How-To Guide

Record absence and leave (manager)

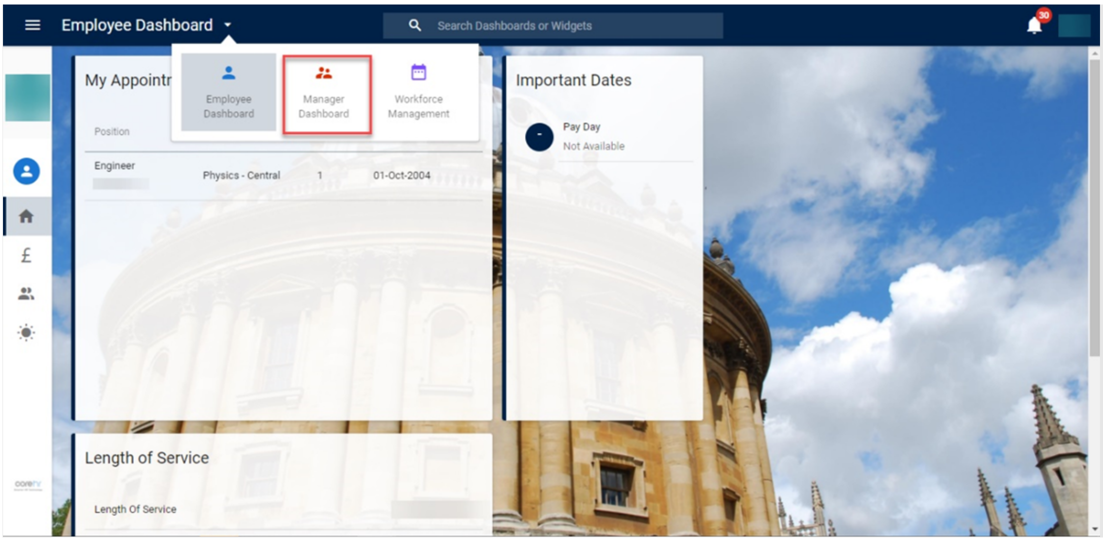
Who is this guide aimed at?	This guide is for managers who need to record absence or leave on behalf of an employee in HR Self-Service.
Useful links and other supporting materials	HR Self-Service guidance and FAQs: www.ox.ac.uk/hrss University guidance on sickness absence for managers: https://hr.admin.ox.ac.uk/sickness-absence#/

Starting point: Log in to HR Self-Service > Employee Dashboard

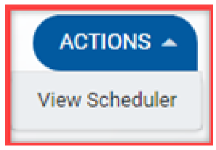
Note * Sickness Absence: If the employee has submitted a fit note, follow the process below and enter the details of the sickness absence. **Do not click the Return to Employee button**. If the employee absence exceeds seven days, a fit note will be required.

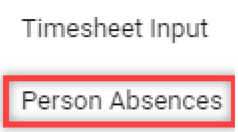
1. Record absence or leave

1. Click on the **Employee Dashboard** dropdown menu and select the **Manager Dashboard**.



2. This takes you to **My Team** widget.
3. Select **ACTION** top right and click on the drop down arrow and select **View Scheduler.** The **Team Scheduler** screen will open.
4. Select the correct employee and their correct appointment under the **Team member** column.
5. Select and click the first date of absence in the date column and select **Person Absences**.

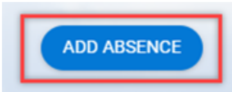




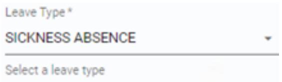
Note * To ensure the absence hasn't already been recorded, review previous absences in the **Person Absences** screen.

Note * When entering a sickness absence, if the employee already has future absences recorded against their calendar (eg annual leave) a warning message will appear. Click to approve and post the sickness.

6. Select **ADD ABSENCE** (top right). The **Absence Detail** screen will open.



7. Click the **Leave Type** drop-down arrow to select the leave type from the list.



8. Check the first date of absence/leave is correct in the **Start Date.**

Identify the relevant scenario from the options below, and follow the steps listed:

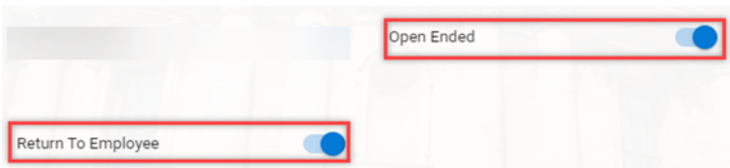
(Option 1) If recording sickness absence and the individual is absent from work and/or you require them to complete the sickness reason themselves when they return, **<u>only</u> complete steps 9 – 11**.

(Option 2) If the individual is back at work and you are going to complete all the details, including the sickness reason, **skip steps 9 – 11 and <u>only</u> follow steps 12 – 15**.

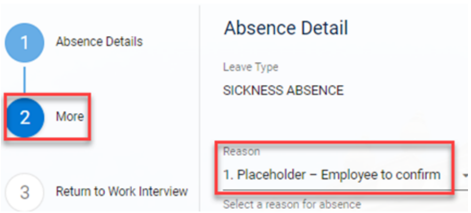
(Option 3) If recording leave or non-sickness absence, **skip steps 9 – 15 and <u>only</u> follow steps 16-17**.

Option 1 - Employee still absent and you expect them to complete reason code:

9. Select the **Open Ended** slider and the **Return to Employee** slider**.**



10. From step 2 – More, select 'Placeholder – employee to confirm' as the **Reason Code**.



11. Click **SAVE**. If this is a sickness-related absence, the employee will receive a notification to review and update the absence entry. On their return to work, they should update the record with the end date of the absence and the reason for the absence.

Option 2 - Employee has returned and you are recording full details, including reason code:

12. Enter the last date of absence in the **End Date** field.

13. Click on the **2 More** tab and select the relevant **Reason Code**.

14. Complete tabs 3 - 4 as appropriate (Return to Work Interview and Supporting Documents)

15. Click **Save**.

Option 3 – Recording other absence:

16. Enter the last date of absence in the **End Date**.

17. Click **Save**.

2. Review and amend an absence record

You should have received a system notification that the employee has updated and submitted the absence record for your review.

Starting point: Log in to HR Self-Service > Manager Dashboard > My Team > Actions > View Scheduler

1. Select the correct employee and their correct appointment under the **Team Member** column.

2. Select the correct week using the navigation arrow (top right).

3. Click the **Sickness** entry in the date columns. The **Absence Detail** screen will open.

4. Click on the **Open Ended** slider to close it.

5. Click on the **2 More** tab and enter any additional narrative if necessary.

6. Click on the **Work Related** button, if the absence was due to work. This can be used at the discretion of each department, for reporting purposes. This button does not drive any payroll changes or send any information to Occupational Health and Safety. Please review the [Managing sickness cases and other matters policy webpages](#).

If a return to work interview is conducted, click on the **interview completed** button and complete the interview notes below. Please review the [University Return to Work Policy](#).

Note * Copy and paste text directly into the Interview Notes field or type straight into it.

7. Click **SAVE**. A success message will appear. Wait for the dark green line to fill.

Note * When entering a sickness absence, if the employee already has future absences recorded against their calendar (eg annual leave) a warning message will appear. Click to approve and post the sickness.

Note * A screenshot of the **Interview Notes** field should be emailed to the employee, so that they are aware of what has been recorded. HR should be copied into the email if this is required by your department/faculty. The employee should review the interview notes to ensure they are an accurate representation of the discussion. If so, no further action is required. Where changes to the interview notes are agreed, the manager can update these in the system as appropriate.