Absence Management Module Settings

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process of creating reports within the Report Builder Module in EPM Connect.

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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

Date of Change	23rd October 2025
Summary of Change	Changes to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

General Guidance

Settings within Absence Management can be configured in line with your Absence Management Policies and support users in recording absences in line with these policies. Absence Management Settings are only available to those with relevant permissions.

Main Settings

Main Settings allow you to manage the overall settings that affect the whole module.

1. On the left-hand side of the EPM Connect window, select Absence Management. A list of further menu options are displayed.

2. Select **Settings**. The **Absence Settings** page is displayed.

3. Select the **Main Settings** tab.

4. From the **Show Absences By** drop-down menu, select the option you require.

    Absences can be filtered by the year they occurred, choose which format of year is most appropriate.

5. Configure the remainder of the settings by moving the toggle to **YES** or **NO**.

    YES
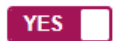
    ⓘ Hover over the **i** icon next to each setting for more details.

    Allow Users who can Approve & Edit Absences to Override Approvals.

    When editing an absence, which has already been approved, users with permissions to **Edit and Approve All Absences** will see a pop-up that allows them to update the absence instance without resetting the approval process.

6. Click **Save** to finish.

    🖫 Save
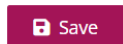
Absence Triggers

The **Absence Triggers** tab allow you to configure absence triggers, ratings and notifications. Absence Triggers will be displayed within the **Summary** page of the module and trigger notifications will be sent to relevant users when an employee hits a trigger.

Once the settings you have made have been saved you can view all items within the data table on the main screen.

✏ Click the pencil icon to edit an existing setting.

✖ Click the red cross icon to delete the existing setting.

1. On the left-hand side of the EPM Connect window, select **Employees**. A list of further menu options are displayed.

2. Select **Settings**. The Absence Settings page is displayed.

3. Select the **Triggers Setup** tab. The tab information is displayed.

4. Select the tab you require.

   We recommend completing the sections in the following order:

   1. Trigger Ratings

   2. Triggers Setup

   3. Trigger Notifications

   4. Trigger Settings

Triggers Ratings

This tab allows you to set the trigger ratings for your school.

You may choose RAG ratings - green (low), amber (medium) and red (high) trigger ratings. However, you can select any colours you choose and include up to 10 rating levels, with names of your choice, for example *Informal Trigger*.

1. Select the **Trigger Ratings** tab. The tab information is displayed.

2. Click the **+Add Trigger Rating** button. A new window is displayed.

   + Add Trigger Rating

3. In the **Rating Name** field, enter rating name.

   This can be a level, for example, *Low, Medium* or *High*, or a name such as *Informal Trigger*.

4. From the **Rating** drop-down menu, select a number.

5. From the **Rating Colour** options, select a colour to represent this trigger.

6. Click **Done** to finish. The window closes.

   Done

7. Click **Save** to finish.

   Save

Triggers Set Up

Set up Bradford Factor Triggers, in addition to bespoke absence triggers, based on frequency or duration. From formal triggers to prompt attendance meetings to informal triggers which can be set up ahead of formal triggers to provide an opportunity for informal conversations.

Bradford Factor Triggers

1. Select the **Triggers Setup** tab. The tab information is displayed.

2. Click the **+Create Bradford Factor Trigger** button. A new window is displayed.

   + Create Bradford Factor Trigger

3. In the **Factor** field, enter the factor which you wish to apply.

4. From the **Trigger Rating** drop-down menu, select a rating.

5. From the **Filter By** drop-down menu, select the option you require.

   We suggest leaving this blank.

6. In the **Notify From** field, enter or select a date.

   This is the date from which the trigger will become active.

7. Click **Save** to finish.

   🖫 Save

Other Absence Triggers

Other absence triggers can be based on either duration or frequency.

Duration-based Triggers

Duration-based Triggers are designed to trigger a notification when a single absence reaches a specific duration, or a total number of days absence is reached over a set period.

1. Select the **Triggers Setup** tab. The tab information is displayed.

2. Click the **+Create Other Absence Trigger** button. A new window is displayed.

   ➕ Create Other Absence Trigger
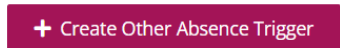
3. From the **Trigger Type** drop-down menu, select **Duration**.

4. In the **Description** field, enter a description of the trigger.

   For example, Nine working days of absence in a rolling 12-month period.

5. In the **Duration of** field, enter a number and select from **Days**, **Weeks** or **Months**.

   This is the total number of days/weeks/months.

6. In the **Over Instances** field, enter the number of instances.

   This can be left blank if the number of instances is not relevant.

7. In the **Within** field, enter a number and select from **Days**, **Weeks** or **Months**.

   This is the period in which the duration or frequency of absences will be measured.

8. From the **Trigger Rating** drop-down menu, select the option you require.

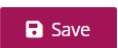   **Trigger Ratings** are set up within the **Trigger Ratings** tab.

9. From the **Filter By** drop-down menu, select the option you require.

   We suggest leaving this blank.

10. In the **Notify From** field, enter a date.

    This is the date in which the trigger will become active.

11. Click **Save** to finish.

    🖫 Save

Example

Frequency-based Triggers

Frequency-based Triggers are designed to trigger a notification when a specific number of absence instances have been reached during a specific period.

1. Select the **Triggers Setup** tab. The tab information is displayed.

2. Click the **+ Create Other Absence Trigger** button. A new window is displayed.
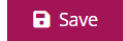

3. From the **Trigger Type** drop-down menu, select **Frequency**.

4. In the **Description** field, enter a description of the trigger.

   For example, More than 3 absences in 3 months.

5. In the **Number of Absences** field, select a number.

   This is the total number of absences during the set **Within** period. For example, 3.

6. In the **Within** field, enter a number and select from **Days**, **Weeks** or **Months**.

   This is the period in which the duration or frequency of absences will be measured.

7. In the **Lasting Over** field, enter a number and select from **Days**, **Weeks** or **Months**.

   This can be left blank if the duration of each absence is not relevant.

8. From the **Trigger Rating** drop-down menu, select the option you require.

   Trigger Ratings are set up within the **Trigger Ratings** tab.

9. From the **Filter By** drop-down menu, select the option you require.

10. In the **Notify From** field, enter a date.

    This is the date in which the trigger will become active.

11. Click **Save** to finish.

     Save

Example

Triggers Notifications

Select which users or user groups are notified when a trigger condition is met.

Users – Including Line Managers

1. Select the **Trigger Notifications** tab. The tab information is displayed.

2. Click the **+Add User** button. A new window is displayed.

     Add User

3. From the **User** drop-down menu, select a user or **Line Manager**.

    *To send notifications to an employee's Line Manager, select **Line Manager** from the **Users** field.*

4. Select the box next to relevant trigger types.

5. Click **Save** to finish.

     Save

User Groups

User Groups are set up in **User Administration** within the **Admin** section of the system.

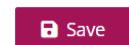To send notifications to an employee's **Line Manager** when a trigger is hit, follow the guide above.

1. Select the **Trigger Notifications** tab. The tab information is displayed.

2. Click the **+Add User Group** button. A new window is displayed.

    + Add User Group

3. From the **User Group** drop-down menu, select the option you require.

    If the **User Group** you require does not exist, set up a new **User Group** within **User Administration** or add the users as individual users.

4. Tick the box next to all relevant trigger types to confirm who should receive notification of these absence types.

5. Click **Save** to finish.

    🖫 Save
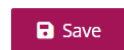
Triggers Settings

This tab allows you to select which Triggers should be excluded from the **Trigger Report** and from **Notifications**, based on their **Trigger Rating**.

1. Select the **Trigger Settings** tab. The tab information is displayed.

2. Move the toggles from **YES** or **NO** to exclude **Medium** and **Low** Rating Triggers.

    NO

3. Click **Save** to finish.

    🖫 Save

Absence Approver Tags

Absence approval tags are managed separately from other permissions within the system.

To set up Absence Approvers against absence reasons there are three steps.

1. Within the **Absence Approver Tags** tab, set up approver tags– this is simply the name of the tag – for example *General Absence and Bereavement* or *Unpaid Other Absence.*
2. Within the **Absence Reasons** tab, set up absence reasons and assign the tags who can approver these absences within the
3. Within the **Employee Record** of the individual, add the relevant approver tags.

The Absence Approver tab within **Absence Management Settings** allows you to set up and manage **Absence Approver Tags**. Once these are set up, they can be assigned to reasons on the **Absence Reasons** tab.

1. Select the **Absence Approver Tags** tab. The tab information is displayed.

2. Click the **+Create Approver Tag** button. A new window is displayed.

    + Create Approver Tag

3. In the **Approver Tag Title** field, enter a title.

    For example, **HR Manager** or **Headteacher**.

4. Click **Save t**o finish.

    🖫 Save

Absence Reasons

This tab allows you to set the **Absences Reasons** which can be selected for each absence type and also allows you to add **Absence Approver Tags** to each reason.

General Absences, **Time in Lieu** and **Holidays** all require approval.

For **Sickness** & **General Absences** you can set whether the absence reason is paid or unpaid leave.

Holiday absences have no reasons. Holiday absences approvals are set in the **Holiday Settings** tab.

Add an Approval Group to an Absence Reason
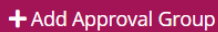
Approval Groups relate to those set up within the **Absence Approval Tags** tab.

When you add an **Approval Group** to an absence type, the users assigned to this group will have permission to authorise absences of this type.

Sickness and **Lateness** do not require approval.

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **General** tab.

3. Click the pencil icon next to the **Absence Reason** you want to edit.

4. Click the **+ Add Approval Group** button. A new window is displayed.

+ Add Approval Group

5. From the **Approver Tags** drop-down menu, select all options that apply.

6. From the **Approval Condition** drop-down menu, select a condition.

   Requires Approval by All Tags requires each approver to approve the absence.

   Requires Approval by Any Of Those Tags requires just one of the approvers to approve the absence.

7. From the **Approval Order** drop-down menu, select the order of this approval.

   The **Approval Order** dictates the order in which each approver approves the absence. If **First** is selected, the absence will be sent to the user with this **Approver Tag** first, to approve the absence. The absence will not be sent to any subsequent approvers until this user has approved the absence.

8. Click **Done** to finish. The window closes.

   Done

9. Click **Save** to finish.

   Save

Add Approver Tags to Users

Absence Approver Tags are set up within the **Job Information** page of each **Employee Record**. We therefore recommend opening an additional tab within your browser window so that you can refer back to the approver tags you have added within Absence Management Settings.

Adding an absence approver tag to an employee will allow you to assign approval permissions for specific absences types.

1. On the left-hand side of the EPM Connect window, select **Employees**. A list of further menu options are displayed.

2. Select **Details**. A list of further menu options is displayed.

3. Select the **All Employees** tab. The tab information is displayed.

4. Click on the name of the relevant employee. The relevant employee record is displayed.

5. Select the **Job Information** tab. The tab information is displayed.

6. Click **Edit Details**. A new window is displayed.

   Edit Details

7. In the **Effective Date** text box, select a date.

8. Click the **Apply** button.

9. Scroll down to the bottom of the page and click the **+ Add Approver Tag** button.

   + Add Approver Tag

10. Tick the relevant **Absence Tag Title**(s).

This will allow the employee to approve any absence that has an absence reason connected to the selected tag.

11. Click the **+Add Absence Approver Tag** button.

+ Add Absence Approver Tag

This user will now have the ability to approve absences of this type.

To remove the absence approver tag, click the red **x** icon.

Create Absence Reasons

The system is preloaded with absence reasons, however new reasons can be added.

Approval Groups are the types of users who are able to approve this type of absence.

Approval Condition drop-down menu, select a condition.

Requires Approval by All Tags requires each approver to approve the absence.

Requires Approval by Any Of Those Tags requires just one approver to approve the absence.

The **Approval Order** dictates the order in which each approver approves the absence.

If **First** is selected, the absence will be sent to the user with this **Approver Tag** first, to approve the absence. The absence will not be sent to any subsequent approvers until this user has approved the absence.

Create Sickness Absence Reasons

1. On the left-hand side of the EPM Connect window, select **Absence Management**. A list of further menu options are displayed.

2. Select **Settings**. The **Absence Settings** page is displayed.

3. Select the **Main Settings** tab.

4. Select the **Absence Reasons** tab. The tab information is displayed.

5. Select the **Sickness** tab.

The grid provides a list of current **Sickness Absence Reasons**.

✎ Current reasons can be edited by clicking the pencil icon.

6. Check through the list before adding additional reasons.

7. Click the **+Create Sickness Absence Reason** button. A new window is displayed.

+ Create Sickness Absence Reason

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

9. From the **SWFC Absence Category** drop-down menu, select a category.

    The categories listed within the drop-down menu relate to the School Workforce Census.

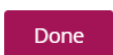10. Click **Save** to finish.

    [💾 Save]

Create and Manage General Absence Reasons

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **General** tab.

3. Click the **+ Add Approval Group** button. A new window is displayed.

   [+ Add Approval Group]

    These are the groups you set up within the **Absence Approver Tags** tab.

4. From the **Approver Tags** drop-down menu, select all options that apply.

5. From the **Approval Condition** drop-down menu, select a condition.

6. From the **Approval Order** drop-down menu, select the order of this approval.

7. Click **Done** to finish. The window closes.

    [Done]

8. Click **Save** to finish.

    [💾 Save]
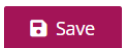
Create and Manage Lateness Absence Reasons

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **Lateness** tab.

3. Click the **+Create Lateness Reason** button. A new window is displayed.

    [+ Create Lateness Absence Reason]

4. In the **Reason Title** field, enter a title.

5. Click **Save** to finish.

    [💾 Save]

Create and Manage Time off in Lieu Earned Reasons

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **Time off in Lieu Earned** tab.

3. Click the **+ Create Time off in Lieu Absence Reason** button. A new window is displayed.

    [+ Create Time off in Lieu Absence Reason]

4. In the **Reason Title** field, enter a title.

5. Click the **+ Add Approval Group** button. A new window is displayed.

   + Add Approval Group

6. From the **Approver Tags** drop-down menu, select all options that apply.

7. From the **Approval Condition** drop-down menu, select a condition.

8. From the **Approval Order** drop-down menu, select the order of this approval.
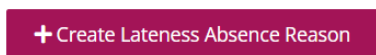
9. Click **Done** to finish. The window closes.
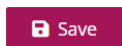
   Done

10. Click **Save** to finish.

    ⊟ Save

Create and Manage Time off in Lieu Spent Reasons

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **Time off in Lieu Spent** tab.

3. Click the **+Create Time off in Lieu Absence Reason** button. A new window is displayed.

   + Create Time off in Lieu Absence Reason

4. In the **Reason Title** field, enter a title.

5. From the **SWFC Absence Category** drop-down menu, select a category.

6. Click the **+Add Approval Group** button. A new window is displayed.

   + Add Approval Group

7. From the **Approver Tags** drop-down menu, select all options that apply.

8. From the **Approval Condition** drop-down menu, select a condition.

9. From the **Approval Order** drop-down menu, select the order of this approval.

10. Click **Done** to finish. The window closes.

    Done

11. Click **Save** to finish.

    ⊟ Save

Holiday Settings

This tab allows you to set the rules for your employees' holiday allowance, including who can approve holidays.

1. Select the **Holiday Settings** tab. The tab information is displayed.

2. In the **Annual Leave Year Start Day & Month** field, select a date and month.

3. In the **Reason Title** field, enter a title.

4. Click the **+Add Approval Group** button to add a new approver group. A new window is displayed.

    Approval Groups are the types of users who are able to approve this type of absence.

5. From the **Approver Tags** drop-down menu, select all options that apply.

    If the **Approver Tag** you require is not showing, these can be set up within the **Absence Approver Tags** tab.

6. From the **Approval Condition** drop-down menu, select a condition.

    Approval Condition drop-down menu, select a condition.

7. From the **Approval Order** drop-down menu, select the order of this approval.

    The **Approval Order** dictates the order in which each approver approves the absence. If **First** is selected, the absence will be sent to the user with this **Approver Tag** first, to approve the absence. The absence will not be sent to any subsequent approvers until this user has approved the absence.

8. Click **Done** to finish. The window closes.

9. Click **Save** to finish.

Family Leave Settings

This tab allows you to set the rules for your employees parental leave.

1. Select the **Family Leave Settings** tab. The tab information is displayed.

2. Click the **+ Add Approval Group** button. A new window is displayed.

    Approval Groups are the types of users who are able to approve this type of absence.

3. From the **Approver Tags** drop-down menu, select all options that apply.

If the **Approver Tag** you require is not showing, these can be set up within the **Absence Approver Tags** tab.
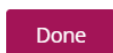
4. From the **Approval Condition** drop-down menu, select a condition.

   Approval Condition drop-down menu, select a condition.

5. From the **Approval Order** drop-down menu, select the order of this approval.

   The **Approval Order** dictates the order in which each approver approves the absence. If **First** is selected, the absence will be sent to the user with this **Approver Tag** first, to approve the absence. The absence will not be sent to any subsequent approvers until this user has approved the absence.

6. Click **Done** to finish. The window closes.

   Done
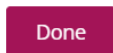
7. Click **Save** to finish.

   Save

Casual Staff Settings

This tab allows you to separate Zero Hour Staff from Absence Records and exclude them from absence-related reports, summaries and analytics.

1. Select the **Casual Staff Settings** tab. The tab information is displayed.

2. Select the box to exclude casual staff from summaries, analytics and reports.

3. Click **Save** to finish.

   Save

Parental Leave

The settings within this tab will be managed by your EPM Implementation Team.

Phased Return Settings

Phased Return Main Settings

This tab allows you to set rules for your employees' phased returns.

1. Select the **Phased Return Settings** tab. The tab information is displayed.

2. From the **The period before a phased return end date to send email notification reminders** drop-down menu, select an option.

3. Click **Save**.

   Save
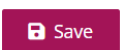
Templates

This section allows you to create templates which can be created for phased returns to reduce administration. Alternatively, a bespoke **Phased Return** can be created for the individual within the employee's **Absence Record**.

1. Select the **Phased Return Settings** tab. The tab information is displayed.

2. Click the **+Add Template** button.

   + Add Template

3. In the **Name** field, enter a template name.

4. Click on the day.

   Monday

   > **Important**
   >
   > The day must be clicked before entering any other details. Once clicked this will be highlighted.

5. In the **Start Time** field, enter a start time.

6. In the **End Time** field, enter an end time.

   Once **Start** and **End** Times have been entered, the **Hours per day** will autocalculate.

   To override the automated calculation, move the **Override Hours** toggle to **YES** and enter the **Hours per day** manually. Move the **Override Hours** toggle to **YES** and enter the **Hours per day** manually.

7. Repeat the above steps for each relevant day.

   Remember to select the day first.

8. Click the **Calculate Hours** button.

   ↦ Calculate Hours

   If all fields have been entered correctly the **State** will display **Valid**.

   If the **State** displays **Invalid**, a red error message will pop up detailing the issues.

   Make the relevant changes and once the **State** displays **Valid**, click **Calculate Hours** again.

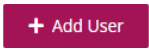   The total hours will be displayed in **Hours per week.**

9. Click **Save**.

   🖫 Save

Phased Return Notifications

These settings determine the users and user groups that are notified when a phased return condition is met.

Users

1. Select the **Phased Return Settings** tab. The tab information is displayed.
2. Click the **+Add User** button.

   + Add User

3. From the **User** drop-down menu, select the user's email address.
4. Move the toggles to select the relevant options.

   Moving the **On Add** toggle to **YES** will send a notification when a **Phased Return** is added.

   Moving the **On Modify** toggle to **YES** will send a notification when a **Phased Return** is modified.

   Moving the **On Due to End** toggle to **YES** will send a notification when a **Phased Return** is due to end.

   Moving the **On End** toggle to **YES** will send a notification when a **Phased Return** ends.

5. Click **Save**.

   Save

User Groups

1. Select the **Phased Return Settings** tab. The tab information is displayed.
2. Click the **+Add User** Group button.

   + Add User

3. From the **User Group** drop-down menu, select the relevant User Group.
4. Move the toggles to select the relevant options.

   Moving the **On Add** toggle to **YES** will send a notification when a **Phased Return** is added.

   Moving the **On Modify** toggle to **YES** will send a notification when a **Phased Return** is modified.

   Moving the **On Due to End** toggle to **YES** will send a notification when a **Phased Return** is due to end.

   Moving the **On End** toggle to **YES** will send a notification when a **Phased Return** is ended.

5. Click **Save**.

   Save

Trust Overview (Relevant to Trust Users only)

Trusts can view Absence data across the entire trust via **Trust Overview**, both within the **Summary** and **All Absences** sections. The **Absence Setup** section allows users to configure settings which apply to all schools within the Trust.

Absence Setup

This page allows you to set overall settings for the **Absence Management** Module for all MAT Properties (schools).

Select the tab below to direct you to an area of absence management to setup.

Main Settings

This page allows you to configure overall settings and copy central absence settings into schools.

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options are displayed.

2. Select **Absence Management**. A list of further menu options are displayed.

3. Select **Absence Setup**. The **Absence Setup** page is displayed.

4. Select the **Main Settings** tab.

Settings

These settings can be set to configure:

- how absences are shown
- employee abilities, such as TOIL
- data to exclude from Analytics, such as weekends and zero hour staff
- acknowledgements for Return to Work

1. Scroll down to **Settings**.

2. From the **Show Absence By** drop-down menu, select the option you require.

   Calendar Year: Runs from January 1st to December 31st. This cannot be changed.

   Financial Year: Runs from April 1st to March 31st. Financial Year Start Day & Month is set in **Admin** within **Other Settings**. If this is not set, it will default to 1st September to 31st August.

   Holiday: Is set in **Absence Management**, within **Holiday Settings**.

   Previous Rolling 12 Months: Covers the last 12 months.

   School Year: Runs from 1st September to 31st August.

3. Move the toggles to **YES** or **NO** to configure the settings you require.

Absence Settings by School

Turning on **Uses Central Settings** will override existing local settings and prevent them from being changed in the school site.

1. Scroll up to **Absence Settings by School**.

2. Move the toggles to **YES** or **NO** to override each individual property's (school's) settings with the settings you have configured within this page.

> Turning on **Uses Central Settings** will override existing local settings and prevent them from being changed in the school site.

Absence Reasons

This page allows you to set overall settings for the Absence Management Module for all MAT Properties.

Set the absences reasons which can be selected for each of the absence types detailed within the page.

General **Absences**, **Holidays** & **Time Off In Lieu** all require approval.

For **Sickness**, **General Absences**, & **Time Off In Lieu** absences can be set whether the absence reason is paid or unpaid leave.

These reasons can be mapped from Multi-Site to local properties (schools) so all properties use the same reasons.

1. Select the **Absence Reasons** tab.

2. Select the relevant sub-tab.

Sickness Absence Reasons

1. Select the **Absence Reasons** tab.

2. Select the **Sickness** tab. The tab information is displayed.

3. Click the **+Create Sickness Absence Reason** button. A new window is displayed.

    + Create Sickness Absence Reason

4. In the **Reason Title** field, enter a title.

5. From the **SWFC Absence Category** drop-down menu, select a category.

6. Click **Save** to finish.

    🖫 Save

General Absence Reasons

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **General** tab.

3. Click the **+Create General Absence Reason** button. A new window is displayed.

+ Create General Absence Reason

4. In the **Reason Title** field, enter a title.

5. From the **SWFC Absence Category** drop-down menu, select a category.

6. Move the **Is Paid by Default** toggle to **YES** or **NO**. Click **Save** to finish.

7. Click the **+Add Approval Group** button. A new window is displayed.

+ Add Approval Group

8. From the **Approver Tags** drop-down menu, select all options that apply.

9. From the **Approval Condition** drop-down menu, select a condition.

10. From the **Approval Order** drop-down menu, select the order of this approval.

    The **Approval Order** dictates the order in which each approver approves the absence. If first is selected, this approval will be first to approve the absence.

11. Click **Done** to finish. The window closes.

Done

12. Click **Save** to finish.

🖫 Save

Lateness Absence Reasons

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **Lateness** tab.

3. Click the **+Create Lateness Reason** button. A new window is displayed.

+ Create Lateness Absence Reason

4. In the **Reason Title** field, enter a title.

5. Click **Save** to finish.

🖫 Save

Time off in Lieu Earned

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **Time off in Lieu Earned** tab.

3. Click the **+Create Time off in Lieu Absence Reason** button. A new window is displayed.

+ Create Time off in Lieu Absence Reason

4. In the **Reason Title** field, enter a title.

5. Click the **+Add Approval Group** button. A new window is displayed.

+ Add Approval Group

6. From the **Approver Tags** drop-down menu, select all options that apply.

7. From the **Approval Condition** drop-down menu, select a condition.

8. From the **Approval Order** drop-down menu, select the order of this approval.

   The **Approval Order** dictates the order in which each approver approves the absence. If first is selected, this approval will be first to approve the absence.

9. Click **Done** to finish. The window closes.

   Done

10. Click **Save** to finish.

    Save

Time off in Lieu Spent

1. Select the **Absence Reasons** tab. The tab information is displayed.

2. Select the **Time off in Lieu Spent** tab.

3. Click the **+Create Time off in Lieu Absence Reason** button. A new window is displayed.

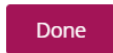   + Create Time off in Lieu Absence Reason

4. In the **Reason Title** field, enter a title.

5. From the **SWFC Absence Category** drop-down menu, select a category.

6. Click the **+Add Approval Group** button. A new window is displayed.

   + Add Approval Group

7. From the **Approver Tags** drop-down menu, select all options that apply.

8. From the **Approval Condition** drop-down menu, select a condition.

9. From the **Approval Order** drop-down menu, select the order of this approval.

   The **Approval Order** dictates the order in which each approver approves the absence. If first is selected, this approval will be first to approve the absence.
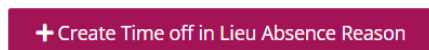
10. Click **Done** to finish. The window closes.

    Done

11. Click **Save** to finish.

    Save

Absence Triggers

Triggers Set Up

Set up Bradford Factor Triggers, in addition to bespoke absence triggers, based on frequency or duration. From informal triggers which will alert you of potential absence issues and allow you to have early conversations, to formal triggers to prompt attendance meetings.

Bradford Factor Triggers

1. Select the **Triggers Setup** tab. The tab information is displayed.
2. Click the **+Create Bradford Factor Trigger** button. A new window is displayed.

   + Create Bradford Factor Trigger

3. In the **Factor** field, enter the factor which you wish to apply.
4. From the **Trigger Rating** drop-down menu, select either Low, Medium or High.
5. From the **Filter** By drop-down menu, select the option you require.
6. Click **Save** to finish.

   🖫 Save

Other Absence Triggers

1. Select the **Triggers Setup** tab. The tab information is displayed.
2. Click the **+Create Other Absence Trigger** button. A new window is displayed.

   + Create Other Absence Trigger

3. From the **Trigger** type drop-down menu, select either **Duration** or **Frequency**.
4. In the **Description** field, enter a description of the trigger.
5. In the **Duration** of field, select a number and select from **Days**, **Weeks** or **Months**.
6. In the **Over Instances** field, enter the number of instances.
7. In the **Within** field, select a number and select from **Days**, **Weeks** or **Months**.
8. From the **Filter By** drop-down menu, select the option you require.
9. In the **Notify From** field, enter a date.
10. Click **Save** to finish.

    🖫 Save

Triggers Ratings

This tab allows you to set the trigger ratings for your school.

You may choose RAG ratings - green (low, amber (medium) and red (high) trigger ratings. However you can select any colours you choose and include up to 10 rating levels.

1. Select the **Trigger Ratings** tab. The tab information is displayed.

2. Click the **+Add Trigger Rating** button. A new window is displayed.

    + Add Trigger Rating

3. In the **Rating Name** field, enter rating name.

4. From the **Rating** drop-down menu, select a rating.

5. From the **Rating Colour** options, select a colour.

6. Click **Done** to finish. The window closes.

    Done

7. Click **Save** to finish.

    Save

Triggers Settings

This tab allows you to select which Triggers should be excluded from Trigger Report and from Notifications, based on their Trigger Rating.

1. Select the **Trigger Settings** tab. The tab information is displayed.

2. Move the toggles from **YES** or **NO** to exclude **Medium** and **Low** Rating Triggers.

    NO

3. Click **Save** to finish.

    Save

Absence Approver Tags

This tab allows you to set up Absence Approver Tags. These can be used to set the employees who can approve absences. Once these are set up they can be assigned to reasons on the 'Absence Reasons' tab.

1. Select the **Absence Approver Tags** tab. The tab information is displayed.

2. Click the **+ Create Approver Tag** button. A new window is displayed.

    + Create Approver Tag

3. In the **Approver Tag Title** field, enter a title.

4. Click **Save t**o finish.

    Save