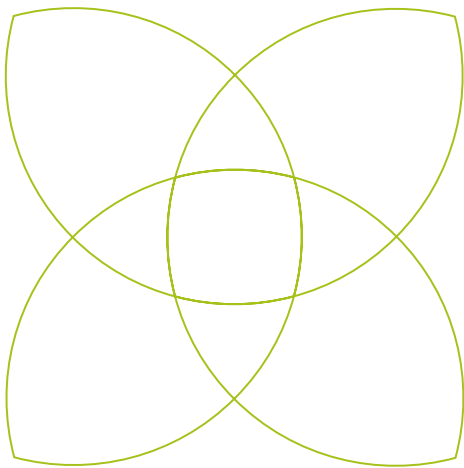




eLeave  
User Guide

# eLeave User Guide


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## Contact SARD

### Get in touch with us

If you have any questions or feedback, please contact us either by phone or email

 0208 771 4153

 [info@sardjv.co.uk](mailto:info@sardjv.co.uk)

 [www.sardjv.co.uk](http://www.sardjv.co.uk)

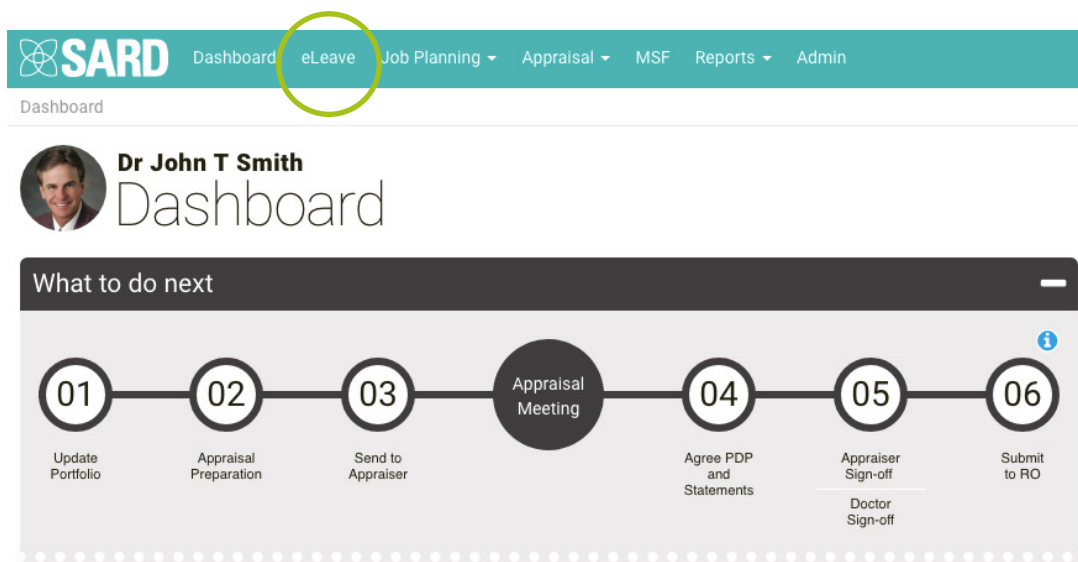
### Where to find us / write to us:

Suite 2B  
25-27 Westow Street  
London  
SE19 3RY

# eLeave User Guide


Clicking on the 'eLeave' tab in the top menu will take you to your eLeave, where you can view your allowances, request leave, view your booked leave and view the booked leave of your colleagues. Approvers can manage leave for their approvees in the same section.

If you have not already created your eLeave calendar then you will be prompted to select an Approver and create one. You will then be taken to the calendar.



**SARD** Dashboard **eLeave** Job Planning ▾ Appraisal ▾ MSF Reports ▾ Admin

Dashboard

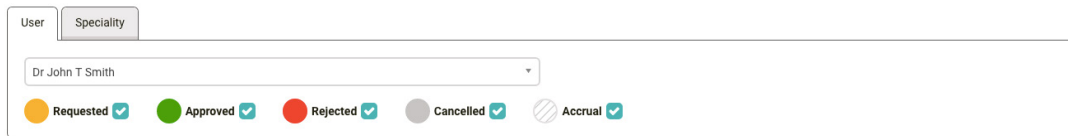
 **Dr John T Smith**  
Dashboard

What to do next

- 01 Update Portfolio
- 02 Appraisal Preparation
- 03 Send to Appraiser
- 04 Appraisal Meeting
- 05 Agree PDP and Statements
- 06 Appraiser Sign-off
- 07 Doctor Sign-off
- 08 Submit to RO

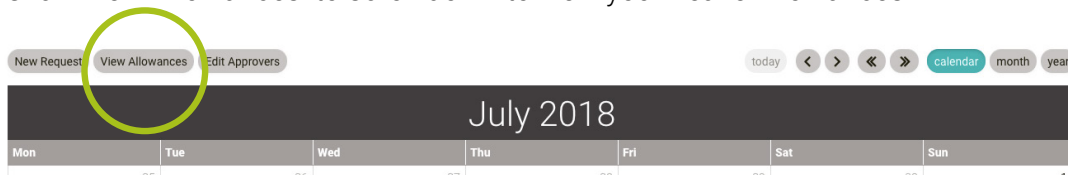
# 1 Users

The 'User' tab is where you manage your personal leave.



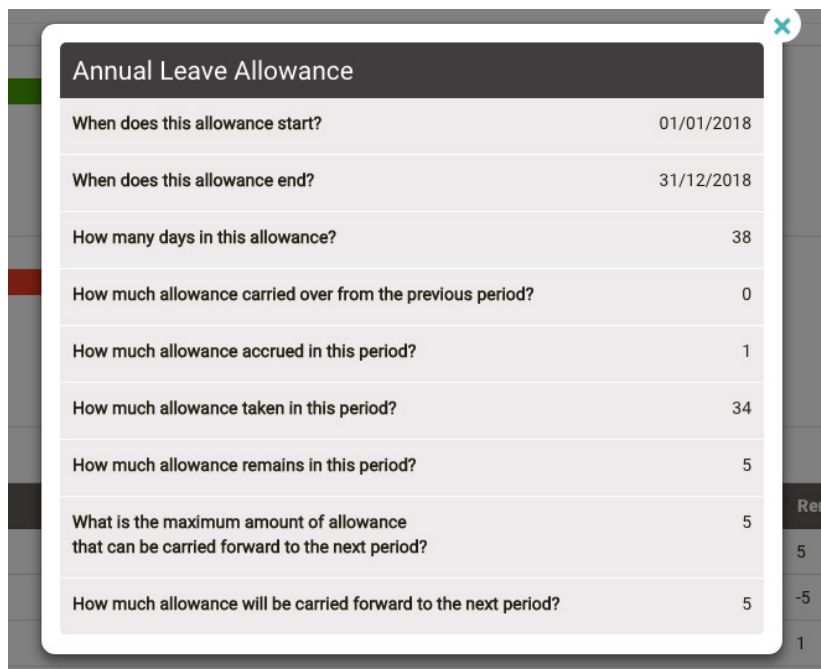
## 1.1 Allowances

Click 'View Allowances' to scroll down to view your Leave Allowances.



This table contains allowances which are relevant to the currently selected month. You can see when the Allowance runs From and To, how many days have been 'Taken' between those dates, and how many are Remaining.

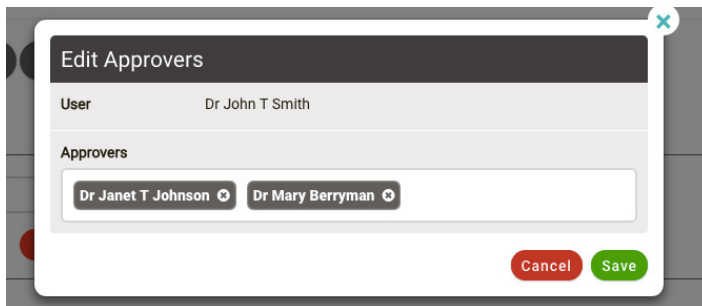
If you click 'View' in the 'Details' column, you can see more information about the Allowance.



Annual Leave Allowance	
When does this allowance start?	01/01/2018
When does this allowance end?	31/12/2018
How many days in this allowance?	38
How much allowance carried over from the previous period?	0
How much allowance accrued in this period?	1
How much allowance taken in this period?	34
How much allowance remains in this period?	5
What is the maximum amount of allowance that can be carried forward to the next period?	5
How much allowance will be carried forward to the next period?	5

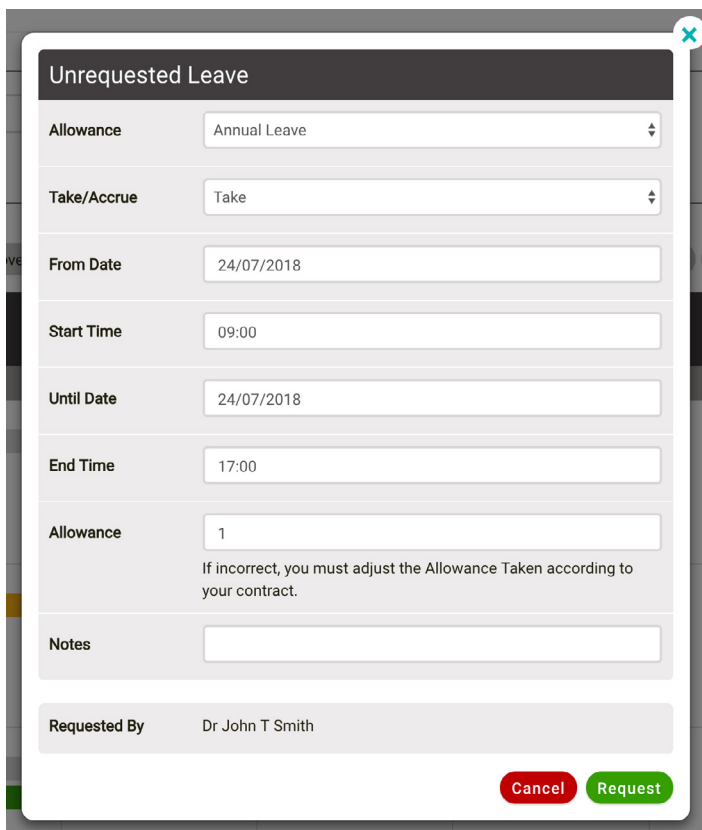
## 1.2 Choosing Your Approver

Click 'Edit Approvers' to select Approvers, who will be able to view, approve, reject and cancel your leave. They will be notified of all requests and cancellations you make.



## 1.3 Requesting Leave

To request leave, you can click 'New Request', or click on the day you wish the leave to start. A pre-populated leave request form for that day will be created. You can modify the details of the leave as necessary. The 'Allowance Taken' field will update automatically to keep track of the number of days between the dates, but you can override this by changing the value manually. When you are happy with the details, click 'Request'. Your Approvers will be sent a notification prompting them to review and approve the request.



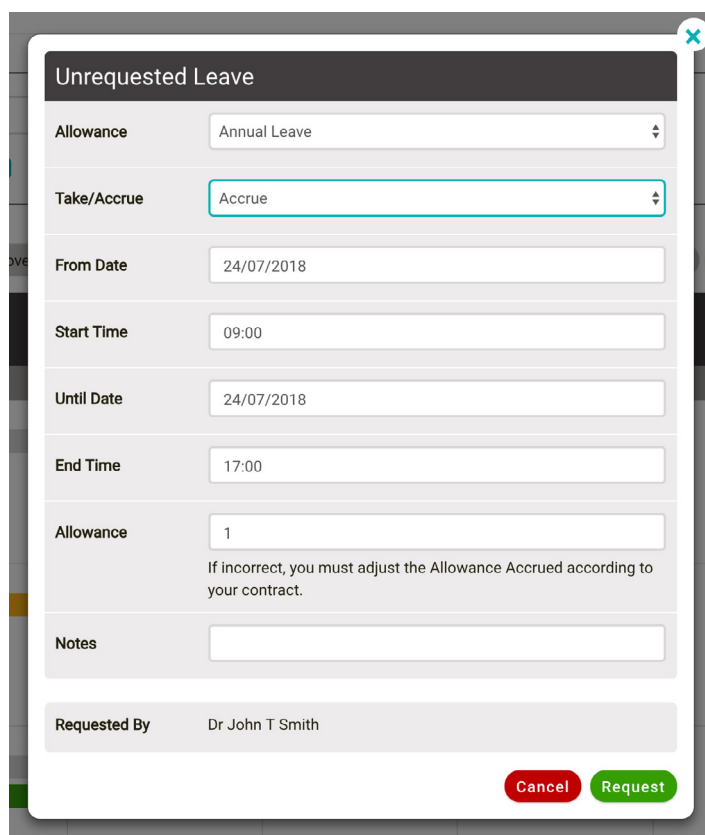
## 1.4 Adding/Cancelling Historical Leave

Leave that has already been taken can be requested and approved retroactively.

Approved leave that took place in the past can only be cancelled by the Approver or Administrator.

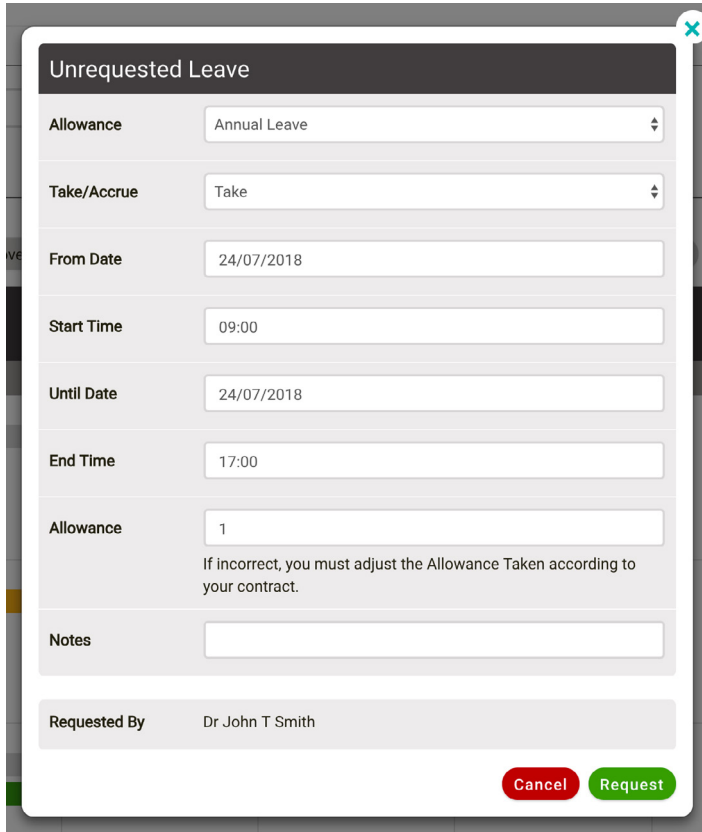
## 1.5 Leave In Lieu

The system can be used to both Accrue and Take Leave In Lieu. To Accrue Leave In Lieu (i.e. to work a day when you normally would not), select 'Leave In Lieu' from the 'Allowance' drop-down and select 'Accrue' from 'Take/Accrue':



You can then set dates, times and allowance as normal, and click 'Request'. This request will then be sent to your Approver, and the days will be added to your leave in lieu allowance.

To Take your accrued Leave In Lieu (i.e. spend the extra day of leave you have accrued), create a new Leave in Lieu request and select 'Take' instead of 'Accrue':



The screenshot shows a modal window titled "Unrequested Leave" with a close button in the top right corner. The form contains the following fields:

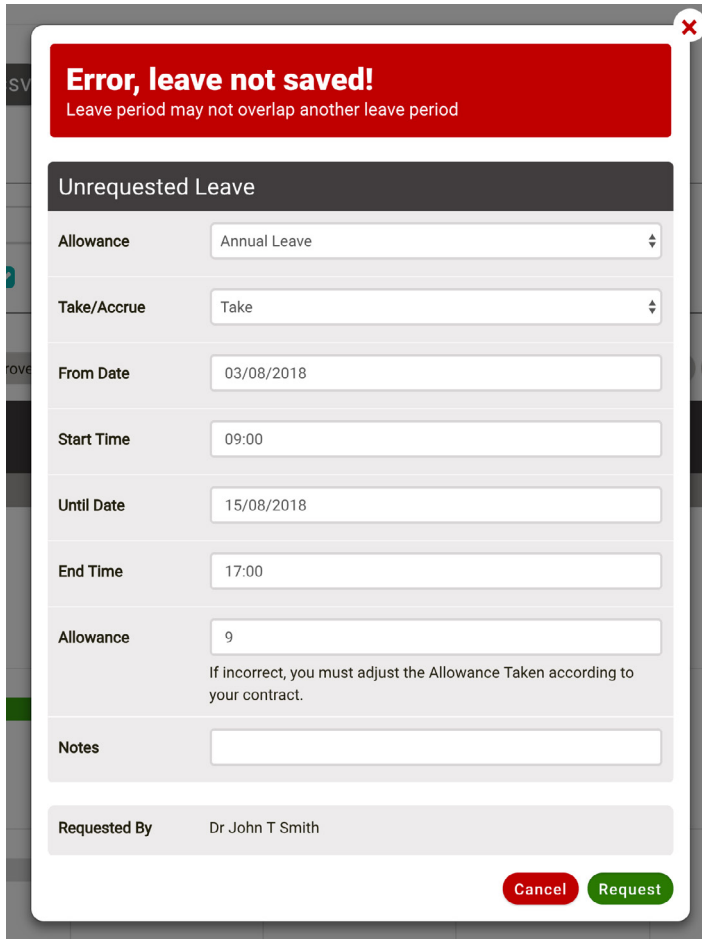
- Allowance:** Annual Leave
- Take/Accrue:** Take (indicated by a green arrow)
- From Date:** 24/07/2018
- Start Time:** 09:00
- Until Date:** 24/07/2018
- End Time:** 17:00
- Allowance:** 1

Below the Allowance field, there is a note: "If incorrect, you must adjust the Allowance Taken according to your contract." There is also a "Notes" text area. At the bottom, the "Requested By" field is populated with "Dr John T Smith". Two buttons, "Cancel" (red) and "Request" (green), are located at the bottom right of the form.

Once requested, this amount of leave will be subtracted from your Leave In Lieu allowance.

## 1.6 Errors

If you make a mistake entering the leave, e.g. requesting leave which finishes before it starts, the request will not be saved and an error message will be displayed, prompting you to correct the error. Once corrected, press 'Request' again to request the leave.



**Error, leave not saved!**  
Leave period may not overlap another leave period

**Unrequested Leave**

Allowance: Annual Leave

Take/Accrue: Take

From Date: 03/08/2018

Start Time: 09:00

Until Date: 15/08/2018

End Time: 17:00

Allowance: 9  
If incorrect, you must adjust the Allowance Taken according to your contract.

Notes:

Requested By: Dr John T Smith

Cancel Request



## 1.7 Changing a Leave Request

While it is still in the 'Requested' state, you can change a leave request by clicking on the leave period:

	5	6
<b>Dr John T Smith</b>		

You can then make any changes and click 'Save' to save them.

**Requested Leave** ✕

**Allowance** Annual Leave

**Take/Accrue**

**From Date** 05/08/2018

**Start Time** 09:00

**Until Date** 06/08/2018

**End Time** 17:00

**Allowance** 1

If incorrect, you must adjust the Allowance Taken according to your contract.

**Notes**

**Requested By** Dr John T Smith

**Requested At** 14:11 on 05/04/2018

**View Planned Activities**
+

Cancel
Save

The leave will be updated accordingly.

	5	6	7
<b>Dr John T Smith</b>			

## 1.8 Cancelling Leave

To cancel leave, click on the leave in question and then click the 'Cancel' button:

View Planned Activities				
Date	Start	End	Activity	
Wednesday 5 September	08:00	12:00	DCC	Core Hospital
Thursday 6 September	08:00	12:00	DCC	OVERRIDE: 0 per year Core Hospital Enter a brief description...
Friday 7 September	08:00	12:00	DCC	Core Hospital

Cancel Leave



Your Approvers will be notified that the leave has been cancelled. Leave in the past which has already been approved can only be cancelled by your Approver or an Administrator.

## 1.9 Viewing Leave

You can view leave at any time, including after it has been cancelled, by clicking on the leave period in question on the calendar:

	5	6	7
Dr John T Smith			

## 1.10 Speciality Tab

You can view the requested and approved leave of other users in your speciality by selecting the Speciality tab:

User Speciality

ADULT MENTAL ILLNESS

Requested
  Approved
  Accrual

Days with more than 25% of 3 doctors on leave

### 1.11 Month/Year List View

Click 'month' or 'year' to view a list of all leave during the period.

New Request View Allowances Edit Approvers today < > << >> calendar month year

July 2018						
User	Allowance Name	From Date	Start Time	Until Date	End Time	Summary
Dr John T Smith	Annual Leave	03/07/2018	09:00	03/07/2018	17:00	Take 1 day
Dr John T Smith	Annual Leave	09/07/2018	09:00	13/07/2018	17:00	Cancelled
Dr John T Smith	Annual Leave	09/07/2018	09:00	13/07/2018	17:00	Take 5 days
Dr John T Smith	Annual Leave	16/07/2018	09:00	20/07/2018	17:00	Take 5 days
Allowance	From	To	Taken	Remaining	Details	
Annual Leave	01/01/2018	31/12/2018	38	1	→ View	
Study / Professional Leave	01/01/2018	31/12/2018	10	-2	→ View	
Test	01/01/2018	31/12/2018	0	1	→ View	

### 1.12 Filter View

Types of leave periods can be hidden by unchecking the checkboxes next to the key:

User Speciality

ADULT MENTAL ILLNESS

Requested
  Approved
  Accrual

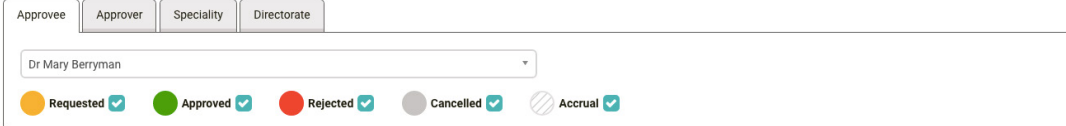
### 1.13 Download as CSV

Click 'Download as CSV' to download a CSV file containing the leave in the current view. This file can be opened in a spreadsheet program.

[Download Guide](#)
[Download as CSV](#)
[Print View](#)

## 2 Approvers

If you have the Leave Approver role, you have access to the Approve and Approver tab where you can manage leave for your Approvees.



### 2.1 Approving/Rejecting/Canceling Leave

To Approve/Reject/Cancel leave, click on the leave period in question:

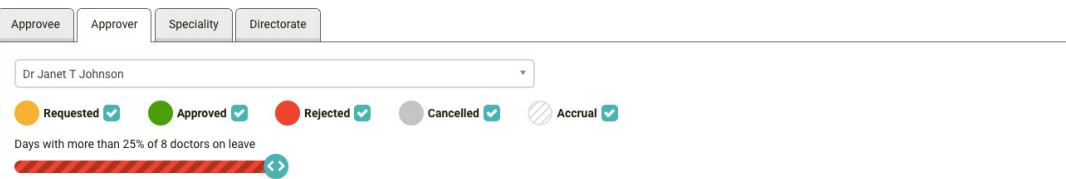
	5	6	7
	Dr John T Smith		

Click View Planned Activities to view any activities in the user's job plan for the day in question. You can then Cancel, Reject or Approve the leave:

<b>Take/Accrue</b>	
From Date	14/07/2018
Start Time	09:00
Until Date	15/07/2018
End Time	17:00
Allowance	0
Notes	
Requested By	Dr John T Smith
Requested At	15:19 on 27/07/2018
View Planned Activities <span style="float: right;">+</span>	
<span style="background-color: red; color: white; padding: 2px 10px; border-radius: 5px;">Cancel Leave</span> <span style="background-color: red; color: white; padding: 2px 10px; border-radius: 5px; margin-left: 5px;">Reject Leave</span> <span style="background-color: green; color: white; padding: 2px 10px; border-radius: 5px; margin-left: 5px;">Approve Leave</span>	































### 2.2 Approver Tab

The Approver tab allows you to view all leave for all your approvees on one calendar.



## 2.3 Approving Leave via the Dashboard

As a Leave Approver, you can also approve leave via the eLeave Requests section on your Dashboard. This is a quick way to view and approve your pending requests.

User	Allowance	From	Until	Action
Dr John T Smith	Annual Leave	Sat, 30 Dec 2017	Wed, 03 Jan 2018	  
Dr John T Smith	Study / Professional Leave	Sun, 20 Aug 2017	Sun, 20 Aug 2017	  
Dr John T Smith	Study / Professional Leave	Thu, 30 Nov 2017	Thu, 30 Nov 2017	  
Dr John T Smith	Annual Leave	Fri, 08 Dec 2017	Sat, 09 Dec 2017	  
Dr John T Smith	Annual Leave (accrue)	Mon, 08 Jan 2018	Mon, 08 Jan 2018	  
Dr John T Smith	Annual Leave	Thu, 12 Apr 2018	Sat, 14 Apr 2018	  
Dr John T Smith	Annual Leave	Thu, 01 Mar 2018	Sat, 03 Mar 2018	  
Dr John T Smith	Study / Professional Leave	Thu, 07 Dec 2017	Thu, 07 Dec 2017	  
Dr John T Smith	Study / Professional Leave	Tue, 09 Oct 2018	Thu, 11 Oct 2018	  
Dr John T Smith	Annual Leave	Sat, 14 Jul 2018	Sun, 15 Jul 2018	  

[eLeave](#)

## 2.4 Edit Allowances

As an approver, you can edit the allowances for users. Click on 'View' in the 'Details' column to edit:

- Number of days in the allowance
- Upper limit for number of days to carry forward to next year

**Allowance** ✕

What is this allowance called? Study / Professional Leave

When does this allowance start? 01/01/2018

When does this allowance end? 31/12/2018

How many days in this allowance?

How much allowance carried over from the previous period? 0

How much allowance accrued in this period? 0

How much allowance taken in this period? 0

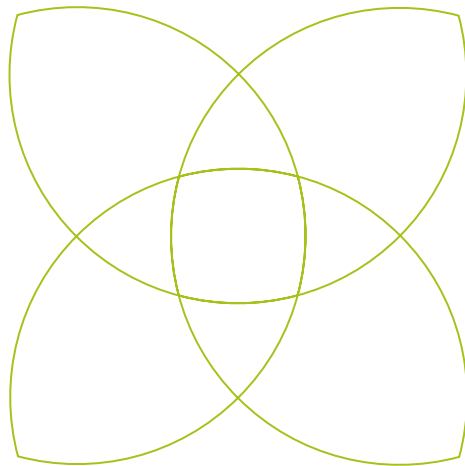
How much allowance remains in this period? 10

What is the maximum amount of allowance that can be carried forward to the next period?

How much allowance will be carried forward to the next period? 0

Cancel
Save

As usual let us know if you have any questions or comments via the live chat system or via email at [support@sardjv.co.uk](mailto:support@sardjv.co.uk).



Our promise is simple:  
Great Technology and  
Great Customer Service.



[www.sardjv.co.uk](http://www.sardjv.co.uk)