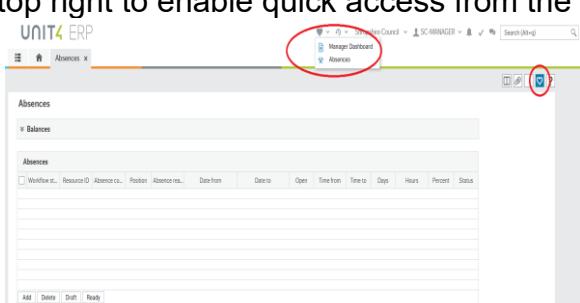
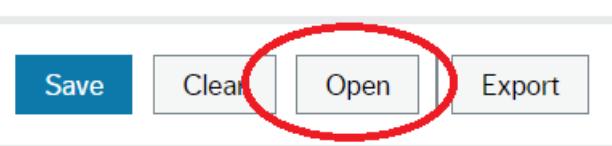
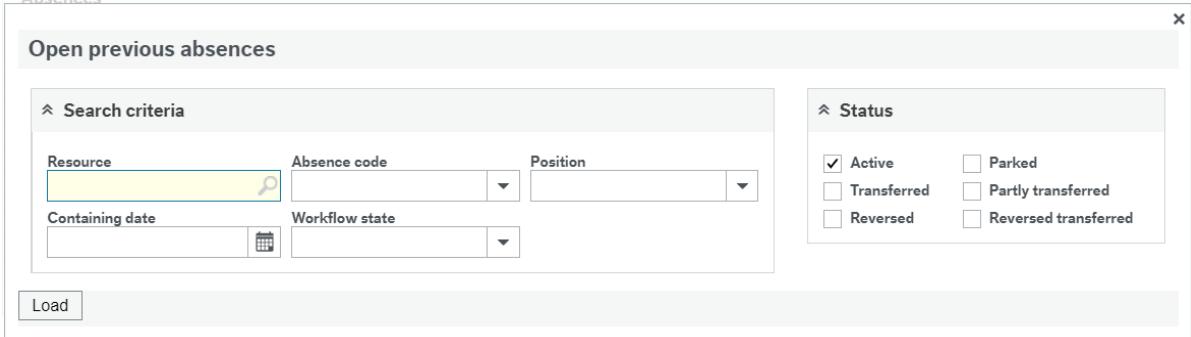
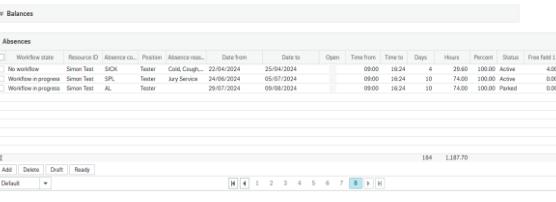
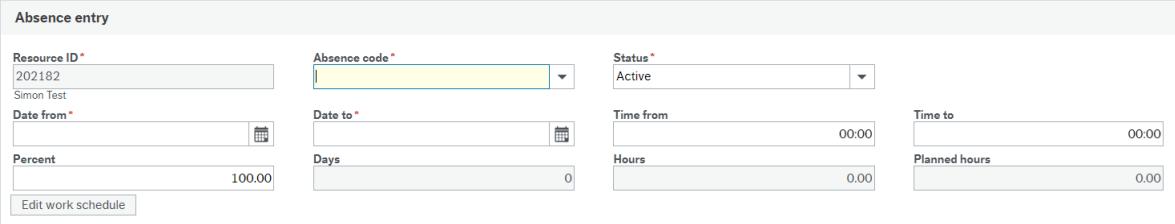
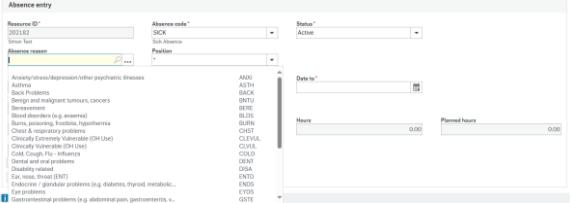


How to record absence as a line manager

| | | Last Updated |
|-------|---|--------------|
| 1 | Scope: This guidance is to show how line managers record any absence for their employees | 07.05.2024 |
| 2 | Introduction: Line Managers need to report absences for their employees (especially Sick type absences) in the ERP to inform Payroll to make the relevant payment adjustments | 07.05.2024 |
| 3 | Navigate to Main Menu → Your employment → Your employment → Absences | 07.05.2024 |
| 4 | Step by step process: | 07.05.2024 |
| 4.1 | The Absences section can be set as a Favourite by clicking on the blue heart in the top right to enable quick access from the global toolbar. (<i>Video link below</i>)  | 26.09.2025 |
| 4.2 | Open  When creating, amending or checking absences; select Open to view the full absence record for the employee (Resource.) | |
| 4.2.1 | Open previous absences  | |



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| <p>4.2.2</p> <p>Search criteria</p> <p>Resource: Select the relevant employee (Resource) by typing ahead or pressing SPACEBAR and selecting the correct one.</p> <p>Absence code: You can search by the specific Absence code here or leave it blank.</p> <p>Position: You can search by the specific Position here or leave it blank.</p> <p>4.2.3</p> <p>Status</p> <p>It is advisable to tick all the Status boxes to load all the employees' absences to avoid duplication or errors occurring.</p> <p>4.2.4</p> <p>Load</p> <p>When the Resource has been selected and relevant Status boxes ticked, click Load to load the employee's absence record.</p> | <p>4.3</p> <p>Absences</p> <p></p> <p>4.3.1</p> <p>Add</p> <p>To add a new absence line, select Add.</p> <p>4.3.2</p> <p>Delete</p> <p>When applicable an absence line can be deleted by ticking the box to the left of the line and selecting Delete.</p> <p>4.4</p> <p>Absence entry</p> <p></p> <p>4.4.1</p> <p>Resource ID</p> <p>Depending on the number of people you line manage, the Resource ID may prepopulate, or you will need to select from the dropdown or by typing ahead.</p> <p>4.4.2</p> <p>Absence code</p> <p>Select the Absence code from the dropdown or by typing ahead.</p> |
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| 4.4.3 | <p>Absence reason</p> <p>Depending on the Absence code selected, an Absence reason needs to be selected by typing ahead or pressing SPACEBAR to bring up the list.</p>  |
| 4.4.4 | <p>Position</p> <p>If they have more than one position, select which position the absence needs to be recorded against.</p> <p>If it needs to be recorded against both then select All positions.</p> <p>Please note that if an absence is recorded against more than one position, it will create an absence line for each position and any amendments to the absence will need to be made to each line.</p> |
| 4.4.5 | <p>Date from</p> <p>The Date from is the date that the absence starts and the absence should be recorded in the ERP the day the manager is notified or as soon as possible after. When a date is added here, the Date to date will populate with the same date until amended.</p> |
| 4.4.6 | <p>Open ended absence</p> <p>Open-ended absence should be ticked if there isn't a definitive end date to the absence.</p> <p>A Preliminary end date of the last day of the current year will populate in the Date to field.</p>  |
| 4.4.7 | <p>Date to</p> <p>When the absence has ended, the Date to needs to be confirmed in the ERP as soon as possible preferably the day the employee returns to work.</p> <p>The Date to needs to be the last day of the absence and not the day the employee returns to work.</p> |
| 4.4.8 | <p>Percent</p> <p>To record half a day's absence, the Percent can be amended to 50.</p>  |
| 4.5 | <p>Save</p> <p>Select Save to confirm any additions or amendments made in the Absences screen.</p> |

4.6 Amending or closing an absence

To amend or close an open absence, select Open, the relevant employee (Resource) and click Load.

Click on the relevant absence line and scroll down to the Absence entry. Untick the Open ended absence box (if ticked) and change the Date to to the last day of the absence and Save.

The screenshot shows the 'Absences' screen with a list of entries. The second entry, for 'Simon Test' with absence code 'SICK' and reason 'Asthma', is selected and highlighted with a red oval. In the 'Absence entry' details below, the 'Open ended absence' checkbox is checked, and the 'Date to' field shows '10/05/2024'. The 'Status' dropdown shows 'Active'.

4.7 Status

If any amendments need to be made to an absence with the status Transferred or Partly Transferred, contact Payroll as the absence has gone through (or partly gone through) the payroll process.

The screenshot shows the 'Absences' screen with a list of entries. The entire list of absences is circled with a large red oval.

The Status must not be changed by the line manager when adding a new absence or amending an existing absence.

4.8 Error Message - Overlap in date interval Error

If there is any planned leave recorded for the period of the unplanned absence, it will need amending before recording the unexpected absence otherwise an Overlap in date interval error will occur. (Video link below)

- Please correct the following:
 - Overlap in date interval ! Annual Leave (AL) 20/05/2024 - 24/05/2024.
 - **Absences:** Please fix the marked errors before saving.

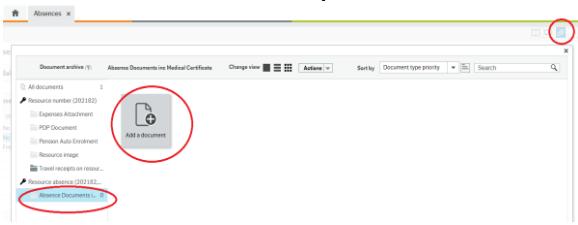
Please refer to the Sickness Absence Management Policy to check eligibility. (*Policy link below*)

4.9

Attachments

To attach a document to an absence line, such as a doctor's note, click on the line and then click on the paper clip in the top right.

Click Add a document and select Document type Absence Documents inc Medical Certificate from the dropdown.



Click Upload in File name to upload the document that has previously been saved. Add a name for the document in the Document title field and select Save to attach.

4.10

Workflow

There is no approval for this process but Payroll will be informed of any saved entries.

4.11

Further Action

Further action may need to be taken via the Return to Work Form or the Return to Work from Maternity Leave Form. (*Video and policy links below*)

The Sickness Absence Management Policy, Family Leave Policy, Parental Bereavement Leave Policy and Special Leave Policy under HR & Payroll policies outlines the Council's approach to managing absence and may need to be referred to. (*Policy links below*)

Occupational Health may need to be utilized and the OH Referral form may need to be completed. (*Video link below*)

If the employee has returned to work on a phased return after a period of sickness, their period of sick leave has ended and this needs to be reflected in the ERP. The employee will return to full pay so their absence entry in the ERP needs to confirm that they have returned to work. If their pay needs reducing, this is actioned by amending their hours via the Contract/Position Change form. (*Video link below*)

4.12

Knowly

Remember to use the in system guidance notes (blue lightbulb in the top right) whilst in the ERP.



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| 5 | <p>Related guidance and policies</p> <p>Video Links</p> <ul style="list-style-type: none"> • Unplanned Absences – Adding and Amending • How to Add Favourites • Absence Error – How to Remove an Absence for your Employee • Return to Work Form • Return to Work from Maternity Form • OH Referral Form • Contract/Position Change Form • How to find and use a Knowly <p>Policies</p> <ul style="list-style-type: none"> • Sickness Absence Management Policy • Family Leave Policy • Parental Bereavement Leave Policy • Special Leave Policy <p>Training on Leap into Learning</p> <ul style="list-style-type: none"> • ERP Essentials for Line Managers • ERP Recruitment and Onboarding • ERP Managing Absence • ERP Employment Changes | 02.10.2025 |
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