



## People and Money system

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### Line Manager/Senior Manager/School Department Administrator – How to view Absence Reports

Line Manager/Senior Manager/School Department Administrator

Estimated time to complete: 12 minutes

#### Before you start.

The information in this guide details how line managers, senior managers and School/Department Administrators (SDAs) can access the Absence Reports dashboard app on People and Money to view reports relating to:

- Annual Leave
- Annual Leave Accrual
- Family Friendly Leave
- Other Paid Leave
- Special Paid Leave
- Unpaid Leave
- Sickness Absence
- Open Absence Sickness report all instances of sickness absence which do not have an Absence End Date on the day the report is run
- Sickness Absence Report for 10 or more intermittent days in a rolling 12-month period
- Sickness Absence Report for 3 or more spells of absence within a rolling 6-month period

*Note that the person running the report will not be included in the results.*

To support the Absence management policy (for sickness absence) the three sickness absence review reports have been developed as a management tool and will be emailed directly to the employee's line manager. Managers will only receive an email if there is data to report.

The absence review reports are also available through the Absence Report app in People and Money and can be run at any time. The reporting period will mirror the report sent to the line manager.

If an employee has more than one assignment, all line managers for the employee will be sent the report.

The three reports have been developed as a management tool to allow managers to monitor and review attendance levels of staff and support staff health and wellbeing. It may not always be the case that action has to be taken on receiving one or more of the three absence reports. The information in the report should be reviewed and considered in line with the Absence Management Policy and Absence Management guidance for Line managers. Advice should be sought from your local HR Partner before taking any formal action.

The **Open Absences Report** will be sent each Monday, to line managers who have a direct report flagged as being off with sickness absence (e.g. currently have the open absence box ticked) in People and Money. If an employee has more than one assignment, all line managers for the employee will be sent the report. An open-ended absence must be closed off when the employee returns to work

The **Monthly Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period** will be sent on the first day of the month where a direct report meets the review point in the reporting period.

The **Monthly Sickness Absence Review for 3 or More Periods in a rolling 6-month period** will be sent on the first day of the month where a direct report meets the review point in the reporting period.

Appendix 1 shows the absence types that are included in each report.

- **Line Managers** will see data for their direct and indirect reports via My Team
- **Senior Managers** will see data for all employees within their area of responsibility via My Client Groups
- **SDAs** will see data for all employees with an assignment in their area of responsibility via My Client Groups
- If a line manager looks at the three absence review reports in the Absence app and has other roles in the system, like Senior Manager, SDA, GH Admin, Timekeeper, Pure, they will also be able to see all the employees in their area of responsibility on that report, including both their direct reports and others. All other absence reports show only their direct and indirect reports. Colleagues are reminded that they **should only be reviewing data** for employees for which they have a responsibility for the purpose of absence management.

Guidance on each of the leave types can be found in the relevant sections of the [People and Money User guides](#)

For more information on related policies please refer to the [HR A-Z of Policies and Guidance](#)

This is a simple overview of the process for **Line Managers**:

1. Click on '**My Team**' and select the '**Absence Reports**' app

Please note, when opening the 'Absence Reports' app for the first time, another tab may open and appear blank. If this happens, please close the tab and re-select the 'Absence Reports' app.

2. Select the relevant tab to review the information for your direct and indirect reports. If you also have SDA access you will be able to view information for all employees in your area of responsibility, except yourself, via My Client Groups.
3. Use the required date fields to select the required time period.
4. Use the optional filters to select the required information.
5. Click **Apply** to view results
6. Export the data if required using the **Export** link

This is simple overview of the process for those with **Senior Manager** role:

1. Click on '**My Client Groups**' and select the '**Absence Reports**' app

Please note, when opening the 'Absence Reports' app for the first time, another tab may open and appear blank. If this happens, please close the tab and re-select the 'Absence Reports' app.

2. Select the correct tab to review the information for all employees in your area of responsibility, except yourself –
3. Use the required date fields to select the required time period.
4. Use the optional filters to select the required information.
5. Click **Apply** to view results
6. Export the data if required using the **Export** link

This is a simple overview of the process for **SDAs**:

1. Click on '**My Client Groups**' and select the '**Absence Reports**' app

Please note, when opening the 'Absence Reports' app for the first time, another tab may open and appear blank. If this happens, please close the tab and re-select the 'Absence Reports' app.

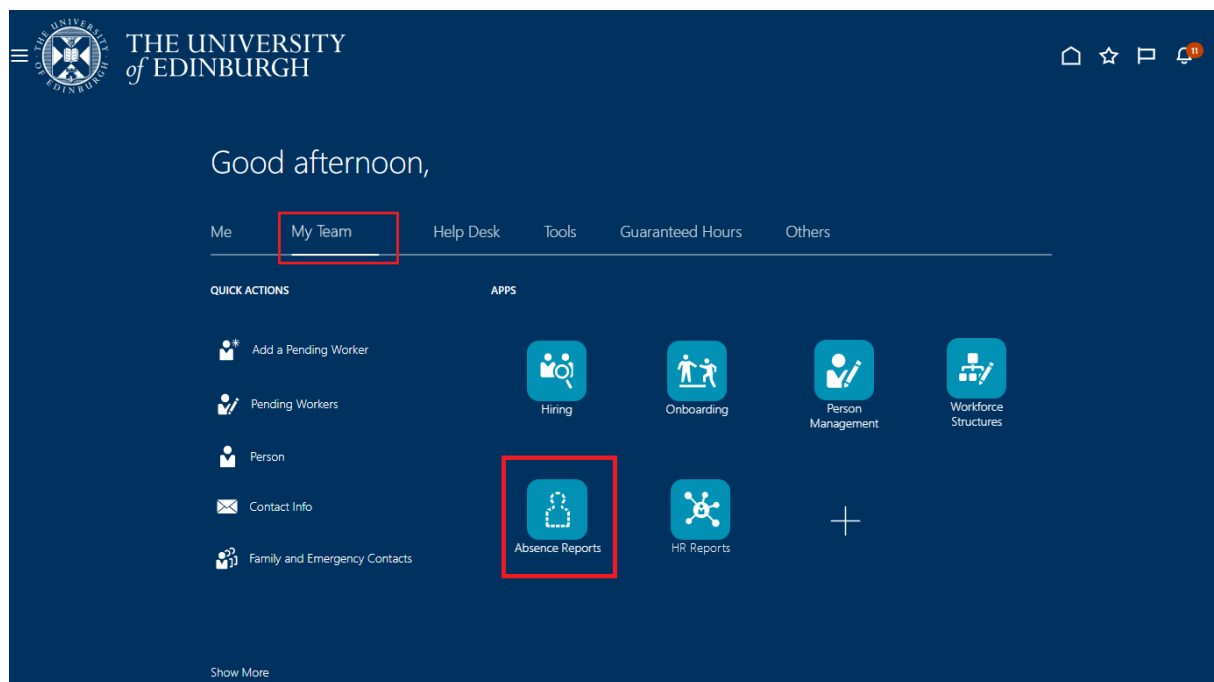
1. Select the correct tab to review the information for all employees in your area of responsibility, except yourself
2. Use the required date fields to select the required time period.
2. Use the optional filters to select the required information.
3. Click **Apply** to view results
4. Export the data if required using the **Export** link

If there are no results to display, either because you have chosen filters that are too restrictive, or because there is no matching data within your area of responsibility, you will see an onscreen message *'No Results: The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again'*. You may wish to widen your search criteria.

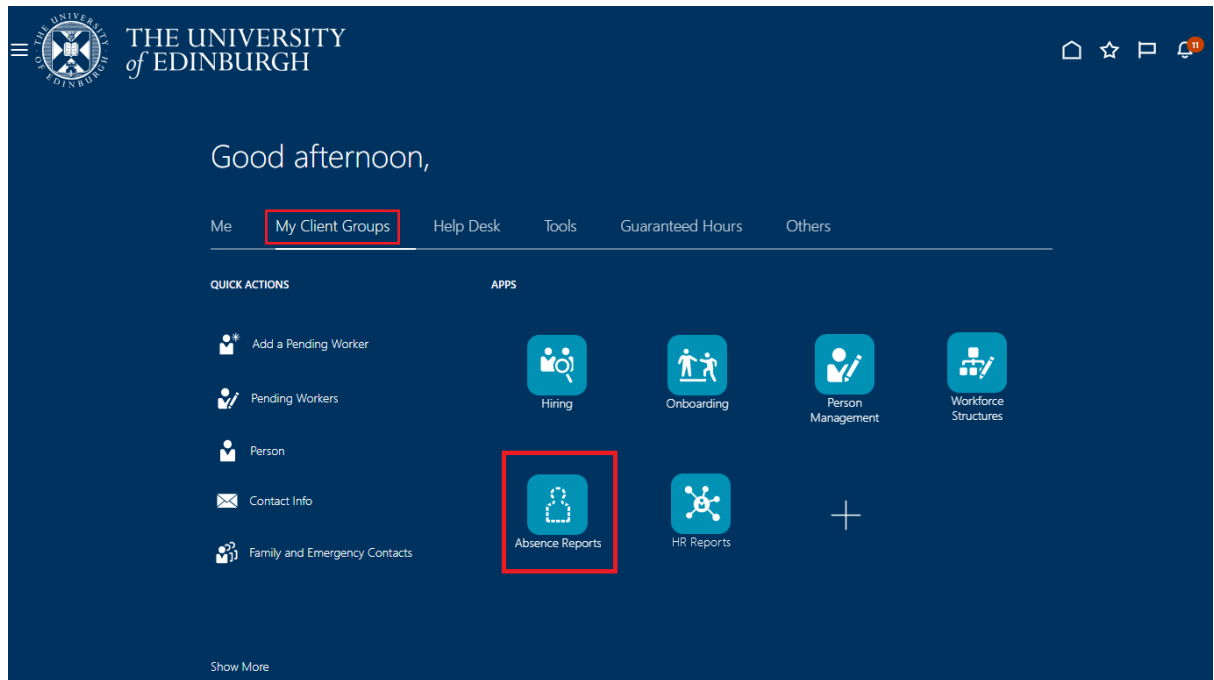
For detailed guidance, see the next section.

## In Detail...

1. From the **Home** page:
  - Click on **My Team** if you are a line manager:



- Click on **My Client Groups** if you are a Senior Manager or SDA:



2. Click the **Absence Reports** tile

Please note, when opening the 'Absence Reports' app for the first time, another tab may open and appear blank. If this happens, please close the tab and re-select the 'Absence Reports' app.

The Absence Reports dashboard returns real time data for the line manager's direct and indirect reports.

If you are a School/Department Administrator or have a Senior Manager role, then you will be able to return data for all employees with an assignment in your Area of Responsibility.


If you are a line manager who is also a School/Department Administrator then you will be able to return data for your direct and indirect reports via My Team, and for your Area of Responsibility via My Client Groups.

*Note: the person running the report will not be included in the results.*

Dashboards are displayed in tab format, with a welcome page containing a short description of the dashboard purpose, and the report names displayed on each tab.

**Absence Dashboard**

Welcome Page Annual Leave Annual Leave Accrual Family Friendly Leave Other Paid Leave Special Paid Leave Unpaid Leave Sickness Absence Open Sickness Absences Report Sickness Absence Review for 10 or More Days Sickness Absence Review for 3 or More Periods

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A suite of reports is available to support staff using People and Money, and the HR and Payroll processes it supports.

The Absence dashboard will provide Managers and School/Dept Administrators with information regarding the various types of absences, shown below:

**Annual Leave** - all instances of annual leave, in hours.

**Annual Leave Accrual** - the annual leave balance, in hours. This is made up of the annual leave entitlement, plus public holiday entitlement, plus any carry over for the previous year, minus all leave approved or taken. Accrual shows as at 31st December of the current year.

**Family Friendly Leave** - instances of family friendly leave, in days

**Other Paid Leave** - instances of other paid leave, in hours.

**Special Paid Leave** - instances of special paid leave, in hours.

**Unpaid Leave** - instances of unpaid leave, in hours.

**Sickness Absence** - instances of sickness absence, in days.

Plus the following three absence review reports:

- **Open Absence Sickness Report** - all instances of sickness absence which do not have an absence end date on the date the report is run.
- **Sickness Absence Report for 10 or more intermittent days** - Sickness Absence Review for 10 or more intermittent days of absence in a rolling 12 month period.
- **Sickness Absence Report for 3 or more spells** - Sickness Absence Review for 3 or more spells of absence within a rolling 6 month period.

Absence review reports are also sent via email attachment to an employee's line manager. If an employee holds more than one post the reports will be sent to all line managers.

Please refer to the user guidance linked below for more information.

The reports show data for all employees within a user's Area of Responsibility, except the person running the report. This can be at College/Professional Services Group level, School/Planning Unit level or Department level, depending on your role and the access you have been provided. If you are a Line Manager you will see data for your direct reports.

Prompts and filters allow you to choose relevant data. If there are no results to display, either because you have chosen filters that are too restrictive, or because there is no matching data within your area of responsibility, you will see an onscreen message: 'No Results. The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again'.

Reports can be exported to Excel or PDF depending on the content. When exporting the data, ensure that you use the **Formatted** export option only.

You can access further guidance in the Reporting section of the People and Money user guides page.

For more information on related policies please refer to the Human Resources A-Z of Policies and Guidance.

To amend your system access please submit an HR Data Access Request, available on the HR Forms A-Z.

If you are exporting this information please ensure you are complying with University GDPR regulations.

Please submit a Service Request if you need support

Managers and School/Department Administrators will see the same tabs, with the same column headings, however the data returned will vary according to each user's security access.

### 3. Select the relevant tab

- Annual Leave
- Annual Leave Accrual
- Family Friendly Leave
- Other Paid Leave
- Special Paid Leave
- Unpaid Leave
- Sickness Absence
  - Open Absence Sickness report all instances of sickness absence which do not have an Absence End Date on the day the report is run
  - Sickness Absence Report for 10 or more intermittent days in a rolling 12 month period
  - Sickness Absence Report for 3 or more spells of absence within a rolling 6 month period

**Absence Dashboard**

Welcome Page Annual Leave Annual Leave Accrual Sickness Absence Family Friendly Leave Other Paid Leave Special Paid Leave Unpaid Leave Open Sickness Absences Report Sickness Absence Review for 10 or More Days Sickness Absence Review for 3 or More Periods

4. Use the **date fields** to select the required time period. Start and end dates will default to today's date where applicable.
5. Use the **optional filters** to select the required information.

Note: when moving onto other Reports within the Absence Dashboard, filters should be **Reset** before running another Report.

Click **Apply** to view results.

Absence Dashboard

Welcome Page

Annual Leave

Annual Leave Accrual

Sickness Absence

A/L Filters

Calendar Date

Between

30/05/2024

-

30/05/2024

Approval Status

Approved

Employee Number

--Select Value--

College/P SG

--Select Value--

School/Planning Unit

--Select Value--

Department

--Select Value--

Sub Dept (MVM ONLY)

--Select Value--

Apply

Reset

Export the data if required using the **Export** link. See the section on [Exporting](#) for more detail.

For specific information on each of the reports, please see the next section.

Annual Leave Report

The ‘Annual Leave’ tab displays the following information. In the example below the report has been filtered on Approval Status to show absences with status ‘Approved’.

Annual Leave

Annual Leave Accrual

Sickness Absence

Family Friendly Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Sickness Absences Report

Sickness Absence Review for 10 or More Days

Sickness Absence Review for 3 or More Periods

A/L Filters

Calendar Date

Between

01/06/2022

-

05/06/2022

Approval Status

Approved

Employee Number

--Select Value--

College/P SG

--Select Value--

School/Planning Unit

--Select Value--

Department

--Select Value--

Sub Dept (MVM ONLY)

--Select Value--

Apply

Reset

Annual Leave Details - Absence Dashboard

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College/Professional Service Group	School/Planning Unit	Level 2 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Grade	Job Family	Job Function Name	Line Manager	Assignment Status	Approval Status	Calendar Year	Absence Type	Weekly Working Hours	Absence Hours	Absence Hours	Absence Hours	A	H
																	Active - Payroll Eligible	Approved	2022	Leave	35					
																	Active - Payroll Eligible	Approved	2022	Leave	35					
																	Active - Payroll Eligible	Approved	2022	Leave	35			8		
																	Active - Payroll Eligible	Approved	2022	Leave	35		7.5	3.5		
																	Active - Payroll Eligible	Approved	2022	Leave	35			7		
																	Active - Payroll Eligible	Approved	2022	Leave	35					
																	Active - Payroll Eligible	Approved	2022	Leave	19.5					
																	Active - Payroll Eligible	Approved	2022	Leave	35		7	7	7	

The Annual Leave report has the following filters and data available:

Annual leave details - Filters	Data
<ul style="list-style-type: none"> <li>•Calendar date – between 2 dates</li> <li>•Approval status</li> <li>•Employee Number</li> <li>•College/ Professional Service Group</li> <li>•School/Planning Unit</li> <li>•Department</li> <li>•Sub Department (input only for MVM College)</li> </ul>	Person Number Assignment Number First Name Preferred name Last Name College / Professional Service Group School / Planning Unit Department Sub Dept (MVM only) Personal Job Title Worker Category Assignment Category Person Type Grade Job Family Job Function Line Manager Assignment Status Approval status Calendar year Absence type Weekly working hours Date Day of month Absence hours taken per day

*Note: the report will display December closure dates for employees who have a fixed term contract end date before the end of the annual leave year, if these are present in People and Money.*

### Annual Leave Accrual Report

The 'Annual Leave Accrual' tab displays the annual leave balance to the end of the current leave year, 31<sup>st</sup> December.



Annual Leave Accrual

Employee Number

College/PSG

School/Planning Unit

Department

Sub Department (Input Only for MVM College)

Assignment Status

Apply

Reset

Annual Leave Accrual

Person Number	Assignment Number	First Name	Preferred Name	Last Name	Level 3 Department	Level 4 Department	Assignment Category	Worker Category	Weekly Working Hours	Continuous Service Date	Projected End Date	Contract Review Date	Assignment Status	Grade	Line Manager	Absence Plan Name	Calendar Year	Accrual Balance (in hours)	Previous Year Carryover (in hours)	Carryover Expiration (in hours)	Year End Disbursement	Adjustments (in hours)	Total Hours Booked to Date (in hours)	Remaining Balance (in hours)
																Use Annual Leave	2025	53.3	30.0	-30.0	-45.0		53.3	
																Use Annual Leave	2025	252.0	35.0	-28.0	-49.0		-7.0	252.0
																Use Annual Leave	2025	201.6	28.0	-28.0	-130.1		201.6	
																Use Annual Leave	2025	252.0	35.0	-35.0	-224.0		252.0	
																Use Annual Leave	2025	252.0	35.0	-35.0	-224.0		252.0	
																Use Annual Leave	2025	126.0	17.5	-17.5	-87.8		126.0	
																Use Annual Leave	2025	252.0	35.0	-35.0	-8.5		252.0	
																Use Annual Leave	2025	151.2	21.0	-21.0	-135.0		151.2	
																Use Annual Leave	2025	252.0	35.0	-35.0	-224.0		252.0	
																Clinical Annual Leave	2025	230.4	40.0	-40.0	-47.1		230.4	
																Use Annual Leave	2025	252.0	35.0	-35.0	-31.5		252.0	
																Use Annual Leave	2025	252.0	21.0	-21.0			252.0	
																Use Annual Leave	2025	252.0	35.0	-35.0	-80.0		252.0	
																Use Annual Leave	2025	252.0	35.0	-35.0	-14.0		252.0	

The Annual Leave Accrual report has the following filters and data available:

Annual leave accrual - filters	Data
<ul style="list-style-type: none"> <li>Employee Number</li> <li>College/ Professional Service Group</li> <li>School/Planning Unit</li> <li>Department</li> <li>Sub Department (input only for MVM College)</li> </ul> <p>Annual leave accrual report shows balance as at 31 December for the current annual leave year.</p> <p>*Carryover expiration in hours shows the number of hours which would be lost at the end of the annual leave year if they did not take them. From 2024 onwards, carryover from one year can be used until the 31 December of the following year</p>	Person Number Assignment Number First Name Preferred name Last Name Department Sub dept – CMVM only Worker Category Weekly working hours Grade Line Manager Absence Type Absence Plan name Calendar year Accrual balance (in hours) Previous year carryover (in hours)

	Carry over expiration (in hours)* Year End Disbursement Adjustments (in hours) Total hours booked to date (in hours) Remaining balance (in hours)
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The annual leave balance is made up of the Accrual (annual leave entitlement including public holidays) plus any carry over for the previous year, minus all leave approved or taken.

The 'carryover expiration (in hours)' field shows the number of hours which would be lost at the end of the annual leave year if the employee did not take them. Hours that have been carried over from the previous leave year are used first, so the carry over expiration figure will reduce over the year as the employee takes their leave.

The 'Year End Disbursement' field shows the balance at the end of the Annual leave year, which is greater than the carry over maximum limit (35 hours). E.g. if the balance at the end of the carry over period is 38 hours (maximum carry over is currently 35 hours) then the 3 hours will show as year-end disbursement figure. These 3 hours have not carried over and therefore have been lost.

There is a duty on employers and therefore, managers, to encourage employees to take annual leave and inform them that annual leave should be taken in accordance with the [Annual Leave policy](#). This will minimise any year end disbursement. If the annual leave balance is incorrect, please ensure the employee has booked all their leave and check the public holidays and closure days.

Check the work schedule for their assignment is correct. Employees and Line managers can check the work schedule via the Team Schedule:

Employees can view this by selecting Me > Time and Absence > Team Schedule.

Line managers can find it by selecting My Team > Show More > Team Schedule.

The blue boxes show the days scheduled to work and the hours in each box show the hours scheduled each day. The yellow boxes show where annual leave has been booked.

Team Schedule

Search by person or shift name  Show Filters

< > Today Jul 31, 2022 - Aug 6, 2022 Sort By Last Name - A to Z

Employee	Sun 31	Mon 01	Tue 02	Wed 03	Thu 04	Fri 05	Sat 06
	1h	1h	1h	1h	1h	1h	1h
	1h	1h	1h	1h	1h	1h	1h
		8h	8h 30m	8h			
		8h	8h 30m	8h			
		7h	7h	3h 30m	7h	7h 30m	
		7h	7h	3h 30m	7h	7h 30m	

Work schedules for primary assignments are also included in the All Staff Report, access via the HR Reports tile > All Staff Report.

If the work schedule in Team Schedule is missing or incorrect it can be corrected by following the process below:

- Complete the [Work Schedule Change Form \(No Hours Change\)](#). This will help users provide all the required details needed for HR Services to update People and Money. This form should be used for requesting a change to work schedule when the contractual working hours are not changing.
- The form should then be attached to the Service Request>Interim Form>Work Schedule change (no hours change) prior to submitting.

You should continue to use the Change Assignment process to request a change to contractual working hours.

## Family Friendly Leave Report

The 'Family Friendly Leave' tab displays the following information:

Family Friendly Leave

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College/Professional Service Group	School/Planning Unit	Level 2 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approval Status	Absence Status	Absence Type	Absence Reason	Absence Start Date	Absence End Date	Absence Duration (in Days)
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The Family Friendly Leave report has the following filters and data available:

Family Friendly leave - filters	Data
<ul style="list-style-type: none"> <li>•Absence start date</li> <li>•Absence end date</li> <li>•Approval status</li> <li>•Absence status</li> <li>•Employee Number</li> <li>•College/ Professional Service Group</li> <li>•School/Planning Unit</li> <li>•Department</li> <li>•Sub Department (input only for MVM College)</li> </ul>	Person Number Assignment Number First Name Preferred name Last Name College/ Professional Service Group School/Planning Unit Department Sub Department (input only for MVM College) Personal job title Worker Category Assignment category Person Type Weekly working hours Assignment FTE Grade Job Family Job Function Line Manager Assignment status Approval status Absence Status Absence Type Absence Reason Absence Start date Absence End date Absence duration (in days)

Other Paid Leave Report

The ‘Other Paid Leave’ tab displays the following information:

Navigation Page

Annual Leave

Annual Leave Annual

Business Absence

Family Priority Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Business Absences Report

Business Absence Review for 10 or More Days

Business Absence Review for 3 or More Days

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Filters

Absence Start

Date

21/04/2022

Absence End

Date

30/09/2022

Approval Status

All Column Value

Absence Status

All Column Value

Employee Number

Select Value

College/PSG

Select Value

School/Planning Unit

Select Value

Department

Select Value

Sub Department

Input Only for MVM College

Select Value

Apply

Reset

Other Paid Leave

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approval Status	Absence Status	Absence Type	Absence Reason	Absence Start Date	Absence End Date	Absence Duration (in Hours)
																							Conference/Seminar	22/09/2022	23/09/2022	21
																							Special Sick Leave	04/04/2022	09/04/2022	28
																							Special Sick Leave	19/04/2022	01/05/2022	54
																							Personal Health and Welfare appointment	17/05/2022	18/05/2022	2
																							Training/Training Course	09/05/2022	12/05/2022	21
																							Conference/Seminar	02/05/2022	07/05/2022	35
																							Special Sick Leave	19/04/2022	20/04/2022	7
																							Personal Health and Welfare appointment	31/05/2022	01/06/2022	2

The Other Paid Leave report has the following filters and data available:

Other Paid Leave - filters	Data
<ul style="list-style-type: none"><li>•Absence start date</li><li>•Absence end date</li><li>•Approval status</li><li>•Absence status</li><li>•Employee Number</li><li>•College/ Professional Service Group</li><li>•School/Planning Unit</li><li>•Department</li><li>•Sub Department (input only for MVM College)</li></ul>	<ul style="list-style-type: none"><li>Person Number</li><li>Assignment Number</li><li>First Name</li><li>Preferred name</li><li>Last Name</li><li>College/ Professional Service Group</li><li>School/Planning Unit</li><li>Department</li><li>Sub Department (input only for MVM College)</li><li>Personal job title</li></ul>

	Worker Category
	Assignment category
	Person Type
	Weekly working hours
	Assignment FTE
	Grade
	Job Family
	Job Function
	Line Manager
	Assignment status
	Approval status
	Absence Status
	Absence Type
	Absence Reason
	Absence Start date
	Absence End date
	Absence duration (in days)

## Special Paid Leave Report

The 'Special Paid Leave' tab displays the following information.

The Special Paid Leave report has the following filters and data available:

Special Paid Leave - filters	Data
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<ul style="list-style-type: none"> <li>•Absence start date</li> <li>•Absence end date</li> <li>•Approval status</li> <li>•Absence status</li> <li>•Employee Number</li> <li>•College/ Professional Service Group</li> <li>•School/Planning Unit</li> <li>•Department</li> <li>•Sub Department (input only for MVM College)</li> </ul>	Person Number Assignment Number First Name Preferred name Last Name College/ Professional Service Group School/Planning Unit Department Sub Department (input only for MVM College) Personal job title Worker Category Assignment category Person Type Weekly working hours Assignment FTE Grade Job Family Job Function Line Manager Assignment status Approval status Absence Status Absence Type Absence Reason Absence Start date Absence End date Absence duration (in days)
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## Unpaid Leave Report

The 'Unpaid Leave' tab displays the following information.

Worcome Page

Annual Leave

Annual Leave Accrual

Sickness Absence

Family Friendly Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Sickness Absence Report

Sickness Absence Review for 10 or More Days

Sickness Absence Review for 3 or More Periods

Filters

Absence Start Date

01/04/2022

Absence End Date

30/05/2022

Approval Status

(All Column View)

Absence Status

(All Column View)

Employee Number

(Select Value)

College/PSG

College of Arts

School/Planning Unit

(All Column View)

Department

(All Column View)

Sub Department

(Input Only for MVM College)

Apply

Reset

Unpaid Leave

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approval Status	Absence Status	Absence Type	Absence Reason	Absence Start Date	Absence End Date	Absence Duration (Hours)
																						Unauthorised Leave	UKU1	02/05/2022	04/05/2022	14
																						Unpaid Leave	Extended Unpaid Leave	01/04/2022	02/08/2022	858
																						Unpaid Leave	Authorised absence	25/04/2022	28/04/2022	7
																						Unpaid Leave	Authorised absence	01/04/2022	30/07/2022	802
																						Unpaid Leave	Unauthorised absence	01/05/2022	02/05/2022	7
																						Unpaid Leave	Authorised absence	05/04/2022	07/04/2022	1
																						Unpaid Leave	Authorised absence	30/05/2022	31/05/2022	1

The Unpaid Leave report has the following filters and data available:

Special Paid Leave - filters	Data
<ul style="list-style-type: none"> <li>•Absence start date</li> <li>•Absence end date</li> <li>•Approval status</li> <li>•Absence status</li> <li>•Employee Number</li> <li>•College/ Professional Service Group</li> <li>•School/Planning Unit</li> <li>•Department</li> <li>•Sub Department (input only for MVM College)</li> </ul>	<ul style="list-style-type: none"> <li>Person Number</li> <li>Assignment Number</li> <li>First Name</li> <li>Preferred name</li> <li>Last Name</li> <li>College/ Professional Service Group</li> <li>School/Planning Unit</li> <li>Department</li> <li>Sub Department (input only for MVM College)</li> <li>Personal job title</li> <li>Worker Category</li> <li>Assignment category</li> <li>Person Type</li> <li>Weekly working hours</li> <li>Assignment FTE</li> <li>Grade</li> <li>Job Family</li> </ul>



	Job Function Line Manager Assignment status Approval status Absence Status Absence Type Absence Reason Absence Start date Absence End date Absence duration (in days)
--	--

## Sickness Absence Report

The 'Sickness Absence' tab displays the following information:

Absence Dashboard

Home

Catalog

Favorites

Dashboards

Create

Open

Welcome Page

Annual Leave

Annual Leave Accrual

Sickness Absence

Family Friendly Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Sickness Absences Report

Sickness Absence Review for 10 or More Days

Sickness Absence Review for 3 or L\*

Filters

Absence Start Date

09/08/2022

Absence End Date

09/08/2022

Approval Status

(All Column Val)

Absence Status

(All Column Val)

Employee Number

--Select Value--

College/PSG

--Select Value--

School/Planning Unit

--Select Value--

Department

--Select Value--

Sub Department

(Input Only for MVM College)

--Select Value--

Apply

Reset

Sickness Absence

Rows 1 - 30

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family
											Open Ended	Employee				
											Open Ended	Employee				
											Open Ended	Employee				
											Open Ended	Employee				
											Open Ended	Employee				
											Open Ended	Employee				
											Fixed Term	Employee				
											Open Ended	Employee				
											Open Ended	Employee				

The Sickness Absence report has the following filters and data available:

<b>Sickness absence leave - filters</b>	<b>Data</b>
---	-------------

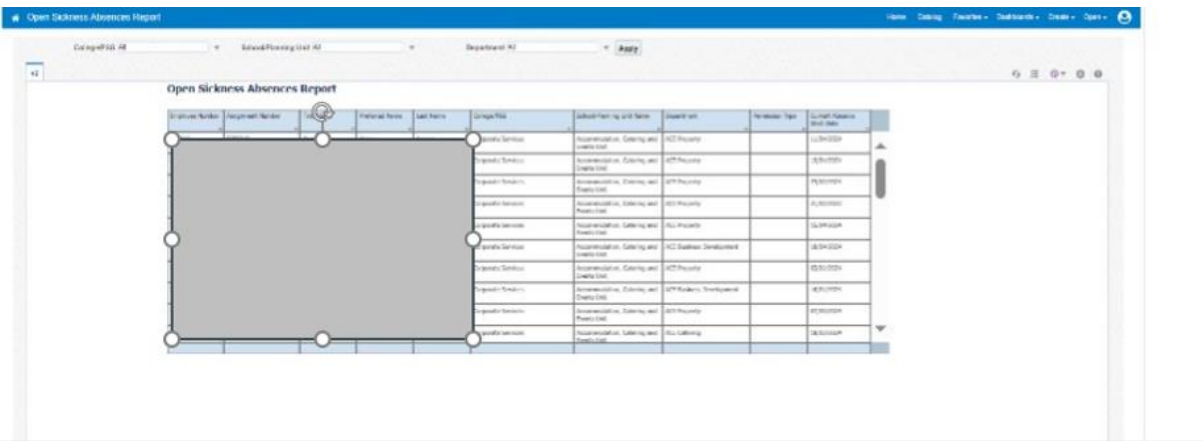
•Absence start date	Person Number
•Absence end date	Assignment Number
•Approval status	First Name
•Absence status	Preferred name
•Employee Number	Last Name
•College/ Professional Service Group	College/PSG
•School/Planning Unit	School/Planning Unit
•Department	Department
•Sub Department (input only for MVM College)	Sub dept – CMVM only
	Personal job title
	Worker Category
	Assignment category
	Person Type
	Weekly working hours
	Assignment FTE
	Grade
	Job Family
	Job Function
	Line Manager
	Assignment status
	Absence status
	Absence Type
	Absence Reason
	Absence Start date
	Absence End date
	Absence duration (in days)
	Approval status

For further information on the types of leave included in each of the reports, please see [Appendix 1](#).

Open Sickness Absence report

This report shows employees with an open sickness absence on People and Money. Line managers will receive this report to their primary work email address for direct reports. Where an employee has more than one assignment, the line manager of each assignment will receive an email. The email will be sent weekly, on a Monday. The employee’s line manager records must be maintained to ensure the report is sent to the current line manager. This is particularly important when the line manager leaves their post. If there is no line manager, the email and report will not be sent.

The report will show anyone that has an open period of sickness absence. This is defined as having the flag ‘open absence’ ticked. Employees will remain on the report until the absence is updated with an end date and the flag is unticked. Please follow the steps within the guide [‘How to enter leave on behalf of your direct report’](#).



The filters and data available on this report are:

Open Absence - filters	Data
------------------------	------

- College/ Professional Service Group
- School/Planning Unit
- Department

Employee Number  
 Assignment Number  
 First Name  
 Preferred name  
 Last Name  
 College/PSG  
 School/Planning Unit  
 Department  
 Permission type  
 Current Absence start date

## Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period

This report shows employees who have reached the absence review point of 10 or more intermittent days of sickness absence in a rolling 12-month period. Line managers will receive this report via email, **only** if their direct report reaches this review point. Emails will be sent monthly, on the first day of the month. This report will display the number of calendar days in a rolling 12-month period, therefore, it is important that managers are aware of this and take into account the staff members working days when reviewing the report and subsequently taking any action. See the line manager guide on “How to Enter Leave on Behalf of your direct report”, under the Absence section of the [People and Money Guides](#).

Employee Number	Assignment Number	Job Title	Preferred Name	Last Name	College/PSG	School/Planning Unit	Department	Permission Type	Sickness Absence (Last 12 Months)	Number of Intermittent Absence Days
					College Services	Accountability, Caring and Protection			11	2
					College Services	Accountability, Caring and Protection			104	7
					College Services	Accountability, Caring and Protection			96	1
					College Services	Accountability, Caring and Protection			11	1
					College Services	Accountability, Caring and Protection			11	1
					College Services	Accountability, Caring and Protection			10	1
					College Services	Accountability, Caring and Protection			10	1
					College Services	Accountability, Caring and Protection			14	1
					College Services	Accountability, Caring and Protection			104	7
					College Services	Accountability, Caring and Protection			96	1

The filters and data available on this report are:

Sickness absence leave - filters	Data
<ul style="list-style-type: none"> <li>•Date (defaults to last date of previous month to align with report sent to Line manager by email)</li> <li>•College/ Professional Service Group</li> <li>•School/Planning Unit</li> <li>•Department</li> </ul>	<p>Employee Number</p> <p>Assignment Number</p> <p>First Name</p> <p>Preferred name</p> <p>Last Name</p> <p>College/PSG</p> <p>School/Planning Unit</p> <p>Department</p> <p>Permission type</p> <p>Total calendar days lost in a period</p> <p>Number of intermittent periods of absence</p>

### Sickness Absence Review for 3 or More Periods in a rolling 6-month period

This report shows employees who have reached the absence review point of 3 or more periods of sickness absence in a rolling 6-month period. Emails will be sent monthly, on the last day of the month. In order for this report to capture everyone who has hit a review point of 3 or more periods, in the month the report is sent, the report will look back 7 months. For example, if the report sends automatically to line managers on the 30 April it will look back to 1 October. Therefore, it could be the case that an individual appears on the report in a month but does not necessarily have 3 or more spells of absence in a rolling 6 month period. Full consideration and review should be given to the absence levels of the staff member.

**Sickness Absence Review for 3 or More Periods**

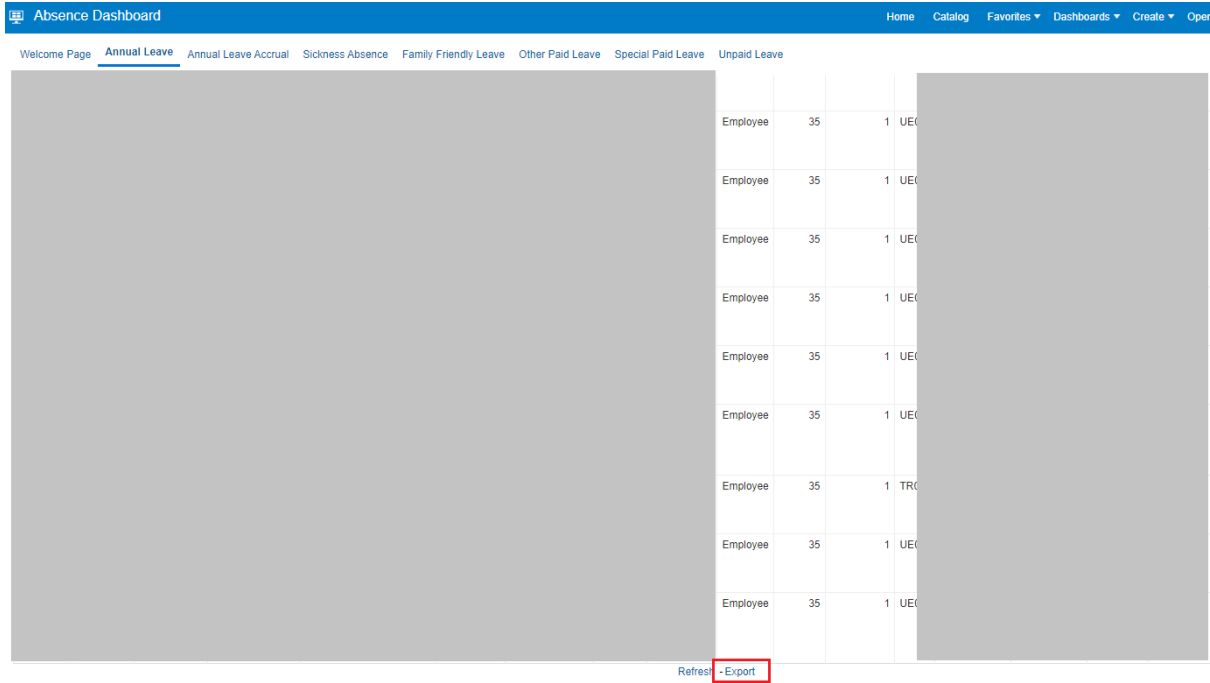
Employee Number	Assignment Number	First Name	Preferred Name	Last Name	College/PSG	School/Planning Unit Name	Department	Permission Type	Total Number of Absences	Total Calendar Days Lost in Period
					Corporate Services	Accommodation, Catering and Events Unit			3	13
					Corporate Services	Accommodation, Catering and Events Unit			1	10
					Corporate Services	Accommodation, Catering and Events Unit			3	12
					Corporate Services	Accommodation, Catering and Events Unit			1	10
					Corporate Services	Accommodation, Catering and Events Unit			1	9
					Corporate Services	Accommodation, Catering and Events Unit			4	18
					Corporate Services	Accommodation, Catering and Events Unit			3	13
					Corporate Services	Accommodation, Catering and Events Unit			3	9
					Corporate Services	Accommodation, Catering and Events Unit			1	5
					Corporate Services	Accommodation, Catering and Events Unit			1	14

The filters and data available on this report are:

Sickness absence leave - filters	Data
<ul style="list-style-type: none"><li>•Date (defaults to last date of previous month to align with report sent to Line manager by email)</li><li>•College/ Professional Service Group</li><li>•School/Planning Unit</li><li>•Department</li></ul>	<ul style="list-style-type: none"><li>Employee Number</li><li>Assignment Number</li><li>First Name</li><li>Preferred name</li><li>Last Name</li><li>College/PSG</li><li>School/Planning Unit</li><li>Department</li><li>Permission Type</li><li>Total number of Absences</li><li>Total Calendar Days Lost in period</li></ul>

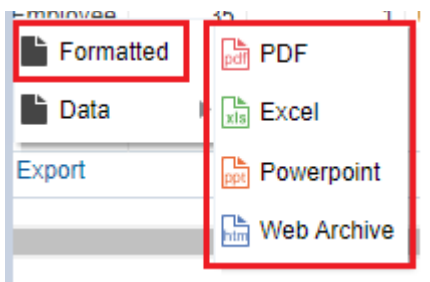
## Exporting

You can export the Annual Leave, Annual Leave Accrual, Sickness Absence, Family Friendly Leave, Other Paid Leave, Special Paid Leave and Unpaid Leave reports for further manipulation, by selecting the **Export** link at the bottom of the report (you may have to scroll).



When exporting the Annual Leave report, use only the **Formatted** option.

When exporting the **Formatted** report you will see the options PDF, Excel, Powerpoint and Web Archive:



The **formatted** version retains the layout that is displayed onscreen and may take a few seconds to download.

If you wish to view the data in the report without exporting, you can use the arrows at the bottom to navigate through the results. Initially you will see rows 1-30.

J	30/09/2023	0	0	UE06	Step 3
---	------------	---	---	------	--------

Rows 1 - 30  
Export

Select the blue arrow to view rows 1-500.

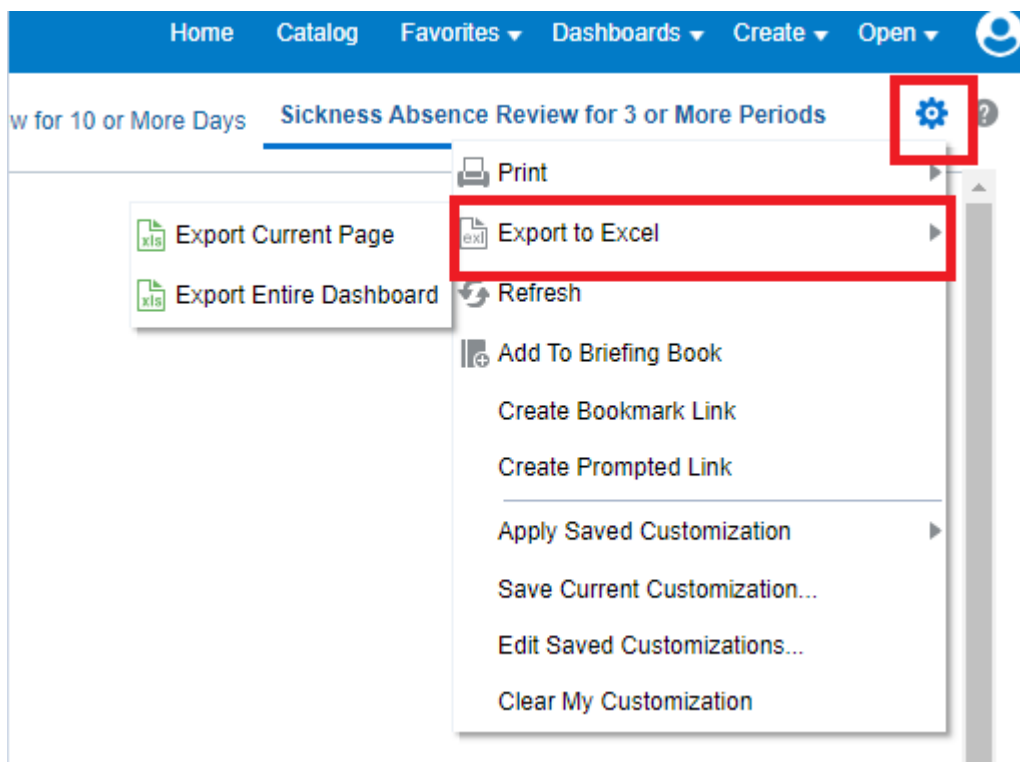
--	--	--	--	--	--

Rows 1 - 500  
Export

Use the up and down arrows to move up 500 rows or down 500 rows.

## Exporting Sickness Absence Review Reports

To export the Sickness Absence Review reports select the **cog** icon, then **Export to Excel** and choose either **Export Current Page** or **Export Entire Dashboard**.

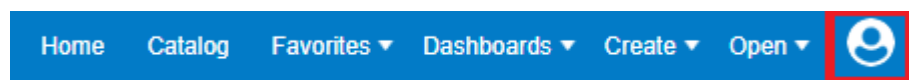


Note: exporting the entire dashboard may take a few minutes.

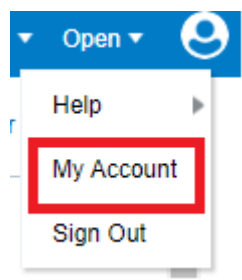


## Date Format

Depending on your settings, you may notice date formats displayed as MM/DD/YYYY. This can be changed to DD/MM/YYYY via the My Profile screen. Click on the person icon in the top right corner:



Choose **My Account**



In the pop up window that follows, change the **Locale (location)** field to 'English – United Kingdom' and click **Ok**

A screenshot of the 'My Account' settings window. The window has a title bar with a question mark and a close button. Below the title bar is a grey header area. The main content area has a tabbed interface with 'Preferences' selected. The 'Preferences' tab shows various settings: 'Starting Page' (Default), 'Locale (location)' (English - United Kingdom), 'User Interface Language' (English), 'Time Zone' (Default - Unknown Time Zone), 'Currency' (Default - User Preferred Currency using Simple Currency M...), 'Subject Area Sort Order' (Default - Sort A to Z), 'Prompts Auto-Complete' (Default), 'Analysis Editor' (Default - Start on Results tab when editing Analysis), and 'Accessibility Mode' (Default). The 'Locale (location)' field is highlighted with a red rectangular box. At the bottom right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red rectangular box.

The next time you log in your date settings will display as DD/MM/YYYY.

*Note: there is a button at the top of the dashboard called 'Catalog'. If you click on this it will take you to the folder structure of the OTBI reporting tool. It is not possible to restrict your access to these folders. However only the folder names are visible, you will not be able to return any data.*

## Appendix 1

### Annual Leave Report

Leave type	Absence Reasons
Leave	n/a

### Annual Leave Accrual Report

Leave type	Absence Reasons
Leave	n/a

### Sickness Absence Report

Leave type	Absence Reasons
Sickness	Anxiety Arthritis Asthma Back Pain (incl disc, sciatica, spondylitis etc) Broken Bone Cancer incl Leukemia Carpal Tunnel Syndrome Chest Infection/Bronchitis Chickenpox/Mumps/Measles/Shingles Debility Depression Diabetes Diarrhoea and/or Vomiting (incl general stomach bug) Ear Disorder Epilepsy or other seizure Eye Disease Eye Infection Flu/flu like symptoms GI Tract Ulcer Haemorrhoids Headache/Migraine Heart Disease incl Angina Hernia Hip, Leg, Foot pain Hypertension Illness arising from childbirth excl post natal depression Illness arising from pregnancy Infective Skin Condition Irritable Bowel Syndrome Kidney Infection Long Covid Menopause or perimenopause symptoms Menstrual Related Illness Multiple Sclerosis Other - Infection Other - Mental Health

	Other - multiple cause to include road traffic accident Parkinsons Pleurisy/Pneumonia Repetitive Strain Injury Sciatica Shoulder, Neck, Hand pain Soft Tissue Injury Stress Stroke Throat/Cold/Cough/URTI/Hayfever/Laryngitis/Sinusitis Thrombosis/Embolism Thyroid Toothache/Extraction Trapped Nerve Urine Infection/Cystitis Virus
Other Sickness	As above

### Family Friendly Leave Report

Leave type	Absence Reasons
Adoption and Surrogacy	n/a
Maternity	n/a
Partner Adoption	n/a
Partner Birth	n/a
Statutory Shared Parental Adoption	n/a
Statutory Shared Parental Birth	n/a
Shared Parental Adoption	n/a
Shared Parental Birth	n/a
Unpaid Parental Leave	n/a
Neonatal Care Leave	n/a

### Other Paid Leave Report

Leave type	Absence Reasons
Other Paid Leave	Academic/Sabbatical Adoption Appointment Antenatal appointment - partner Antenatal appointment – personal CPD Delegate SPD Speaker Conference/Seminar Personal Health and Welfare appointment Study Leave Time Off In Lieu (TOIL) Training/Training Course
Phased Return	n/a

### Special Paid Leave Report

Leave type	Absence Reasons
Special Paid Leave	Army Reserves/Volunteer Reserve Forces

	Bereavement Leave Compassionate Leave Emergency Domestic Situations Fertility Treatment Funeral Jury Service Police statement Voluntary Public Service/Leave for Public Duties Volunteering Activities Witness at Court
Emergency Time Off for Dependants	Paid Leave
Parental Bereavement	<p>Not to be confused with Bereavement Leave (paid leave for the loss of an immediate family member). Parental Bereavement leave type should be used for the loss of a child up to the age of 18 years.</p> <p>Please review the <a href="#">Absence and Leave Options</a> webpage and the <a href="#">Special Leave Policy</a> for circumstances when this reason should be used.</p> <p>Bereavement leave can be selected under Special Paid Leave</p>

### Unpaid Leave Report

Leave type	Absence Reasons
Unauthorised Leave	UKVI – used for sponsored worker unauthorised leave
Unpaid Leave	Academic/Sabbatical Army Reserves/Volunteer Reserve Forces Authorised Absence Campaigning for Election to Parliament Carers Leave Compassionate Leave Emergency Time off for Dependants Extended Unpaid Leave Representing your Country Unauthorised Absence Voluntary Public Service/Leave for Public Duties