



System User Guide

Line Manager Guide to Sickness Absence

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Introduction

This guide covers key tasks for Line Managers in the 'Sickness Absence' system process.

- Please review the end to end [Guide to Sickness Absence](#) (under the absence and leave heading)
- Please review the relevant HR policy for the absence type being processed and work within the guidelines stated. The HR absence policies can all be reviewed on the [Leave and Absence Policies](#) webpage.
- Periods of absence are subject to monitoring in line with the HR policy.
- To support the Absence management policy the following three 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.
- Weekly Open Sickness Absences Report – all instances of sickness absence which do not have an Absence End Date on the day the report is run
- Monthly Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period
- Monthly Sickness Absence Review for 3 or More Periods in a rolling 6-month period
- 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 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. Further details are available in the guide '[How to view Absence Reports](#)'.
- 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.
- This user guide details the processes to add and manage absences for direct reports within the team.
- Each absence type has a section to record comments. This should be completed with additional information as relevant. Please ensure that any notes added are kept professional and in line with

GDPR regulations, noting that an employee can request to see any information that is held on the system for them.

- Most absence types cannot overlap with each other. If this occurs, an error message will display on screen when the absence is submitted. This will prevent the absence from being processed until the overlap has been resolved.

There is one exception to this: when a sickness absence is entered without an end date, future planned annual leave dates do not need to be deleted.

- If an absence period needs to be extended, please ensure to edit the existing absence instead of adding on a new one. This prevents multiple absences being reported for one event for sickness and monitoring purposes, which can lead to further issues with payroll processing.
- To cancel or amend an absence follow the guidance within in the section below [‘How to end an open sickness absence’](#).

In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

How to Log a Sickness Absence for a Direct Report

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.
2. Select the relevant employee from the list.
3. Select **Sickness** from the **Absence Type** drop down list
4. Enter the **Start Date** for the absence.
5. Select whether the absence is for a full day or half day from the **Start Date Duration** drop down menu.
6. Enter the **End Date** and **Duration** if known. Alternatively, click on the **Open ended** toggle if the return date is not known at this stage.
7. Select a relevant **Reason** for the sick leave from the list of options available in the drop-down menu.
8. Add any relevant **Comments** if applicable. This might be to capture an informal back to work discussion.
9. Upload any relevant **Attachments** if applicable.
10. Please disregard the **Legislative Information** and **Additional Information** fields at the bottom the page – you do not need to complete these.
11. Click on the **Submit** button to complete the absence recording.

How to Add a Self Certificate/Return to Work Form for a Direct Report

1. From the home page click on the **My Team** tab and select the **My Team** app.
2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Document Records** from the drop-down menu.
3. Click on the **+Add** button.
4. Select **Self Certificate (RTW Form)** from the **Document Type** drop-down list.
5. Enter the **Name** and the **From** and **To Date** from the certificate
6. Drag the file into the **Attachments** box or alternatively click on the **Hyperlink** to upload the document from where it is saved to.
7. Click on the **Submit** button.

How to Add a Fit Note for a Direct Report

1. From the home page, click on the **My Team** tab and select the **My Team** app.
2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Document Records** from the drop-down menu. (You will need to scroll down to select Document Records).
3. Click on the **+Add** button.
4. Select **Fit Note (Medical Certificate)** from the **Document Type** drop-down list.
5. Enter the **Name**. This should be unique to the employee e.g. their name and the date.
6. Enter the date it was **Issued On**.
7. Record the **From Date** and **To Date** that the form covers the employee for.
8. Drag the file into the **Attachments** box or alternatively click on the **Hyperlink** to upload the document from where it is saved to.
Note: Please ensure both sides of the Fit Note have been scanned and attached.
9. Click on the **Submit** button.
10. Return the original Fit Note back to the employee.

How to Log a Phased Return for a Direct Report

When a phased return has been agreed for an employee who has been off work sick, the first step in the process is to end the existing sickness absence as of the day before the phased return commences. Phased Return should commence from the first day they return to some work.

Note: An employees' pay will not be affected by the Phased Return absence type. They will be paid their normal contractual pay.

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.
2. Select the relevant employee from the list.
3. Select **Phased Return** from the **Absence Type** drop-down menu and enter the agreed dates of the phased return. Enter any relevant **Comments** or **Attachments**.

4. Against the **Additional Information** section, enter the start and end date of the first week of the phased return arrangement in the **WK1 Start Date** and **WK1 End Date** fields. Select the **WK1 Type of Change** option from the drop-down list as applicable and capture the **WK1 New working hours (if applicable)** to record the agreed work pattern for the week. Where **Change to duties/workload** or **Change to workload** options were instead selected, record the relevant details in the **WK1 Any further detail** field.
5. Repeat 4 for up to an additional 5 weeks as applicable, in the respective fields. Then click on the **Submit** button to complete.

Note: Should the employee wish to continue the conditions of the phased return past the standard period stated within the Absence policy, there is the option to process a contract amendment for this change. Please review the absence policy for further information.

How to End an Open Sickness Absence

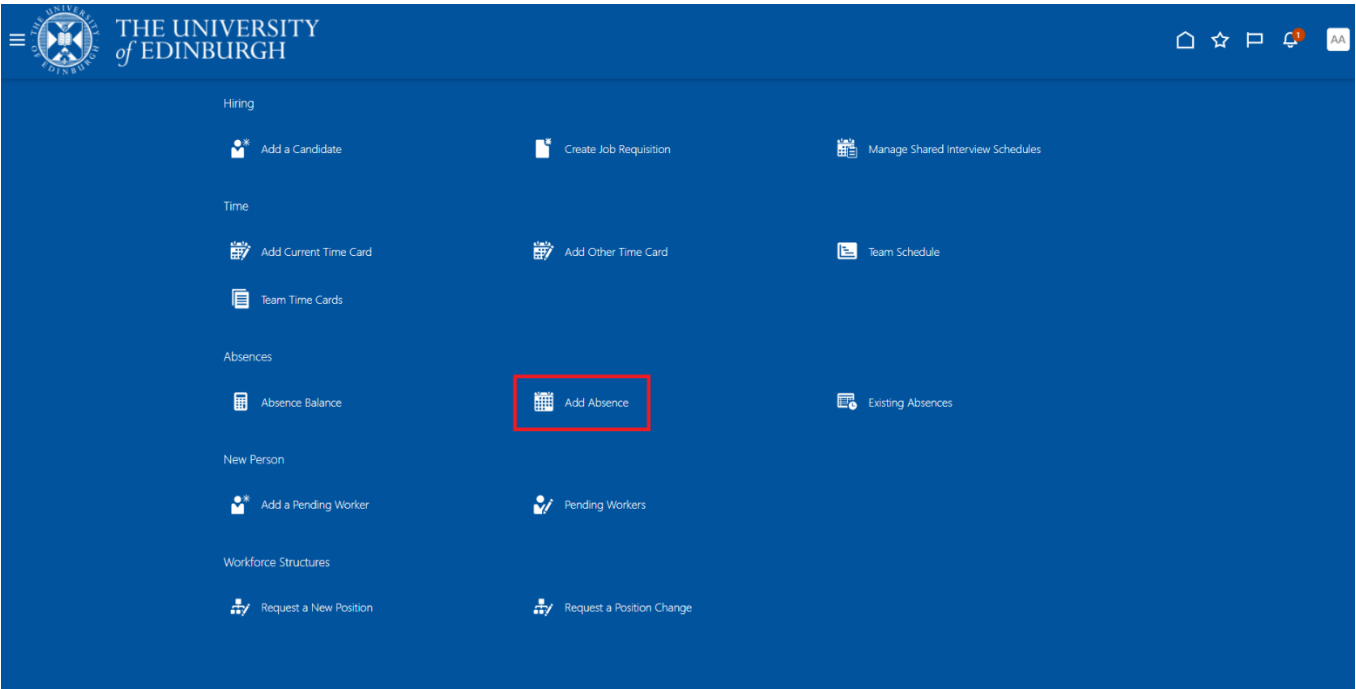
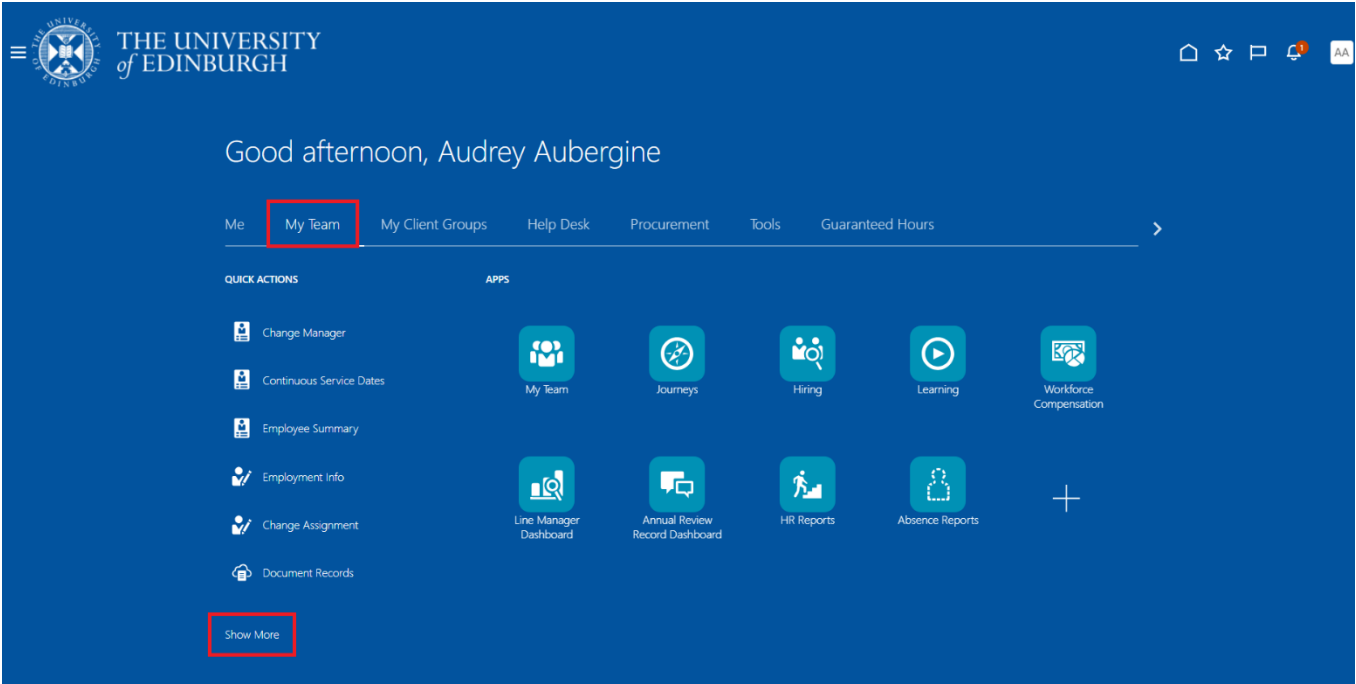
1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.
2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.
3. Find the Open Ended absence you would like to end and click on the **pencil icon** next to it.
4. Click on the **Open ended toggle**. This will enable the **End Date** field.
5. Select the absence **End Date**.
6. Click **Submit**.

In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

How to Log a Sickness Absence for a Direct Report

- 1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.



- 2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

< Add Absence

Search by name, person number, or assignment number

Reports Direct reports X Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (1)

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
Bertie Beetroot	Graphic Designer			Active - Payroll Eligible	Employee	bertie.beetroot@ed.ac.uk

3. Select **Sickness** from the **Absence Type** drop-down menu.

BB New Absence
Bertie Beetroot

Cancel Save and Close Save Submit

Absence Type

- Annual Leave
- Emergency Time off for Dependants
- Other Paid Leave
- Parental Bereavement
- Partner Adoption
- Partner Birth
- Phased Return
- Sickness

4. If you are the line manager for more than one of the employee's assignments, a **Personal Job Title** drop down menu will appear and you will have two options to choose from:
 - a. Leave the **Personal Job Title** field blank to submit an absence across all assignments
 - OR**
 - b. Select a specific assignment from the **Personal Job Title** field. **Note:** In-active assignments may appear in the drop down list, therefore, please ensure you've selected an **active** assignment.
5. In the **Dates** section:
 - a. Enter the **Start Date** for the absence.

- b. Select whether the absence is for a full day or half day from the **Start Date Duration** drop down menu.
- c. Enter the absence **End Date** and **Duration** where known. Alternatively, click on the **Open ended** toggle, if the return date is not known at this stage.

Note: To cancel or amend a period of sickness absence please refer to the [How to End an Open Sickness Absence](#) section of this guide. Extensions or Amendments must not be added on as an additional absence.

6. In the **Details** section:
 - a. Select a relevant **Reason** for the sick leave from the list of options available in the drop-down menu. This field is mandatory.
 - b. Add any relevant **Comments** if applicable. The date of an informal back to work discussion can be captured here.
 - c. Upload any relevant **Attachments** if applicable.

BB New Absence
Bertie Beetroot

Cancel Save and Close Save Submit

Duration
1 Calendar Days

Details

Reason ▼
Required

Comments

Attachments

Drag and Drop
Select or drop files here.

URL Add URL

Legislative information

Consumed SSP Weeks
0

Original Start Date 📅

7. Please disregard the **Legislative Information** and **Additional Information** fields at the bottom the page – you do not need to complete these.
8. Click on the **Submit** button to complete the absence.

Note: The **Save and Close** and **Save** buttons will save this absence in draft state only. **Please ensure to Submit it once all the details have been added.**

BB New Absence
Bertie Beetroot

Cancel Save and Close Save Submit

End Date
4/06/2025 📅

Duration
1 Calendar Days

Details

Reason
Headache/Migraine ▼

Comments

Attachments

Drag and Drop
Select or drop files here.

URL Add URL

Legislative information

9. Following the recording of a sickness absence, the Line Manager will receive a notification with a checklist of actions to carry out. This will be accessible through the **Notification Bell** on the home screen. Actions will include:

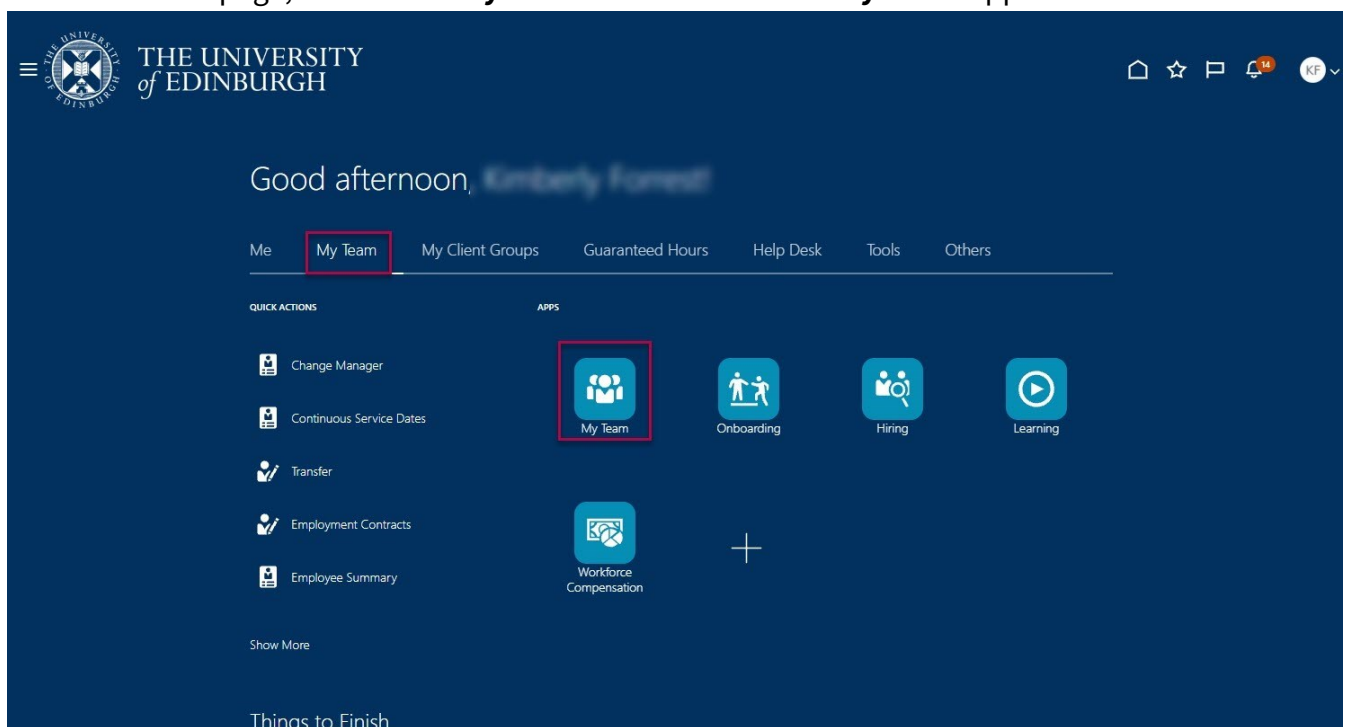
- a. Read absence management policy
- b. Check whether a fit note is required for the absence
- c. Check review points/patterns of absence
- d. Rules around return to work
- e. Case Management for certain absences

Note: Where the absence is entered by a School Department Administrator, the checklist will still be sent to the individuals Line Manager to action. This is because it is the Line Manager's responsibility to ensure it has been carried out.

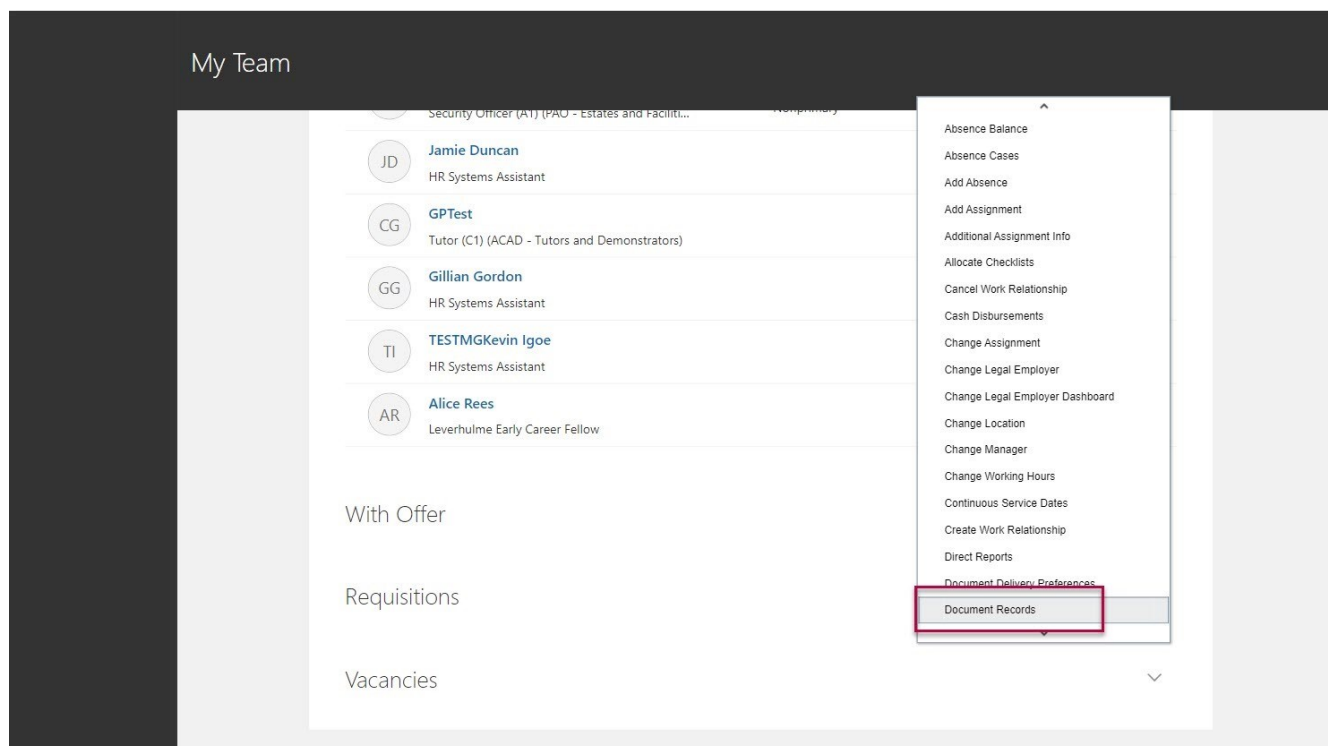
10. Where a sickness absence continues for less than 7 days but more than 4, an employee must supply a Self Certification for the absence, in line with the rules around Self Certification. For further details on this, please see the section, '[How to Add a Self Certificate/Return to Work Form for a Direct Report](#)'. Alternatively, for sickness that continues for over 7 days, the employee must provide a Fit Note. Please see the section of this guide on, '[How to Add a Fit Note for a Direct Report](#)' for further details on how to do this.

How to Add a Self Certificate/Return to Work Form for a Direct Report

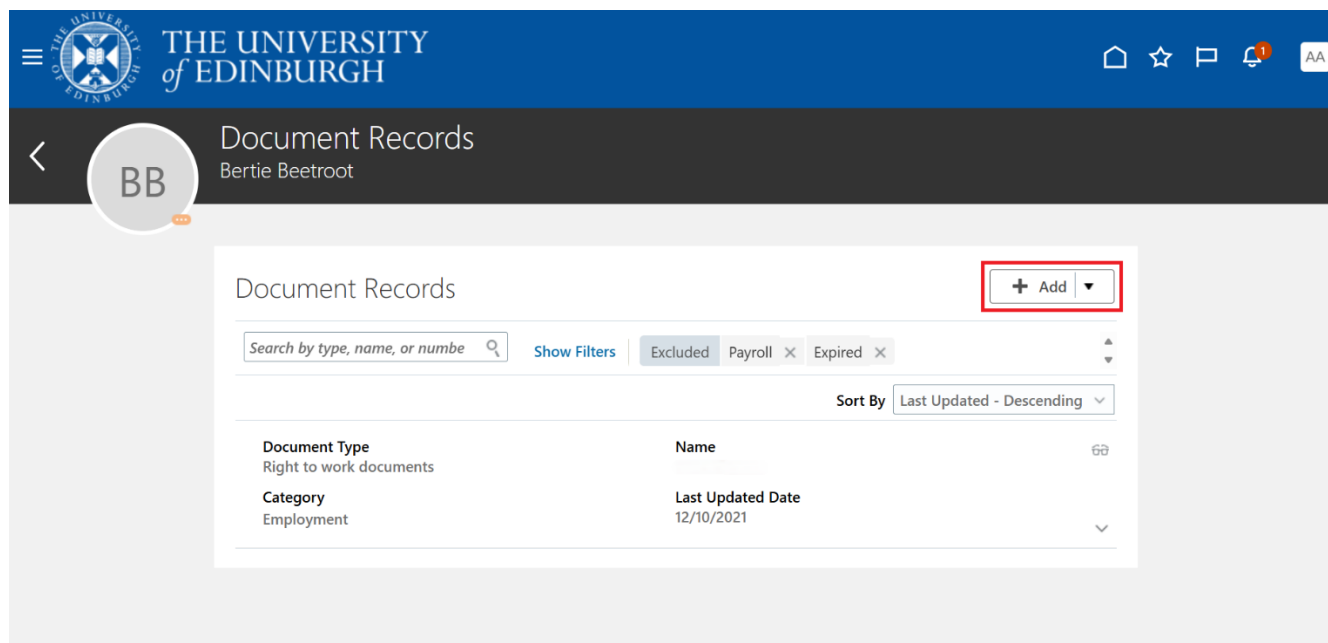
1. From the home page, click on the **My Team** tab and select the **My Team** app.



2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Document Records** from the drop-down menu. (You will need to scroll down to select Document Records)



3. Click on the **+Add** button.



4. Select **Self Certificate (RTW Form)** from the **Document Type** drop-down list.

The screenshot shows the 'Add Document' form with the following fields and callouts:

- Document Type** (4): A dropdown menu with 'Self Certificate (RTW Form)' selected.
- Category** (5): A dropdown menu with 'Absence' selected.
- Country** (6): A dropdown menu with 'All Countries' selected.
- Description**: 'Self-Certificate (RTW Form) Document submitted by worker after returning to work following a period of absence'.
- Name** (5): A text field containing 'Diane Rogers 10/02/2021'.
- Number** (6): A text field containing '1234'.
- From Date** (7): A date field containing '08/02/2021'.
- To Date** (7): A date field containing '10/02/2021'.
- Issued On** (5): A date field with a calendar icon.
- Issuing Authority** (6): A text field.
- Issuing Comments** (7): A text field.
- Context Value** (7): A dropdown menu.
- Attachments** (8): A large dashed box with a cloud icon and the text 'Drag files here or click to add attachment'.
- Submit** (9): A button in the top right corner.
- Cancel**: A button in the top right corner.

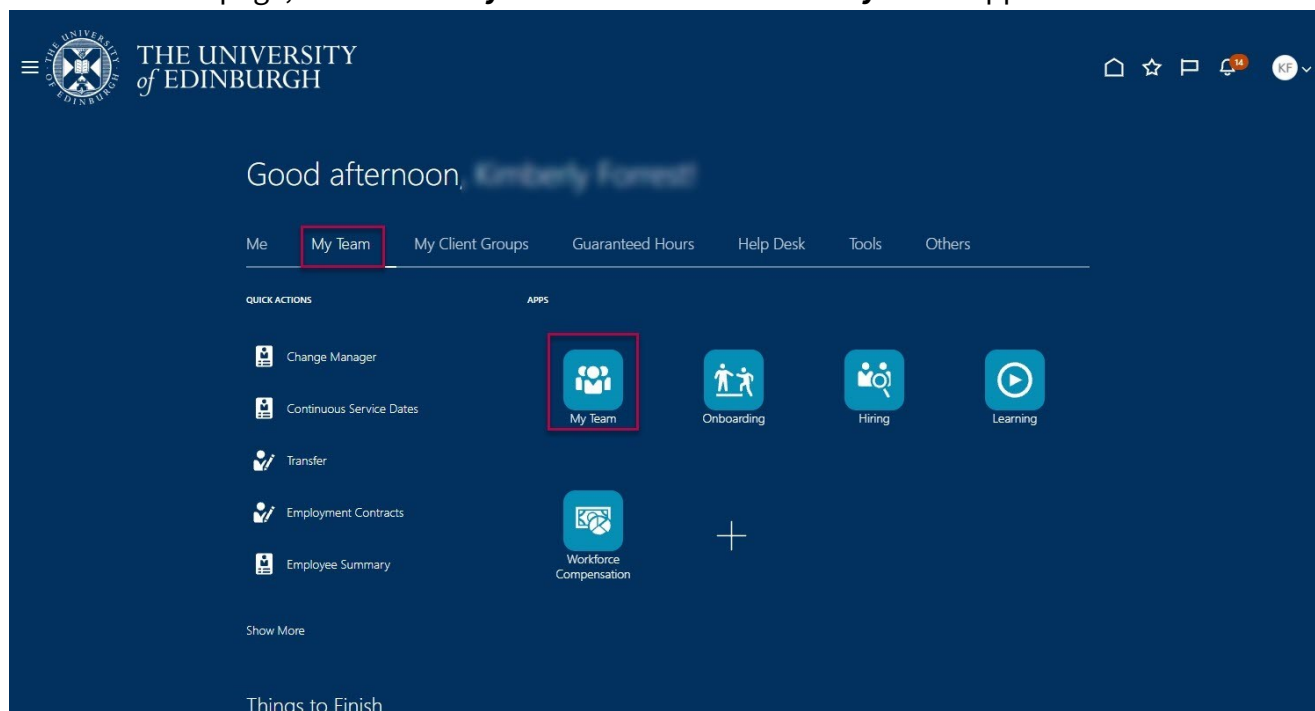
5. Enter the **Name**. This should be unique to the employee e.g. their name and the date.
6. Enter the **Number** to be allocated to the document (a sequential number – 1 if it's the first document to be uploaded, 2 for the second etc).
7. Record the **From Date** and **To Date** that the form covers the employee for.
8. Drag the file into the **Attachments** box or alternatively click on the **Hyperlink** to upload the document from where it is saved to.

Note: Please ensure both sides of the Self Certificate have been scanned and attached.

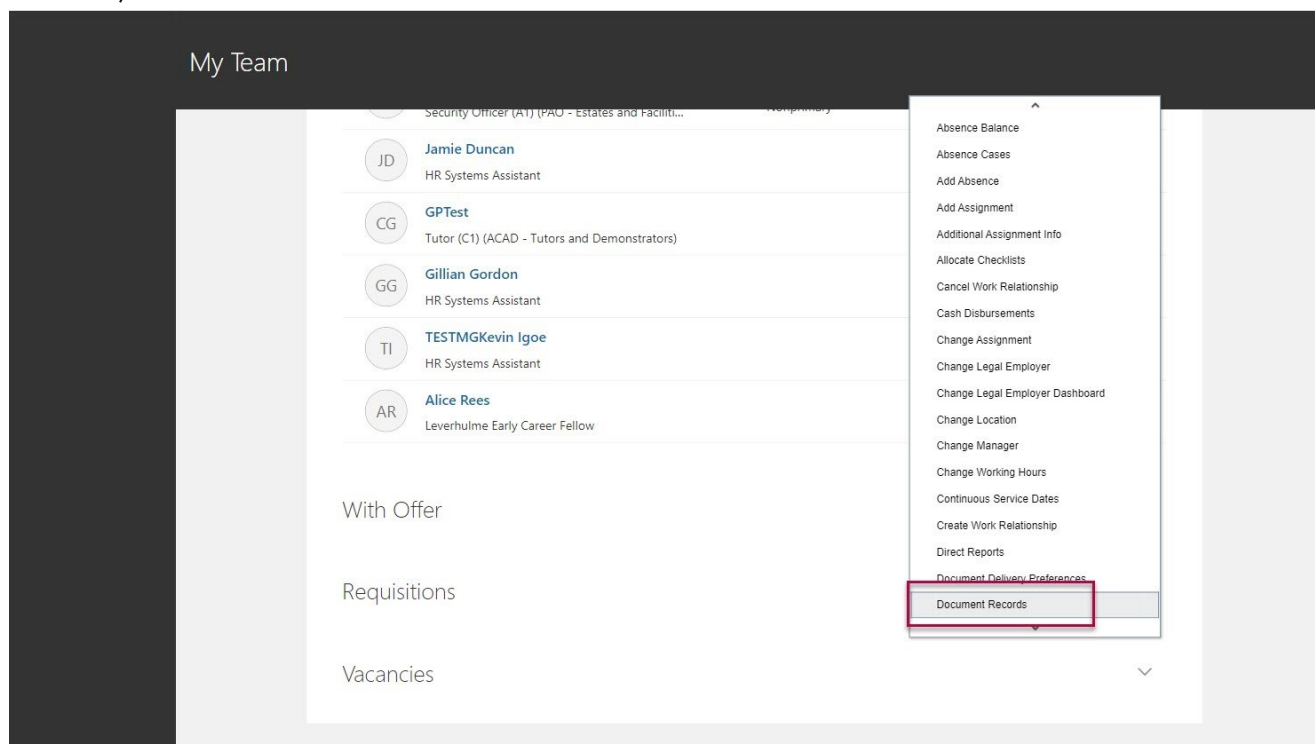
9. Click on the **Submit** button.

How to Add a Fit Note for a Direct Report

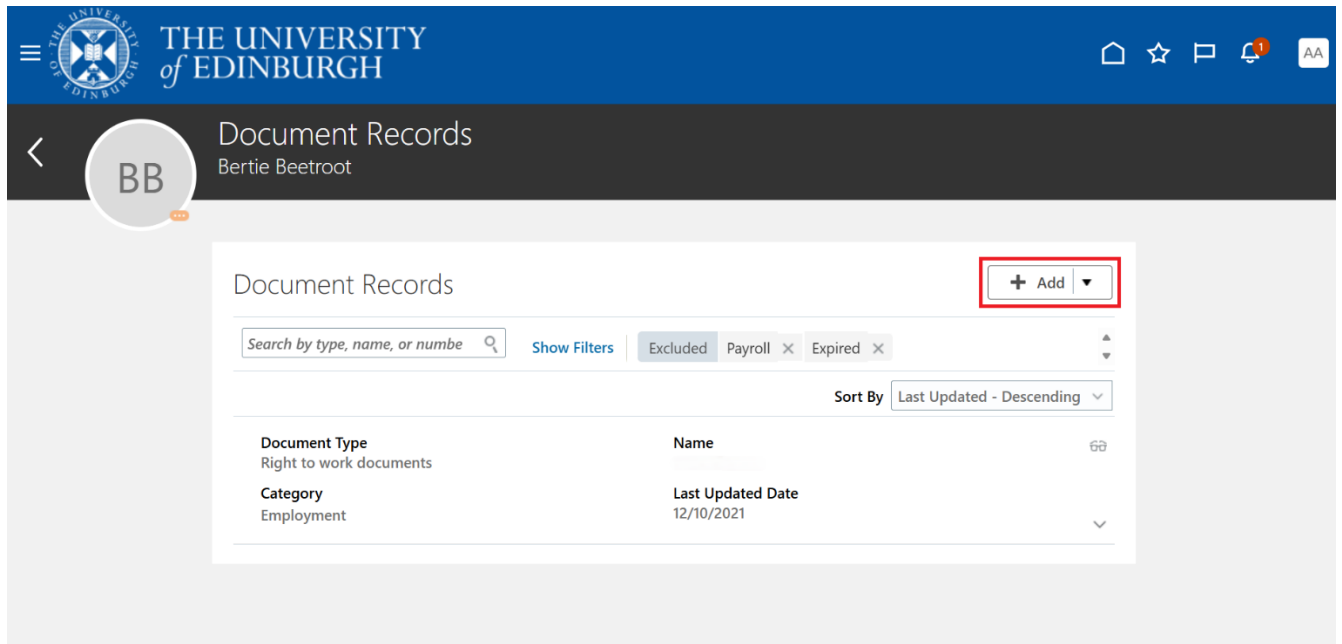
1. From the home page, click on the **My Team** tab and select the **My Team** app.



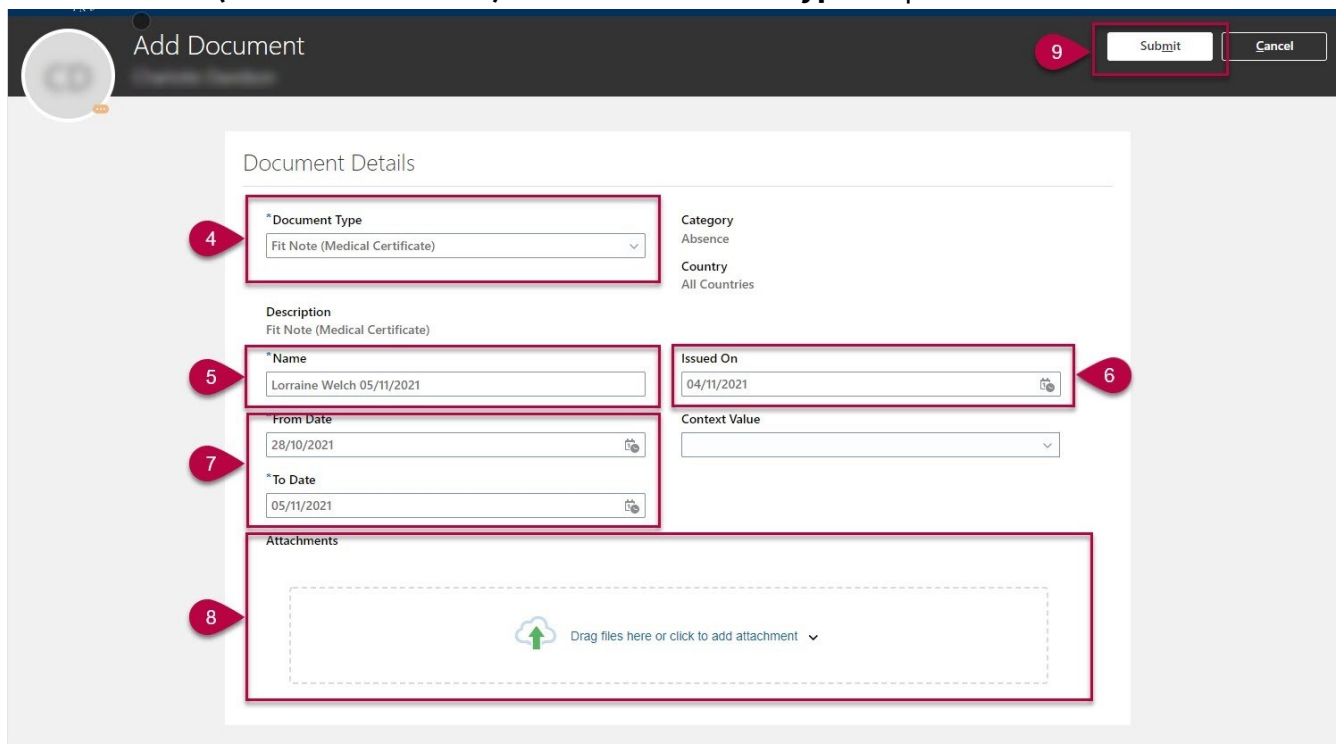
2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Document Records** from the drop-down menu. (You will need to scroll down to select Document Records)



- Click on the **+Add** button.



- Select **Fit Note (Medical Certificate)** from the **Document Type** drop-down list.



- Enter the **Name**. This should be unique to the employee e.g. their name and the date.
- Enter the date it was **Issued On**.
- Record the **From Date** and **To Date** that the form covers the employee for.

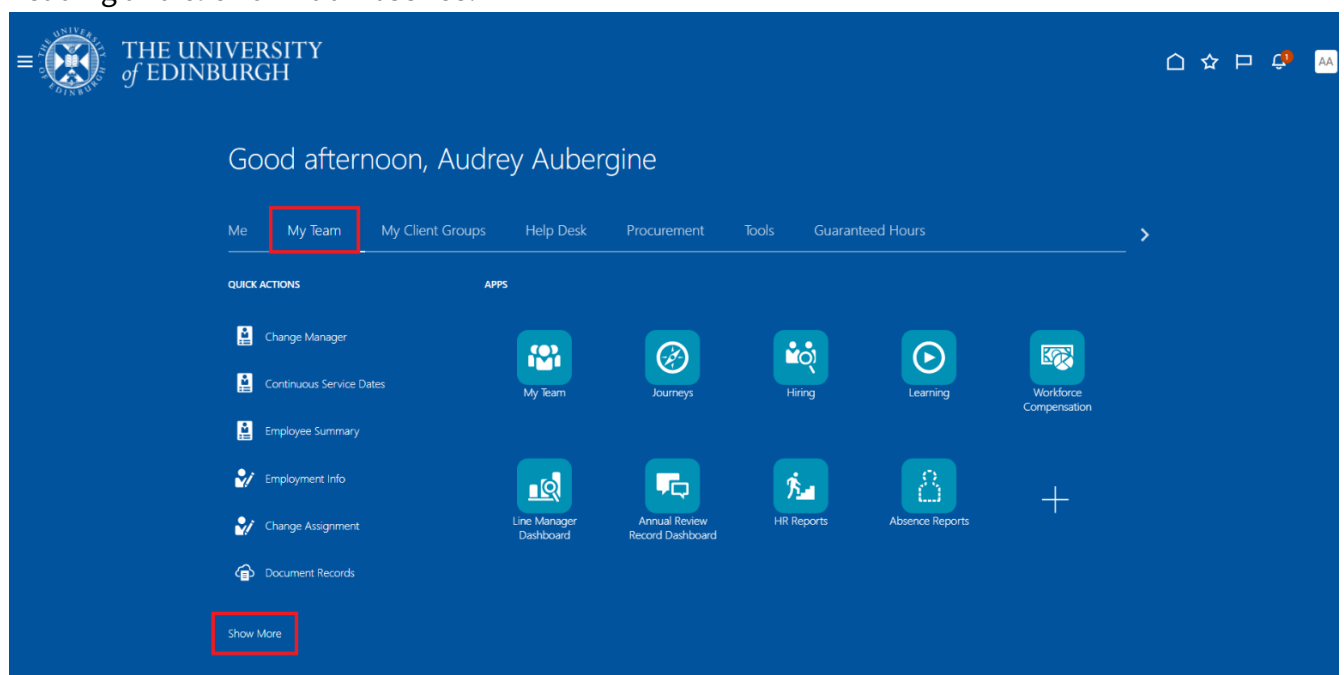
8. Drag the file into the **Attachments** box or alternatively click on the **Hyperlink** to upload the document from where it is saved to.
9. **Note:** Please ensure both sides of the Fit Note have been scanned and attached.
10. Click on the **Submit** button.
11. Return the original Fit Note back to the employee.

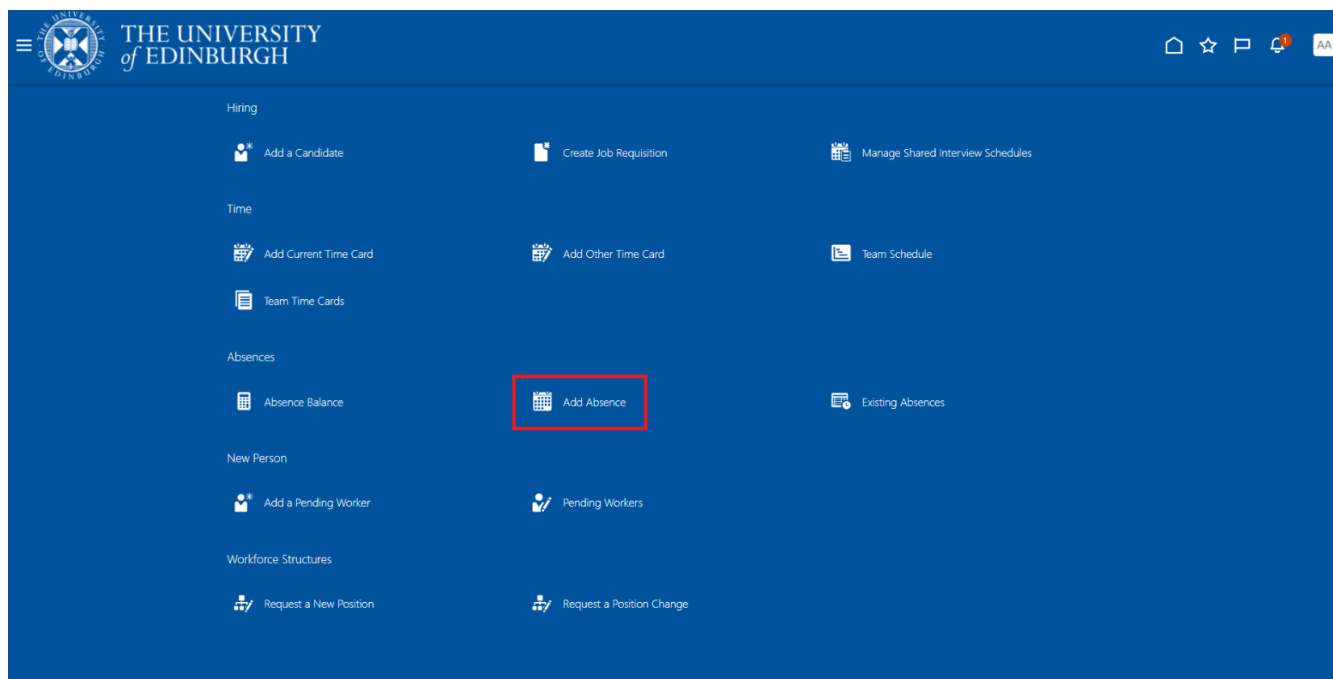
How to Log a Phased Return for a Direct Report

When a phased return has been agreed for an employee who has been off work sick, the first step in the process is to end the existing absence as of the date the phased return is due to take place. For further details on how to do this, please refer to the system guide [Line Manager Guide to Absence and Leave](#).

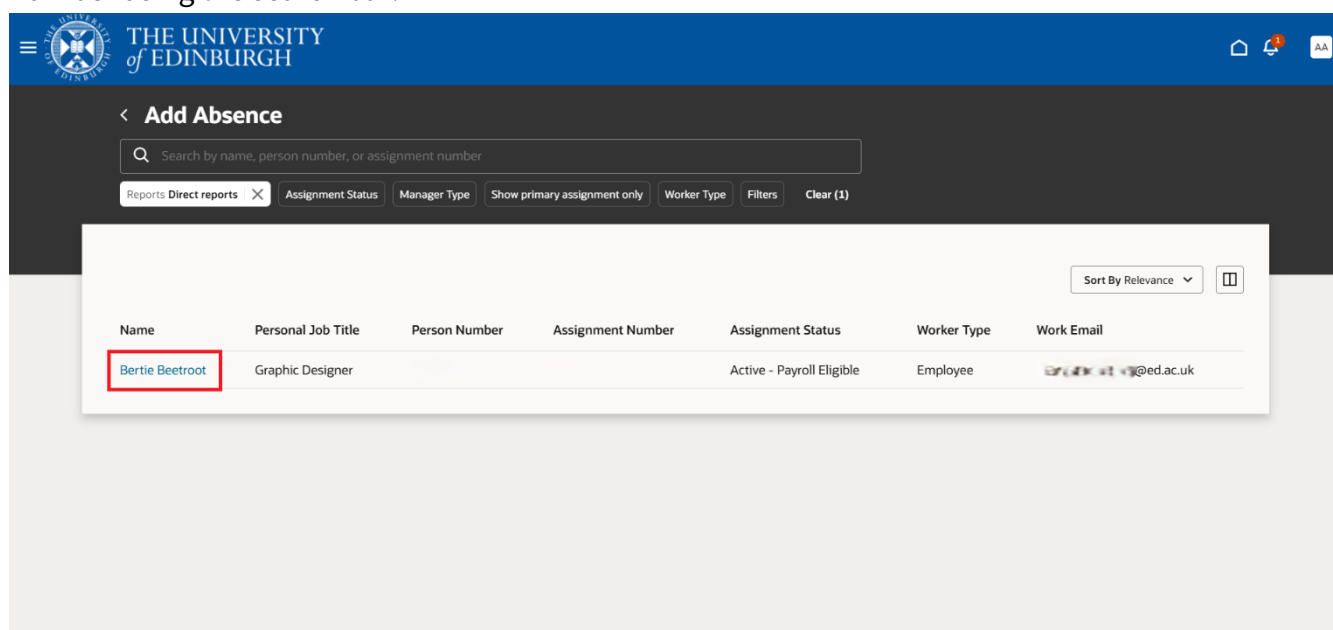
Note: An employees pay will not be affected by the Phased Return absence type.

1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Add Absence**.





2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.



3. Select **Phased Return** from the **Absence Type** drop-down menu.

BB **New Absence**
Bertie Beetroot

Cancel Save and Close Save Submit

Absence Type

Annual Leave
Emergency Time off for Dependants
Other Paid Leave
Parental Bereavement
Partner Adoption
Partner Birth
Phased Return
Sickness

he details of your absence here.

4. If you are the line manager for more than one of the employee's assignments, a **Personal Job Title** drop down menu will appear and you will have two options to choose from:
- Leave the **Personal Job Title** field blank to submit an absence across all assignments
- OR**
- Select a specific assignment from the **Personal Job Title** field. **Note:** In-active assignments may appear in the drop down list, therefore, please ensure you've selected an **active** assignment.
5. In the **Dates** section, enter:
- Start Date
 - Start Date Duration (Full Day/Half Day)
 - End Date
 - End Date Duration (Full Day/Half Day)

Note: Should the employee wish to continue the conditions of the phased return past the standard period stated within the Absence policy, there is the option to process a contract amendment for this change. Please review the [absence policy](#) for further information.

BB New Absence
Bertie Beetroot

Cancel Save and Close Save Submit

Absence Type
Phased Return

Personal Job Title
Graphic Designer

Dates

Start Date Required

Start Date Duration Required

End Date Required

Projected Balance 0 Calendar Days

As-of

Details

6. In the **Details** section:
 - a. Add any relevant **Comments** if applicable.
 - b. Upload any relevant **Attachments** if applicable.

Duration
19 Calendar Days

Projected Balance 0 Calendar Days

As-of 20/06/2025 [Calculate](#)

Details

Comments

Attachments

Drag and Drop
Select or drop files here.

URL [Add URL](#)

Legislative information

Additional information

WK1 Start Date WK1 End Date

7. Against the **Additional Information** section, enter the start and end date of the first week of the phased return arrangement in the **WK1 Start Date** and **WK1 End Date** fields.

BB
New Absence
Bertie Beetroot

Cancel
Save and Close
Save
Submit

Legislative information

Additional information

WK1 Start Date	WK1 End Date
WK1 Type of Change	WK1 New working hours (if applicable)
WK1 Any further detail	WK2 Start Date
WK2 End Date	WK2 Type of Change
WK2 New working hours (if applicable)	WK2 Any further detail
WK3 Start Date	WK3 End Date
WK3 Type of Change	WK3 New working hours (if applicable)
WK4 Start Date	WK4 End Date

8. Select the **WK1 Type of Change** option from the drop-down list as applicable. The options to select from are, **Work hours adjusted**, **Change to duties/workload** or **Change to work location**.

BB
New Absence
Bertie Beetroot

Cancel
Save and Close
Save
Submit

Legislative information

Additional information

WK1 Start Date	WK1 End Date
WK1 Type of Change	WK1 New working hours (if applicable)
WK1 Any further detail	WK2 Start Date
WK2 End Date	WK2 Type of Change
WK2 New working hours (if applicable)	WK2 Any further detail
WK3 Start Date	WK3 End Date
WK3 Type of Change	WK3 New working hours (if applicable)
WK4 Start Date	WK4 End Date

9. Capture the **WK1 New working hours (if applicable)** to record the agreed work pattern for the week. Where **Change to duties/workload** or **Change to workload** options were instead selected, record the relevant details in the **WK1 Any further detail** field.

The screenshot shows the 'New Absence' form with the 'Additional information' section. The 'WK1 New working hours (if applicable)' field is highlighted with a red box. The form includes fields for WK1 Start Date, WK1 End Date, WK1 Type of Change, WK1 New working hours (if applicable), WK1 Any further detail, WK2 Start Date, WK2 End Date, WK2 Type of Change, WK2 New working hours (if applicable), WK2 Any further detail, WK3 Start Date, WK3 End Date, WK3 Type of Change, and WK3 New working hours (if applicable). The 'Submit' button is visible in the top right corner.

10. Repeat steps 6 – 8 for up to an additional 5 weeks as applicable, in the respective fields.

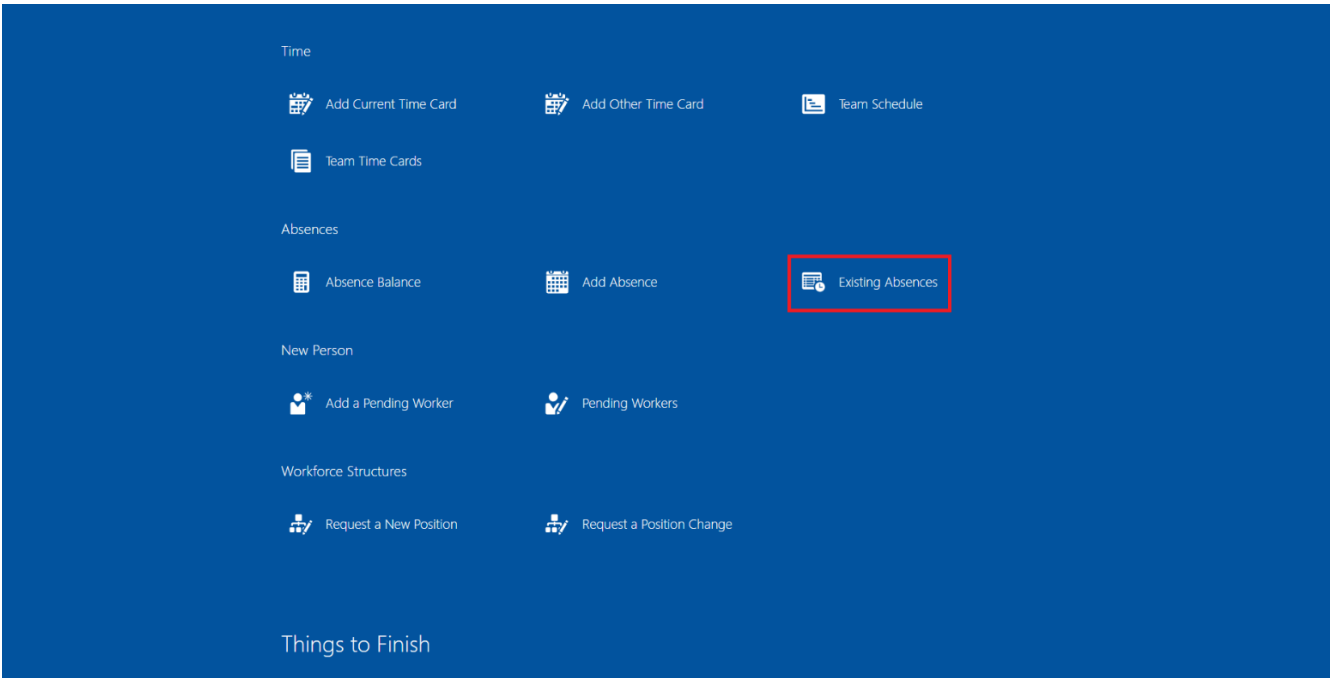
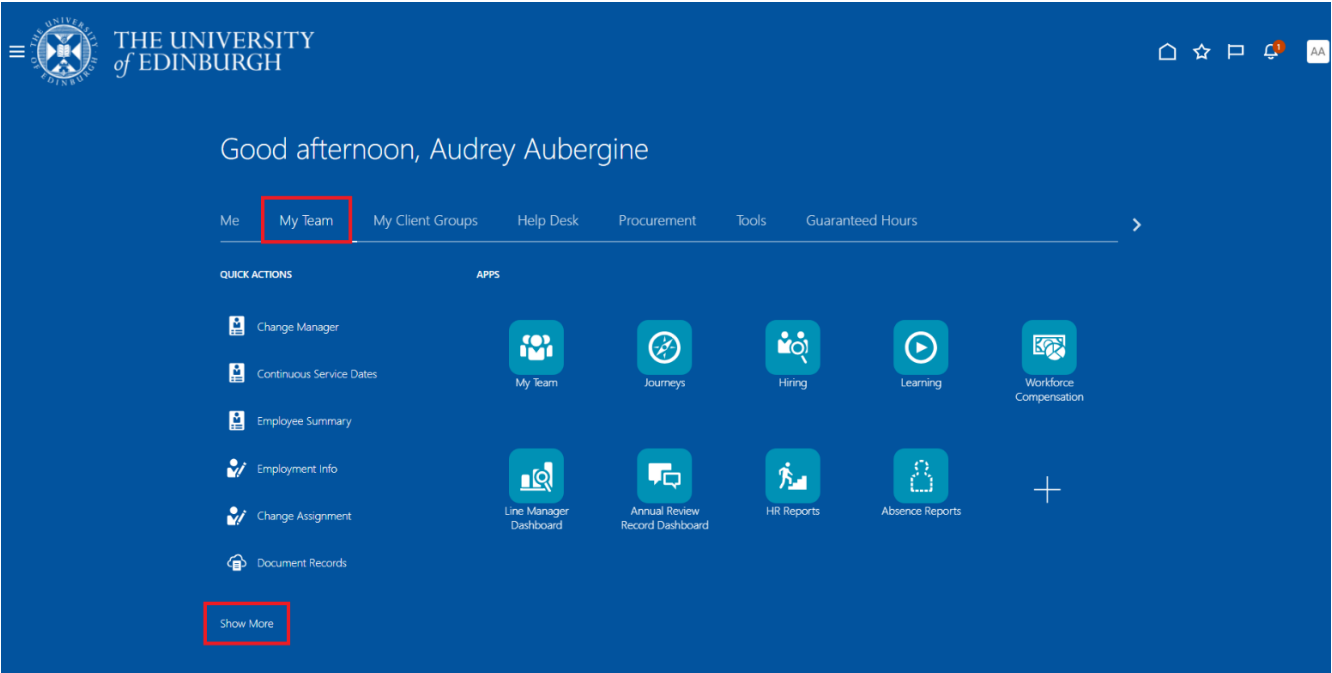
11. Click on the **Submit** button to complete.

Note: The **Save and Close** and **Save** buttons will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.

The screenshot shows the 'New Absence' form with the 'Additional information' section. The 'Submit' button is highlighted with a red box. The form includes fields for WK1 Start Date (2/06/2025), WK1 End Date (6/06/2025), WK1 Type of Change (Working hours adjusted), WK1 New working hours (if applicable) (10), WK1 Any further detail, WK2 Start Date (9/06/2025), WK2 End Date (13/06/2025), WK2 Type of Change (Working hours adjusted), WK2 New working hours (if applicable) (15), WK2 Any further detail, WK3 Start Date, WK3 End Date, WK3 Type of Change, and WK3 New working hours (if applicable). The 'Submit' button is visible in the top right corner.

How to End an Open Sickness Absence

- 1. From the home page, click on the **My Team** tab and **Show More**. Scroll down to the **Absences** heading and click on **Existing Absences**.



2. Select the relevant employee from the list or search by name, person number or assignment number using the search bar.

Existing Absences

Search by name, person number, or assignment number

Reports Direct reports Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (1)

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
	Domestic Team Leader			Active - Payroll Eligible	Employee	@ed.ac.uk-DNU12
	Domestic Assistant			Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU16
	Domestic Assistant			Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU15
	Domestic Team Supervisor			Active - Payroll Eligible	Employee	@ed.ac.uk-DNU17
	Domestic Assistant			Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU18
	Domestic Assistant			Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU6
	Domestic Assistant			Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU11
	Domestic Assistant			Active - Payroll Eligible	Employee	@exseed.ed.ac.uk-DNU12

3. Find the Open Ended absence you would like to end and click on the **pencil icon** next to it.

Existing Absences
Bertie Beetroot

Search by type

Date 26/11/2024 Status Clear (1)

Graphic Designer		7 Hours		
Partner Birth	28/10/2025 - 3/11/2025 7 Calendar Days		Scheduled	
Other Paid Leave Graphic Designer	15/10/2025 - 16/10/2025 14 Hours		Withdrawn	
Annual Leave Graphic Designer	11/06/2025 - 11/06/2025 7 Hours		Withdrawn	
Sickness	4/06/2025 - Open Ended 0 Calendar Days		Scheduled	
Emergency Time off for Dependants Graphic Designer	29/05/2025 - 29/05/2025 7 Hours		Scheduled	
Emergency Time off for Dependants Graphic Designer	28/05/2025 - 28/05/2025 7 Hours		Withdrawn	
Annual Leave	11/06/2025 - 11/06/2025 7 Hours		Scheduled	

4. Click on the **Open ended toggle**. This will enable the **End Date** field.

BB **Edit Absence**
Bertie Beetroot

Cancel Withdraw Submit

Absence Type
Sickness

Dates

Start Date
4/06/2025

Start Date Duration
Full day

Open ended
☒

Estimated End Date

Details

5. Click on the calendar icon in the **End Date** field and select the absence end date. Then click the **Submit** button at the top of the page.

BB **Edit Absence**
Bertie Beetroot

Cancel Withdraw **Submit**

June 2025

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Start Date Duration
Full day

End Date
4/06/2025

Duration
1 Calendar Days

Details

You will be taken back to the Existing Absences page. The status of the absence may change to **Awaiting approval**, however, as you are editing the absence on behalf of the employee it will automatically approve itself. This may take a few minutes.

Version History

Version	Date	Description	Approved By
1.1	N/A	Draft	
2.0	09 June 2025	Updated to new format. Content and screenshots updated to reflect new Redwood screens. Sickness Absence guidance for SDAs has been split out in to separate document (PM3767).	ME

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.