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 in 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](#).

In Brief…

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.

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.

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:
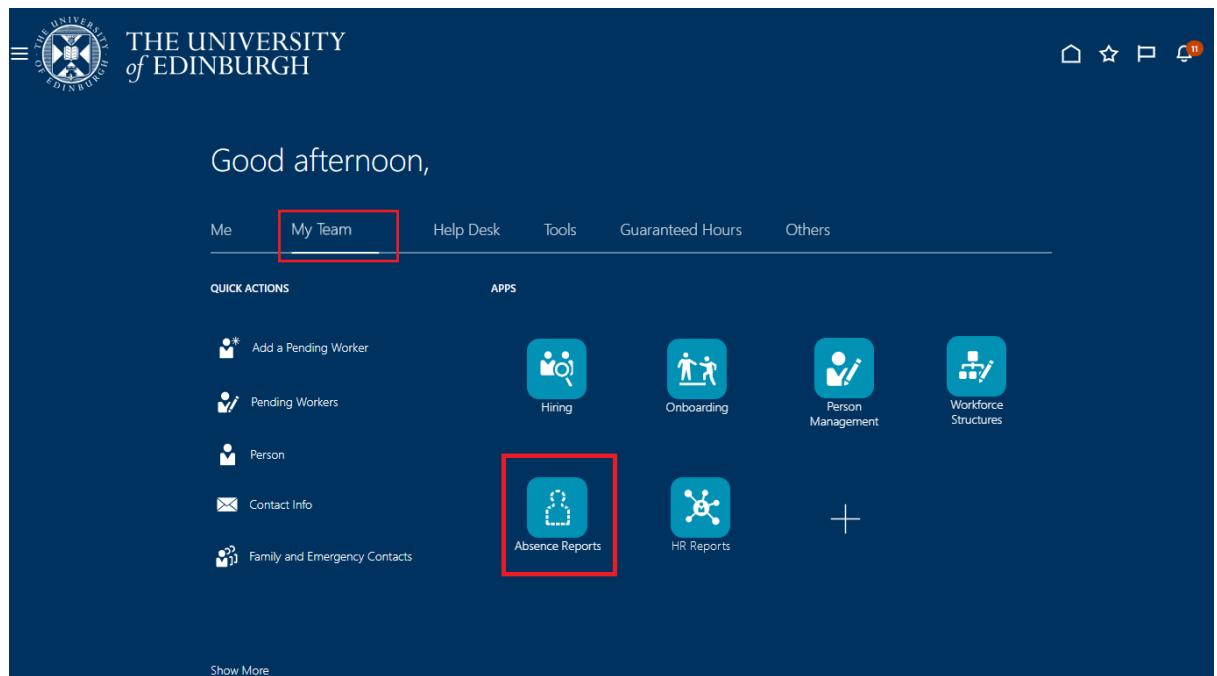
- Click on **My Client Groups** if you are a Senior Manager or SDA:
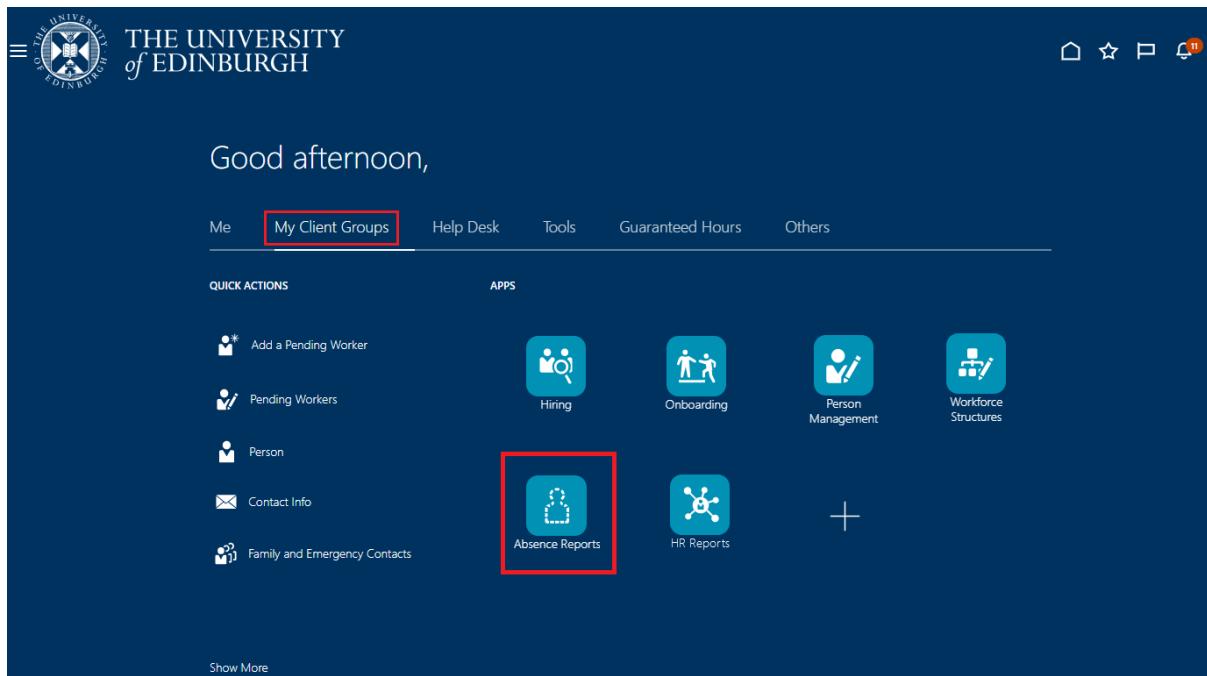
2. Click the **Absence Reports** tile

    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.

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

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.

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'.

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

Annual leave details – Filters	Data
•Calendar date – between 2 dates •Approval status •Employee Number •College/Professional Service Group •School/Planning Unit •Department	Person Number Assignment Number First Name Preferred name Last Name College/Professional Service Group School/Planning Unit Department Personal Job Title Worker Category Assignment Category Person Type Weekly working hours Grade Job Family Job Function Line Manager Assignment Status Approval Status Absence Status Absence Type Date Day of the week 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, 31st December.

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

Annual leave accrual – Filters	Data
•Employee Number •College/Professional Service Group •School/Planning Unit •Department •Assignment Status Annual leave accrual report shows balance as at 31 December for the current annual leave year. *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	Person Number Assignment Number First Name Preferred Name Last Name Department 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)

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.

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:

The Family Friendly Leave report has the following filters and data available:

Family Friendly leave – Filters	Data
•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/ Professional Service Group
•School/Planning Unit	School/Planning Unit
•Department	Department
•Sub Department (input only for MVM College)	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:

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

Other Paid Leave – Filters	Data
•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/Professional Service Group
•School/Planning Unit	School/Planning Unit
•Department	Department
•Sub Department (input only for MVM College)	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 Hours)

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
•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/Professional Service Group
•School/Planning Unit	School/Planning Unit
•Department	Department
•Sub Department (input only for MVM College)	Sub Department (input only for MVM College)
	Personal Job Yitle
	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)

Unpaid Leave Report

The 'Unpaid Leave' tab displays the following information.

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

Special Paid Leave – Filters	Data
•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/Professional Service Group
•School/Planning Unit	School/Planning Unit
•Department	Department
•Sub Department (input only for MVM College)	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 Hours)

Sickness Absence Report

The 'Sickness Absence' tab displays the following information:
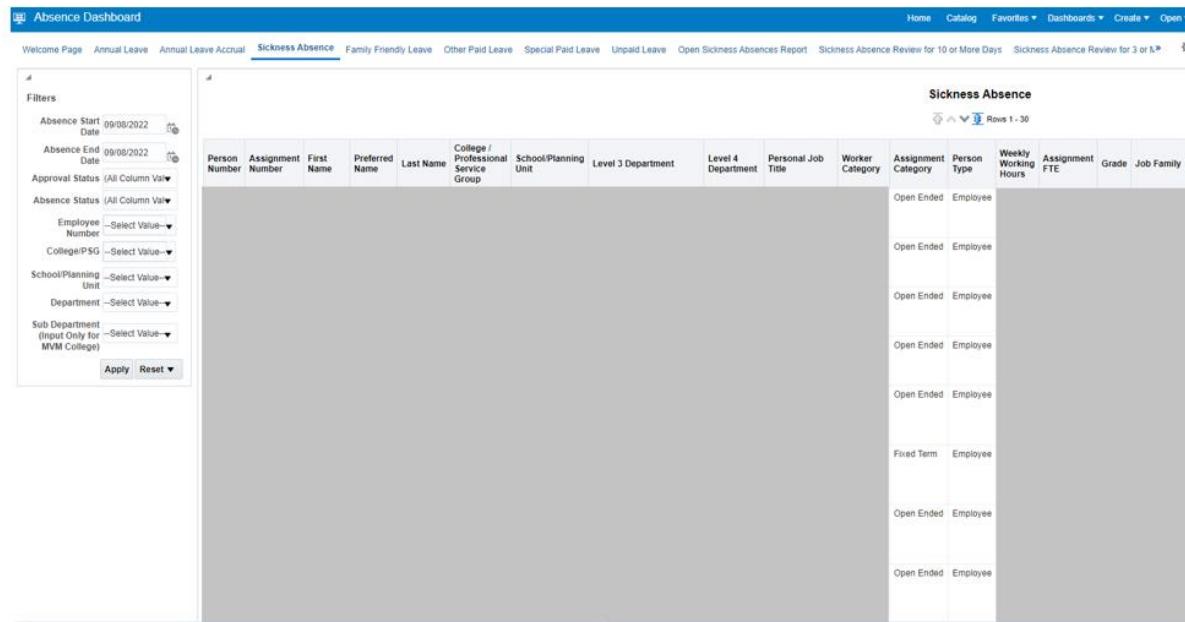
The Sickness Absence report has the following filters and data available:

Sickness absence leave – Filters	Data
•Absence start date •Absence end date •Approval status •Absence status •Employee Number •College/Professional Service Group •School/Planning Unit •Department •Sub Department (input only for MVM College)	Person Number Assignment Number First Name Preferred name Last Name College/PSG School/Planning Unit Department 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 in the Line Manager Guide to Sickness Absence / SDA Guide to Sickness Absence, under the Absence section of the People and Money Guides.

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 to Absence and Leave, under the Absence section of the People and Money Guides.
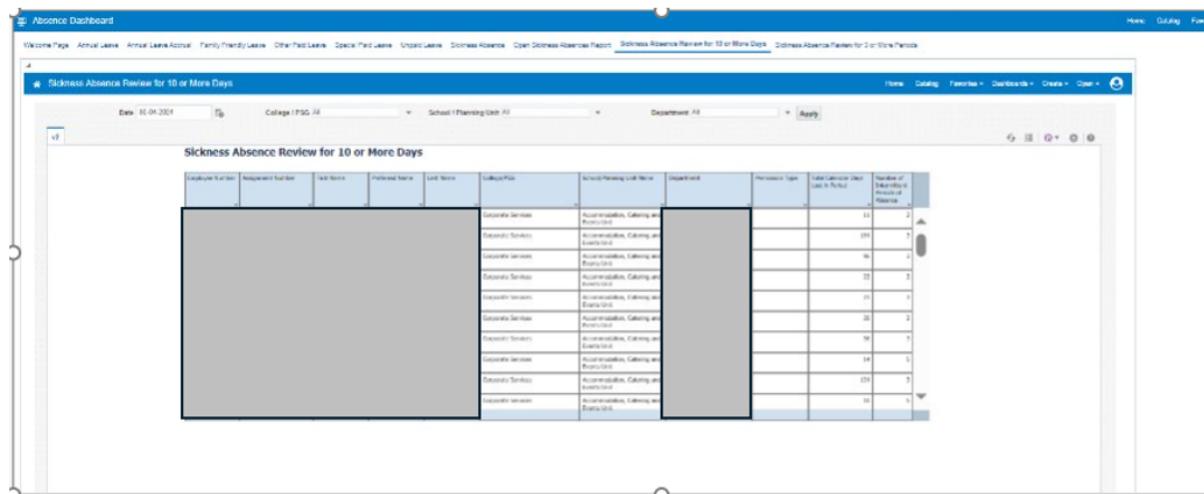
The filters and data available on this report are:

Sickness absence leave – Filters	Data
•Date (defaults to last date of previous month to align with report sent to Line manager by email) •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 Total calendar days lost in a period

	Number of intermittent periods of absence

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.

The filters and data available on this report are:

Sickness absence leave – Filters	Data
•Date (defaults to last date of previous month to align with report sent to Line manager by email) •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 Total number of Absences Total Calendar Days Lost in period

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 down to the bottom and to the right).
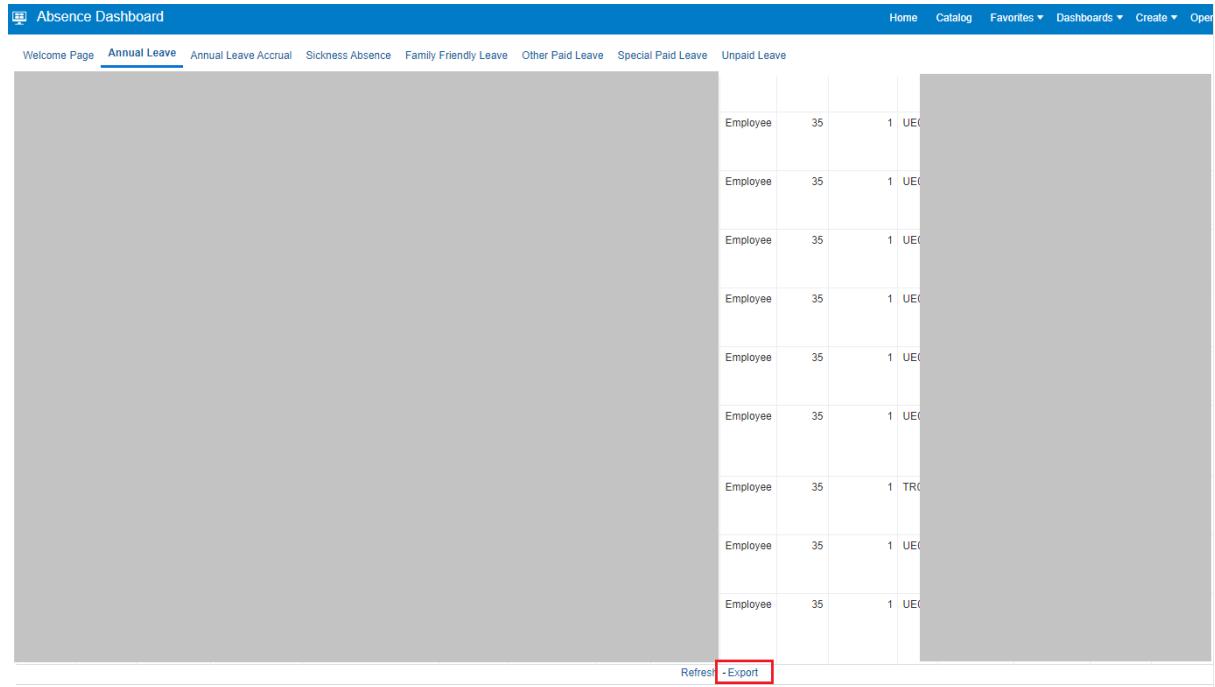
When exporting the Annual Leave report, use only the **Formatted** option.

When exporting the **Formatted** report you will see the options PDF, Excel, Powerpoint and Web Archive:
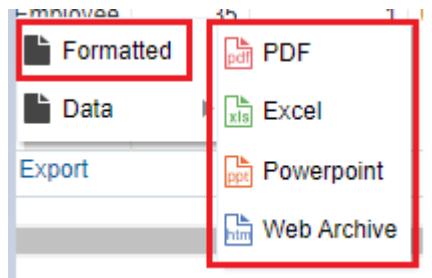
The **formatted** version retains the layout that is displayed onscreen and may take a few seconds to download.

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.

Select the blue arrow to view rows 1-500.

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

Exporting Sickness Absence Review Reports

To export the Annual Leave and Sickness Absence Review reports select the **cog** icon, then **Export to Excel** and choose either **Export Current Page** or **Export Entire Dashboard**.
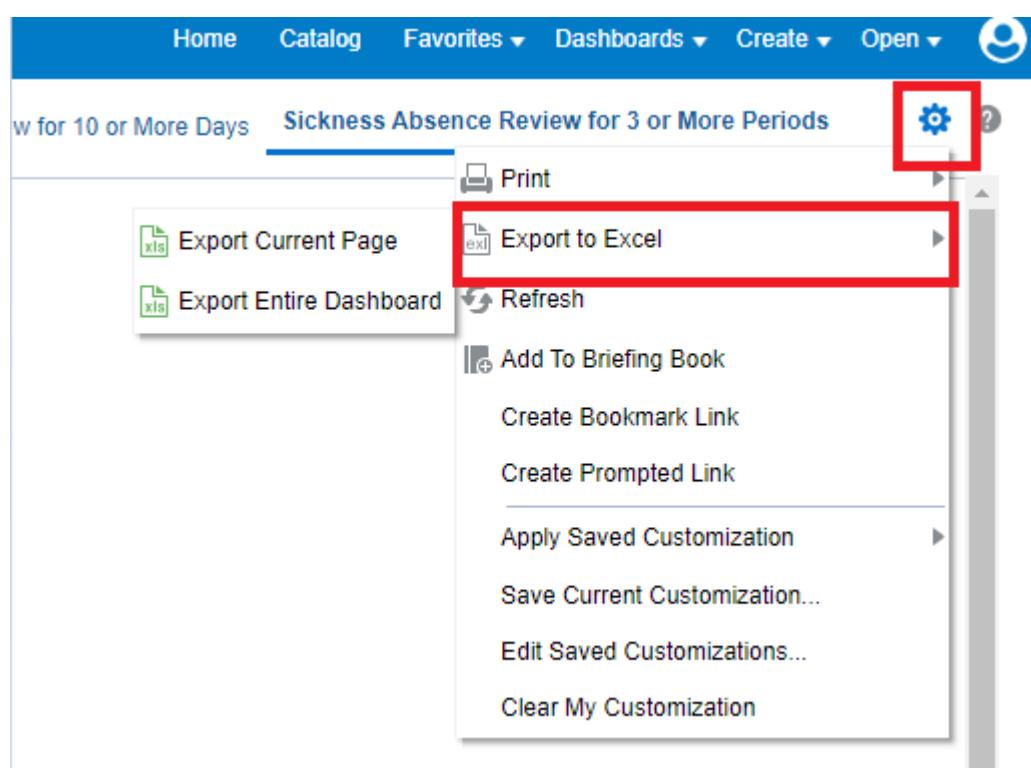
Note: exporting the entire dashboard may take a few minutes.

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**
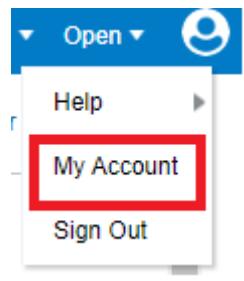
In the pop up window that follows, change the **Locale (location)** field to 'English – United Kingdom' and click **Ok**
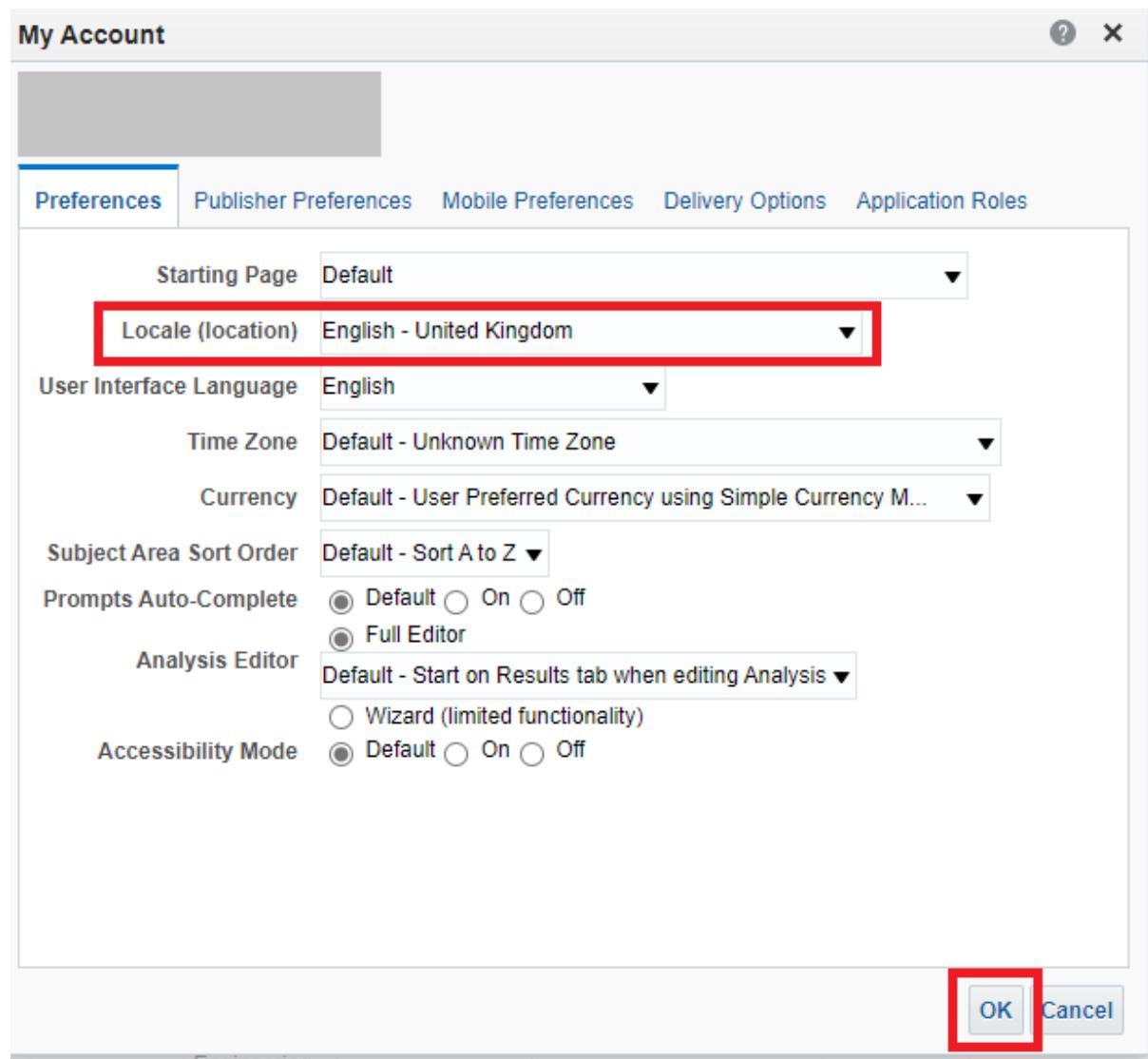
The next time you log in your date settings will display as DD/MM/YYYY.

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.

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	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. Please review the Absence and Leave Options webpage and the Special Leave Policy for circumstances when this reason should be used. Bereavement leave can be selected under Special Paid Leave

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