

Leave requests

Another Check-In · S02

Before the demonstration

Bertland Hope

- Your assigned responsibility
- The correct training record
- Evidence of the result

Today's outcome

Learner identifies a submitted request and explains its balance effect.

The leave year

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- Open Work > My Leave Balances and choose the relevant year

In this step

Choose the year before reading the balance. Entitlement depends on the employee, leave type and configured allocation. An account without the balance-page permission may need the authorized calendar workflow or help from a reviewer.

Balance and statement

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- Review available, reserved and used amounts and open the statement

In this step

Available, reserved and used amounts answer different questions. Use the statement to understand the entries behind the totals. A pending request can reserve leave before a reviewer approves it.

Request details

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- Choose your linked staff ID, leave type, dates and partial-day option, then submit

In this step

Confirm the staff identity, type and dates. Check the partial-day option when applicable. Policy and calendar rules determine the charge, so do not calculate the deduction solely by counting calendar dates.

The request result

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- Read the request confirmation and status
- compare reservation and available balance

In this step

Read the status and compare the new reservation with the previous balance. Keep the confirmation as your reference. If the request fails because of allocation, overlap or balance, resolve that cause before trying again.

Changed dates

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- If returned or dates need changing, contact an authorized reviewer to amend
- use the statement/history available to your role

In this step

Contact the authorized reviewer when a submitted request needs amendment. Explain the dates and reason clearly. Use the available history to follow the revision rather than creating overlapping requests to replace the first one.

Common problems

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- Assuming submission is approval
- ignoring reserved balance
- trying staff self-amend/cancel controls that are not provided
- treating weekends as necessarily chargeable

A useful support report

The task and record
The expected result
The actual message
The authorized next step

Guided practice

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- Submit a valid fictional one-day request and explain the changed available/reserved balance
- Discuss an overlapping or insufficient request without creating duplicates

Evidence to show

The correct training case

The result or permitted decision

Your explanation of the next step

Practice debrief

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- Correct context and permitted action
- A result you can trace
- A clear next step if blocked

Expected result

Learner identifies a submitted request and explains its balance effect.