '23/09/2025' with a calendar icon.
- Holiday end:** A date field (empty).
- Absence:** A dropdown menu set to 'Annual Leave'.
- Authorisation:** A text field set to 'Not applicable'.
- + Holiday balances:** A section header.
- Save:** A green button at the bottom.

- The Annual Leave will be displayed in the left-hand pane. Notice that leave entered by an administrator shows authorisation status as Not applicable. When annual leave is entered by an administrator, the manager doesn't receive a notification.



^ People ⋮

Surname Q +






Results 2 People

Select all

Name ⌵

| | | | |
|---|--------------------------|----|-----|
|  | Dr Donald Brown | De | ate |
|  | Miss Louise Brown | De | |

^ Holiday absence list

| Start date ⌵ | Day ⌵ | E |
|--|-------|---------------------------------|
|  25/09/2025 | Thu | Res |
|  24/09/2025 | Wed | Res |
| 23/09/2025 | Tue | 23/09/2025 Tue Annual Leave Res |
|  22/09/2025 | Mon | 22/09/2025 Mon Annual Leave Res |
|  19/09/2025 | Fri | 19/09/2025 Fri Annual Leave Res |
|  15/09/2025 | Mon | 15/09/2025 Mon Annual Leave Res |
| 01/09/2025 | Mon | 05/09/2025 Fri Annual Leave Res |

Start date : 23/09/2025

Day : Tue

End date : 23/09/2025

Day : Tue

Type : Annual Leave

Position : Research Associate

Current status :

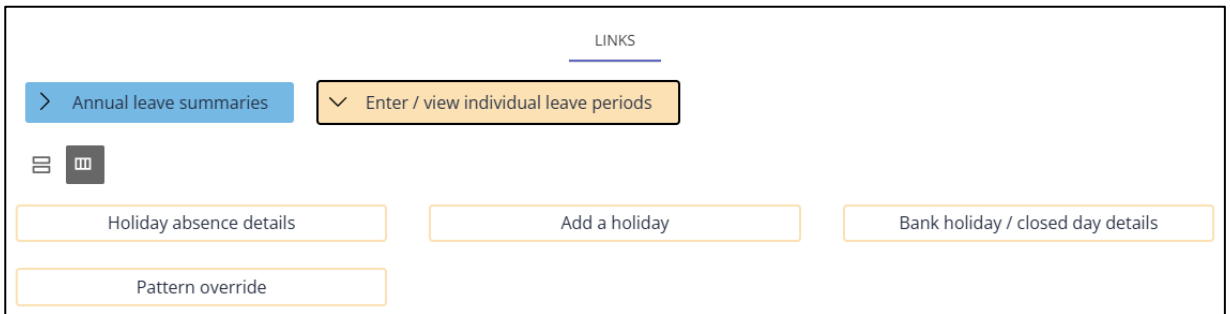
Payroll processing pending

Working days/hours lost : 1

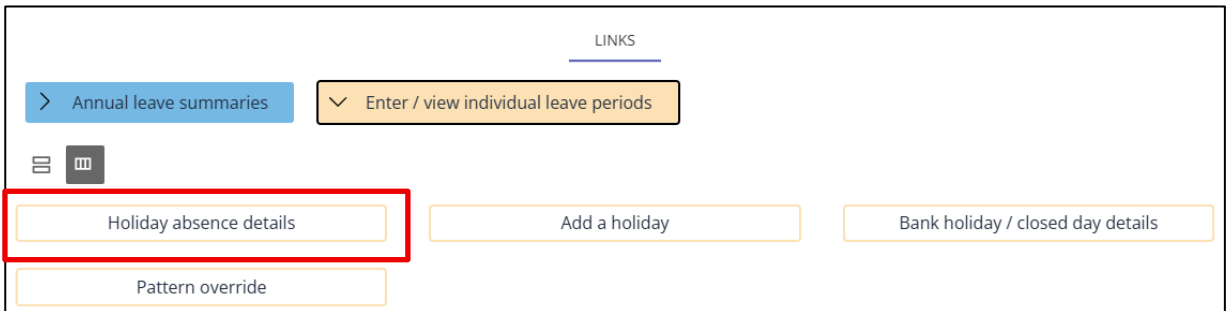
Authorisation status : Not applicable

6. Editing Annual Leave Bookings on behalf of employees

1. Search for the Employee for whom you wish to edit Annual Leave and select Enter / view individual leave periods from the Links



2. Select Holiday absence details



3. The Holiday Absence list will be displayed for the employee.

^ People ⋮

Results 2 People

Select all Save this group

Name Unit Job title

| | | | |
|--|-------------------|------------------------|--------------------|
| | Dr Donald Brown | Department of Training | Research Associate |
| | Miss Louise Brown | Department of Training | Accounts Clerk |

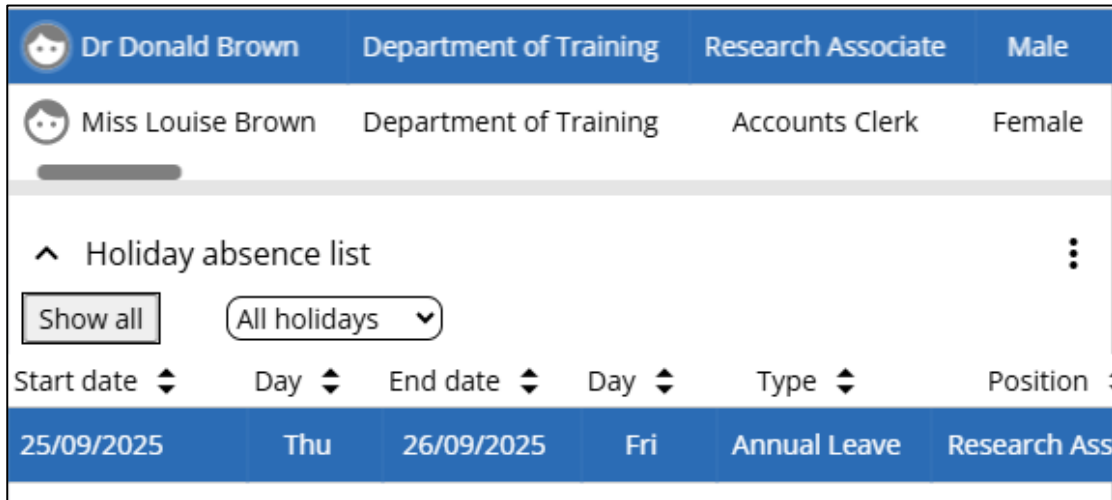
^ Holiday absence list ⋮

| Start date <input type="button" value="⬆️⬆️"/> | Day <input type="button" value="⬆️⬆️"/> | End date <input type="button" value="⬆️⬆️"/> | Day <input type="button" value="⬆️⬆️"/> | Type <input type="button" value="⬆️⬆️"/> |
|--|---|--|---|--|
| 25/09/2025 | Thu | 30/09/2025 | Tue | Annual Leave |
| 24/09/2025 | Wed | 24/09/2025 | Wed | Annual Leave |
| 23/09/2025 | Tue | 23/09/2025 | Tue | Annual Leave |
| 22/09/2025 | Mon | 22/09/2025 | Mon | Annual Leave |
| 19/09/2025 | Fri | 19/09/2025 | Fri | Annual Leave |
| 15/09/2025 | Mon | 15/09/2025 | Mon | Annual Leave |
| 01/09/2025 | Mon | 05/09/2025 | Fri | Annual Leave |
| 14/07/2025 | Mon | 14/07/2025 | Mon | Annual Leave |

8. Select the Annual Leave that you wish to edit.

9. Edit the Annual Leave details as required and click on Save.

10. The change will be displayed in the left-hand pane.

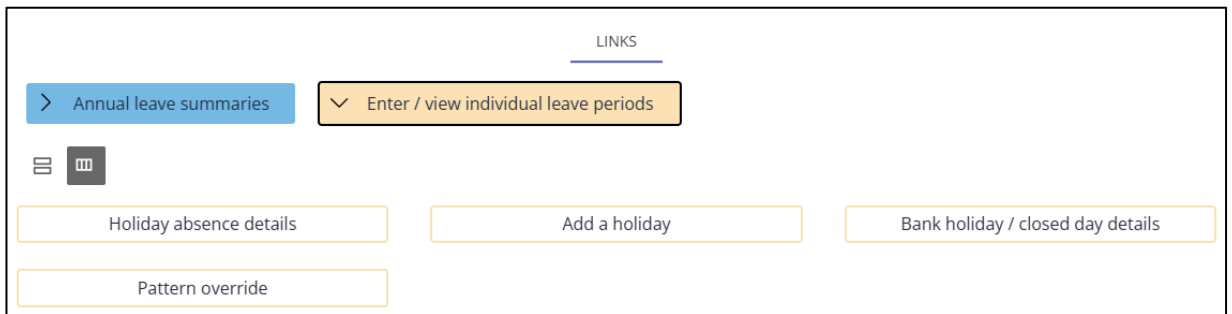


The screenshot shows the CHRIS interface for managing annual leave. At the top, there are two employee profiles: Dr Donald Brown (Research Associate, Male) and Miss Louise Brown (Accounts Clerk, Female). Below them is a 'Holiday absence list' section with a 'Show all' button and a dropdown menu set to 'All holidays'. A table below the dropdown shows a holiday absence for Dr Donald Brown on 25/09/2025 (Thu) to 26/09/2025 (Fri), categorized as 'Annual Leave' for his position 'Research Ass'.

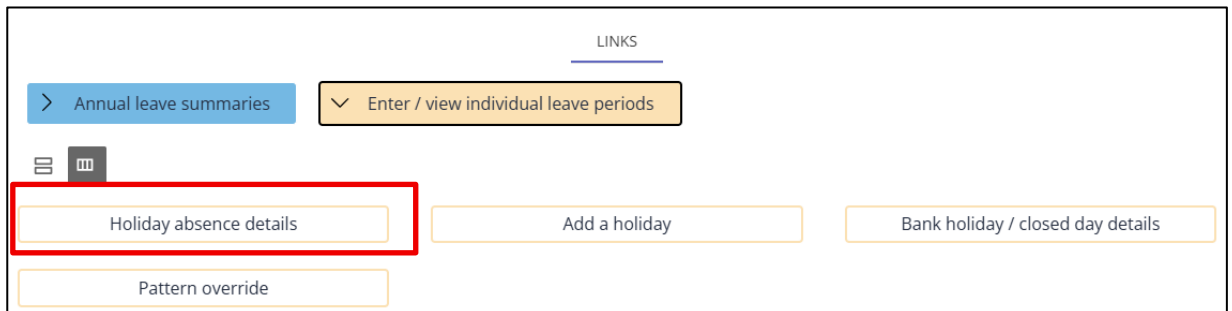
| Start date | Day | End date | Day | Type | Position |
|------------|-----|------------|-----|--------------|--------------|
| 25/09/2025 | Thu | 26/09/2025 | Fri | Annual Leave | Research Ass |

7. Deleting Annual Leave bookings on behalf of employees

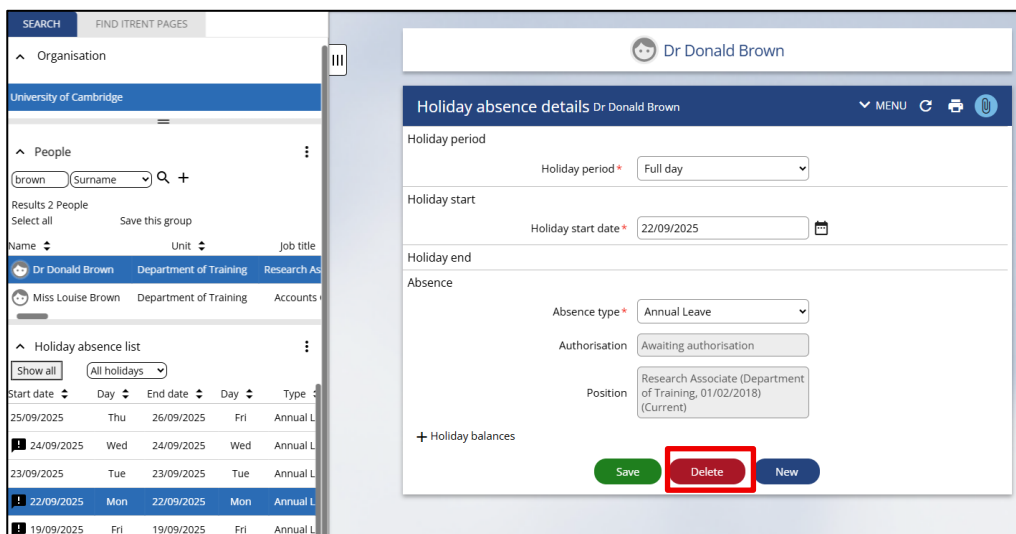
1. Search for the Employee for whom you wish to delete Annual Leave and select Enter / view individual leave periods from the Links



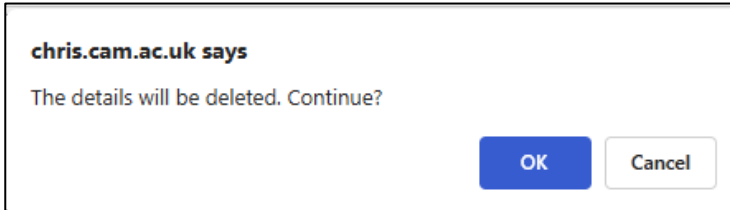
2. Select Holiday absence details



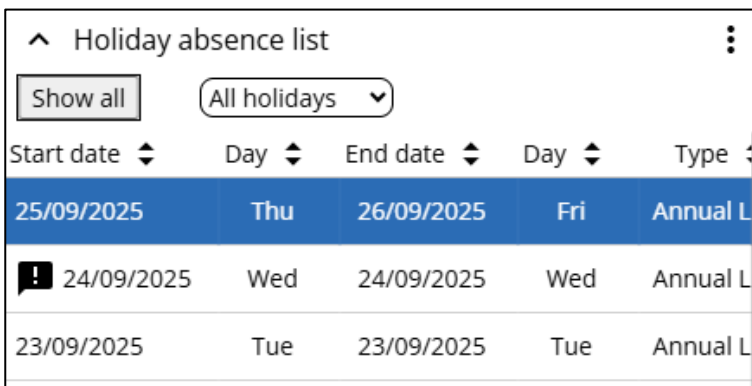
3. Select the Annual Leave Booking that you wish to delete and click on the Delete button.



4. Click on OK to Continue.



5. The Annual Leave will be removed from the list



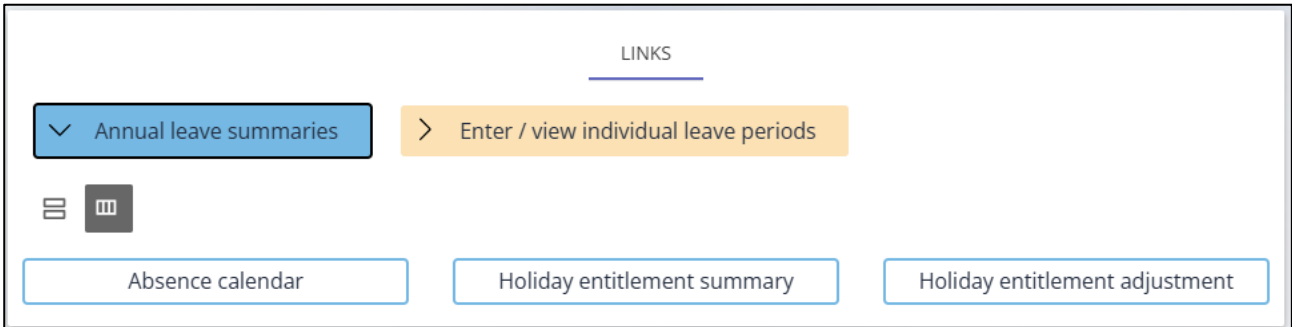
A screenshot of a web interface showing a "Holiday absence list". At the top, there is a "Show all" button and a dropdown menu set to "All holidays". Below this is a table with columns for "Start date", "Day", "End date", "Day", and "Type". The table contains three rows of data, with the first row highlighted in blue.

| Start date | Day | End date | Day | Type |
|--------------|-----|------------|-----|----------|
| 25/09/2025 | Thu | 26/09/2025 | Fri | Annual L |
| ! 24/09/2025 | Wed | 24/09/2025 | Wed | Annual L |
| 23/09/2025 | Tue | 23/09/2025 | Tue | Annual L |

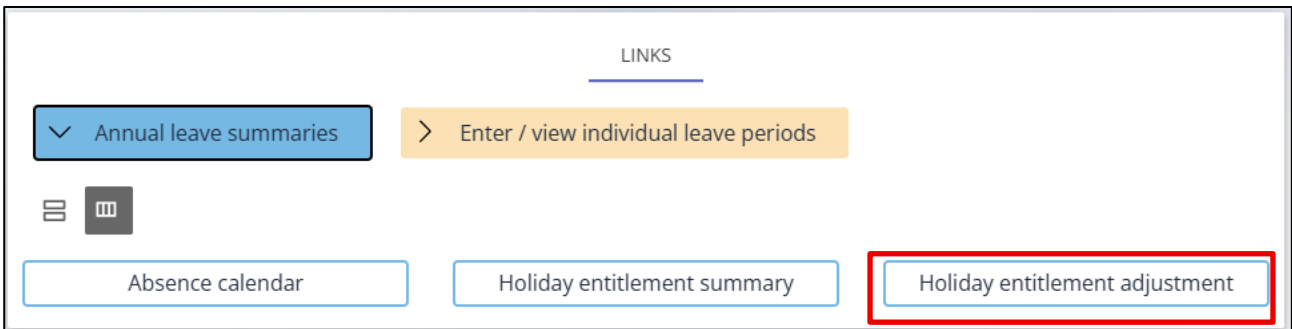
8. Adjusting Annual Leave Balances

8.1 How to make an adjustment or override a balance

1. Select the Employee for whom you wish to make an adjustment.
2. Select Annual Leave summaries from the links.



3. Select Holiday entitlement adjustment



4. The Holiday entitlement adjustment screen will be displayed.

Holiday entitlement adjustment

▼ MENU ↻ 🖨️ 📎

Employment details

Position: Research Associate

Period details

Holiday period dates: 01/10/2024 - 30/09/2025

Scheme name: Academic Related & Research

Entitlement for period: 41 days (41 days Pro Rata)

Brought forward: [input field]

Brought forward not used (lost): [input field]

Adjustment details

Adjustment type: Standard

Entitlement: 41 days

Select the Holiday period dates

Period details

Holiday period dates

Scheme name

5. Select the Adjustment Type:

- Use 'Adjust' to add or deduct leave without overriding CHRIS's calculation of basic entitlement, ensuring it continues to recalculate if the employee's working pattern changes.
- Use 'Override' to replace CHRIS's entitlement calculation completely when it doesn't fit the employee's circumstances, such as where they have non-standard contractual terms.

Please note: using override means that CHRIS will not recalculate if working patterns change, so apply with caution and update as needed.

Adjustment details

Adjustment type

Entitlement

6. Enter the Adjustment details. The end date of the adjustment **must** be the end date of the relevant leave year

Adjustment details

Adjustment type

| Date entered | User name | Value | Reason | End date | Entitlement | Add | Remove |
|--------------|-----------|--------------------------------|---|---|-------------------------------|-----|--------|
| | | <input type="text" value="2"/> | <input type="text" value="Carry forward from Sept 25"/> | <input type="text" value="30/09/2026"/> | <input type="text" value=""/> | + | - |

7. Click on Save

8. The date and username of the person who made the adjustment will be displayed

Adjustment details

Adjustment type

| Date entered | User name | Value | Reason | End date | Entitlement | Add | Remove |
|--------------|-----------|------------------------------------|---|---|--------------------------------------|---|---|
| 17/09/2025 | HET27 | <input type="text" value="2.000"/> | <input type="text" value="Carry forward from Sept 25"/> | <input type="text" value="30/09/2026"/> | <input type="text" value="43 days"/> | <input style="width: 20px;" type="text" value="+"/> | <input style="width: 20px;" type="text" value="-"/> |
| | | <input type="text"/> | <input type="text"/> | <input type="text" value="30/09/2026"/> | | <input style="width: 20px;" type="text" value="+"/> | <input style="width: 20px;" type="text" value="-"/> |

8.2 When a manual adjustment may be required

The most common need for manual adjustments to CHRIS annual leave balances is when there are exceptions to the standard approach to carryover.

8.2.1 What's the standard approach to carryover?

General Board and Council have previously approved a standard University approach to annual leave carryover of up to 5 days of carryover (pro-rated for part-time, if required) to be used by 31 January (other than in the case of long-term sickness absence and family leave returners, or other exceptional circumstances). In normal circumstances, carryover will often be used up by University closure days and bank holidays over the Christmas period (if not already taken).

Up to 5 days of carryover will be granted automatically by the system with an expiry date of 31 January. Any carryover unused by 31 January will be lost. This excludes Established Academic staff, who have a *minimum* rather than maximum annual leave entitlement. Therefore, automated carryover arrangements in CHRIS do not apply to them.

8.2.2 When are there exceptions to the standard carryover approach that may require a manual adjustment?

The most common scenarios are:

- Employees returning from a period of long-term sickness absence
Employees accrue annual leave as normal during long-term sickness absence. Unused statutory annual leave (20 days, pro-rated for staff working fewer than 5 days per week) can be carried forward and must be used within 18 months of the end of the annual leave year in which it was accrued.
- Employees returning from a period of family-related leave
Employees accrue annual leave as normal during periods of family leave (e.g. adoption leave, maternity leave, shared parental leave). Annual leave accrued during family leave should be used within 3 months of the end of the family leave.

- Exceptional circumstances
When there is an exceptional reason agreed with your Head of Institution (or other appropriate authority) and your HR Business Partner that an employee should have longer to use remaining carryover that will expire automatically on 31 January, an adjustment will be needed to their annual leave balance. Payment in lieu of unused carryover is not available as an alternative.

Important points to note: When an employee returns from a period of long-term sickness absence or family leave:

- The manual adjustment to their annual leave balance may need to take account of any automated carryover of up to 5 days already provided by CHRIS at the start of a new leave year (1 October).
- You may need to check they have not lost standard carryover on 31 January that they are still entitled to use (e.g. because they have returned from family leave within the last 3 months).

8.2.3 When else might a manual adjustment be required?

Transfers and secondments

For a transfer or secondment, you need to work with the sending/receiving institution to confirm the employee's annual leave balance. CHRIS should automate a standard balance transfer IF:

- The other institution is using CHRIS annual leave; and
- The annual leave scheme is the same (e.g. the employee is a member of assistant staff going on secondment to another assistant staff position)

However, unused automated carryover days are not added automatically to a secondment (host) position. A manual adjustment is needed.

Therefore:

- Automated balances should still be checked with the other institution.
- A manual adjustment will be needed for balances in other transfer/secondment cases.

8.2.4 Communicating with employees

When you make an adjustment to an employee's annual leave balance, please ensure that you:

- Email the employee (copied to their line manager) to explain how many days have been added to their annual leave balance and why (e.g. to take account of their family-related leave) and how long they have to use these days.
- You will need to diarise the date that adjusted leave should be used by so that you can follow up on this (if this is not the end of the annual leave year). A manual adjustment to remove any unused days may be needed.

8.2.4 Further guidance

- For policy questions about how to manage annual leave for returners from family-related or long-term sickness leave, please contact your HR Business Partner in the first instance.
- For questions about making manual adjustments to CHRIS annual leave balances, please email the CHRIS Helpdesk CHRIS.Helpdesk@admin.ac.uk

9. Using Pattern Override

The Pattern override function can be used to control which days are treated as working days for annual leave bookings for a set period. It is normally used where an employee has a variable days working pattern. It will override the normal working pattern recorded for the employee and can be applied before or after an annual leave booking has been made.

This screen shows days worked or days not worked according to the working pattern for the employee. The Pattern date details will display 01:00 for a working day and 0:00 for a non-working day. It does not show the number of hours each day.

Pattern override Pattern Override 01/09/2025 - 05/09/2025

MENU
↻
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📎

Pattern information

Position *

Pattern type

From date * 📅

To date 📅

Number of days in this pattern

Pattern date details

| | Mon | Tue | Wed | Thu | Fri | Total |
|--------|---|---|---|---|---|-------|
| Week 1 | <input style="width: 40px;" type="text" value="01:00"/> | <input style="width: 40px;" type="text" value="01:00"/> | <input style="width: 40px;" type="text" value="01:00"/> | <input style="width: 40px;" type="text" value="01:00"/> | <input style="width: 40px;" type="text" value="01:00"/> | 5:00 |

Validate
Save

A non-working day in the annual leave period can be adjusted to 0:00 for a non-working day.

Administering Annual Leave in CHRIS



Pattern override Pattern Override 01/09/2025 - 05/09/2025 MENU Refresh Print Link

Pattern information

Position *

Pattern type

From date *

To date

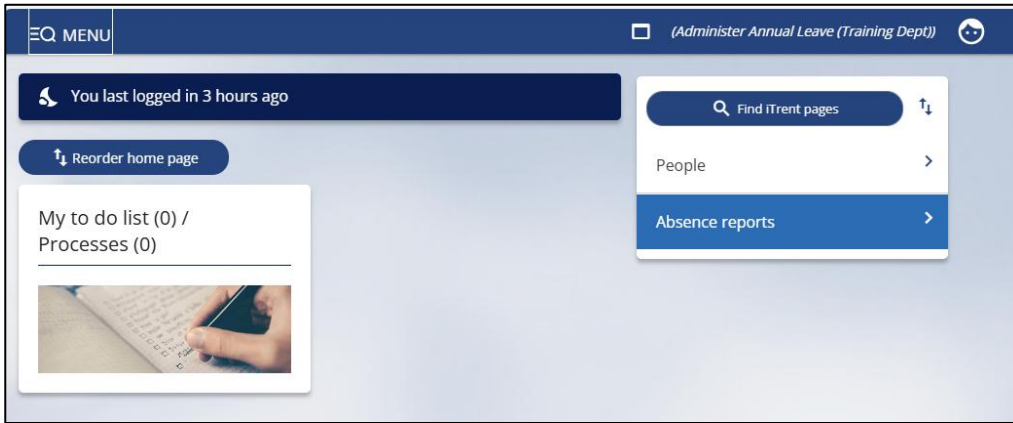
Number of days in this pattern

Pattern date details

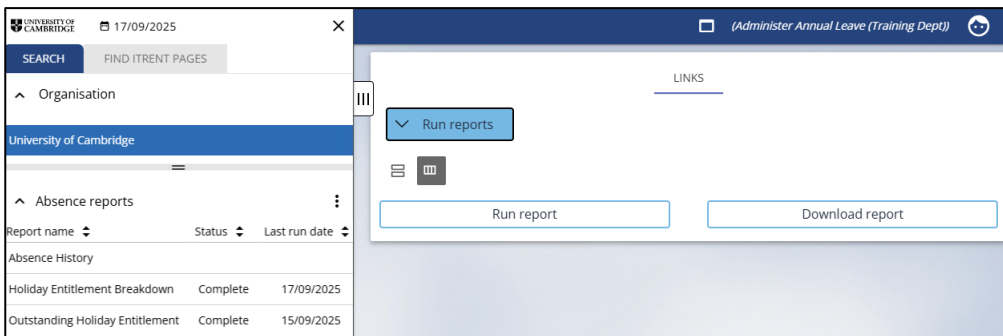
| | Mon | Tue | Wed | Thu | Fri | | | Total |
|--------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|----------------------|----------------------|-----------------------------------|
| Week 1 | <input type="text" value="01:00"/> | <input type="text" value="01:00"/> | <input type="text" value="00:00"/> | <input type="text" value="01:00"/> | <input type="text" value="01:00"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="4:00"/> |

10. Running Annual Leave Reports

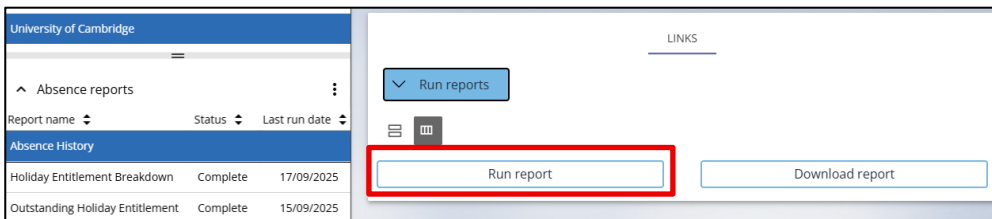
1. Select Absence Reports from the Main Menu



2. The Run reports link will be displayed and the 3 available absence reports: Absence History, Holiday Entitlement Breakdown and Outstanding Holiday Entitlement.



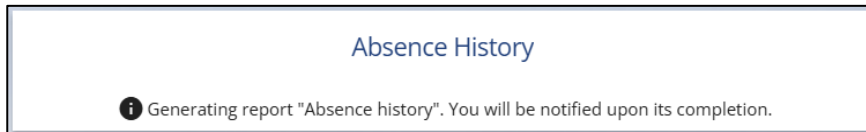
3. Select the Report that you wish to run and click on Run Report.



Absence History Report

1. Choose the Absence Group and Absence Type and dates if required and click on Run

2. A message will be displayed confirming that the report is being generated.



3. Use the menu button at the top of the screen to navigate to Download Report.



- Click on the Download arrow to view the report and Open the file when prompted.

| Absence Reason | | Absent From | Absent To | Days Lost | Hours Lost |
|--|--|-------------|------------|-------------|-------------|
| Department of Training | | | | | |
| Brown Donald (Research Associate; Reference Number: 8000084) | | | | | |
| | | 15/09/2025 | 15/09/2025 | 1.00 | 1.00 [1] |
| | | 01/09/2025 | 05/09/2025 | 5.00 | 5.00 |
| | | 14/07/2025 | 14/07/2025 | 1.00 | 1.00 [1] |
| Employee Totals | | | | 7.00 | 7.00 |
| Unit Totals | | | | 7.00 | 7.00 |

The report shows an 'hours lost' column which should be ignored. We don't use CHRIS to record working patterns to the level of granularity that would make it meaningful. It will always be the same as the number of days.

Holiday Entitlement Breakdown

1. Select the required fields and click on Run

Holiday entitlement breakdown

▼ MENU ↻ 🖨

Unit/Employee *

Organisation start point * 🔍

Effective date * 📅

Holiday Scheme

Reference number

People to include in the report

Those with basic entitlement only.

Those with brought forward entitlement.

Those with manual adjustments/overrides.

Organisation view

Full path display

New page for each organisation unit

Output type

Report run comments

Run

2. A message will be displayed confirming that the report is being generated.

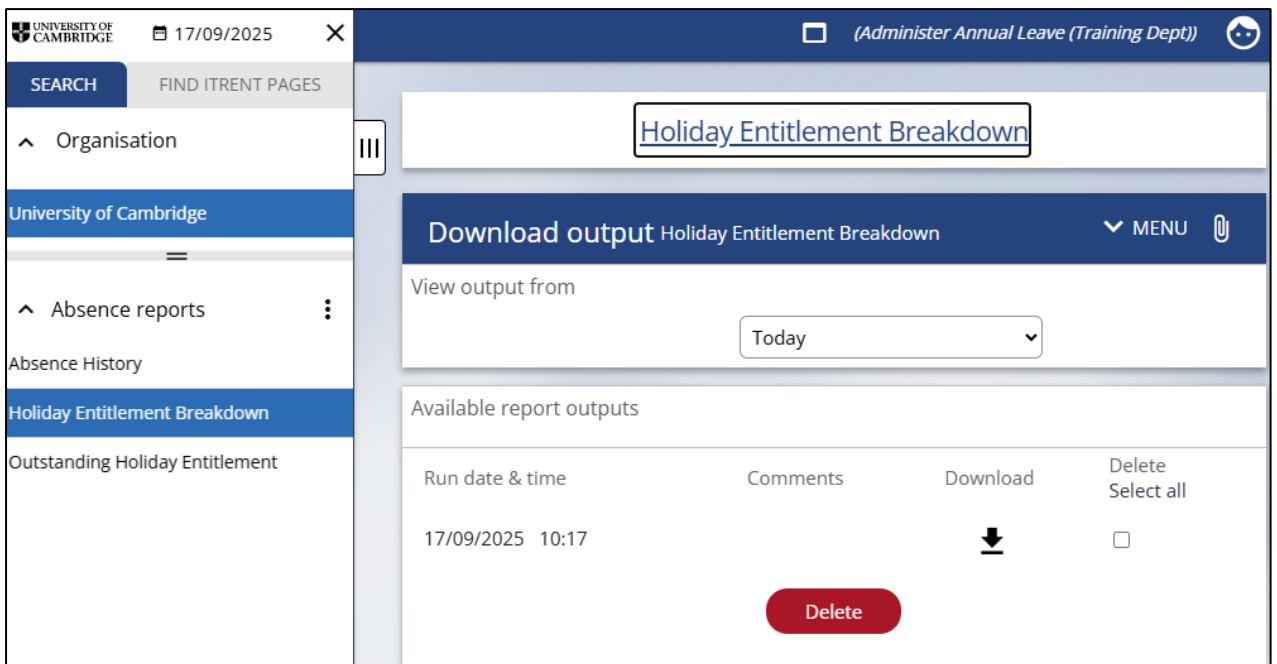
Absence History

i Generating report "Absence history". You will be notified upon its completion.

3. Use the menu button at the top of the screen to navigate to Download Report.



4. Click on the Download arrow to view the report and open when prompted

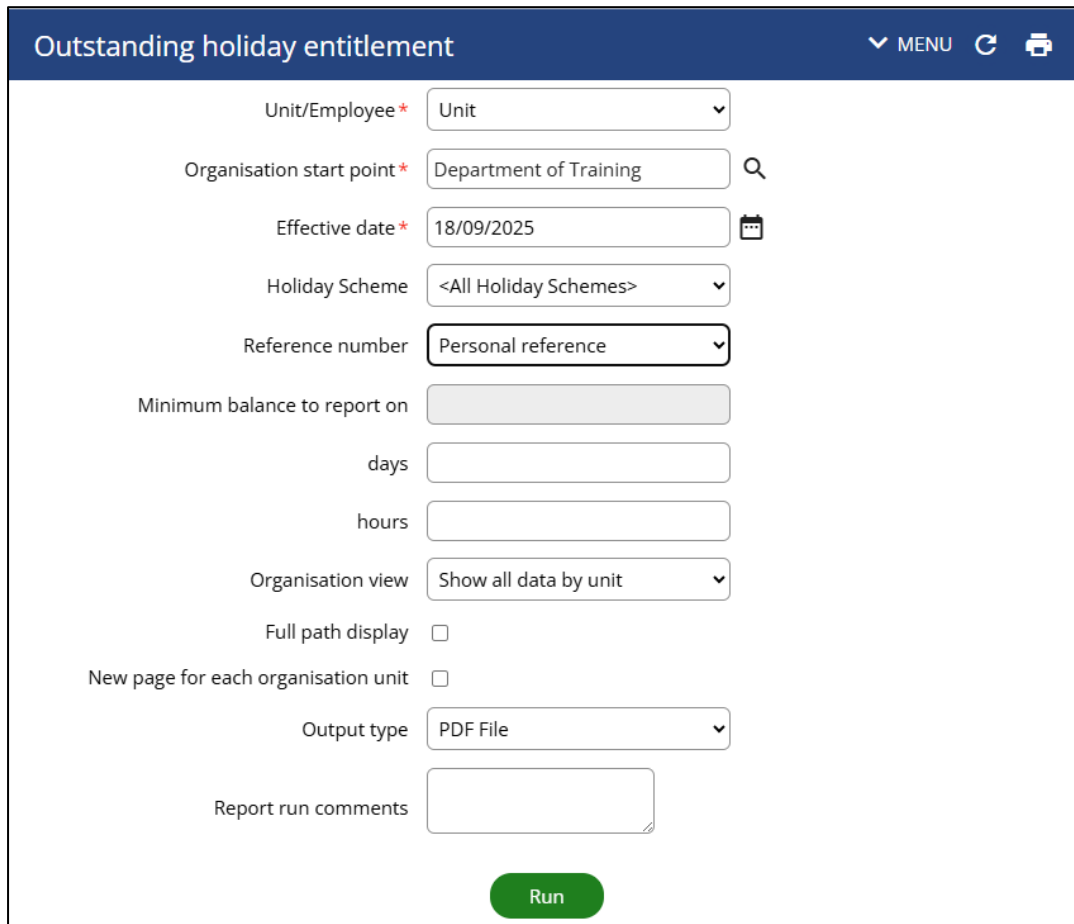


5. The report will be displayed

| Scheme Name | Adjustment Reason | Unit | End of Holiday Yr | Basic Entitlement | B/F | B/F Lost | Adjustment | Override | Total Entitlement |
|--|-------------------|--------|-------------------|-------------------|------|----------|------------|----------|-------------------|
| Department of Training | | | | | | | | | |
| Abbott Pauline (Cleaner; Reference Number: 80000098) Assistant 1 October | | Day(s) | 30/09/2025 | 36.00 | 0.00 | 0.00 | 0.00 | 0.00 | 36.00 |
| Alexander Leonard (Senior Research Associate; Reference Number: 80000039) Academic Related & Research 1 | | Day(s) | 30/09/2025 | 41.00 | 0.00 | 0.00 | 0.00 | 0.00 | 41.00 |

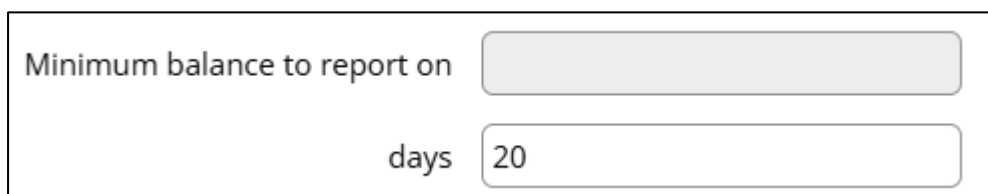
Outstanding Holiday Entitlement

1. The Outstanding Holiday Entitlement Report can be used to report on all employees in the Department with any outstanding holiday or to highlight employees who still have a large amount of leave to take by setting the Minimum balance to report on.



The screenshot shows the 'Outstanding holiday entitlement' configuration page. It features a dark blue header with the title and navigation icons (MENU, refresh, print). Below the header, there are several form fields: 'Unit/Employee *' (dropdown menu), 'Organisation start point *' (text input with search icon), 'Effective date *' (calendar icon), 'Holiday Scheme' (dropdown menu), 'Reference number' (dropdown menu), 'Minimum balance to report on' (text input), 'days' (text input), 'hours' (text input), 'Organisation view' (dropdown menu), 'Full path display' (checkbox), 'New page for each organisation unit' (checkbox), 'Output type' (dropdown menu), and 'Report run comments' (text area). A green 'Run' button is located at the bottom center.

2. Enter a minimum balance if required, and click on Run



This close-up shows the 'Minimum balance to report on' section. It includes a text input field for the minimum balance, a 'days' label, and a text input field containing the value '20'.

