

# 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.**

This guide covers the following process steps:


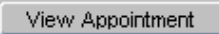
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**Navigate to: Personnel > Maintenance > Personal Profile**

## 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.

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

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

The screenshot shows the 'Amend Appointment Details' window for Giles Beaumonte. It contains the following sections:

- Post Details:** Post Number (228802), Post Profile Type (1A), Effective Date, Target End Date, Planned End Date, Status (Commenced).
- Hierarchy Details:** Company (UNIVERSITY OF OXFORD), Division (FUTURE TECHNOLOGIES), Sub Division (FUTURE TECHNOLOGIES), Level 4 (FUTURE TECHNOLOGIES), Management Unit (FUTURE TECHNOLOGIES), Department (RESEARCH CENTRE), Pay Administered by (FUTURE TECHNOLOGIES DIVISION), Cost Centre (INSTITUTE OF FUTURE TECHNOLOGIES), Location (ZV - FUTURE TECHNOLOGIES), College Association (DEFAULT/NOT APPLICABLE).
- Appointment Details:** Post Type (PERMANENT), Project, Job Category, Job Title (SENIOR RESEARCH FELLOW), Employee Status (PERMANENT), Sub Status (FULL TIME), Category (RESEARCH ONLY), Sub Category (RESEARCH FELLOW), Hours (37.50), FTE Hours (37.50), FTE Weeks (52.0000), FTE% (100), Future Override FTE, Absence Mgt FTE, Pensionable, Acting Up Ind, Secondment, Action (SABBATICAL), Reason Code, Replaces Employee, Comments (Sabbatical leave paid/unpaid).
- Post Details (Text Area):** A text area for entering post information such as department, job title, and cost centre.

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.

## 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.

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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 .

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.

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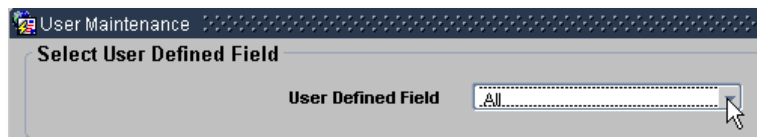
## A3. Partial Dispensation from Duties

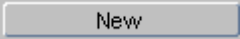
Where the individual has partial dispensation from duties (i.e. is effectively reducing their hours) follow the steps for A1 above, selecting **Reason Code: Sabbatical Leave Partial Dispensation**. Then update the salary following steps for A2 above.

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

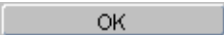


1. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.
2. Click to display **User Defined Field** List of Values.
3. Select **Appt: Sabbatical Leave part 1**.
4. Click :

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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  .

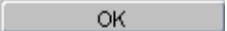
7. Select **Appt: Sabbatical Leave part 2**.

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
Effective Date	Enter the date that the change will take place.
Action	Enter <b>Sabbatical</b> .
Reason Code	Enter <b>Sabbatical Leave Return</b> .
Comments	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.