Absence Letters and Documents

EPM Connect Guide

Document Control

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

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Overview

This guide provides an overview of the process for creating letters in relation to absence.

Important

Return to Work and **Self Certification** forms are available to all customers and automatically create tasks for the school/employee. View the **Enhanced Absence Management Guide** and **Core Absence Management Guide** for more information.

In addition, the EPM HR Team have created a variety of template absence letters for EPM HR Essentials and HR Solutions customers. The template letters can be accessed within the individual absence itself and include letters related to sabbatical and secondments, in addition to sickness letters.

Unlike the **Employees** module, workflows are not used within **Absence Management**.

Step 1: Updating information within the Absence Record

Before creating a letter, all information relating to the absence must be entered and must be saved.

Step 2: Create the letter

The letters available within the Absence Management module include:

- Sick HP + SSP EPM Letter: Relevant only to employees who have hit half pay (HP)
- Sick HP + No SSP EPM Letter: Relevant only to employees who have hit half pay (HP) are not entitled to Statutory Sick Pay (SSP)
- Secondment EPM Agreement: Relevant only to employees who are undertaking secondment
- Sabbatical EPM Letter: Relevant only to employees who are who are undertaking sabbatical

Important

Letters relating to nil pay should be managed via the **Employee Record**. View the **Contracts and Letters Guide** for more information.

1. From the left-hand navigation pane, select **Absence Management**. A list of further menu options is displayed.
2. Select **Absence Records**. The **Absence Management** module is displayed, showing all absence records.

   DO NOT click on the **Reports** button on this screen.

3. In the **Absence Search**, enter the name of the relevant employee.
4. Click **Search**. The table updates.

5. Click the eye icon next to the relevant employee to open their **Employee Absence Record**. The employee record is displayed with key metrics.

   DO NOT click on the **Reports** button on this screen.

6. Scroll down to **Calendar View**.
7. Select the **List View** tab.
8. Click the pencil icon within any of the rows to view or edit information. A new window is displayed.
9. Click the **Reports** button at the top of the screen.

10. Click on the title of the relevant document.

The documents are clearly named.

Important

Do not change any of the **Employee Filters**, these are not relevant to the letter.

11. Click the **Download** button. The download will appear within your computer's download files.

The document name will be the employee's full name followed the document name.

12. Click the download icon at the top of your browser.
13. Open the relevant document and review the contents.

Missing or incorrect information

Check the document for missing or incorrect content. Should any of the information within the letter or contract be missing or inaccurate you will need to repeat the steps from the beginning of this guide to update the information within the relevant section.

The inclusion of **NOT SET** or a fake date within the document indicates that a certain field has not been completed. The majority of these fields relate to fields within the **Absence Instance**, **Salary Information** or **Job Information,** however this may also relate to fields within **Employee Settings**. If unsure, speak to your EPM Team.

Step 3: Create Signable Document

1. Select the **All Employees** tab.
2. In the **Employee Search**, enter the name of the employee you wish to view. A list of employees matching the search criteria are displayed.
3. Click the eye icon on the far right-hand side of the employee you wish to view. The employee record is displayed.
4. Scroll down the page and above the **Job Information** tab, select the relevant job role.
5. Click the **Employees Documents** tab. The relevant job information is displayed.
6. Click the **Edit Details** button.

7. Click the **+ Upload Documents** button.

8. In the **Title** field, enter the title.

9. Click **Select** file.

10. The **Expiry Date** field does not need to be populated.
11. Leave the **Visible to Employee** in **My Portal** box blank.

    The document will automatically be made visible to the employee after all school signatories have signed it.

12. Tick the **Create a signable document from this file after upload** to make the document signable.
13. Click the **Save** button. The screen refreshes and new fields appear.

14. In the **Name** field, enter a name.
15. In the **Message** field, enter a message.

    This can be over-written with a bespoke message.

16. In the **Signature Deadline** field, select a date.

    This must be a future date, not today's date.

17. The **Document** field will have already been added within the previous screen.
18. From the **HR User Notification** drop-down menu, select the email address of the employee the document relates to and where relevant Line Managers who you wish to receive notifications.

    Selected users will receive an email notification whenever any action has been taken, for example the document has been signed or read. Notifications should be set up within **Employees Settings**.

19. From the **Choose HR Recipients** drop-down menu, select the users that apply.

    This should include the employee that the document relates to and if desired, the other signatories. If selected school signatories will be able to view the document within **My Documents** in **My Portal**.

    The recipient is the owner of this document, this means that after users have signed this document, the document will stay attached to the employee profile. If there are multiple recipients there will be multiple signable instances of this document that will belong to each individual recipient.

20. Leave the **Choose Bureau Recipients** field blank.

Add Signatory

Important

The Employer should be added as the first signature. If multiple employers need to sign the document, on behalf of the school or trust, these should be added as subsequent signatories. The Employee should always be the final signatory.

Add Employer Signatories

1. Click the **+ Add Signatory** button. A new window is displayed.

2. From the **HR or Bureau User** drop-down menu, select **HR User**.

3. From the **Users** drop-down menu, select the user that apply.

   Select the email address of the user who will be signing on behalf of the school. Alternatively select **Signer Tags**.

4. From the **Signer Tags** drop-down menu, select the signer tags that apply.

   Signer Tags allow you to set up groups of signatories, for example the Line Manager related to the account or the HR Team.

   Signer Tags are set up in **Employee Settings**.

5. From the **Approval Condition** drop-down menu, select the approach that applies for document to be classed as approved.

   Requires signing by All: Requires each user or signer tag to sign the document.

   Requires signing by Any: Requires just one user or signer tag to sign the document.

6. From the **Approval Order** drop-down menu, select first.

   This will allow the employer to sign first on behalf of the school or Trust. The employee will not be able to view or sign the document until all other signatories have signed the document.

7. Click the **Save** button. The window closes.

8. Repeat the process for all additional employee signatories.

Add Employee Signature

You should now repeat the process for the Employee.

1. Click the **+ Add Signatory** button. A new window is displayed.

2. From the **HR or Bureau User** drop-down menu, select an option.
3. From the **Users** drop-down menu, select the employee.
4. Leave the **Signer Tags** field blank.
5. From the **Approval Condition** drop-down menu, select either option.

   Either option can be used for employees.

6. From the **Approval Order** drop-down menu, select and option.

   Select the next available order, for example if you have already selected First and Second for employers signing on behalf of the trust, select **Third**.

7. Click the **Save** button. The window closes.

8. Click the **Save** button within the main page.

Send email

1. Click the email icon on the far right-hand side of the document listed. A email preview of the email is displayed.

   This is the email that will be sent to the employee. The email content cannot be changed.

2. Click **Send**.

The document will now be sent to the school signatory to sign. This will appear as a **Task** within the **Task Management Module** and within **My Tasks** within **My Portal**.

Once this has been completed, it will be sent to the employee to sign.

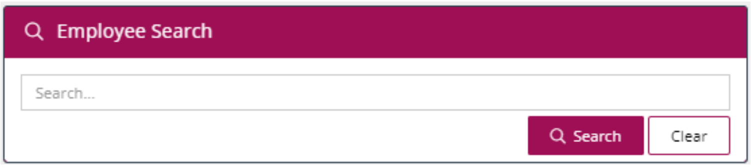
Once signed by both parties, the document will be visible to the employee within **My Documents** in **My Portal**, unless the **Visible to Employee** box has not been ticked.

If the employee rejects the document, the user who has sent the document to be signed will not be notified. Therefore, ensure you have processes in place to receive feedback and for staff to notify you if they have rejected a document. It may be useful to create a task for yourself as a reminder.

Check the progress of the contract or letter

Once the document has been sent for signing, we recommend checking the progress of the document to ensure that all parties have signed the document, in order to ensure compliance.

1. From the left-hand side of the system, select **Employees**. A list of further options is displayed.
2. Select **Details**. A list of further options is displayed
3. Select **All Employees**.
4. In the **Employee Search**, enter the name of the employee you wish to view. A list of employees matching the search criteria are displayed.

5. Click the eye icon on the far right-hand side of the employee you wish to view. The employee record is displayed.
6. On the left-hand side of the **Employee Details** page, from the **Select Job Role** drop-down menu, select the relevant job role.
7. Select the **Job Documents** tab.
8. Click the **Edit Details** button.

9. Check the **Is sent for signing** column within the data table to ensure the document has been sent.

   Yes indicates the document has been sent.

   No indicates the document has not been sent.

To send the document, click the email icon next to the relevant document and click **Send**.

10. Check the **is signed by everyone** column.

    Yes indicates the document has been signed by everyone.

    No indicates the document has not been signed by all parties.

    - Click the eye icon and select the **Signatories** tab to view whether the document has been read and signed by each party.
    - Click the pencil icon to edit. Editing will remove all signatures from the document.
    - Click the cross icon to delete the document.
    - Click the double arrow icon to reset the document. This will remove all signatures.
    - Click the envelope icon to send the document for signing.
    - Click this icon to preview the document. The document will appear within your download files.
    - Click this icon to make the document signable
    - Click this icon to download the document.

Troubleshooting

I'm unsure whether document has been signed by all parties

Follow the **Check the progress of the contract or letter** guide above.

NOT SET or a fake date showing within the document

The inclusion of NOT SET or a fake date (eg. 01/01/0001 or 31/12/9999) within the document indicates that certain field have not been completed. The majority of these fields relate to fields within **Salary Information** or **Job Information**, however this may also relate to fields within **Employee Settings**. If unsure, speak to your EPM Team.

Dash or N/A showing within the address line

If a dash, N/A or other characters are showing within one of the address lines this will be due to a dash, N/A or other character being entered within the address line in **Personal Details** of the relevant **Employee Record** (within the **Employees** module). Any address lines or other unnecessary fields in the system should be left blank, as any characters added within these fields will appear within relevant letters and contracts.

I want my letters to appear on our headed paper

Simply download the letter as per **Step 2: Create the contract or letter**. Add the letterhead to your document and save it within your files under a different name. Move to **Step 3: Create Signable Document** but when uploading the document add the new document. Complete the remaining steps as above. Please note this headed template cannot be saved.