THE UNIVERSITY of EDINBURGH

People and Money system

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

Guide to Sickness Absence for Line Managers and SDAs

Introduction

Before you start

This User guide is for both Line Managers and School/Department Administrators. Where the navigation differs additional guidance for the School Department Administrator has been added.

- 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.
- 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.
- An open ended absence must be closed off when the employee returns to work.
- To cancel or amend an absence follow the guidance within in the section below 'How to end an open sickness absence'

In Brief …

How to Log a Sickness Absence for a Direct report

Line Manager

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 **Add Absence** from the drop-down menu.
3. Select **Sickness** from the **Type** drop down list
4. Enter the **Start Date** for the absence. Update the **Duration** to half day, if applicable.
5. Enter the **End Date** and **Duration** where known.
6. Alternatively, put a tick in the **Open Ended** field 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** as applicable. This might be to capture an informal back to work discussion.
   Please disregard the **Legislative Information** and **Additional Information** fields at the bottom the page – you do not need to complete these.
9. Click on the **Submit** button to complete the absence recording.

SDA

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. Click on the **+Add** button
5. Continue from Step 3 in the Line Manager guidance above.

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

Line Manager

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.

SDA

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. Continue from step 3 in the Line Manager guidance above.

How to Add a Fit Note for a Direct Report

Line Manager

1. From the home page click on the **My Team** tab and select the **My Team** app.
2. Next to relevant employee, click on the **Ellipsis** on the right and then select **Document Records** from the drop-down menu.
3. Click on the **+Add** button.
4. Select **Fit Note** from the **Document Type** drop-down list.
5. Enter the **Name,** the **Issued On** date 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.

SDA
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. Continue from step 3 in the Line Manager guidance above.

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.

Line Manager
From the home page click on the **My Team** tab and select the **My Team** app.
1. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Add Absence** from the drop-down menu.
2. Select **Phased Return** from the **Type** drop-down menu and enter the agreed dates of the phased return. Enter any relevant **Comments** or **Attachments**.
3. 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.
4. Repeat this, for up to an additional 5 weeks as applicable, in the respective fields. Then click on the **Submit** button to complete.
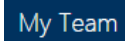
   Note: Should the employee wish to continue the conditions of the phased return past the standard period stated within the Absence policy, there is the option to process a contract amendment for this change. Please review the absence policy for further information.

SDA
1. From the home page click on **My Client Groups** and then **Absences**
2. Click on **Absence Records**
3. Search for appropriate employee and click on their name to select
4. Click on the **+Add** button
5. Continue from step 3 in Line Manager guidance above.

How to end an open sickness absence

Line Manager

1. From the Home page, click the **My Team** My Team link.

2. Click on the My Team app.

3. Click the ellipsis ••• button next to the relevant employee and select **Existing Absences**.

4. Click on the **Edit** ✏ icon next to the open absence record you would like to add the end date to.

5. **Untick the Open ended** checkbox ☑ Open ended to remove the tick.
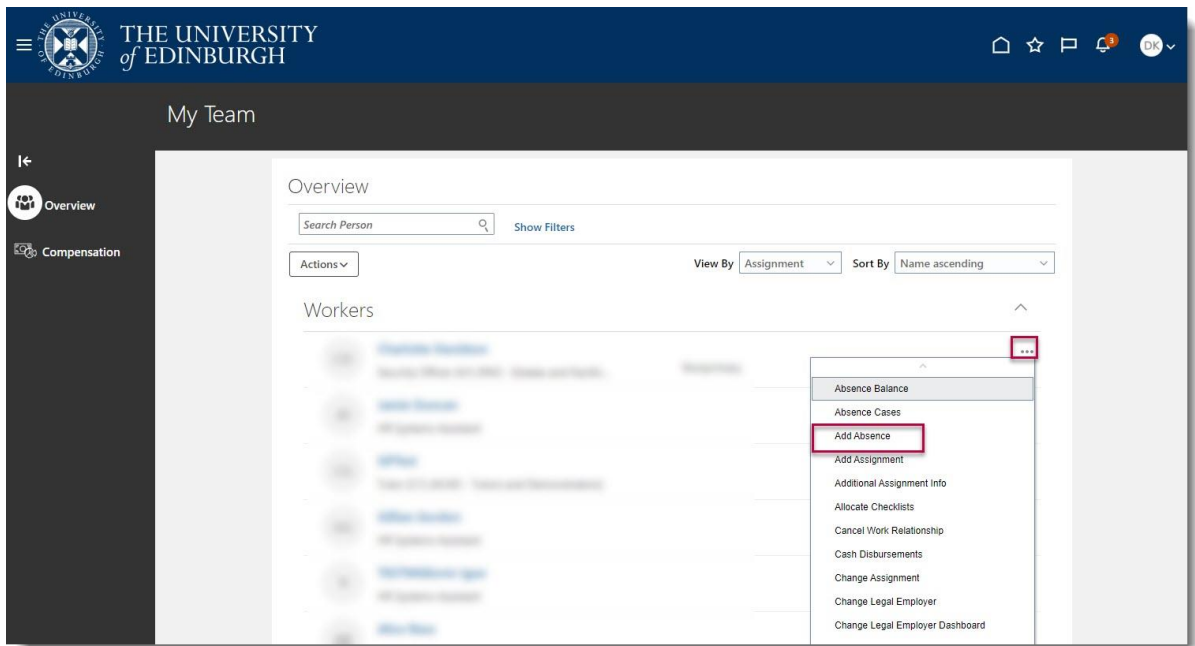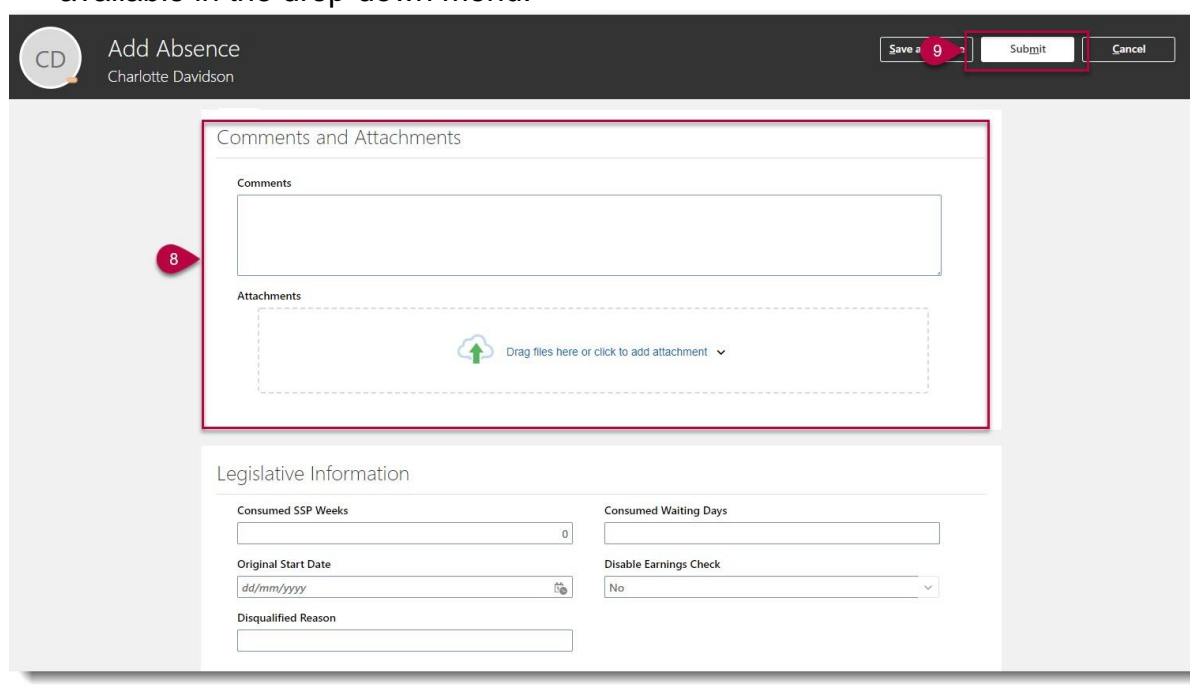6. Select the **End Date**.

7. Click **Submit** [Submit]

SDA

1. From the home page Click on **My Client Groups** and **Show More and** Click on **Absence Records**
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 ☑ Open ended to remove the tick.
5. Select the **End Date**.
6. Click **Submit**

How to Log a Sickness Absence for a Direct Report

Line Manager

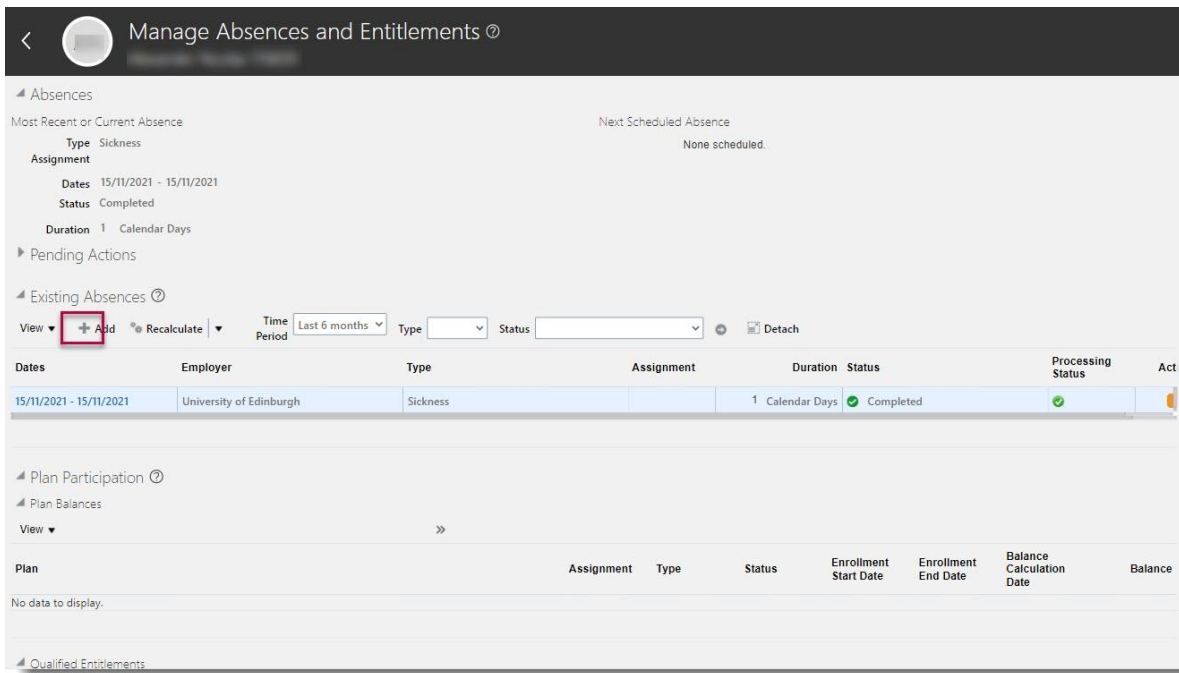1.   From the home page, click on the **My Team** tab and select the **My Team** app.
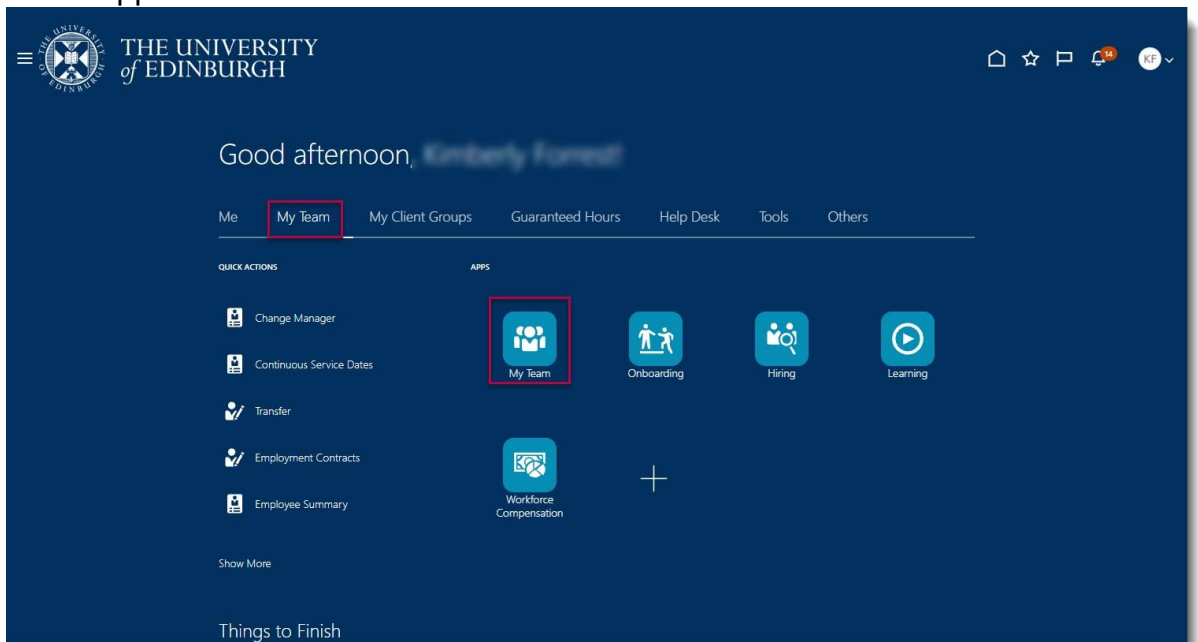
2.   Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Add Absence** from the drop-down menu.

3.	Select **Sickness** from the **Type** drop-down menu.
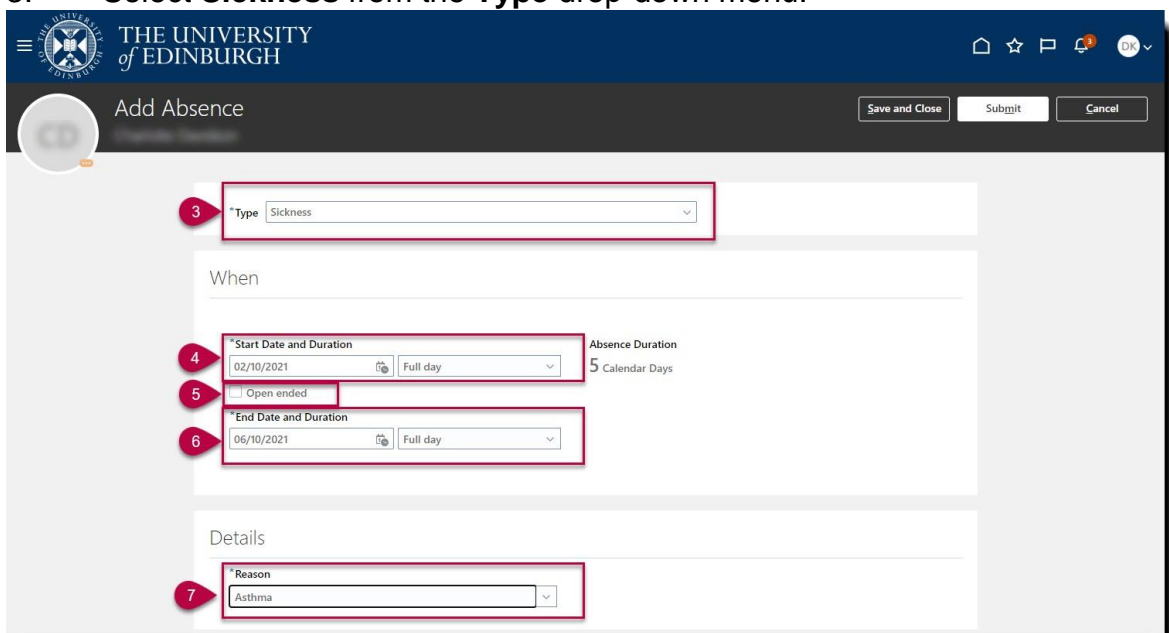
4.	Enter the **Start Date** for the absence. Update the **Duration** to half day, if applicable.

5.	Alternatively, put a tick in the **Open Ended** field, if the return date is not known at this stage.
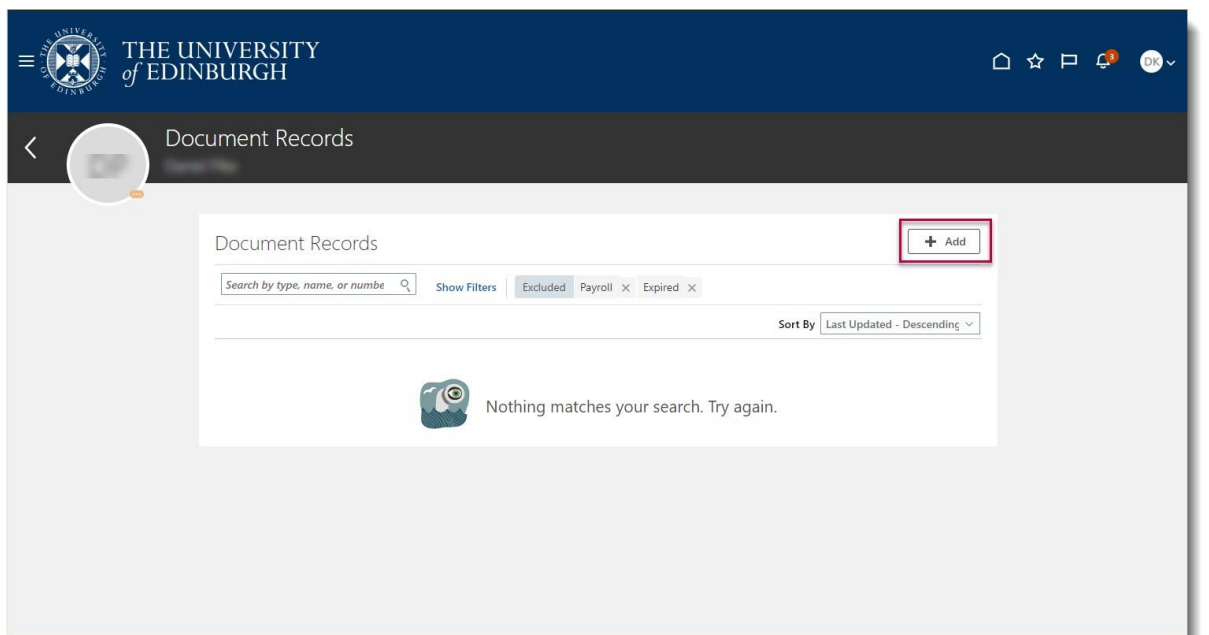
6.	Enter the **End Date** and **Duration** where known

Note: To cancel or amend a period of sickness absence please refer to the system guide How to enter leave on behalf of your direct report. 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.

8.   Add any relevant **Comments** as applicable. The date of an informal back to work discussion can be captured here.
Please disregard the **Legislative Information** and **Additional Information** fields at the bottom the page – you do not need to complete these.

9.   Click on the **<u>Submit</u>** button to complete the absence.

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

10.   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:

- Read absence management policy
- Check review points/patterns of absence
- Rules around self-certification
- Rules around return to work
- 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.

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 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.

SDA

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. Click on the **+Add** button

5. Continue from step 3 in the Line Manager guidance above.

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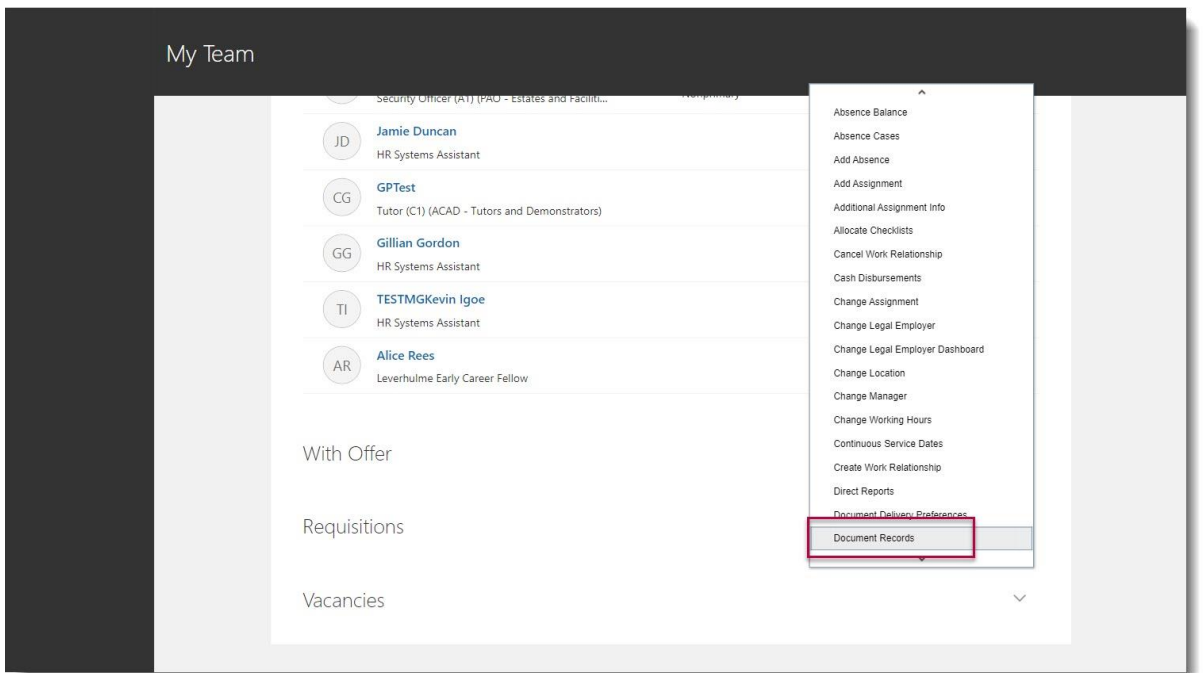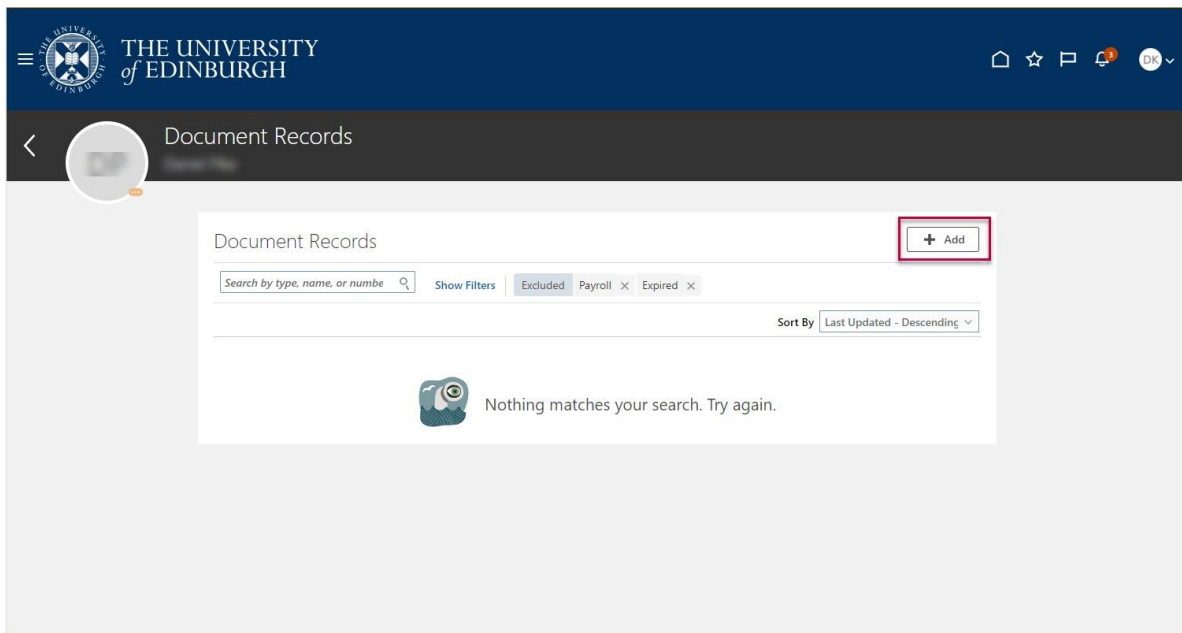
Line Manager

1. From the home page, click on the **My Team** tab and select the **My Team** app.
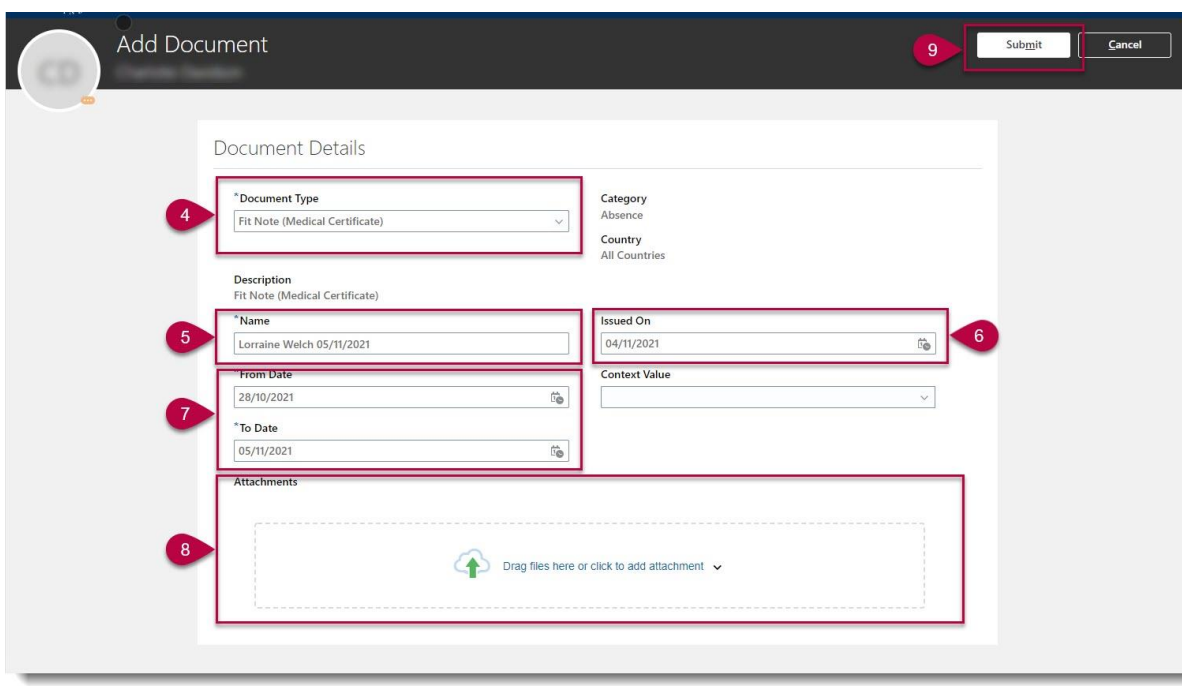
2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Document Records** from the drop-down menu. (You will need to scroll down to select Document Records)

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

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

5. Enter the **Name**. This should be unique to the employee eg 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.

S D A

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

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

3. Search and then click on the name of the employee
4. Continue from step 3 in the Line Manager guidance above.

# How to Add a Fit Note for a Direct Report

Line Manager

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** from the **Document Type** drop-down list.

5. Enter the **Name.** This should be unique to the employee eg 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.

SDA

1. From the home page Click on **My Client Groups** and **Show More**
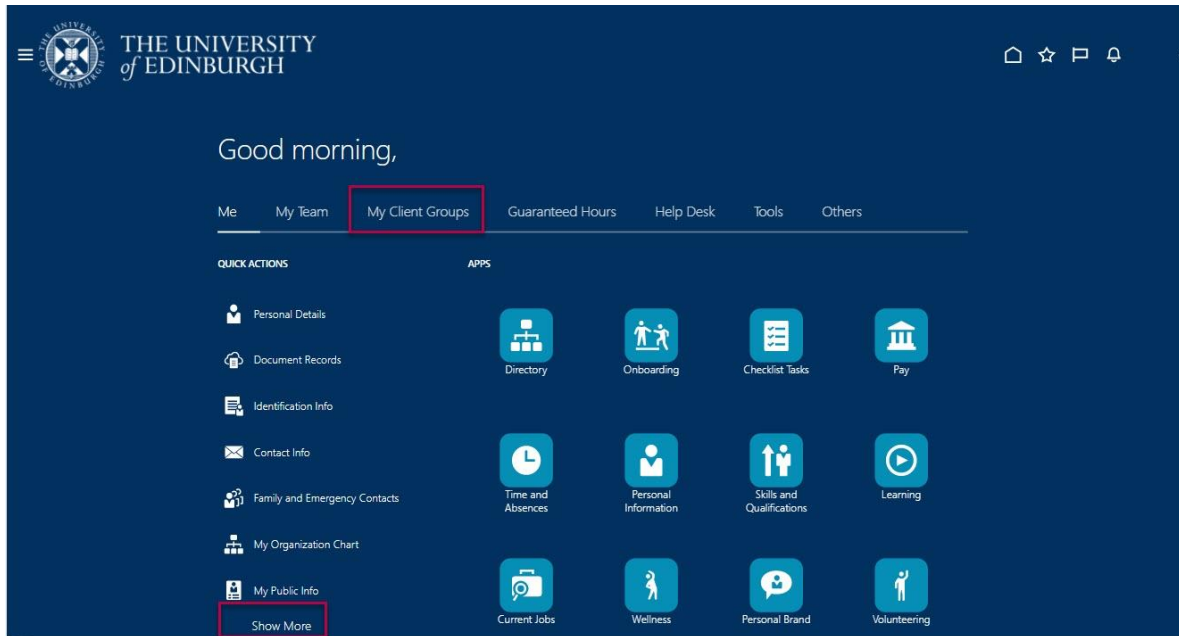
2. Under the **Employee** section, click on **Document Records**
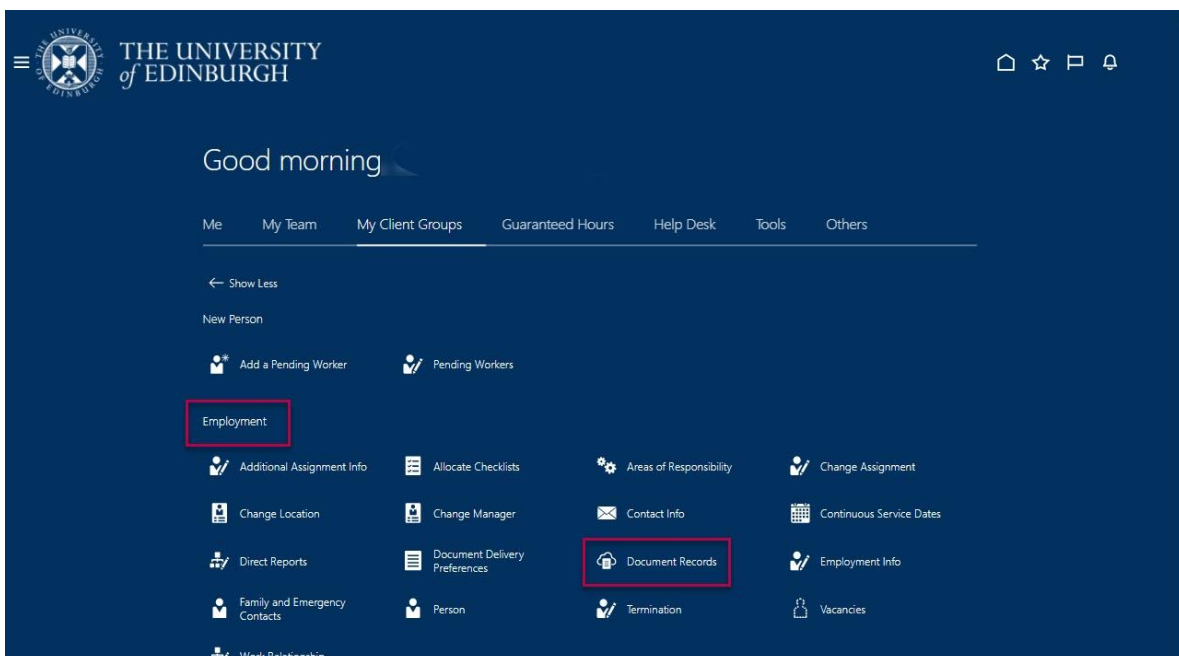
3. Search and then click on the name of the employee
4. Continue from step 3 in the Line Manager guidance above.

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 [How to enter leave on behalf of your direct report](#)

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

Line Manager

1. From the home page, click on the **My Team** tab and select the **My Team** app.
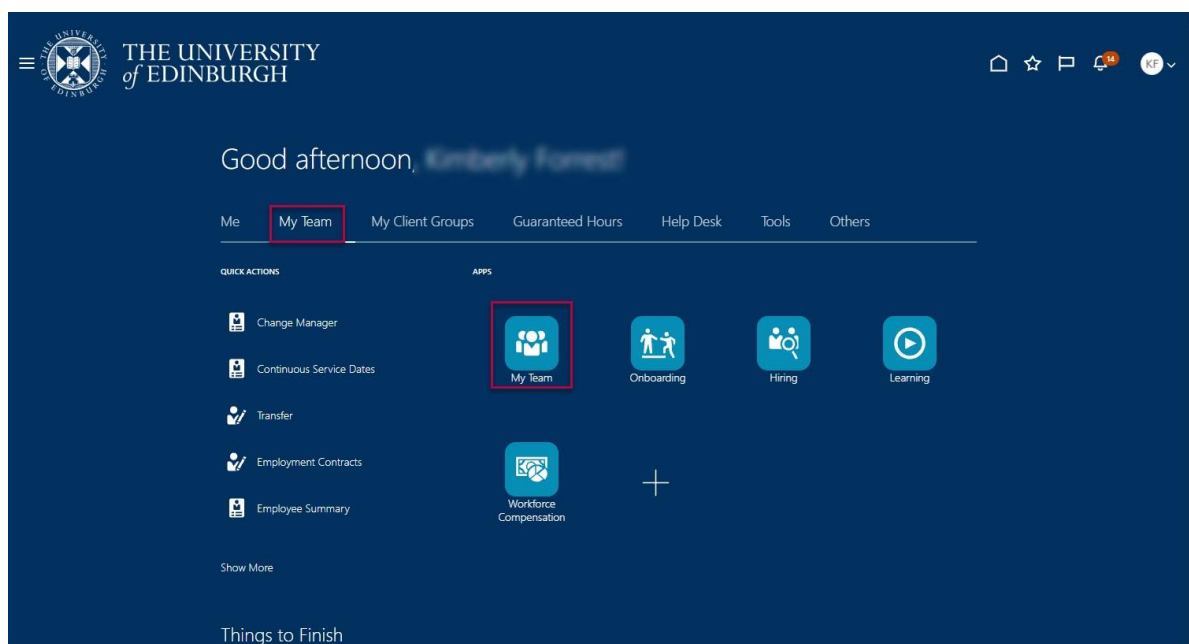
2. Against the relevant employee to add the absence against, click on the **Ellipsis** then select **Add Absence** from the drop-down menu.
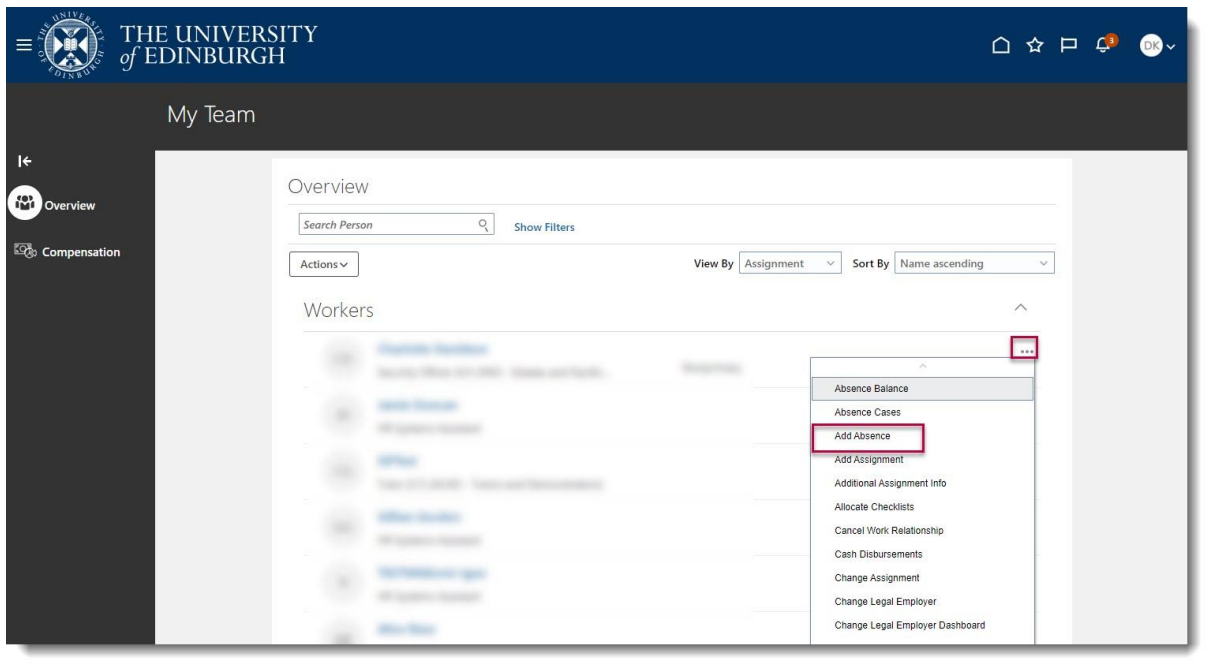
3. Select **Phased Return** from the **Type** drop-down menu.
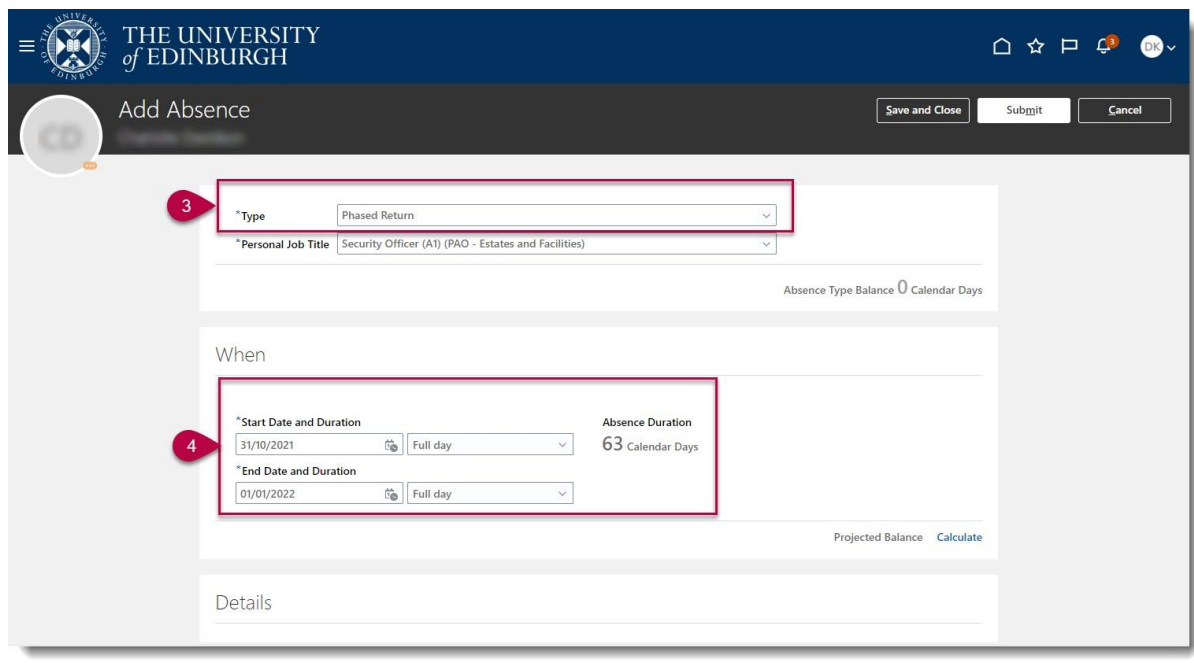
4. Enter the **Start Date** and **Duration** and **End Date** and **Duration** for the agreed period of the phased return.

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.

5. Add any relevant **Comments** or **Attachments**.

6. 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.

7. 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.**
8. 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.
9. Repeat this, for up to an additional 5 weeks as applicable, in the respective fields.

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

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

SDA

1. From the home page click on **My Client Groups** and then **Absences**
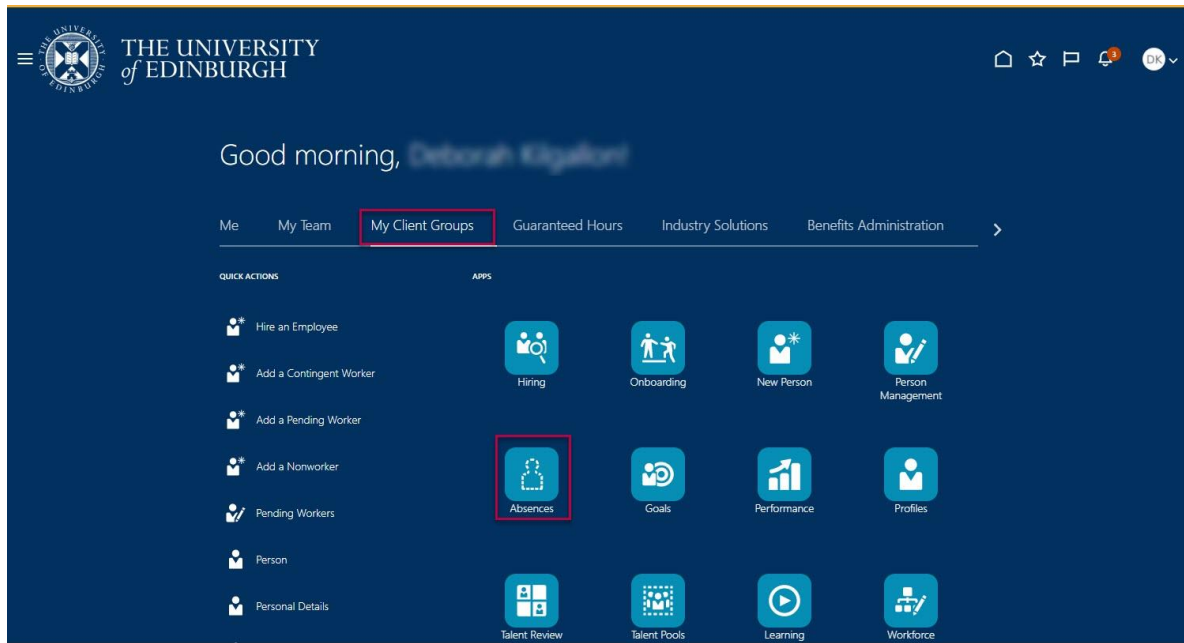
2. Click on **Absence Records**
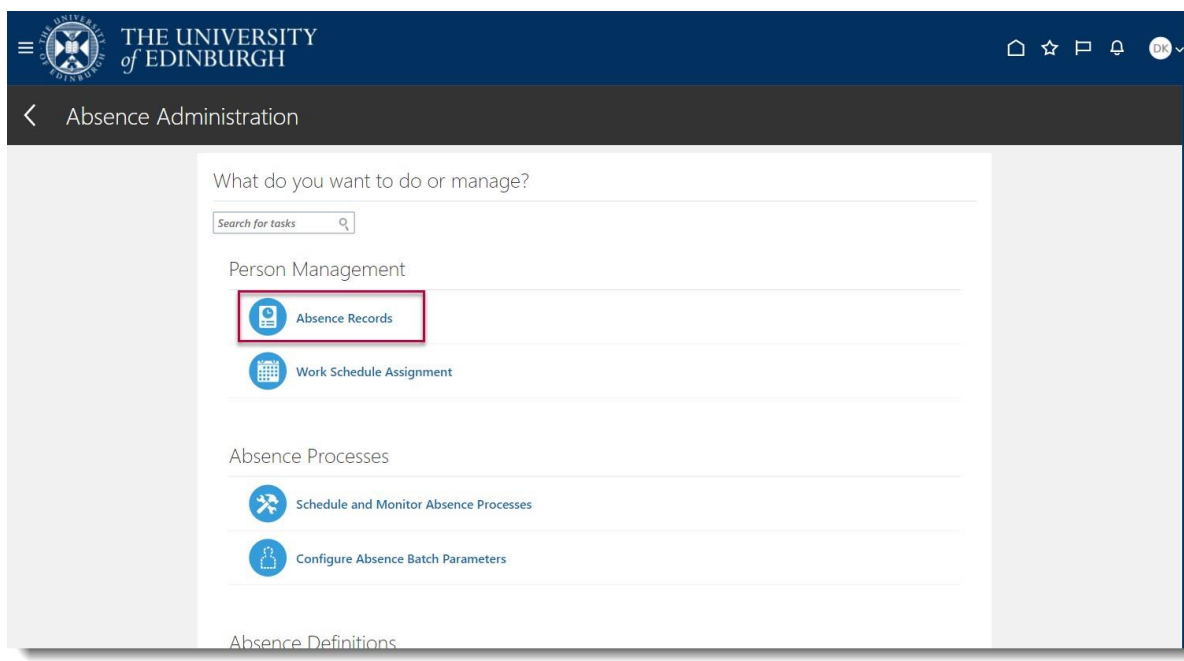
3. Search for appropriate employee and click on their name to select
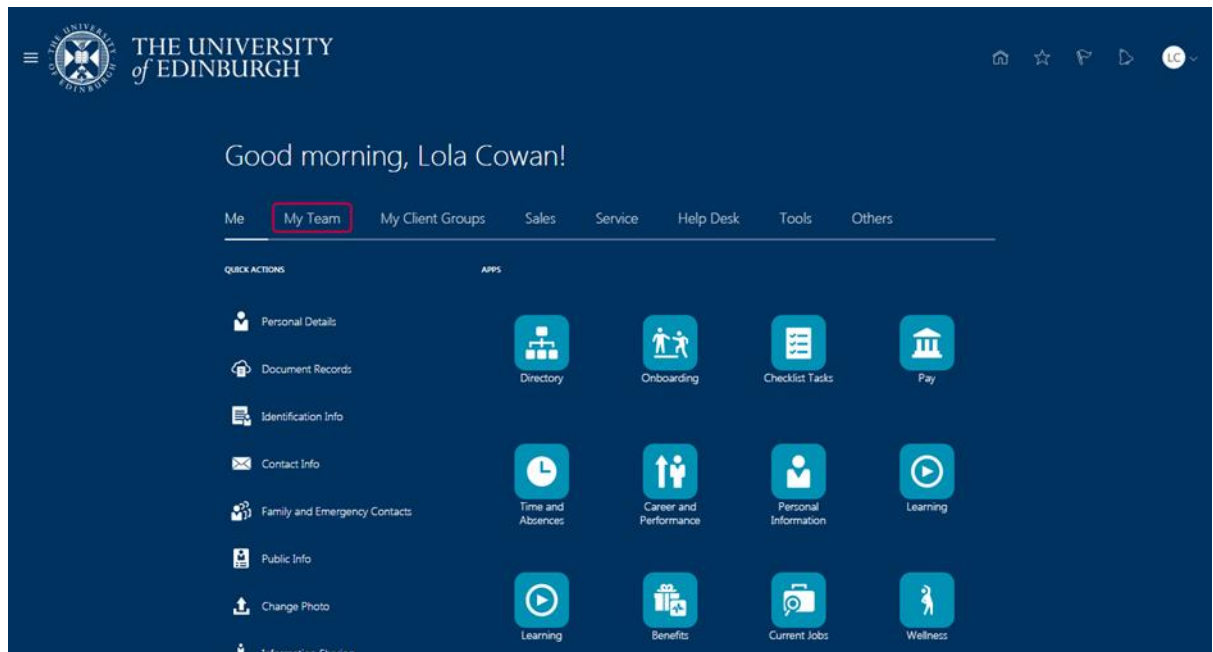4. Click on the **+Add** button
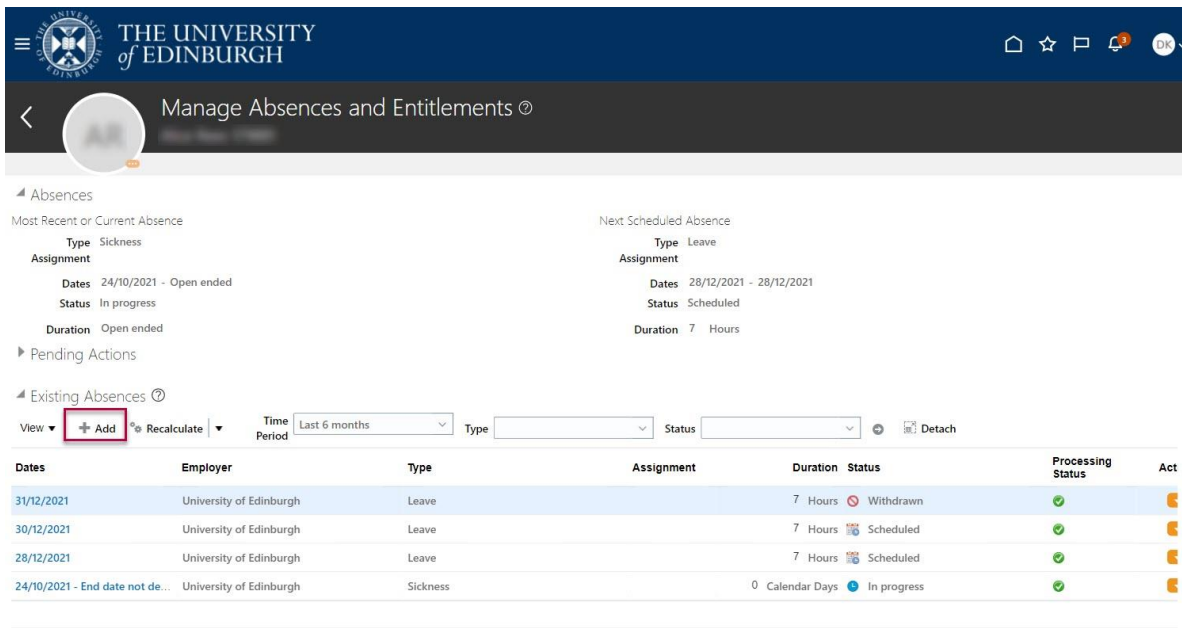
5. Continue from step 3 in Line Manager guidance above

How to end an open sickness absence

Line Manager

1. From the Home page, click the **My Team** link

2. Click the **My Team** app.

3. In the **My Team** page, click the ellipsis ••• button next to the relevant employee to view a list of actions
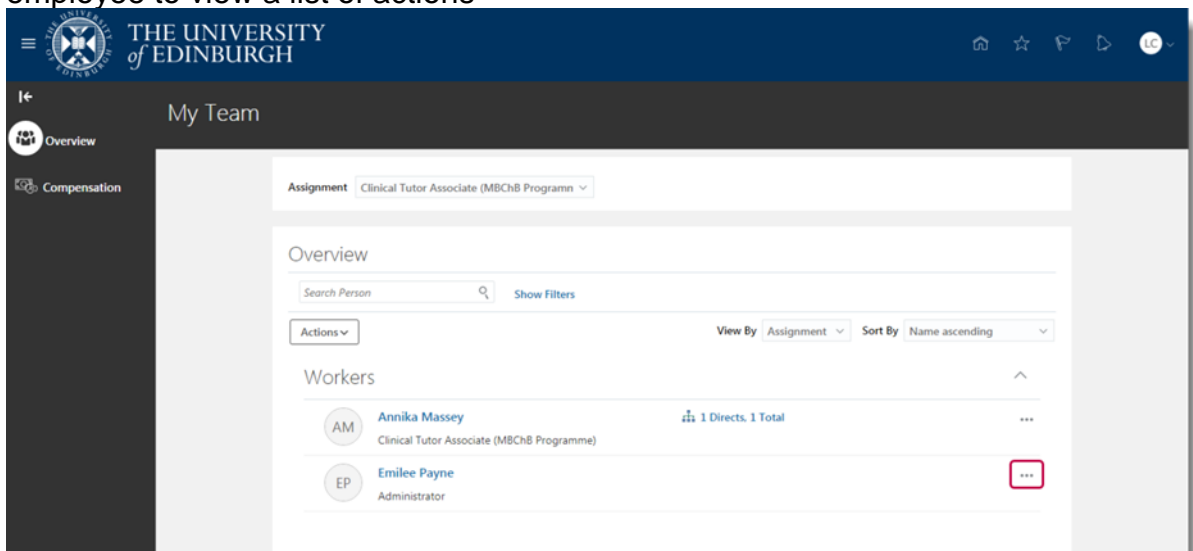
4. Click on the option **Existing Absences**.
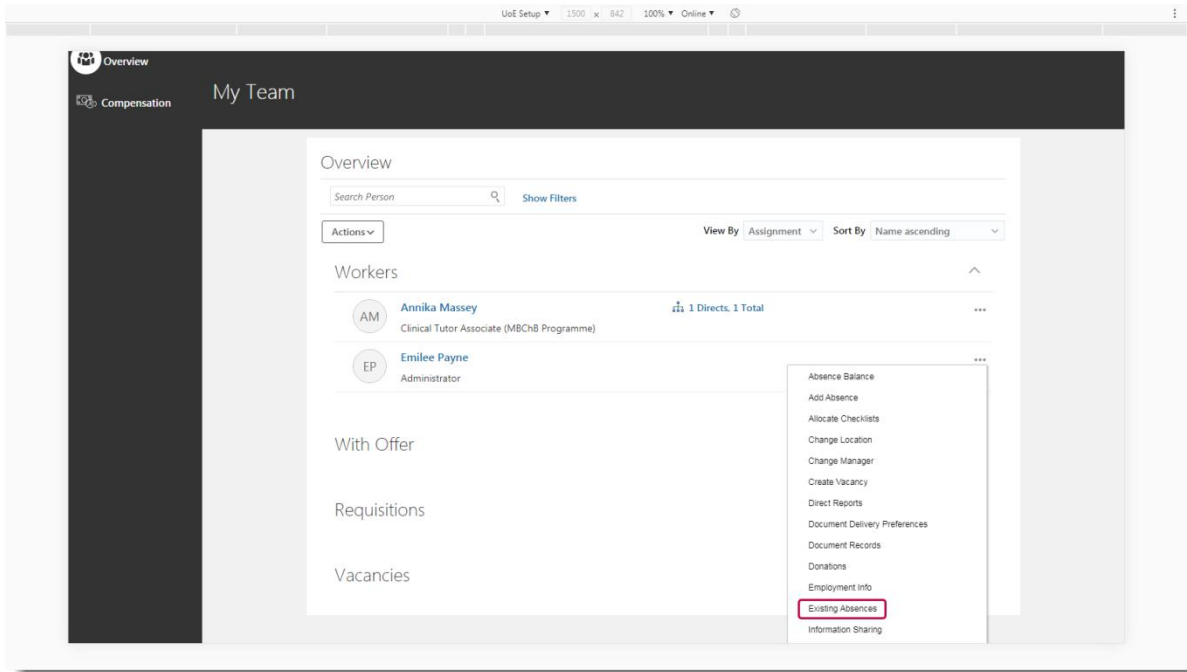
5. In the employee's **Existing Absences** page, click on the **Pencil** icon next to the absence record you would like to end.
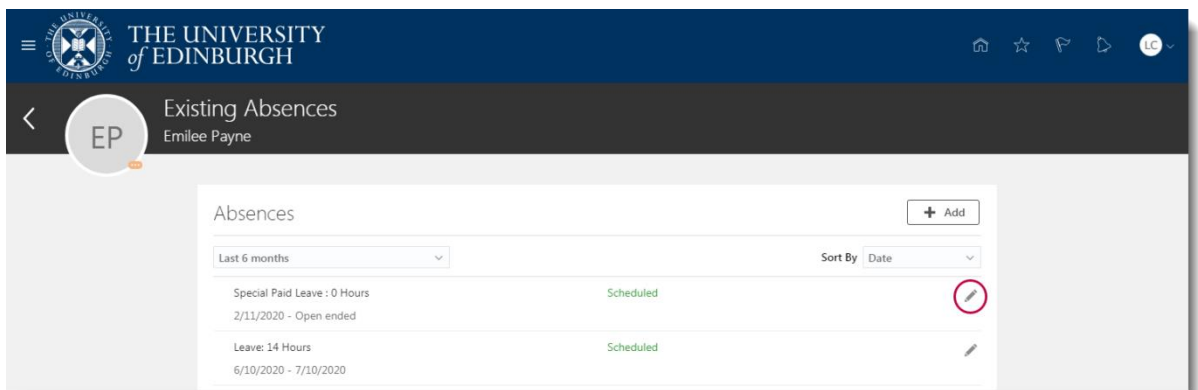
6. From the **When** section in the employee's **Edit Absence** page, untick the **Open ended** checkbox to **remove the tick** and reveal the **End Date** field
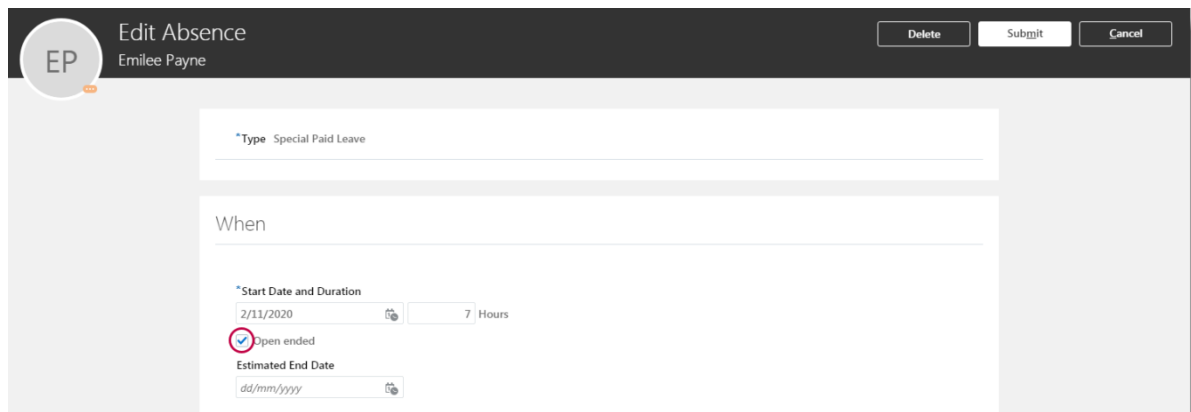
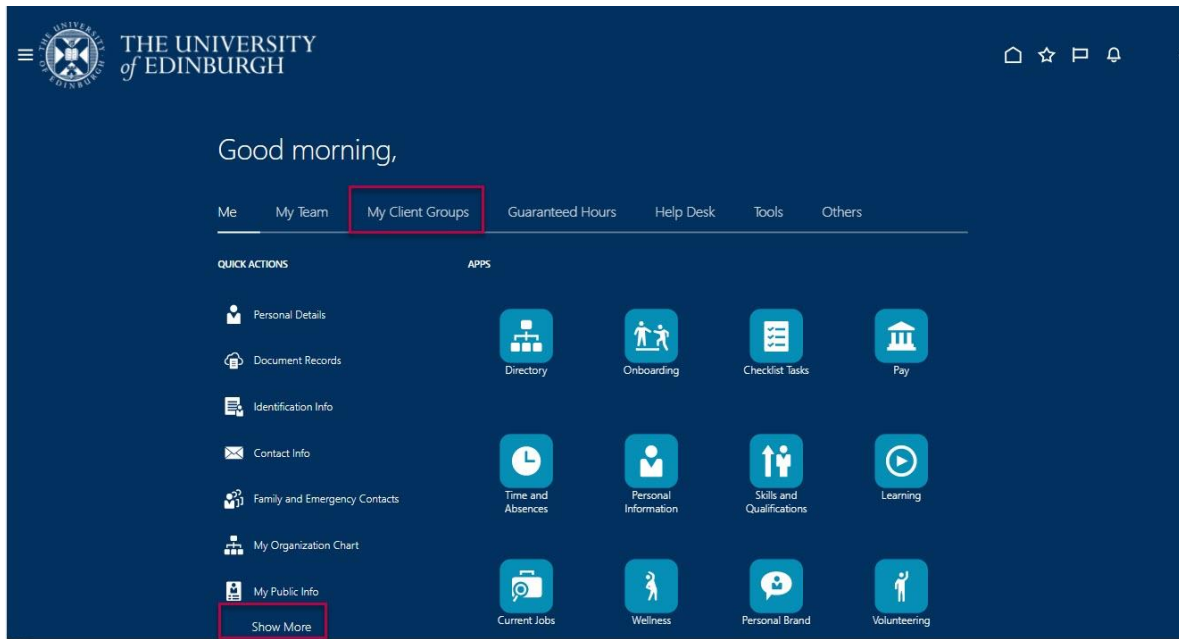7. Click on the calendar icon in the **End Date** field and select the relevant date. Then click the **Submit** button in the banner.

8. The employee's **Existing Absences** pages is opened and the absence is displayed with its start and end date.

SDA

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. Click on the open sickness absence

5. Untick the Open ended checkbox to remove the tick. Select the **End Date** and click **Submit** .