THE UNIVERSITY *of* EDINBURGH

System User Guide

School/Department Administrator Guide to Sickness Absence

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Introduction

This guide covers key tasks for School/Department Administrators in the 'Sickness Absence' system process. It is related to the Process User Guide for Sickness Absence which is linked below.

Guide to Sickness Absence

The Process User Guide provides supporting guidance on all aspects of the sickness absence process.

Before You Start

- 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.
- 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 amend a sickness absence follow the guidance within in the section below 'How to End an Open Sickness Absence'.

Reports

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.

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 an Employee

1. From the home page click on **My Client Groups** and **Show More**.
2. Click on **Absence Records**.
3. Search for appropriate employee and click on their name to select
4. Under **Existing Absences**, click on the +**Add** button.
5. Select **Sickness** from the **Absence type** drop down list.
6. Enter the **Start Date**, **Start Date Duration**, **End Date** and **End Date Duration** where 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. The date of an informal back to work discussion can be captured here.
9. Click on **Add Attachment** to upload any relevant documents if applicable.
10. Please disregard the **Legislative Information** and **Descriptive Information** fields at the bottom the page – you do not need to complete these.
11. Click on the **Submit** button.

How to Add a Self Certificate/Return to Work Form for an Employee

1. From the home page Click on **My Client Groups** and **Show More**.
2. Under the **Employee** section, click on **Document Records**.
3. Search for the employee and click on their name to select.
4. Click on the +**Add** button.
5. Select **Self Certificate (RTW Form)** from the **Document Type** drop-down list.
6. Enter the **Name**. This should be unique to the employee e.g. their name and the date.
7. 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).
8. Record the **From Date** and **To Date** that the form covers the employee for.
9. 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.

10. Click on the **Submit** button.

How to Add a Fit Note for an Employee

1. From the home page click on **My Client Groups** and then **Show More**.
2. Under the **Employee** section select **Document Records**.
3. Search for the employee and click on their name to select.
4. Click on the +**Add** button.
5. Select **Fit Note (Medical Certificate)** from the **Document Type** drop-down list.
6. Enter the **Name.** This should be unique to the employee e.g. their name and the date.
7. Enter the date it was **Issued On**.
8. Record the **From Date** and **To Date** that the form covers the employee for.
9. 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.

10. Click on the **Submit** button.
11. Return the original Fit Note back to the employee.

How to Log a Phased Return for an Employee

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 **My Client Groups** tab, **Show More** and select the **Absence Records** tile.
2. Search for appropriate employee and click on their name to select.
3. Under **Existing Absences**, click on the +**Add** button.
4. Select **Phased Return** from the **Absence Type** drop-down menu.
5. Enter the **Start Date**, **Start Date Duration** (Full Day/Half Day), **End Date** and **End Date Duration** (Full Day/Half Day).
6. Add any relevant **Comments** if applicable.
7. Click on **Add Attachment** to upload any relevant documents.
8. Against the **Descriptive 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.
9. Select the **WK1 Type of Change** option from the drop-down list as applicable.

10. 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.
11. Repeat steps 8 – 10 for up to an additional 5 weeks as applicable, in the respective fields.
12. Click on the **Submit** button.

How to End an Open Sickness Absence

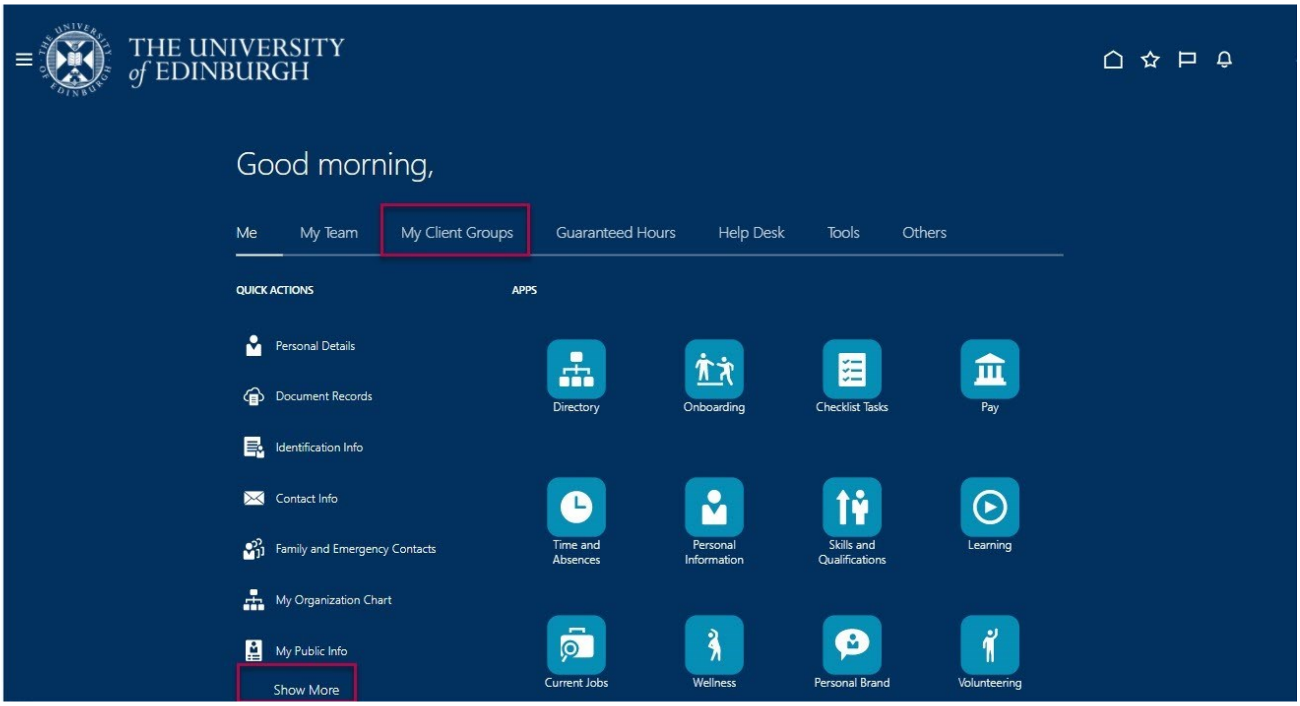
1. From the home page click on **My Client Groups, Show More** and select the **Absence Records** tile.
2. Search for appropriate employee and click on their name to select.
3. Click on the open sickness absence.
4. Untick the **Open ended** checkbox to remove the tick.
5. Enter the absence **End Date**.
6. Click on the **Submit** button.

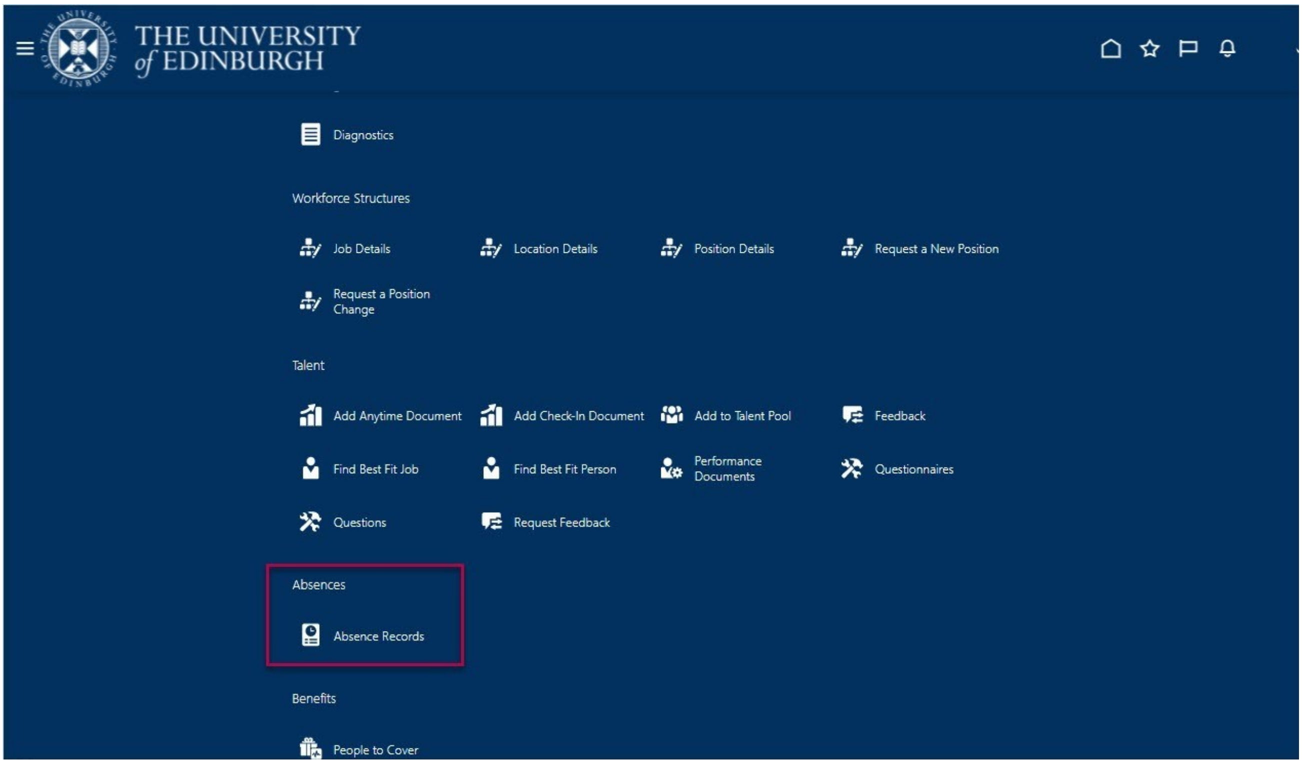
In Detail

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

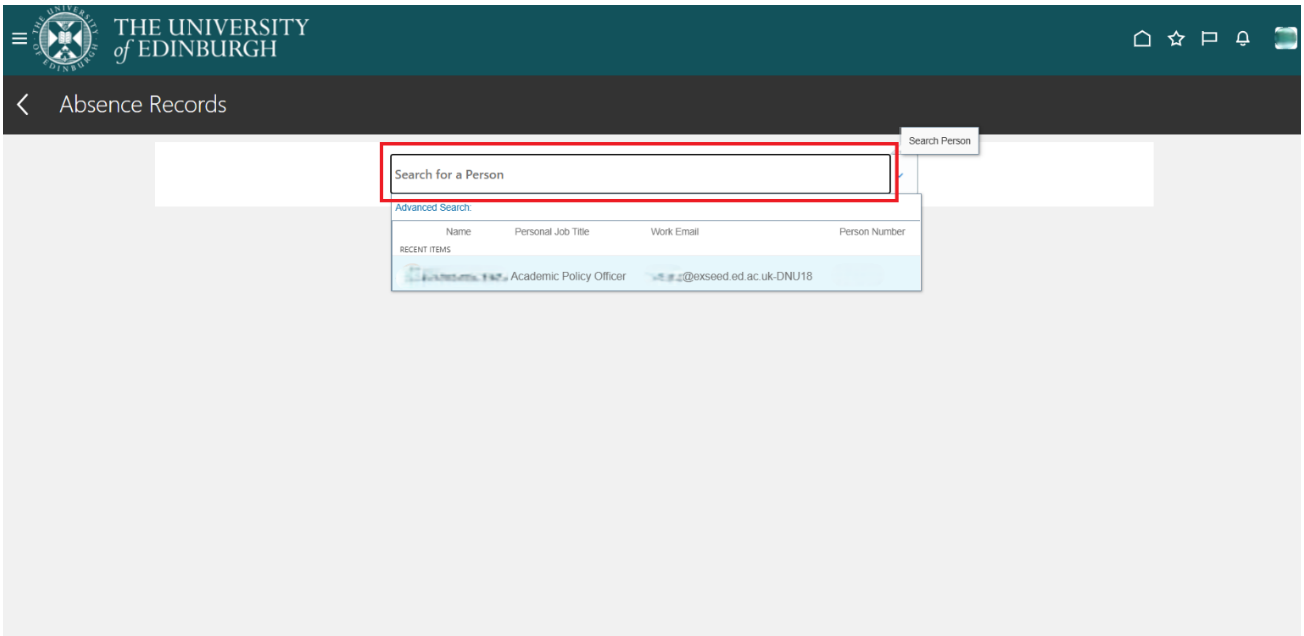
How to Log a Sickness Absence for an Employee

1. From the home page Click on **My Client Groups** tab, **Show More** and select the **Absence Records** tile.

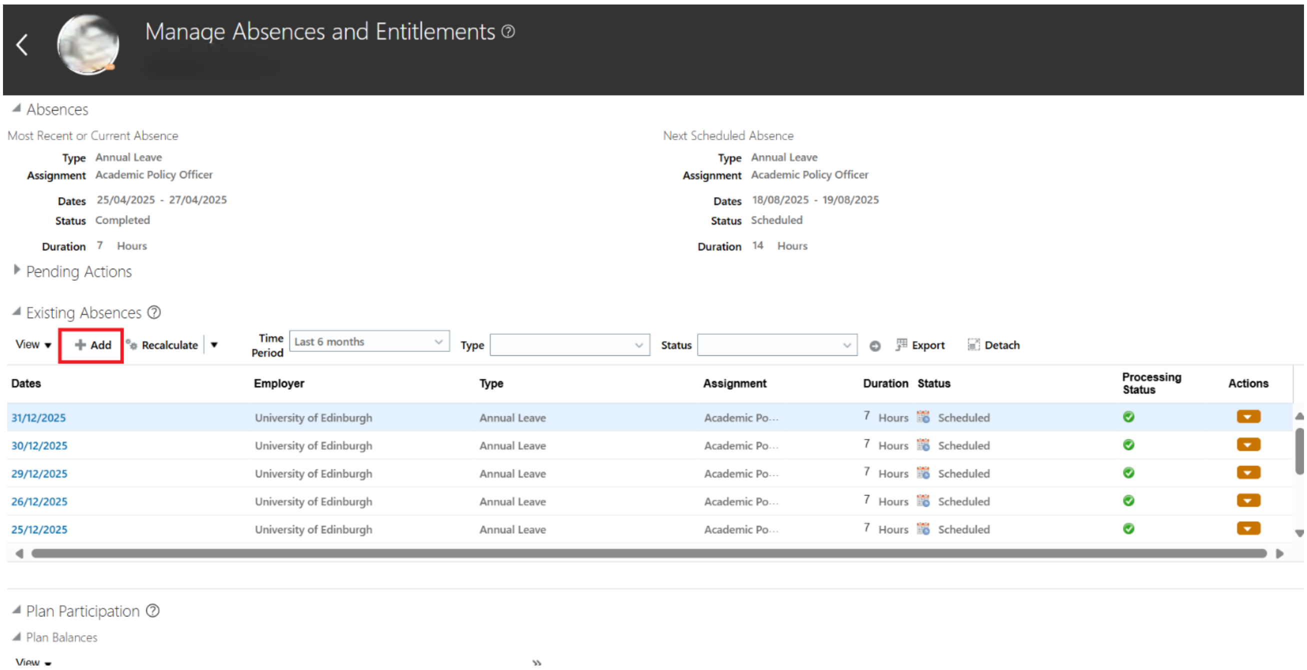




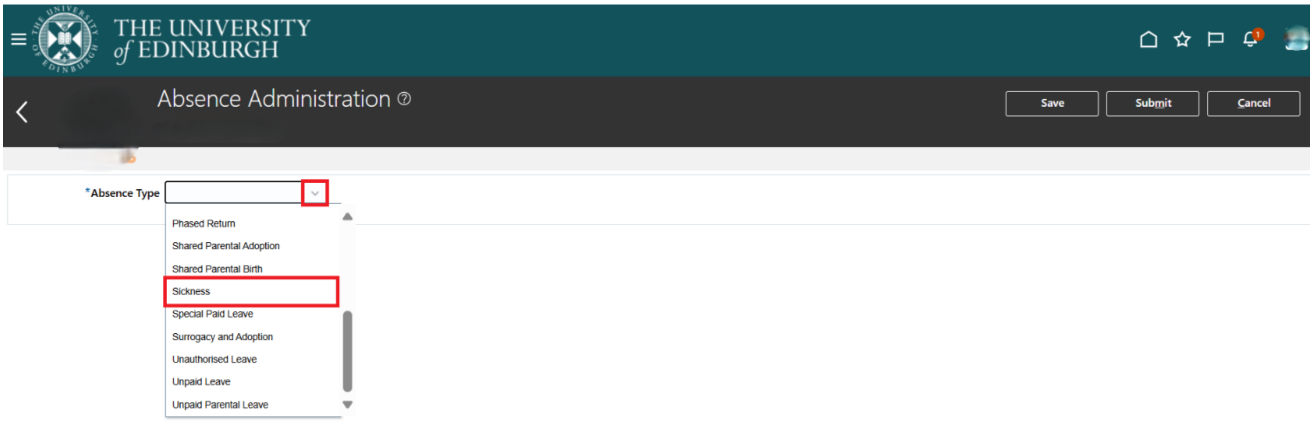
2. Search for the employee and select their name to continue.



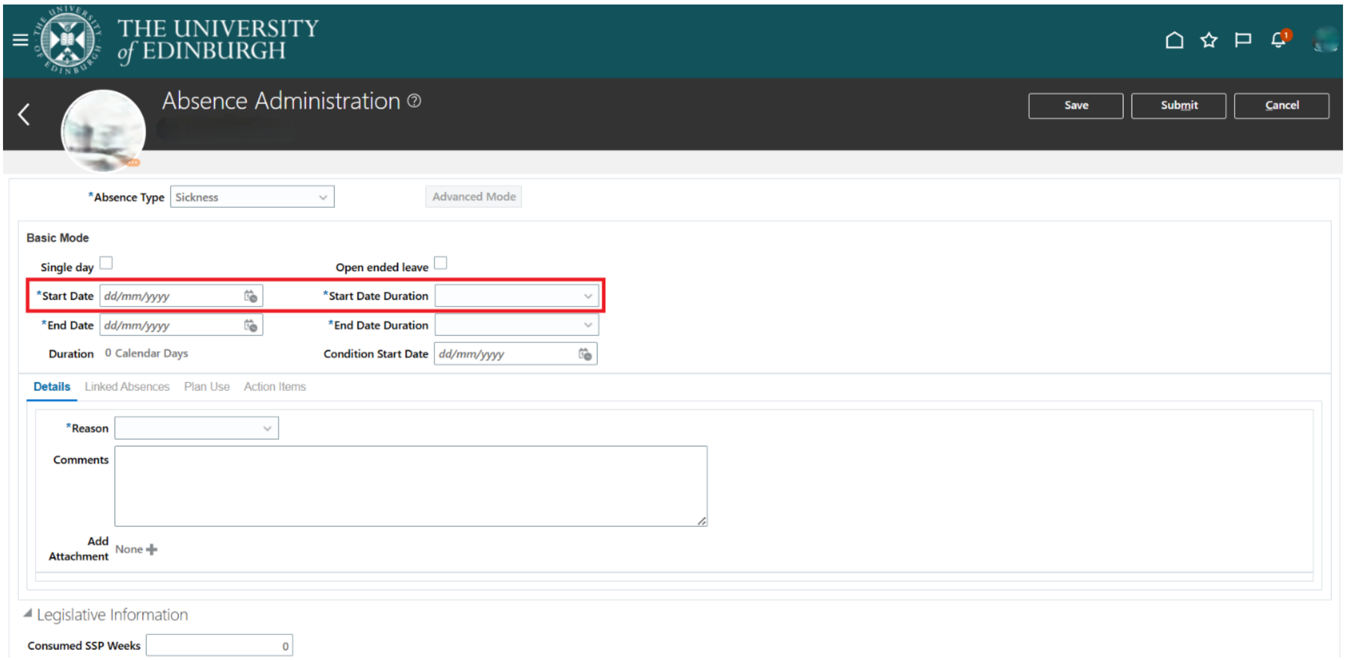
3. Under **Existing Absences**, click on the +**Add** button.



4. Select **Sickness** from the **Absence type** drop down list.

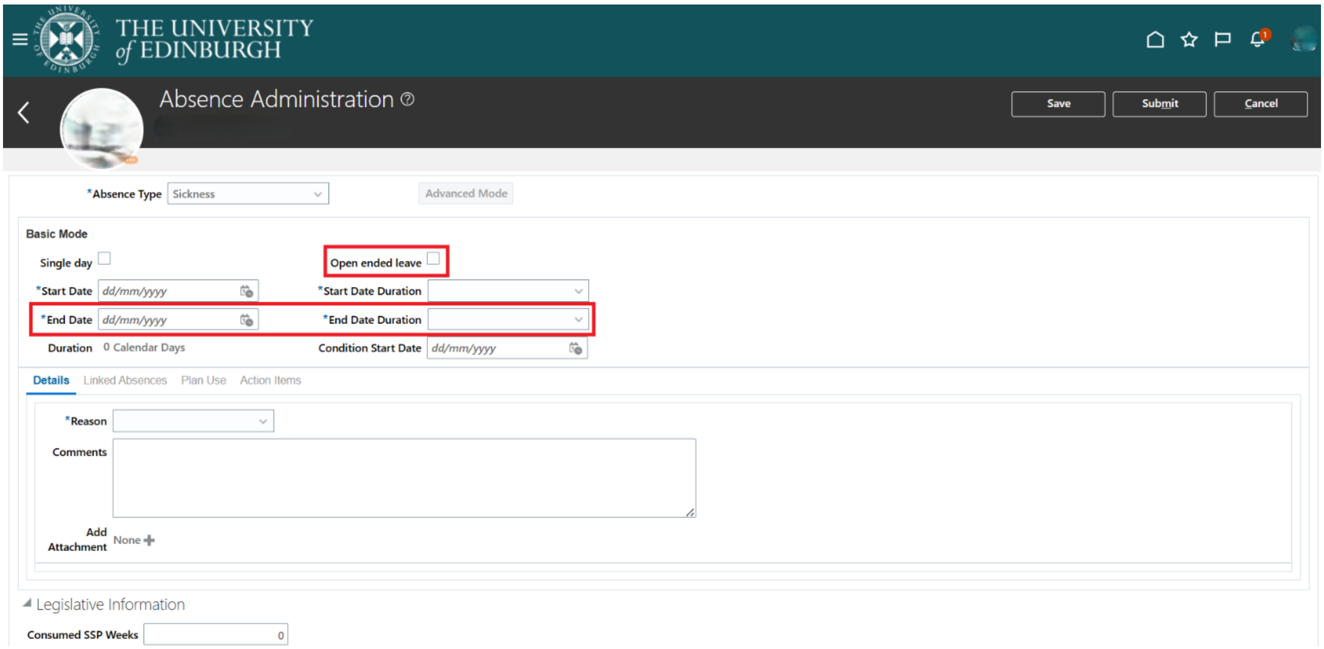


5. Enter the **Start Date** for the absence and select whether the absence is for a full day or half day from the **Start Date Duration** drop down menu.

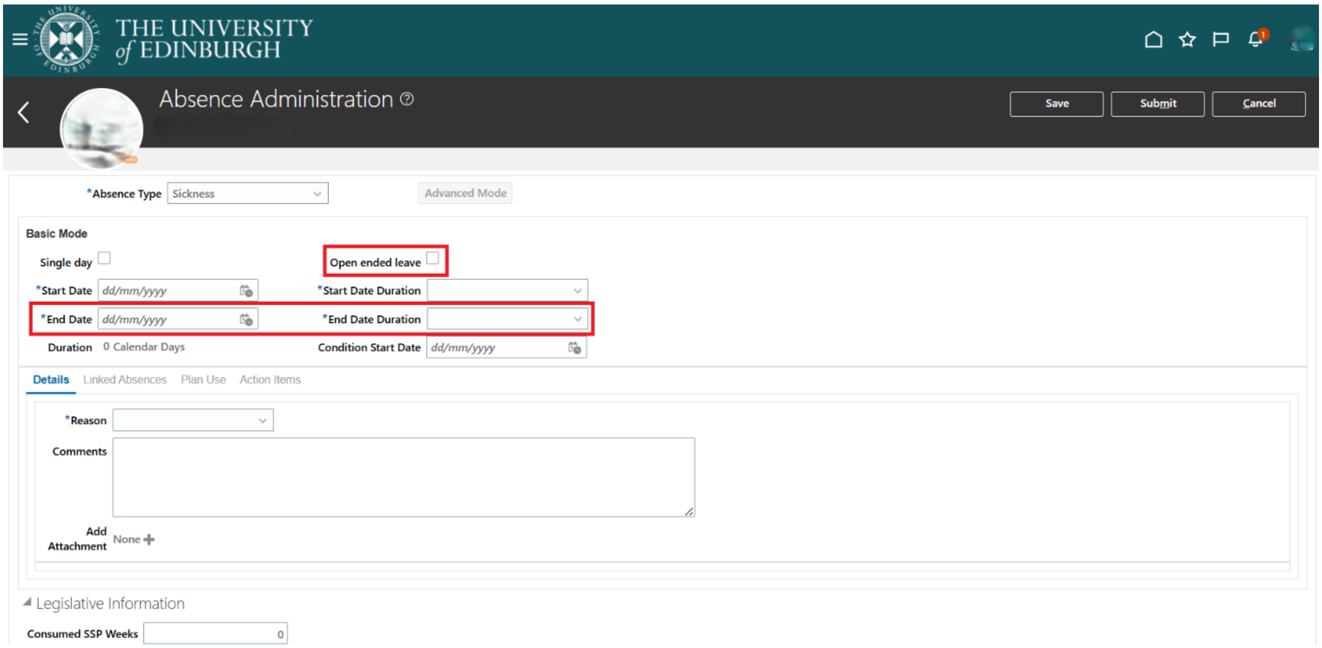


6. Enter the absence **End Date** and **Duration** where known. Alternatively, click on the **Open ended** toggle, if the return date is not known at this stage.

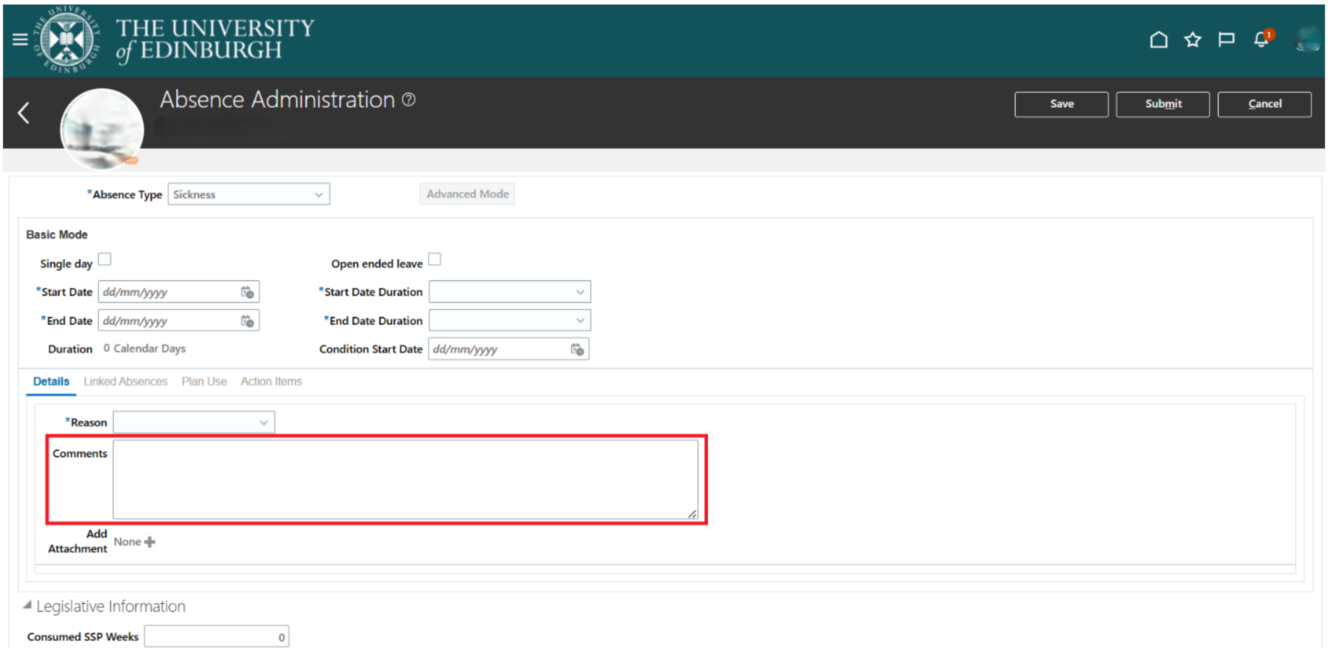
   Note: To amend a period of sickness absence please refer to the How to End an Open Sickness Absence section of this guide. Extensions or Amendments must not be added on as an additional absence.



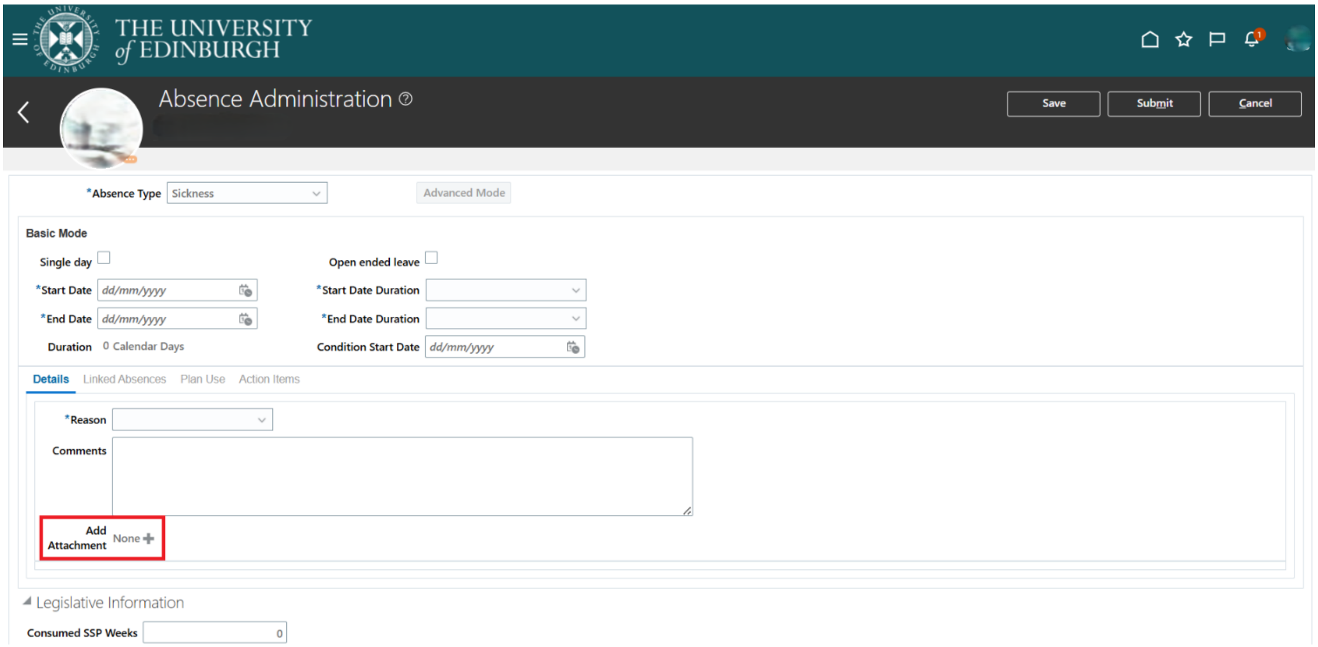
7. Select a relevant **Reason** for the sick leave from the list of options available in the drop-down menu. This field is mandatory.



8. Add any relevant **Comments** if applicable. The date of an informal back to work discussion can be captured here.



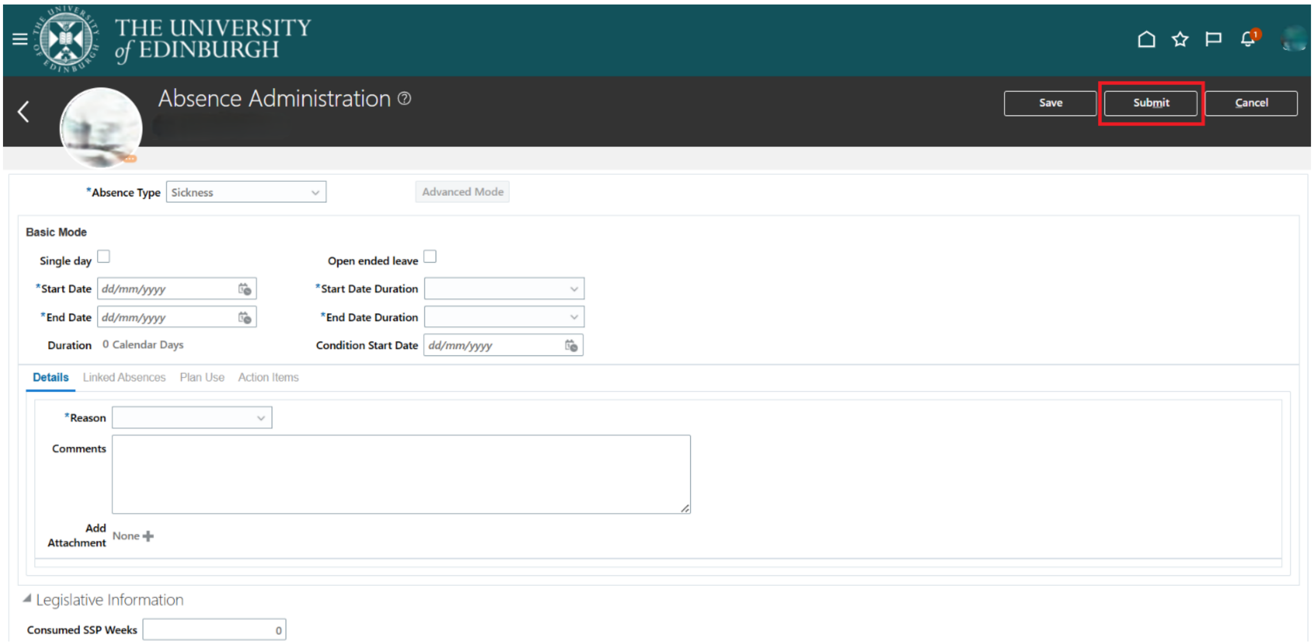
9. Click on **Add Attachment** to upload any relevant documents if applicable.



10. Please disregard the **Legislative Information** and **Descriptive Information** fields at the bottom the page – you do not need to complete these.

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

    Note: The **Save** button will save this absence in <u>draft state only</u>. Please ensure to **Submit** it once all the details have been added.



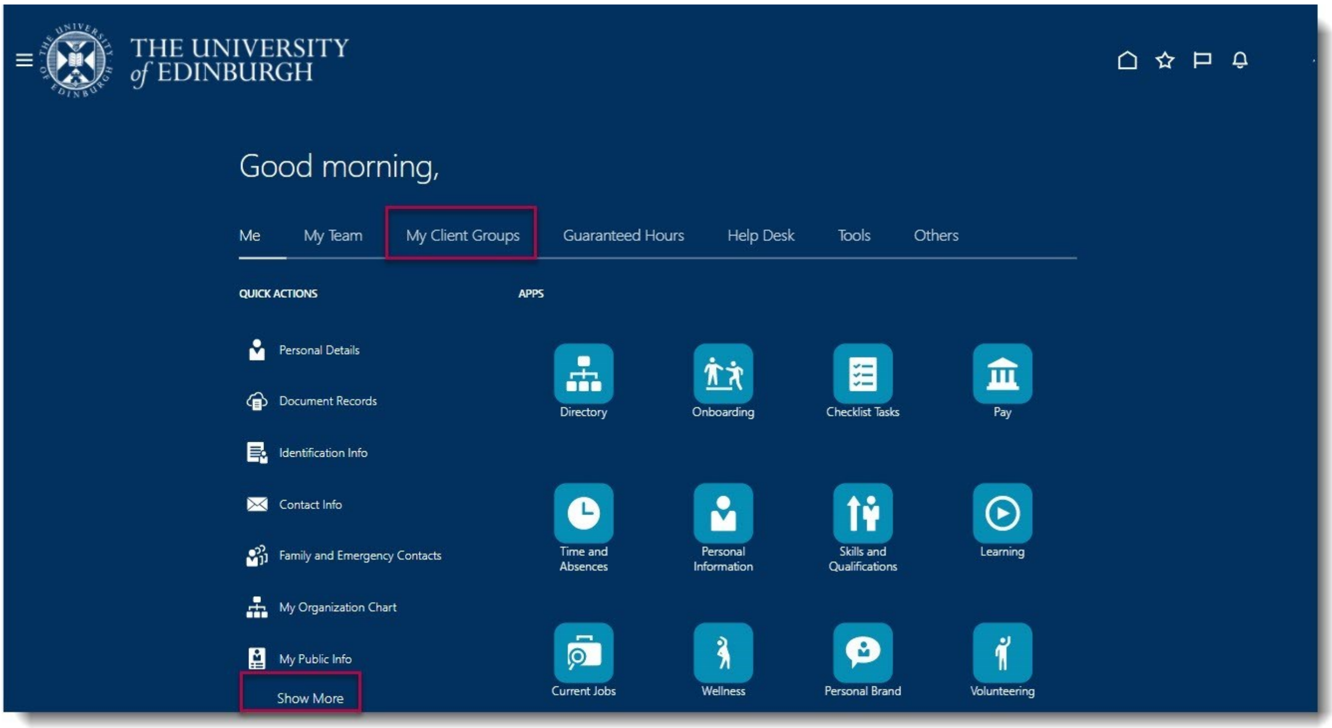
12. A notification will appear confirming the request has been submitted. Click **OK** to continue.

13. Following the recording of a sickness absence, the employee's 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

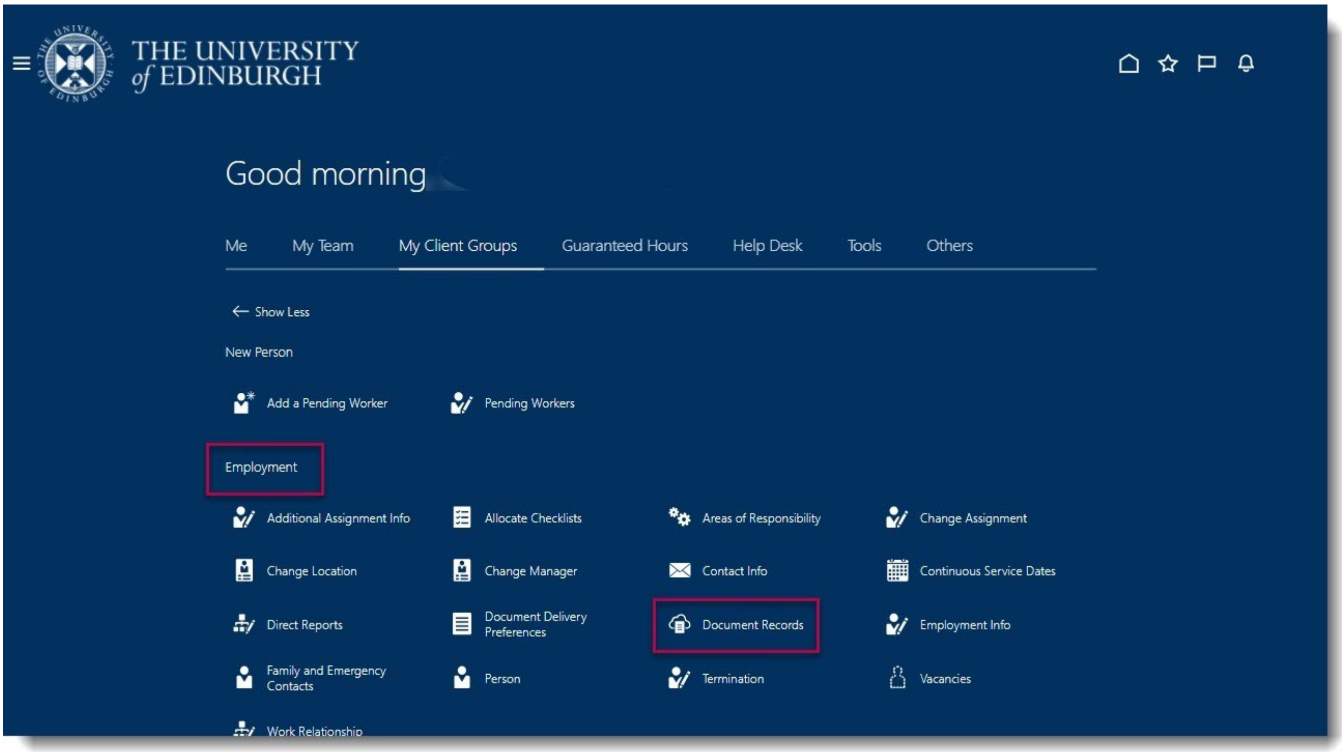
14. Where a sickness absence continues for less than 7 days but more than 4, an employee must supply a Self Certification for the absence, in line with the rules around Self Certification. For further details on this, please see the section, '<u>How to Add a Self Certificate/Return to Work Form for an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

How to Add a Self Certificate/Return to Work Form for an Employee

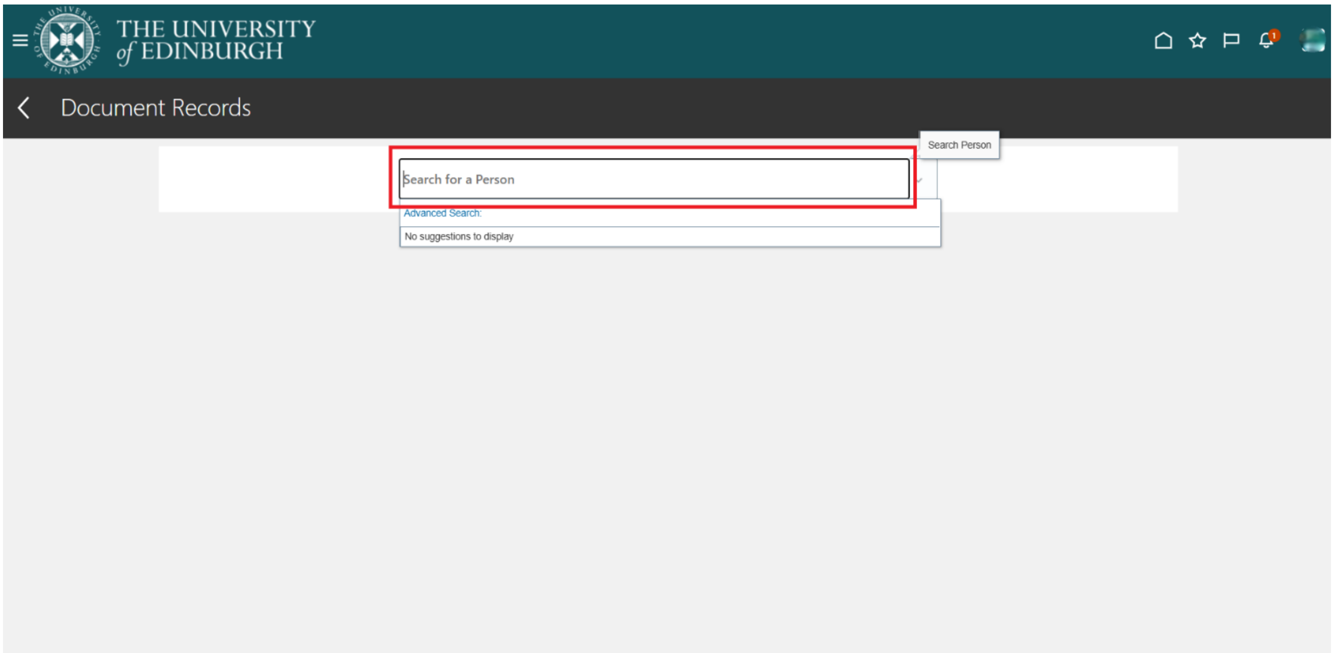
1. From the home page click on the **My Client Groups** tab and **Show More**.



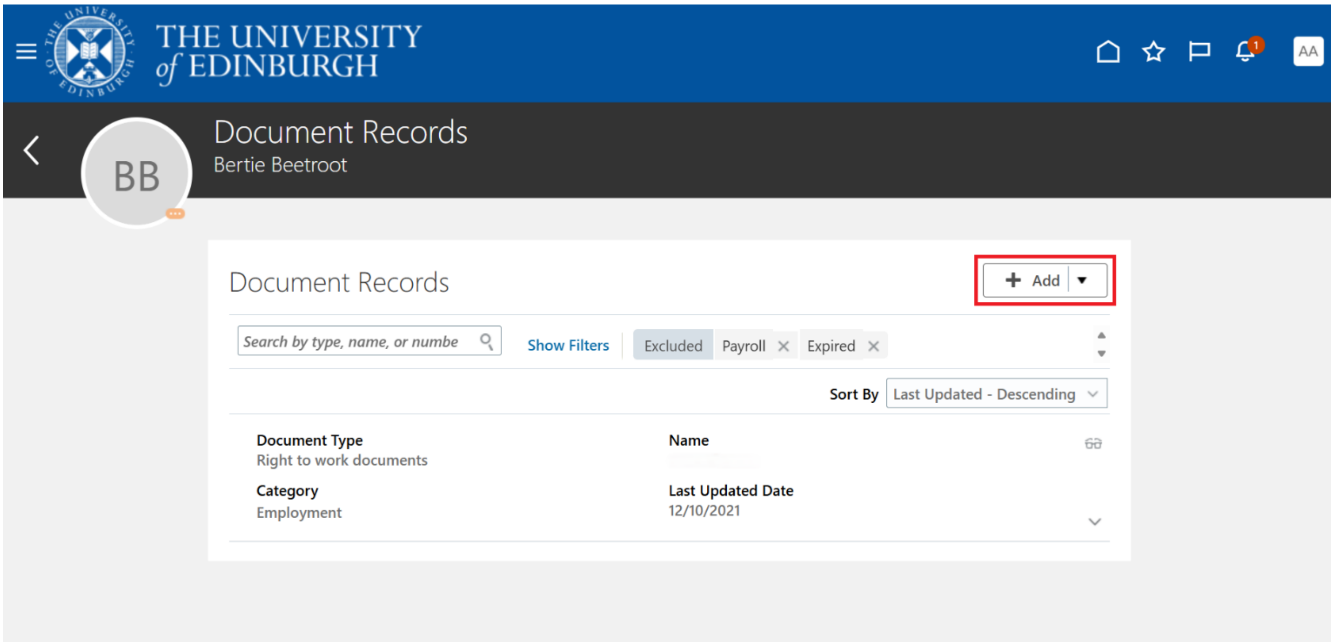
2. Under the **Employment** section, click on **Document Records**.



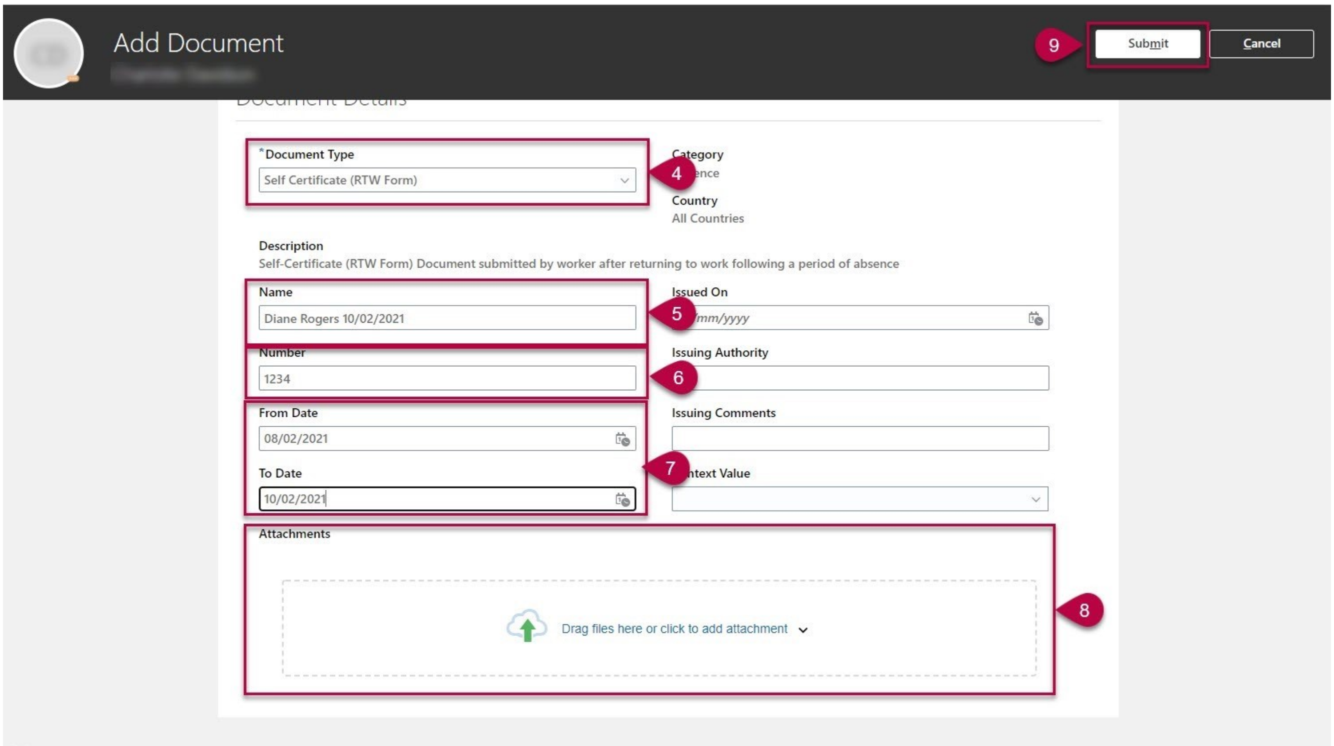
3. Search and then click on the name of the employee.



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



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



6. Enter the **Name**. This should be unique to the employee e.g. their name and the date.

7. 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).

8. Record the **From Date** and **To Date** that the form covers the employee for.

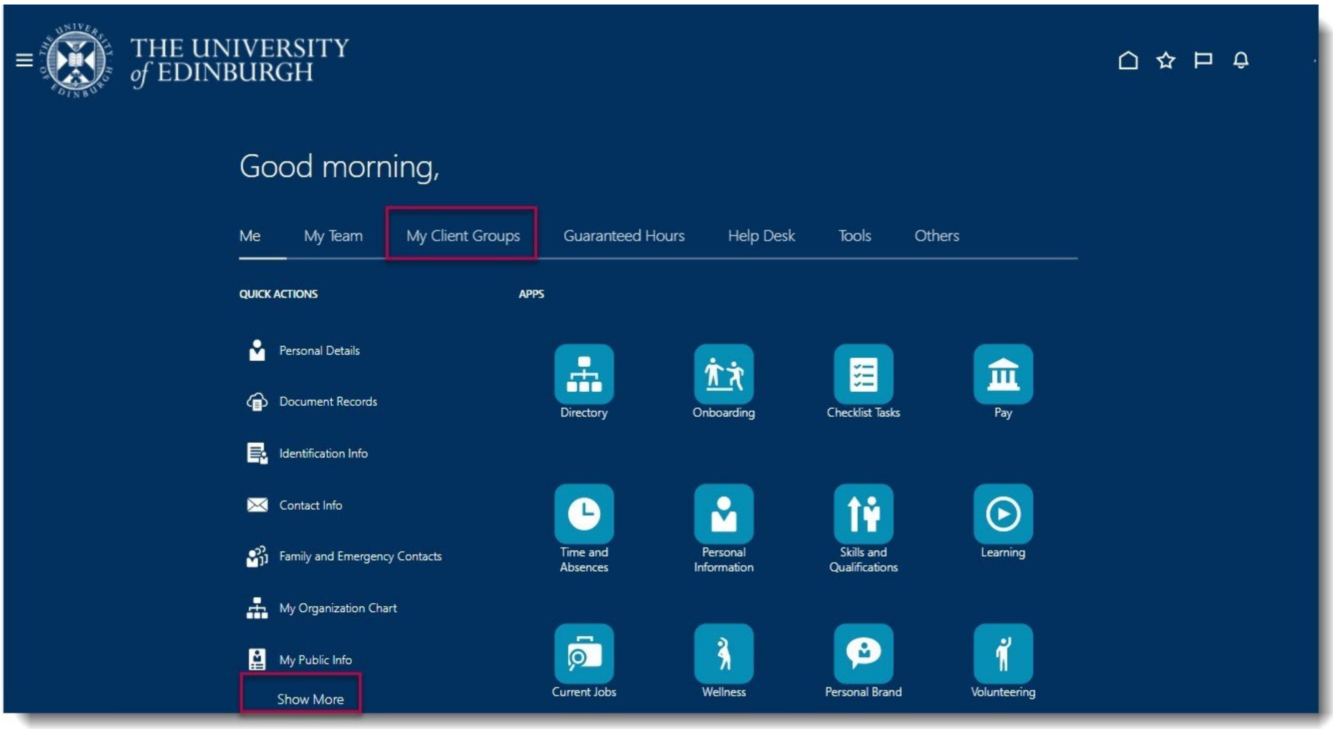
9. Drag the file into the **Attachments** box or alternatively click on the **Hyperlink** to upload the document from where it is saved to.

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

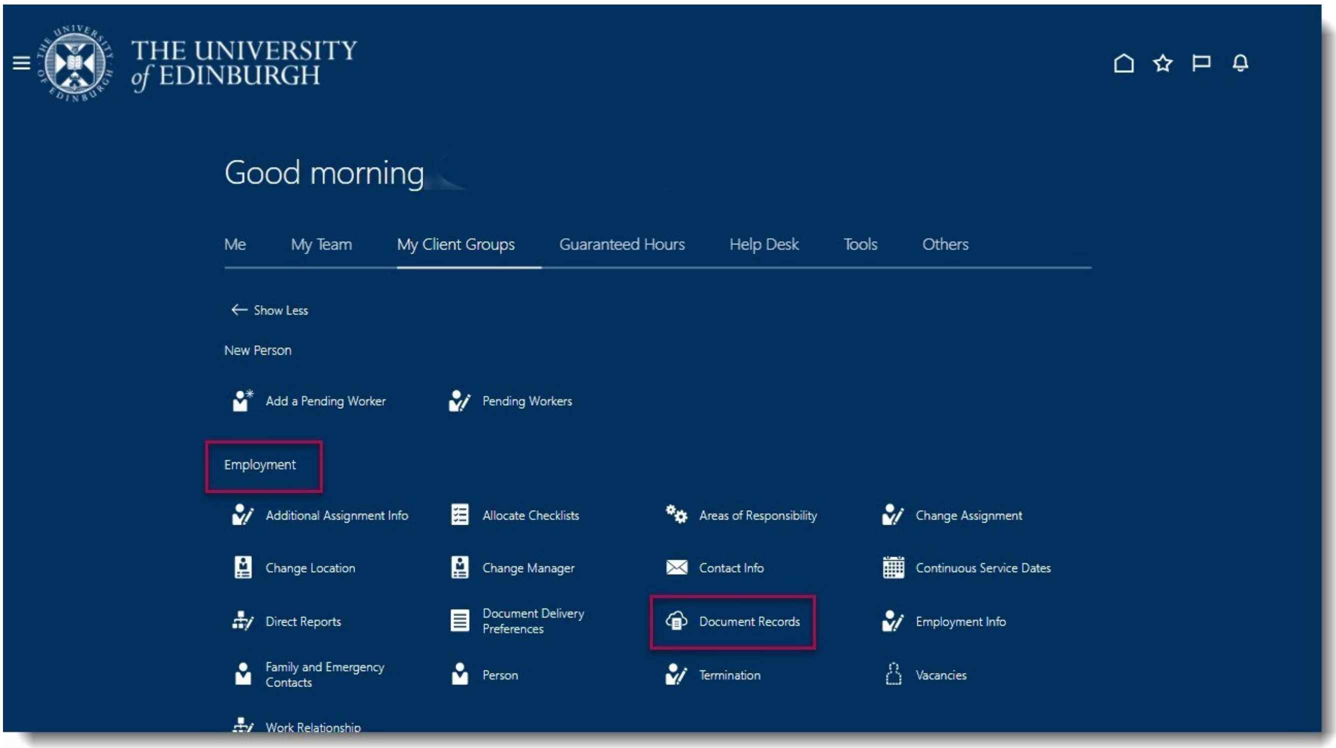
10. Click on the **Submit** button.

How to Add a Fit Note for an Employee

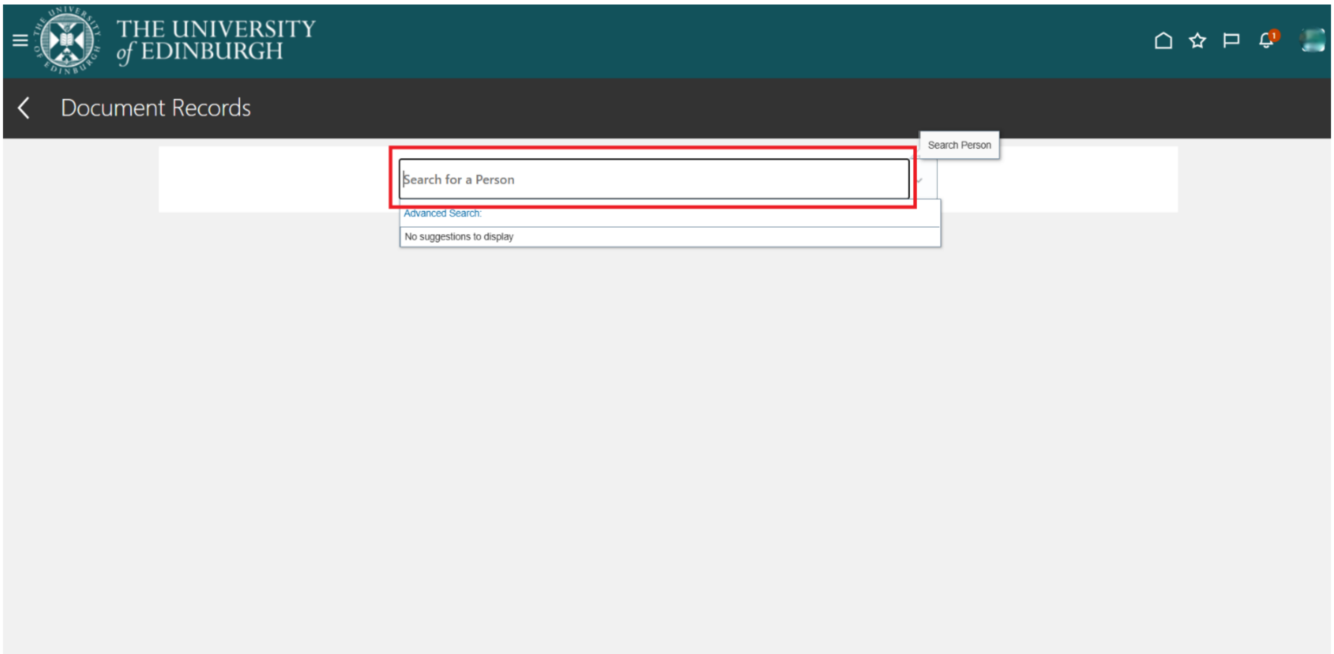
1. From the home page click on the **My Client Groups** tab and **Show More**.



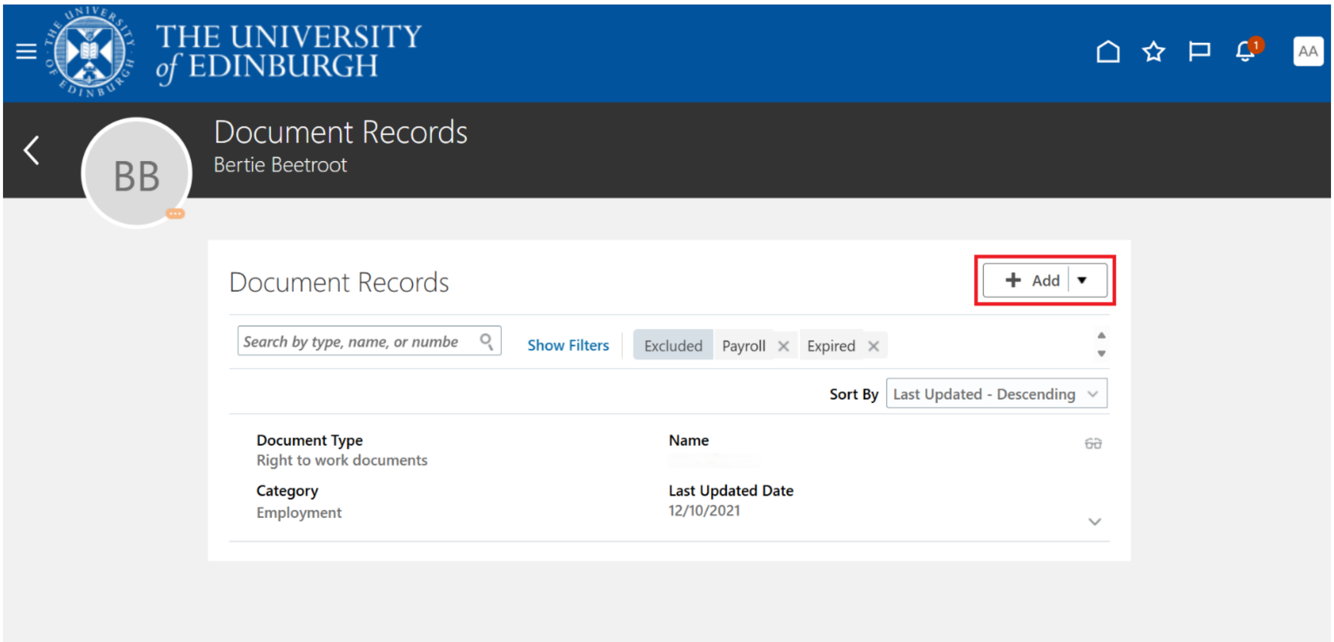
2. Under the **Employment** section, click on **Document Records**.



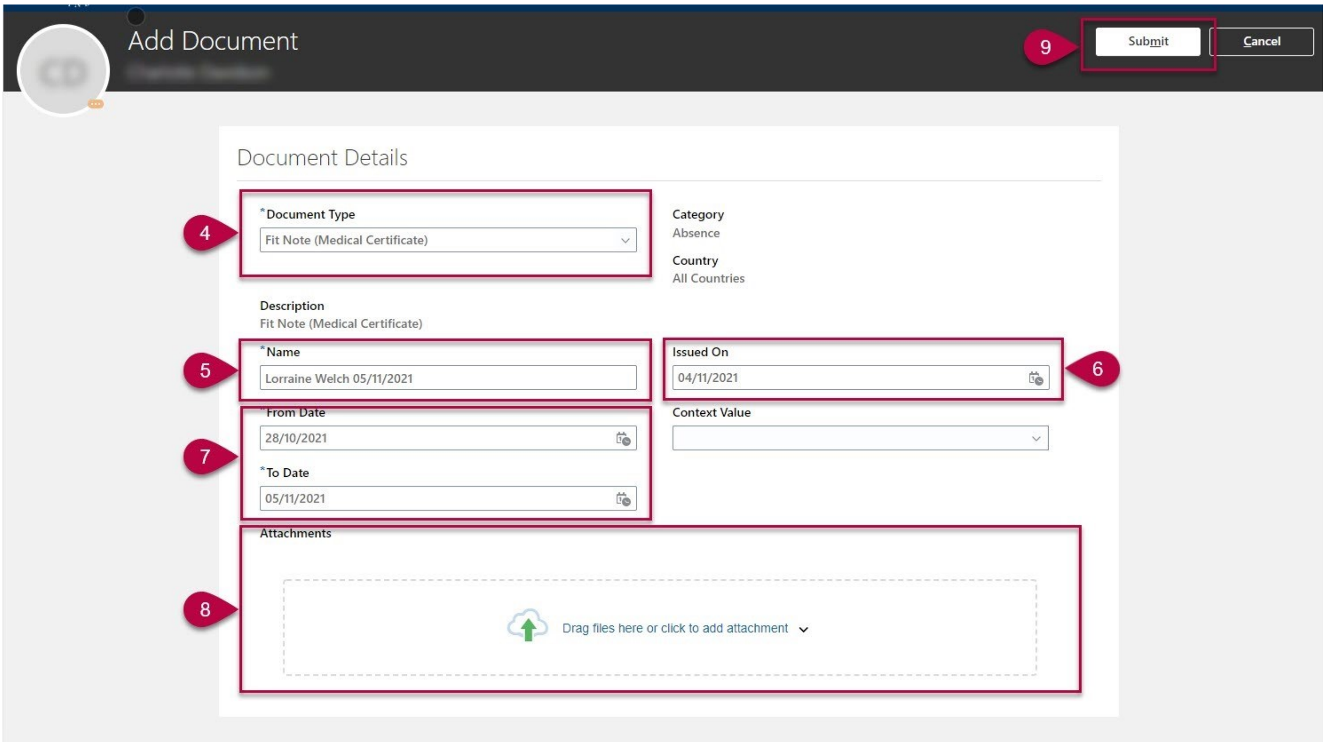
3. Search and then click on the name of the employee.



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



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



6. Enter the **Name**. This should be unique to the employee e.g. their name and the date.

7. Enter the date it was **Issued On**.

8. Record the **From Date** and **To Date** that the form covers the employee for.

9. 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.

10. Click on the **Submit** button at the top of the page.

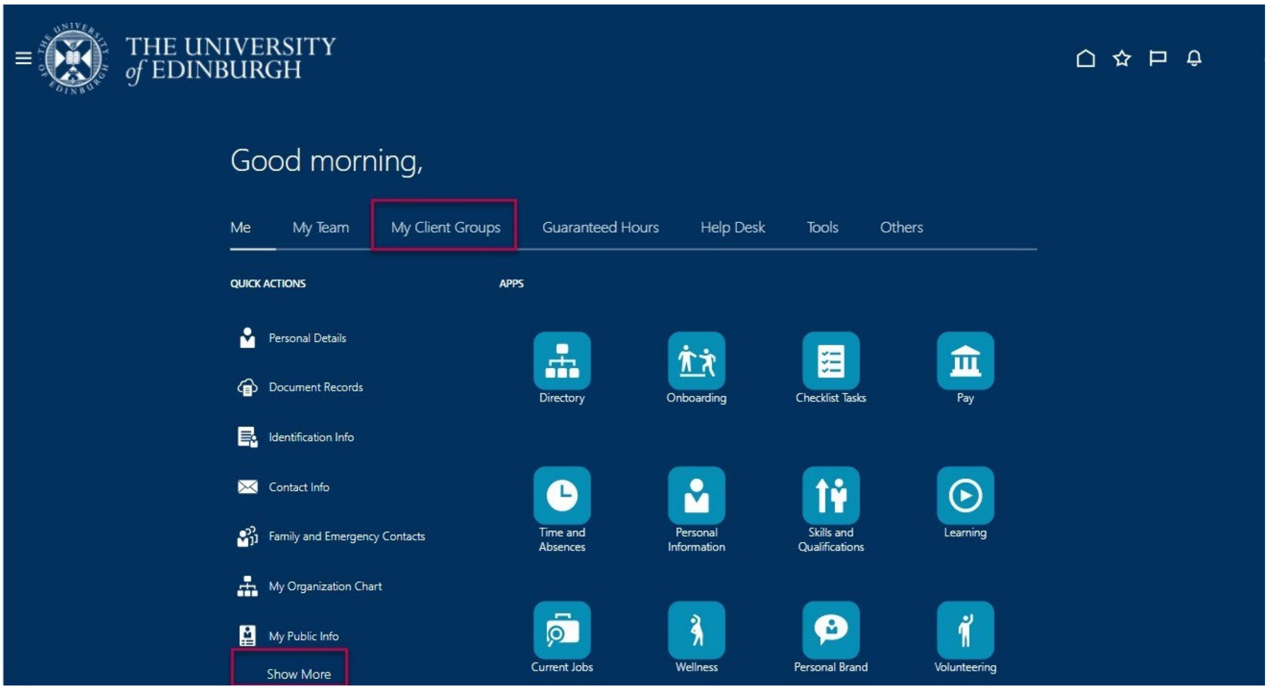
11. Return the original Fit Note back to the employee.

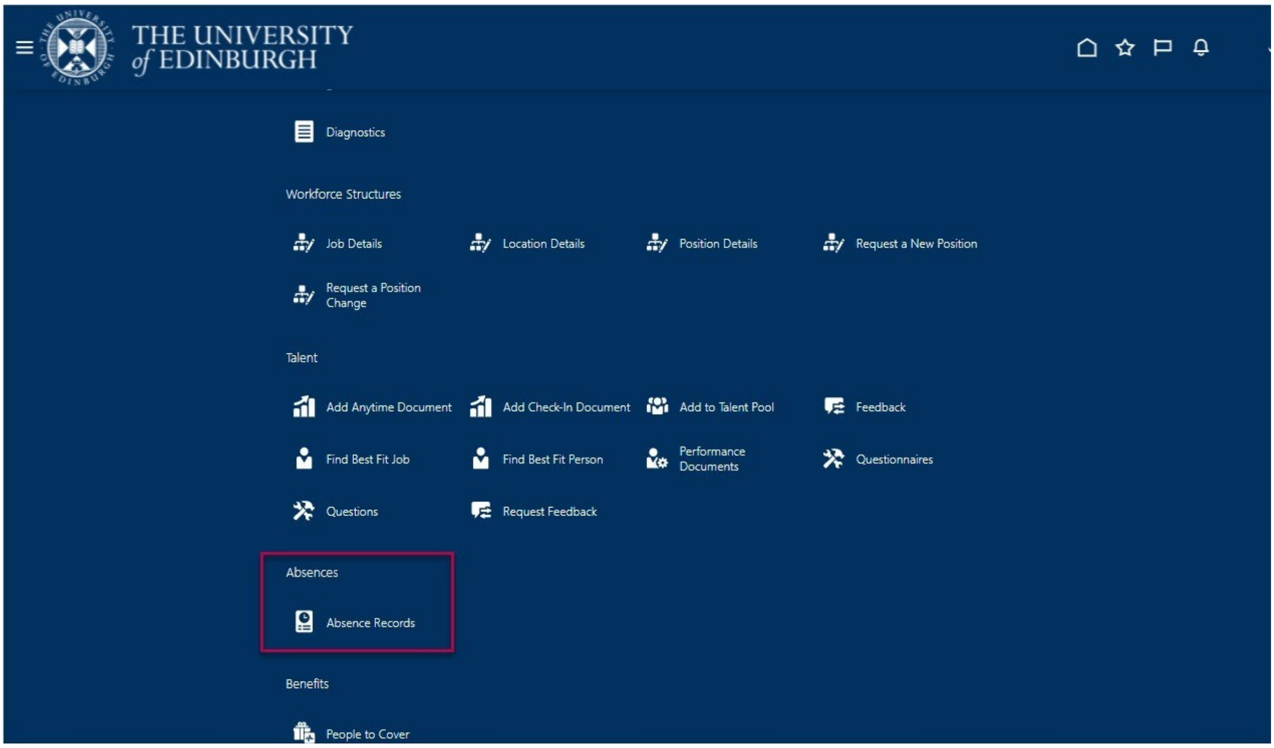
How to Log a Phased Return for an Employee

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 SDA Guide to Leave.

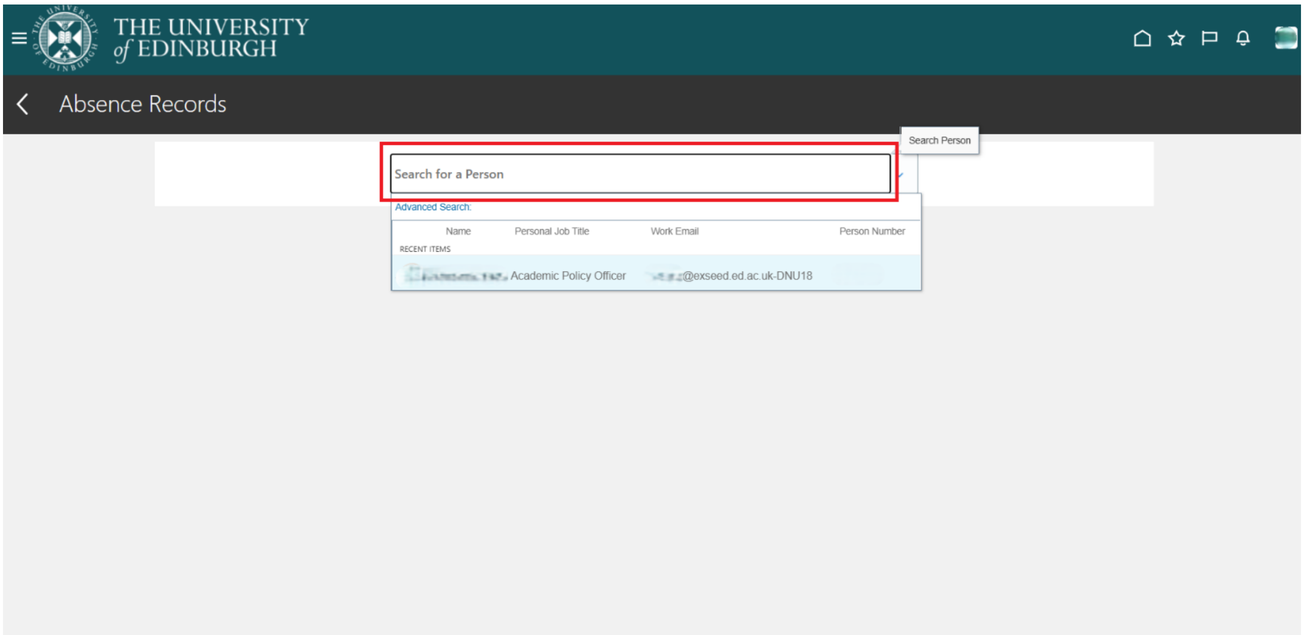
Note: An employee's pay will not be affected by the Phased Return absence type.

1. From the home page Click on **My Client Groups** tab, **Show More** and select the **Absence Records** tile.

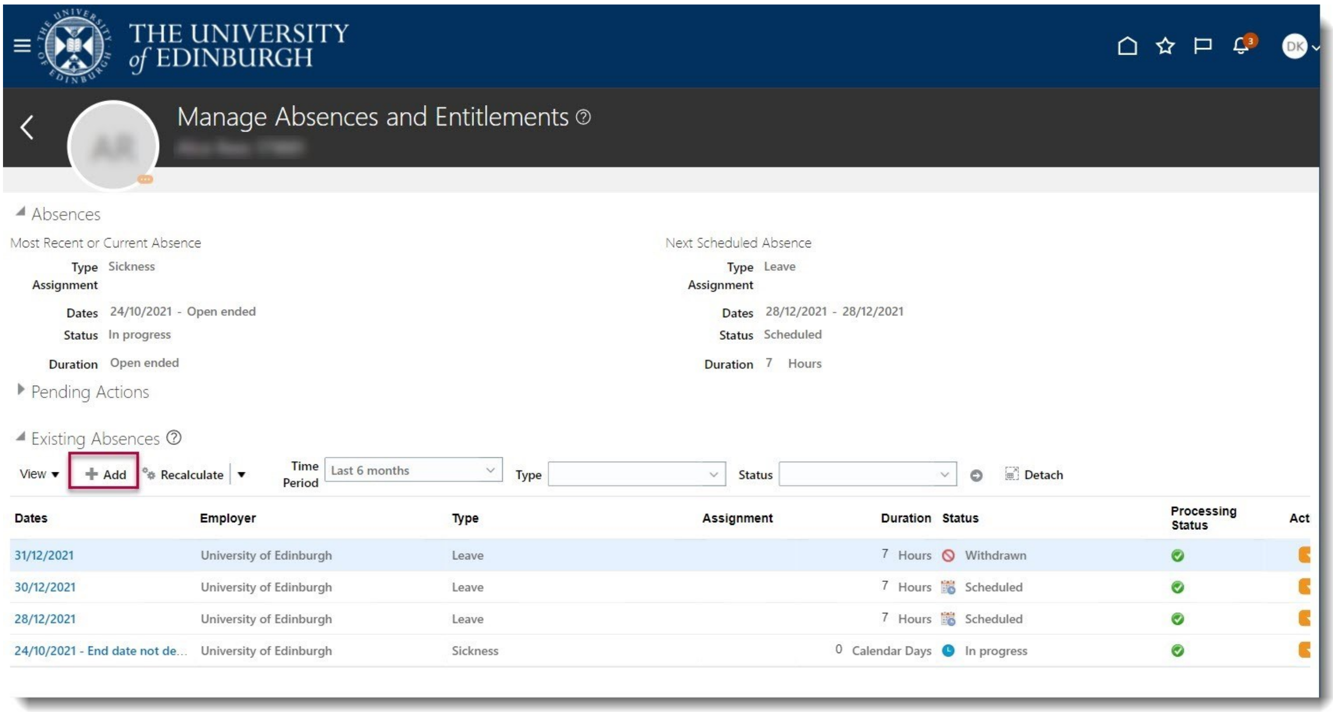




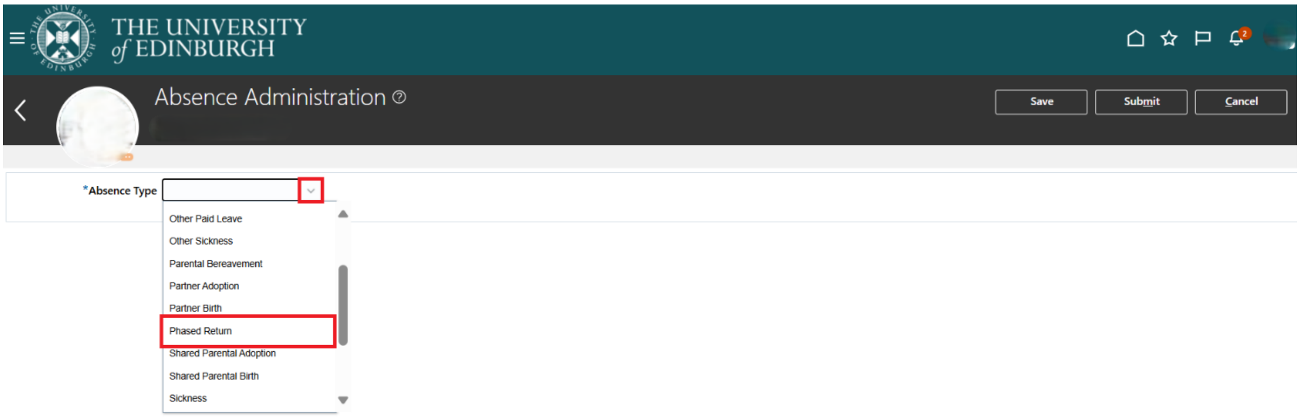
2. Search for appropriate employee and click on their name to select.



3. Under **Existing Absences**, click on the +**Add** button.

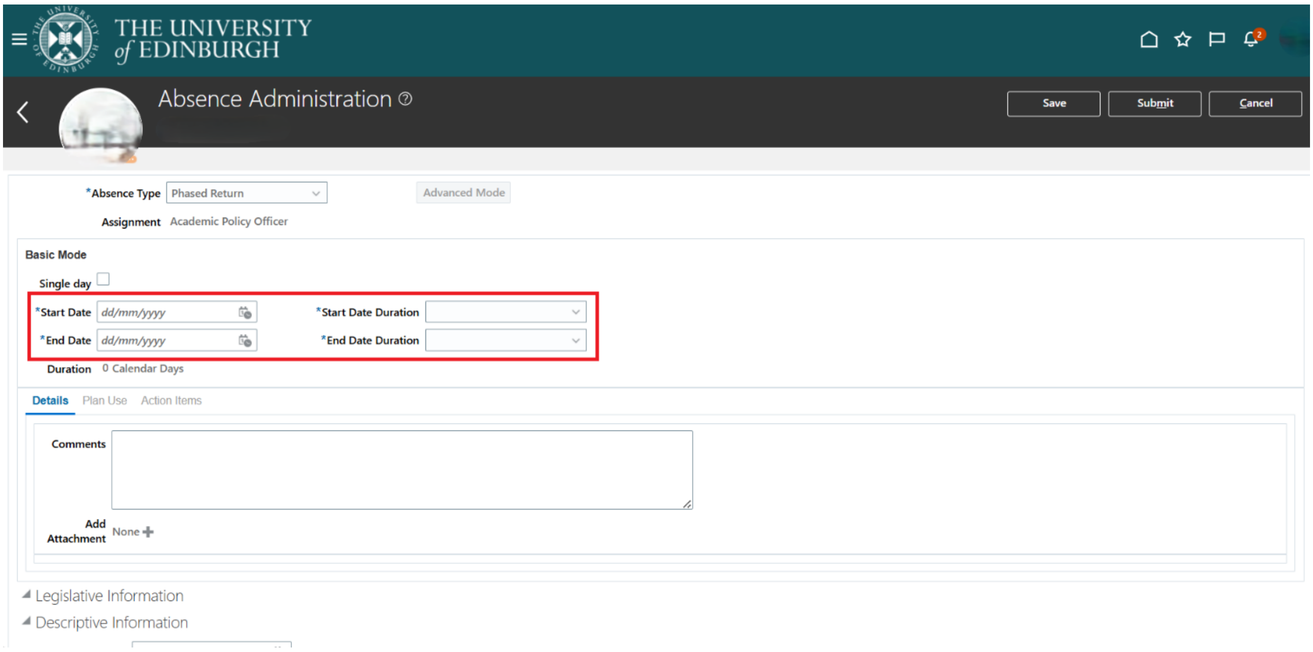


4. Select **Phased Return** from the **Absence Type** drop-down menu.

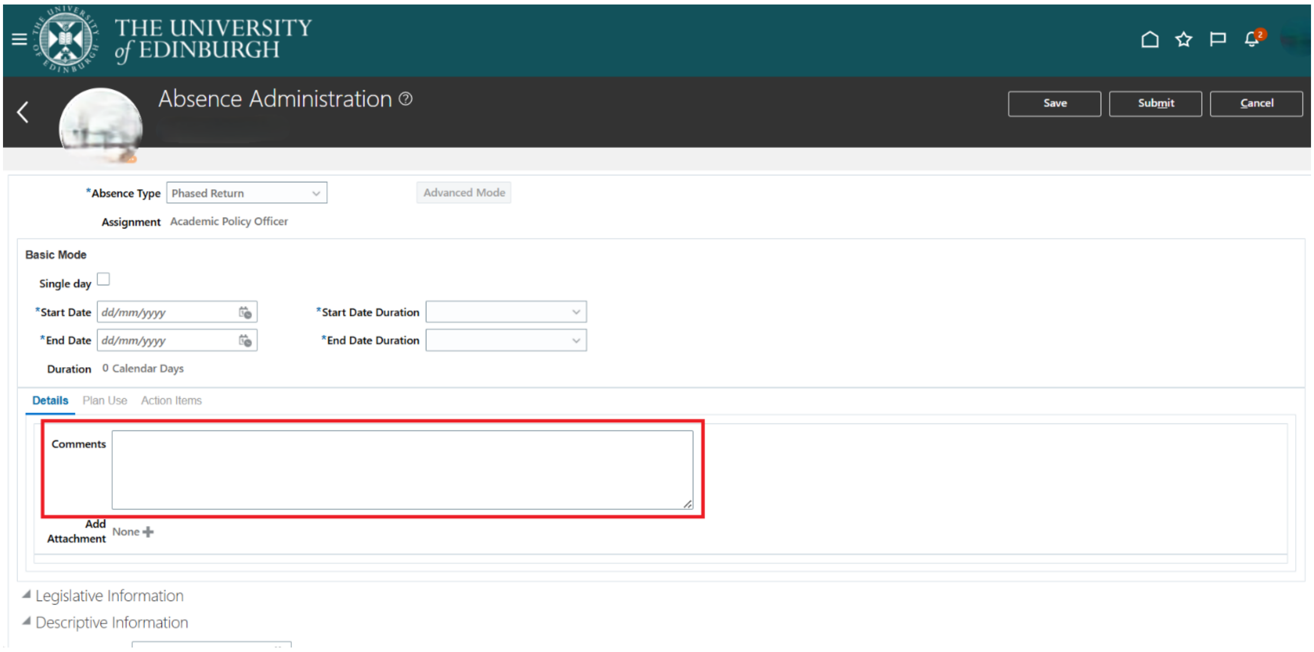


5. Enter the **Start Date**, **Start Date Duration** (Full Day/Half Day), **End Date** and **End Date Duration** (Full Day/Half Day).

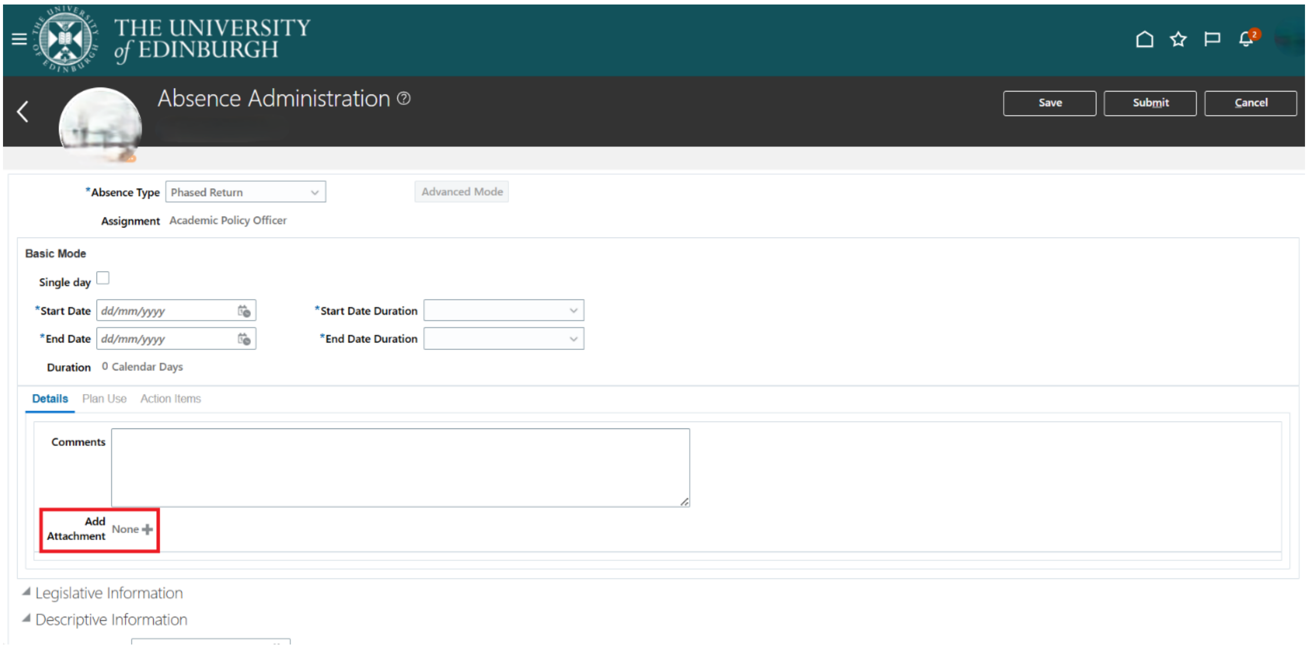
   Note: Should the employee wish to continue the conditions of the phased return past the standard period stated within the Absence policy, there is the option to process a contract amendment for this change. Please review the absence policy for further information.



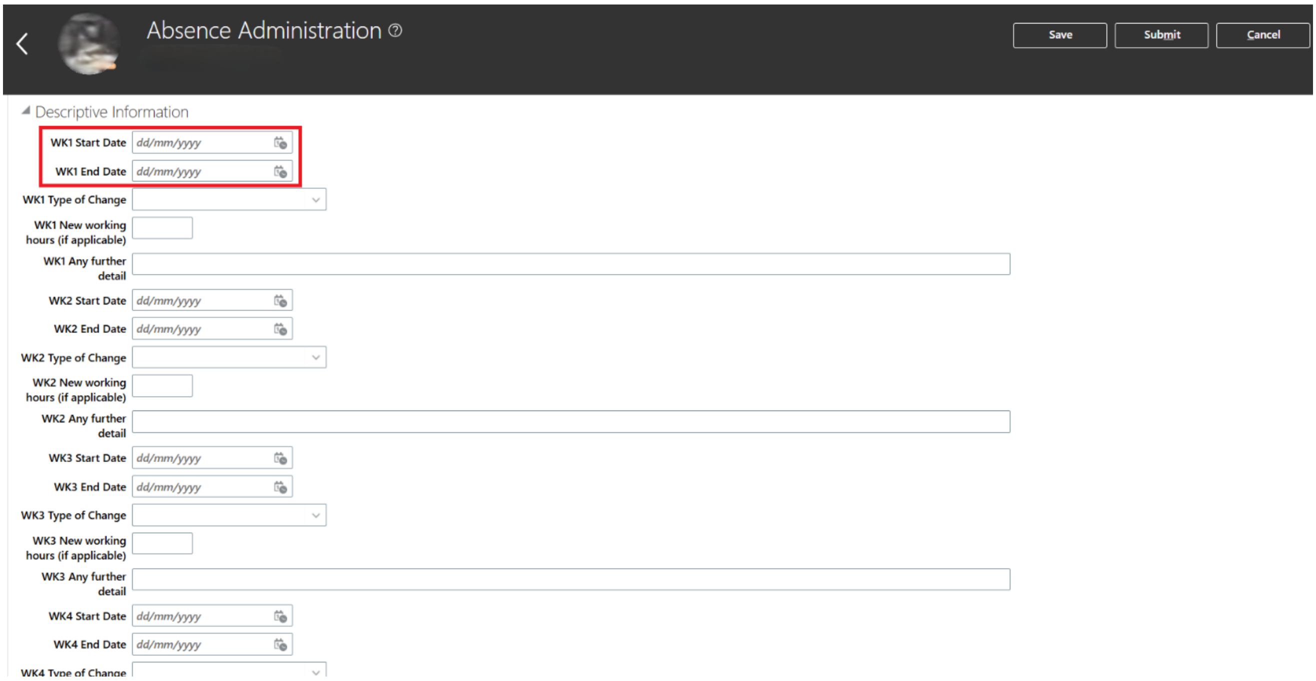
6. Add any relevant **Comments** if applicable.



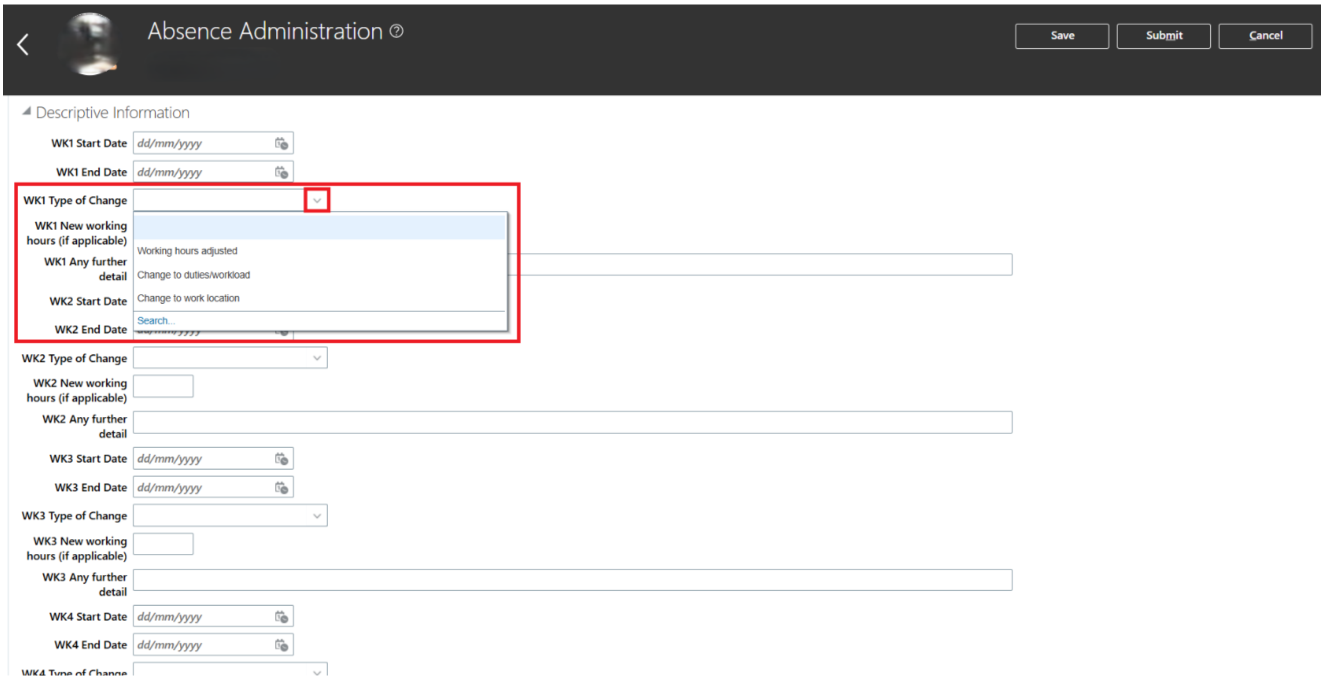
7. Click on **Add Attachment** to upload any relevant documents.



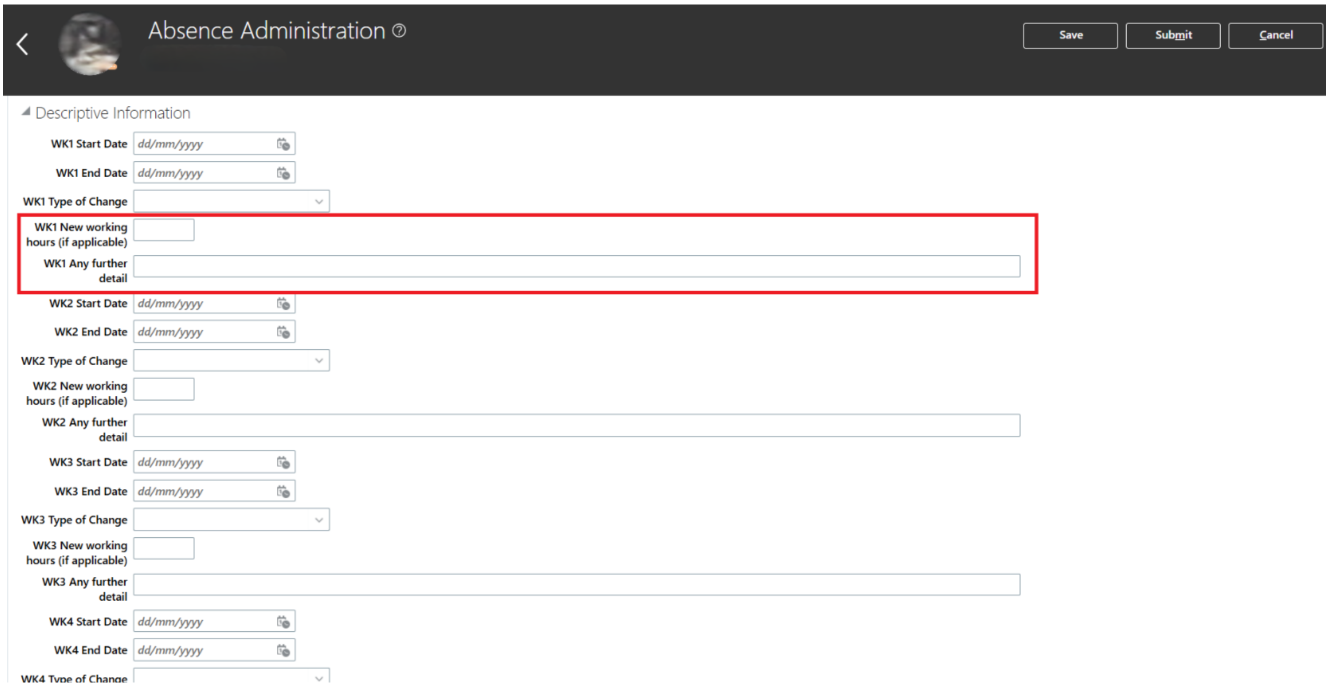
8. Against the **Descriptive Information** section, enter the start and end date of the first week of the phased return arrangement in the **WK1 Start Date** and **WK1 End Date** fields.



9. 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**.



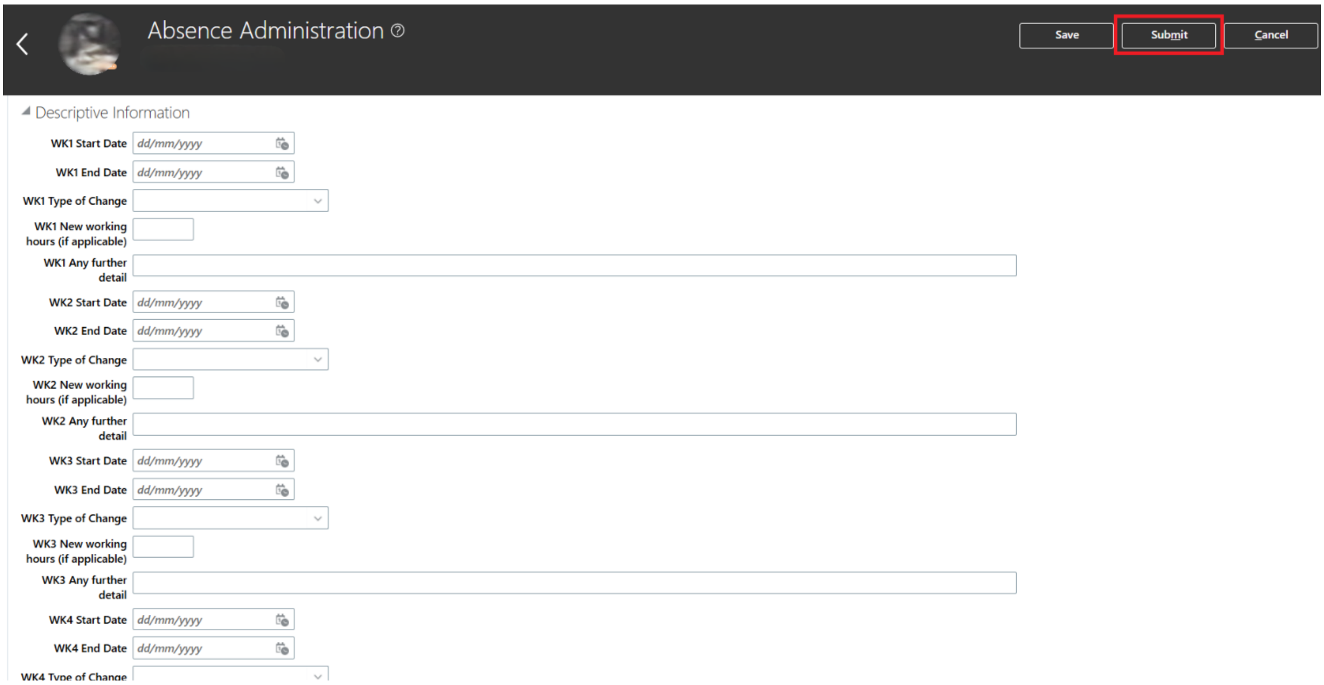
10. Capture the **WK1 New working hours (if applicable)** to record the agreed work pattern for the week. Where **Change to duties/workload** or **Change to workload** options were instead selected, record the relevant details in the **WK1 Any further detail** field.



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

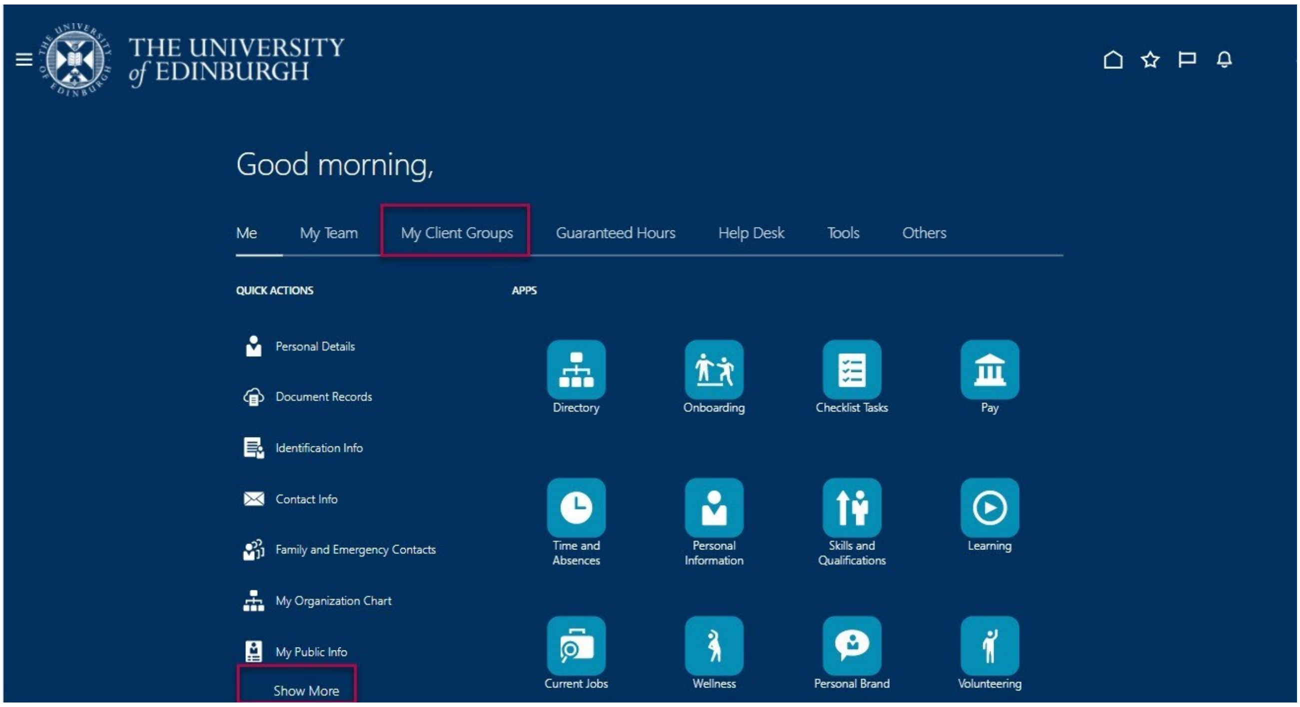
12. Click on the **Submit** button at the top of the page to complete.

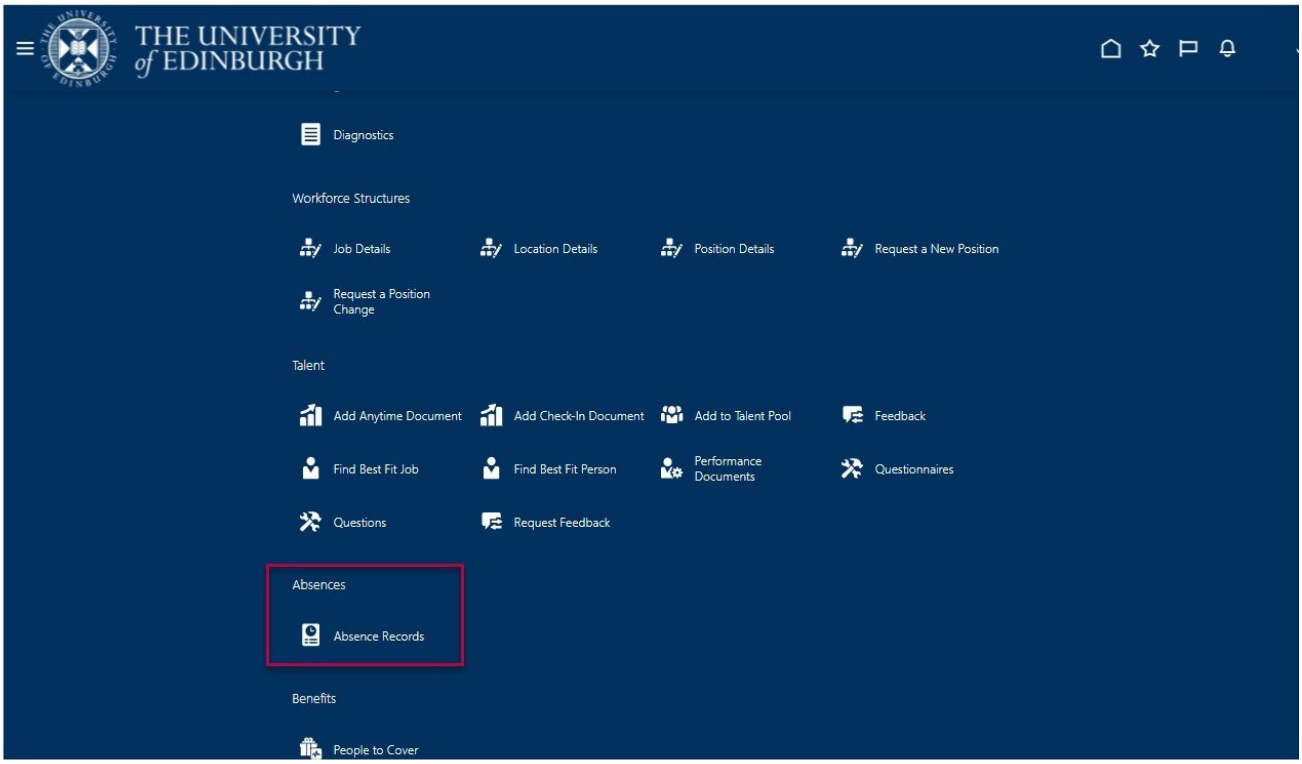
    Note: The **Save** button will save this absence in draft state only. Please ensure to **Submit** it once all the details have been added.



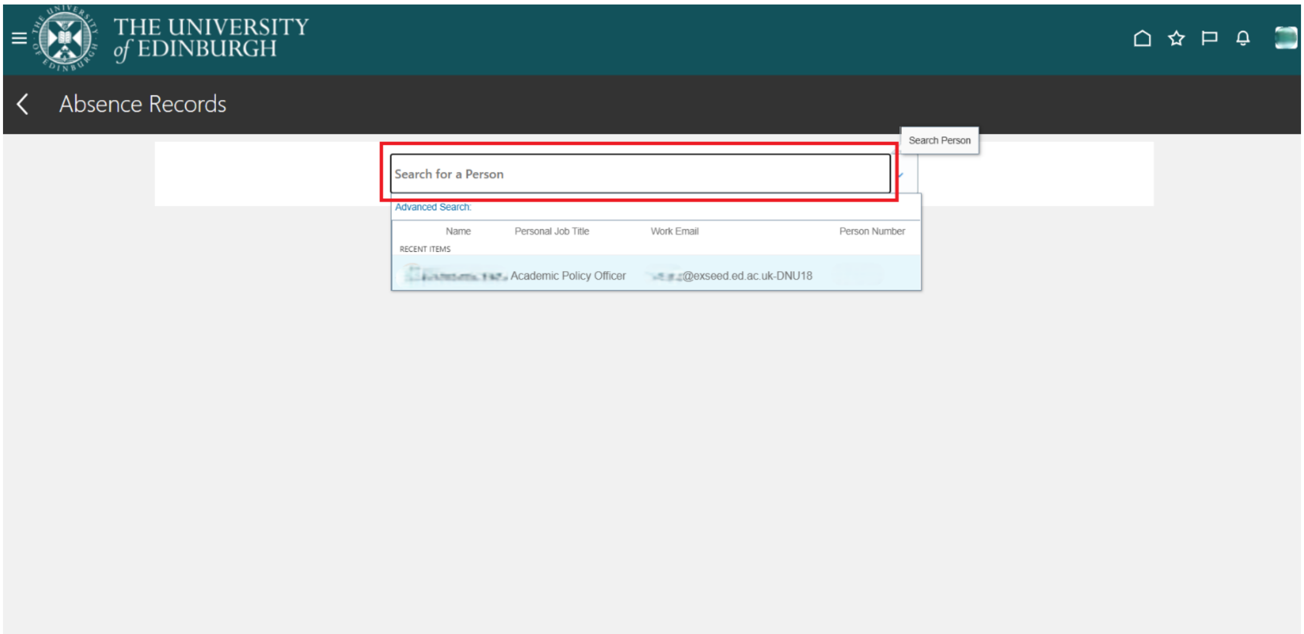
How to End an Open Sickness Absence

1. From the home page Click on **My Client Groups** tab, **Show More** and select the **Absence Records** tile.

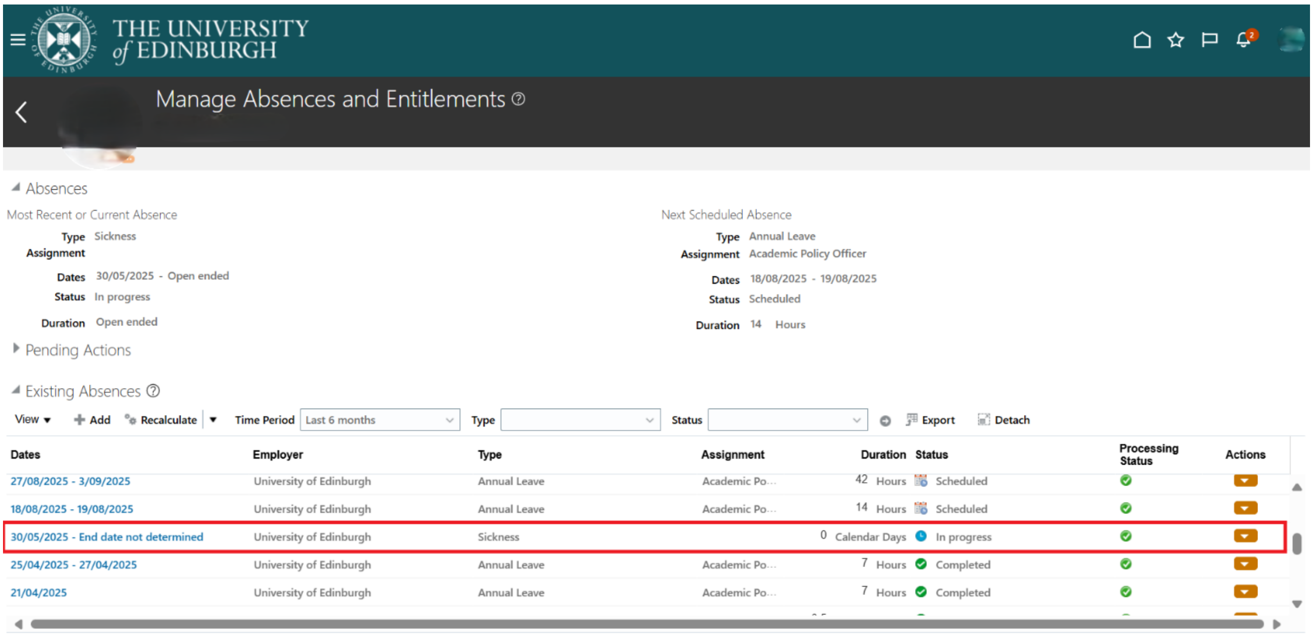




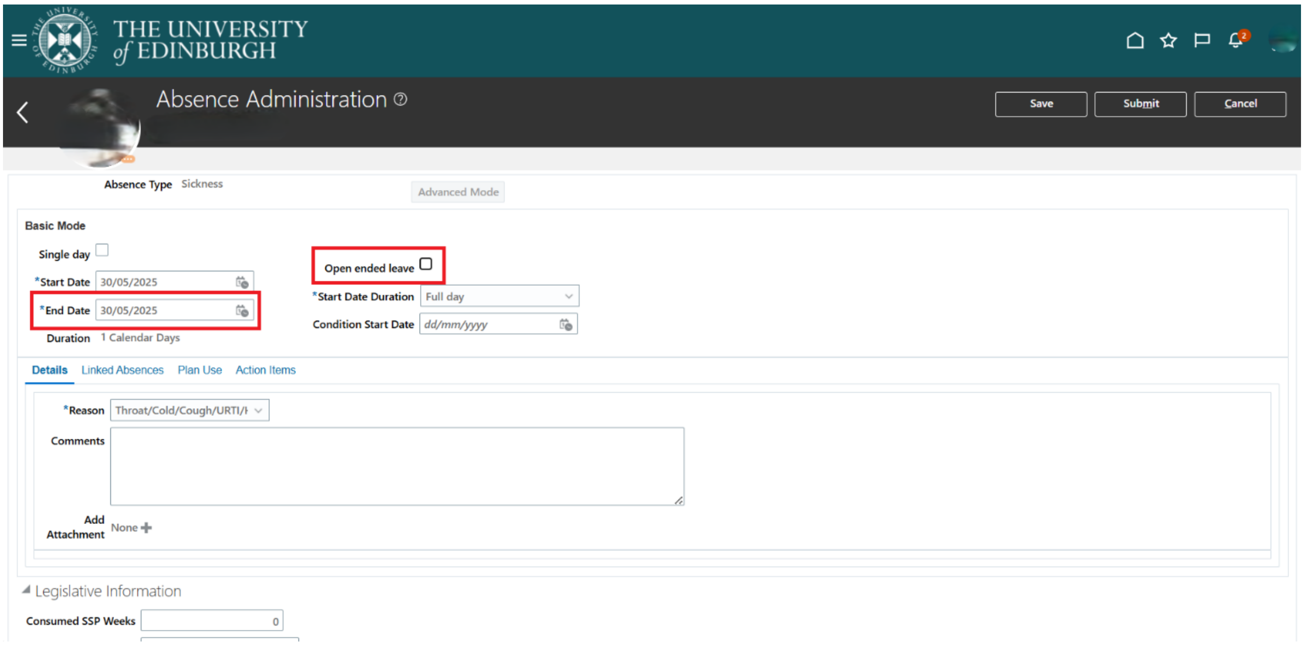
2. Search for the employee and select their name to continue.



3. Click on the open sickness absence dates (blue text) to open the absence.

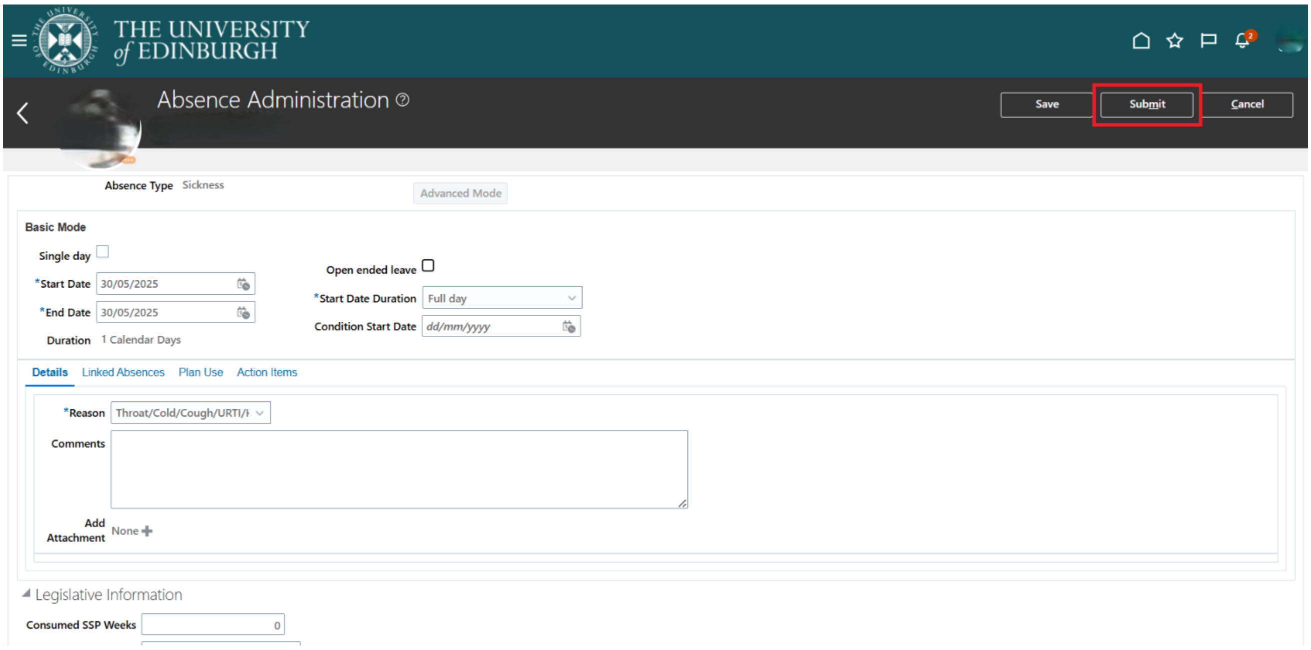


4. Untick the **Open ended** checkbox to remove the tick and enter the absence **End Date**.



5. Click on the **Submit** button at the top of the page to complete the absence.

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



Version History

Version	Date	Description	Approved By
1.1	N/A	Draft	
2.0	09 June 2025	Updated guide to new format and separated from Line Manager guide to sickness absence.	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.