Core Absence Management Module

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for all tasks managed within the Core Absence Management 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

Overview

The Core Absence Management module simplifies and centralises Absence Management recorded in a single platform.

Record all absence types easily as they happen or import absences en masse, saving valuable time. Upload all absence related documents, such as Return to Work and Self Certification forms, supporting a clear audit trail and ensuring all documents are easy to find when you need them.

Gain a daily view of absences and view pre-planned absences within your calendar, to support you in managing annual leave and view individual absence records and heatmaps to identify trends and proactively manage emerging absence issues.

In addition, the module integrates seamlessly with our Payroll module, automatically alerting you to nil and half-pay triggers to support accurate pay processing and reduce the risk of overpayment.

General Guidance

The data shown displays the number of absence instances, not the number of absence days.

Absences reflect the current absence period.

Search functions

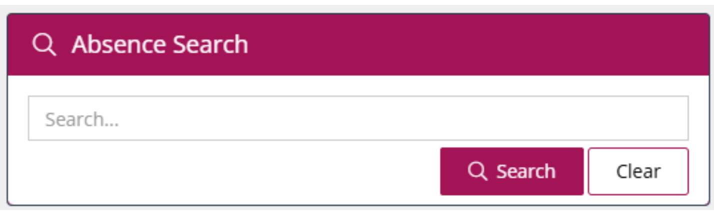
Column headings in a bold text, with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

To search in a column, click on the magnifying glass in the header of the column you want to search. From the for drop-down list, select the rule for your search then add the criteria in the field below.

Data can be exported at any time by clicking the **Export** button. Select from **Word** or **Excel**. The file will appear within your downloads.

The tabs default to **All Employees**. Click on the additional tabs to view **Employees by Department** and **Employees by Job Role**.

When viewing **Employees by Department**, you must first select the department within the **Department Filter** box on the right-hand side.



Summary

The Summary section of the module provides a variety of metrics, including Employees Absent, Employees on Holiday, Attendance Rate and Sickness, in addition to a number of infographics.

1. On the left-hand side of the system window, select **Absence Management**. A list of further menu options is displayed.
2. Select **Summary**. The **Absence Management** module is displayed and a variety of metrics visible.

   Absence data will default to the current absence period defined within **Settings**.

   Absence Period can be amended by entering an **Absence Period Start** and **Absence Period End**.

   Trust users can view their **Attendance Rate Compared to MAT**.

3. To view more details, click the arrow in the top right of any of these metrics to move into specific details, the training courses these relate to and the users they were assigned to.
4. Scroll down to view further infographics.
5. Scroll down to view **All Absences By Type**.

   Absence data will default for the current absence period defined within **Settings**.

   Absence Period can be amended by entering an **Absence Period Start** and **Absence Period End**.

Export Employee's Absence Record Data

Easily export absence data at any time to review for further analysis or attendance meetings.

1. On the left-hand side of the system window, select **Absence Management**. A list of further menu options is displayed.
2. Select **Absence Records**. The Absence Records page displays all absence records.

3. Click the eye icon to open the absence instance.
4. Scroll down to **Calendar View**.
5. Select the **List View** tab.

   To drill down into specific absence data, for example **Sickness,** click on the magnifying glass in the Absence Type header of the column, enter the absence type and click **Apply**. The table will now display only information relating to that absence type.

6. Click **Export** to export the employee's absence data. **S**elect either **Word** or **Excel** format. The file will appear within your downloads.

View Absences

Absence Records displays the total number of absence instances, broken down by employee and absence type and the **Current Status** and **Attendance Rate** of each employee. This is useful in providing a birds-eye view of absences.

Select individual absence records to view Calendar and List Views and a breakdown of Absences, Holiday and TOIL, in addition to a handy heatmap.

Module tip!

Double click on the title of any of the columns to sort the data by absence type. This provides a useful insight into employees with high numbers of that absence type.

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

2. Select **Absence Records**. The **Absence Records** page is displayed, showing all absence records.

3. Click the eye icon to open an employee record. The employee record is displayed with key metrics.

   Weekday Absence Heatmap

   The heatmap provides a useful insight into patterns of absences. For example, should a member of staff show multiple absence days on a Monday, the **M** will be highlighted in amber, and should the pattern continue, this will change to red.

   Calendar View
   Provides a calendar displaying all holiday, general absence and sickness.
   Click on **Month/Week/Day** to change the view.

   Use the arrows at the top left of the calendar to view the previous month/day.

   List View
   Provides a list of all holiday, general absence and sickness.

   Click the pencil icon within any of the rows to view and edit any of the information.
   Click **Save** to finish.

   The **Audit Log** tab will display all changes made to the record, including absences created, restored and archived, uploaded documents, a date stamp and who the activity was completed by.

Edit/Update Absence

Absences can be updated, for example with a **Last Day of Absence** once the employee has returned to work. All amendments to absences will be displayed within the **Audit Trail**.

There are two methods for amending sickness absence. The first is useful when you wish to view and update recent absence end dates. The second is useful when you wish to amend an absence related to a specific employee.

Edit/update an absence within Absence Records

1. On the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Click **Absence Record**. The Absence Management module is displayed showing all absence records.
3. Click the eye icon to open the absence instance.
4. Scroll down to **Calendar View**.
5. Select the **List View** tab.
6. Click the pencil icon within any of the rows to view and edit or add information. A new window is displayed.
7. Amend or add information and click **Save** to finish.

Edit/Update an absence via Absence Instances

1. On the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Click **Absence** Instances. The **Absence Instances** displays all absence instances.
3. Click on the **End Date** title. This will show all absences without an end date and therefore absence instances that need to be updated with an end date.
4. Click the pencil icon next to the absence you wish to amend. The absence instance is displayed.
5. In the **Last Day of Absence** field, select the date and time you wish to amend.

   If the time is left empty, the system will assume that the employee has been absent for the full day.

6. Add/amend any further details within the record.
7. Scroll down to the bottom of the page. The **Documents** tab is displayed.
8. Click **Save** to finish.

Add Documents

Once an absence has been created, **Documents** can be added to the absence (this applies to all absence types).

1. Scroll down to the bottom of the page. The **Documents** tab is displayed.
2. Click the **+ Add Document** button. A new window is displayed.

3. Click **Upload File** and select the document you wish to upload from your files.
4. In the **Title** field, provide a title for the document.
5. Click **Save**.

Add Notes

Once an absence has been created, **Notes** can be added to the absence (this applies to all absence types).

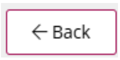
1. Select the **Notes** tab at the bottom of the screen. The **Notes** tab is displayed.
2. Click **+ Add Note**. A new window is displayed.

3. In the field, enter any relevant notes.
4. Click **Save** to finish.

5. Click **Back** at the top of the page. The absence record is displayed.

Audit Trail

The **Audit Trail** provides a detailed record of all changes made to this absence.

Add Return to Work

Return to Work can be completed at any time after the absence has been saved. It can be added immediately or can be added by selecting the relevant absence within the absence record and clicking the pencil icon.

Return To Work forms can only be added if **Last Day of Absence** is populated.

Either complete the form or click the **Upload Alternative Return to Work Interview** button to add an alternative form.

1. Click the + **Add Return to Work Form** button.

2. In the **Return to Work Interview Date** field, enter the date of the Return To Work meeting.
3. In the **Meeting Notes** field, enter any relevant notes from the meeting.
4. Tick the **Was the employee's absence work-related?** box if relevant.
5. Tick the **Does the employee require support to prevent further absences?** box if relevant.
6. Tick the **Does this Employee require a Phased Return?** box if relevant.
7. Tick the **Was the school's sickness reporting procedure followed?** box if relevant.
8. Tick the **Was the absence a result of an accident at work?** box if relevant.

   This will create an additional **Was the absence a result of an accident at work?** box. Tick this box if relevant.

9. In the **Are you taking any medication that work needs to be aware of?** field enter any relevant medications if applicable.
10. In the **Support Offered** field, enter any support offered.
11. In the **Further Action Taken** field, enter any relevant further action taken.
12. Click **Save** to finish.

Upload an alternative form

An alternative Return to Work form can be added instead of completing the fields displayed.

1. Click the **Upload Alternative Self Certification Form** button in the bottom left-hand corner of the pop-up window.

2. Select the relevant form from your files
3. Click **Open**.
4. Click **Save** to finish.

Add Self Certification

Self Certification can be completed at any time after the absence has been added and is usually added by the employee for schools using the Enhanced Absence Management Module. It can be added immediately or can be added by selecting the relevant absence within the absence record and clicking the pencil icon.

Self Certification can only be added if **Last Day of Absence** is populated.

An alternative form can be added on behalf of the employee if a manual form has been completed.

1. Click the **+ Add Self Certification** button.

2. In the **Brief Description of Illness** field, enter a brief description.
3. Tick the **Was your sickness due to a workplace injury or incident?** box if relevant.
4. Tick the **Did you visit a doctor?** box if relevant.
5. Click **Save** to finish.

Upload an alternative form

An alternative Self Certification form can be added instead of completing the fields displayed.

1. Click the **Upload Alternative Self Certification Form** button in the bottom left-hand corner of the pop-up window.

2. Select the relevant form from your files.
3. Click **Save** to finish.

Add an absence

Please note that schools and trusts with Core Absence Management do not have access to employee self-service.

Once an absence has been added, it can not be deleted, only edited.

Add a sickness absence

1. From the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Select **Absence Records**. The Absence Management module is displayed, showing all absence records.
3. Find the employee record you wish to view.
4. Click the eye icon next to the employee you wish to view. The employee's absence record is displayed.
5. Click the **+ Add Sickness** button at the top of the screen. A new page is displayed.

6. From the **Reason for Absence** drop-down menu, select the option you require.

   You must ensure you choose the correct absence type ie Sickness or General Absence, as this cannot be edited once the absence is saved.

   Reason for Absence will display the options you selected within **Absence Settings**.

7. In the **First Day of Absence** field, select a date from the calendar, followed by a time.
8. In the **Last Day of Absence** field, select a date from the calendar, followed by a time.

   The **Last Day of Absence** can be left empty and amended at a later date should the absence be extended.

   If **Time** is left empty, the system will assume the employee has been absent for the full day.

9. Tick the **Pregnancy Related Absence** box if the absence relates to a pregnancy.
10. Tick the **Disability Related Absence** box if the absence relates to a disability.
11. Tick the **Accident At Work** box if the absence relates to an accident at work.
12. In the **Details** field, add any relevant details.
13. In the **Roles** field, select all the roles that the absence relates to.

    The system will calculate the workings days lost for **Absent For (Days)** using the information in the system. This is shown in the **Use Suggested** box.

14. In the **Absent for (Days)** field either click the **Use Suggested** button to populate the field or override manually by entering a number into the field.

15. Tick the **Disable Return To Work** box if you wish to disable the requirement to complete a Return To Work form.

16. Tick the **Disable Self Certification** box if you wish to disable the requirement to complete a Self Certification form.

17. Click **Save**. A number of additional options will appear at the bottom of the page.

    Save

    Once an absence has been saved it cannot be deleted only edited.

    Once saved, the system with automatically calculate any pay changes. The following message will appear:

    Sick pay policy evaluation was scheduled 3 seconds ago.
    Pay Reduction lines will be available after the evaluation had finished.

    Any errors or incomplete information will be displayed within an error message.

Pay Changes

Once saved, the system with automatically calculate any pay changes. The following message will appear:

Sick pay policy evaluation was scheduled 3 seconds ago.
Pay Reduction lines will be available after the evaluation had finished.

Should the absence hit the policy trigger for nil or half pay this will be displayed within a table below the absence.

Date of Pay Change	Pay Percentage	Statutory Sick Pay	Policy Name	
17 Feb 2025	0.00 %	No	Green Book - Support	×

Add a manual pay change

If the absence fails to hit a policy trigger, you can manually add a pay changes line.

1. Click the **Add Pay Changes Line** button.

   + Add Pay Changes Line

2. In the **Percentage** field, enter a percentage

   This is the percentage of pay the employee will receive from the Active From date.

3. In the **Active From** field, select the date in which this percentage should apply.

4. Move the **Statutory Sick Pay** toggle to **YES** or **NO**.

5. Click **Save**.

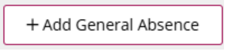
   Save

   Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

6. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add General Absence

1. Select **Absence Records.** The **Absence Management** module is displayed showing all absence records.
2. Find the employee record you wish to view.
3. Click the eye icon next to the employee you wish to view. The employee's absence record is displayed.
4. Click the **+ Add General Absence** button at the top of the screen. A new page is displayed.



5. From the **Reason for Absence** drop-down menu, select the option you require.

   These are set up by EPM. If the absence reason you require is not included, please speak to your EPM Team.

6. In the **First Day of Absence** field, select a date from the calendar, followed by a time.
7. In the **Last Day of Absence** field, select a date from the calendar if known, followed by a time.

   If the time is left empty, the system will assume that the employee has been absent for the full day.

   The **Last Day of Absence** can be added/amended at a later date.

8. In the **Details** field, add any relevant details.
9. In the **Roles** field, select all the roles that the absence relates to.

   The system will calculate the workings days lost for **Absent For (Days)** using the information in the system. This is shown in the **Use Suggested** box.

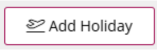
10. In the **Absent for (Days)** field either click the **Use Suggested** button to populate the field or override manually by entering a number into the field.
11. Click **Save**. A number of additional options will appear at the bottom of the page

   Any errors or incomplete information will be displayed within an error message.

   Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

Add Holiday

1. On the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Click **Absence Records**. The **Absence Management** module is displayed showing all absence records.
3. Find the employee record you wish to view.
4. Click the eye icon next to the employee you wish to view. The employee's absence record is displayed.
5. Click the **+ Add Holiday** button at the top of the screen. A new page is displayed.

6. In the **First Day of Absence** field, select a date from the calendar, followed by a **Time**.
7. In the **Last Day of Absence** field, select a date from the calendar, followed by a **Time**.

   The **Last Day of Absence** can be amended at a later date should the absence be extended. This can be left empty and added at a later date.

   If **Time** is left blank, the system will assume the employee has been absent for the full day.

8. In the **Details** field, add any relevant details.

   The system will display the **Allowance Period** under **Details** and the **Annual Leave Allowance, Taken, Awaiting Approval** and **Remaining** under each role listed under **Roles**.

9. In the **Roles** field, select all the roles that the absence relates to.
10. In the **Absent for (Days)** field enter 1 unless the employee has returned to work. This can be amended at a later date.

    The system will calculate the workings days lost for **Absent For (Days)** using the information in the system. This is shown in the **Use Suggested** box.

11. Click **Save**. A number of additional options will appear at the bottom of the page

    Any errors or incomplete information will be displayed within an error message.

    Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

12. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add Family Leave (Maternity, Paternity, Shared Parental, Bereavement and Adoption Leave)

1. On the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Click **Absence Records**. The **Absence Management** module is displayed.
3. Find the employee record you wish to view.

4. Click the eye icon next to the employee you wish to view. The employee's absence record is displayed.
5. Click the **+ Family Leave** button at the top of the screen. Three options are displayed.

6. Select **Paternity**, **Maternity**, **Shared Parental Leave**, **Bereavement** or **Adoption Leave**.

Add Maternity Leave

1. In the **Due Date** field, select a due date.

   The **Earliest Leave Start Date** will be calculated automatically.

2. In the **MATB1 Seen** field, select a date.
3. Click **Upload File** to add upload a copy of the MATB1 form.

4. Select the document from your files.
5. In the **Requested Start Date** field, select a date.
6. In the **Actual Start Date** field, select a date.

   The **Actual Start Date** can be amended at a later date.

   The **Earliest Leave Start Date** will be calculated automatically.

   The **End of Ordinary Leave** date will be calculated automatically.

   The **Additional Leave End Date** will be calculated automatically.

7. In the **Requested End Date** field, select an end date.

   Important

   Absence Duration must be in full weeks from the **Requested Start Date**. For example, a full years Maternity Leave starting on 07/10/24 should end exactly 52 weeks later.

8. Select the **Replaced by Shared Parental Leave** field if this applies.
9. Tick the box next to the role(s) relevant to the maternity leave to confirm they meet the average weekly earnings requirement.
10. Click **Save**. A number of additional options will appear at the bottom of the page

Any errors or incomplete information will be displayed within an error message.

Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

11. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add Paternity Leave

1. In the **Due Date** field, select a due date.
2. In the **Actual Birth Date** field, select a date.

   This can be added at a later date.

3. From the **Block or Split Leave** drop-down menu, select **Block** or **Split**.
4. In the **Start Date** field select the start date or if **Split Leave**, enter the **Week 1 Start Date**.
5. In the **End Date** field select the end date or if **Split Leave**, enter the **Week 1 End Date**.

   This should be exactly 7 days after the start date.

6. If **Split Leave**, select the **Week 2 Start Date**.
7. If **Split Leave**, select the **Week 2 End Date**.

   This should be exactly 7 days after the start date.

8. Tick the box next to the role(s) relevant to the Paternity Leave to confirm they meet the average weekly earnings requirement.
9. Click **Save**. A number of additional options will appear at the bottom of the page

   Any errors or incomplete information will be displayed within an error message.

   Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

10. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add Shared Parental Leave

The following steps outline the process for adding a Shared Parental Leave Request. Please note Shared Parental Leave can be taken in a maximum of three blocks or as a single block. Therefore, only complete the blocks you require.

1. In the **Binding Notice Given to end Maternity Leave/Adoption Leave on*** field, select a date.

   Maternity/Adoption Leave needs to be curtailed before requesting Shared Parental Leave. Enter the date requested to curtail Maternity Leave/Adoption Leave

2. In the **Binding Notice Given to end Maternity Leave/Adoption Pay on*** field, select a date.

   Maternity Pay/Adoption Pay needs to be curtailed before requesting Shared Parental Leave. Enter the date requested to curtail Maternity Pay/Adoption Leave.

3. In the **Date Maternity Leave/Adoption Leave Ends*** select a date.

   This is the last date of Maternity/Adoption Leave. This should be in full weeks. For example, if the Maternity Leave began on a Wednesday, the leave should end on a Tuesday.

4. In the **Date Pay Ends*** select a date.

   This is the last date the employee will be paid Maternity Leave/Adoption Leave.

   This should be in full weeks. For example, if the Maternity Leave began on a Wednesday, the leave should end on a Tuesday.

5. In the **Child's Date of Birth Or Date of Placement*** field, select a date.

   This is the date given on the MATB1 or the Date of Placement certificate

6. In the **Number of Weeks Leave taken by Leave End Date*** field, enter a number.

   This is the number of weeks Maternity /Adoption Leave taken prior to curtailment.

7. In the **Number of Weeks Adoption/Maternity Pay taken by Pay End Date*** field, enter a number.

   This is the number of weeks Adoption/Maternity Pay already taken before curtailment.

8. Tick the **Choose Policy on Behalf of Employee** box if relevant.

   An additional field will be displayed within the **Roles** section of the screen.

9. For each **Job Role**, select the relevant **Pro-rata Rule** and when displayed, select the relevant pay policy from the **Select Pay Policy** field.

   For Teachers - select **365 Rule – Pay** for days worked.

   For Support Staff - select **Calendar Days in Period**.

   Select Pay Policy will only be displayed if the **Choose Policy on Behalf of Employee** box has been ticked.

10. Within the **Details of Individual Sharing Leave** section at the bottom of the screen, enter the **Name** of the partner sharing the leave.

    This should be the name of the partner sharing the leave.

11. In the **National Insurance Number** field, add the partner's National Insurance Number.
12. In the **Home Address** field, add the partner's home address.
13. In the **Employers Name and Address** field, add the partner's employer's names and address.
14. In the **Start of Employment** field, select a date.
15. Tick the **Do they earn at least £118 a week?** box to confirm that they earn £118 per week.
16. Click **Save**. Additional fields will appear further down the screen.

    Please note Shared Parental Leave can be taken in a maximum of three blocks or as a single block. Therefore, only complete the blocks you require.

17. In the **Notice One Given** field, enter the date that the notice was given.

    The **Time Taken (weeks)** field will auto populate based on the date you have entered.

18. Click the **+ Period of Leave** button.

19. In the **Start Date** field, enter the date the leave starts for this period.
20. In the **End Date** field, enter the date the leave ends for this period.
21. Click the **+ Add Period** button to confirm.

22. Complete the relevant field for any additional blocks of leave required.
23. Click **Save**. A number of additional options will appear at the bottom of the page

    Any errors or incomplete information will be displayed within an error message.

    Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

24. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add Adoption Leave

1. Enter the **Adoption Document Seen**.
2. Click the **Upload File** button and upload the **Adoption Document Seen**.

3. In the **Notice Given Field** select the date notice was given.
4. In the **Requested Start Date** field, select the requested start date.
5. In the **Actual Start Date** field, select the actual start date.
6. In the **End Date** field, select the end date.

   Absence duration must be in full weeks from Start Date.

7. In the **Matching Date** field, select the matching date.
8. In the **Expected Placement Date** field, select the expected placement date.
9. In the **Placement Date** field, select the placement date.

   Only one of the **Expected Placement Date** or **Placement Date** must be completed.

11. Tick the box next to the role(s) relevant to the Adoption Leave to confirm they meet the average weekly earnings requirement.
12. Click **Save**. A number of additional options will appear at the bottom of the page

    Any errors or incomplete information will be displayed within an error message.

    Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

13. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add Bereavement Leave

1. Click the **Upload File** button and upload the **Declaration**.
2. 

3. In the **Notice Given On** field, select the date notice was given.
4. From the **Block or Split Leave** drop-down menu, select **Block** or **Split**.
5. In the **Start Date** field select the start date or if **Split Leave**, enter the **Week 1 Start Date**.
6. In the **End Date** field select the end date or if **Split Leave**, enter the **Week 1 End Date**.

   This should be exactly 7 days after the start date.

7. If **Split Leave**, select the **Week 2 Start Date**.
8. If **Split Leave**, select the **Week 2 End Date**.

   This should be exactly 7 days after the start date.

9. In the **Date Of Passing** field, select the date the person passed.
10. Tick the box next to the role(s) relevant to the **Bereavement Leave** to confirm they meet the average weekly earnings requirement.
11. Click **Save**. A number of additional options will appear at the bottom of the page

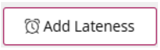
    Any errors or incomplete information will be displayed within an error message.

    Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

12. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**

Add Lateness

1. On the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Click **Absence Records**. The **Absence Management** module is displayed showing all absence records.
3. Find the employee record you wish to view.
4. Click the eye icon next to the employee you wish to view. The employee's absence record is displayed.
5. Click the **Add Lateness** button at the top of the screen.



6. In the **Employee Name** field, enter the employee's name.
7. In the **Reason for Absence** field, select a reason. The reasons displayed are determined within **Settings**.

   Speak to your EPM team if the reason you require is not available.

8. In the **Date**, field select a date.
9. In the **Time of Arrival**, field select a time.
10. In the **Time Expected**, field select a time.
11. In the **Notes** field, enter any relevant notes.
12. In the **Roles** field, select all the roles that the lateness relates to.
13. In the **Absent For (Hours)*** field either click the **Use Suggested** button or enter the number of hours absent.

14. Click **Save**. A number of additional options will appear at the bottom of the page

   Any errors or incomplete information will be displayed within an error message.

   Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

15. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add TOIL

Both earnt and spent TOIL (Time Off In Lieu) can be added to the system within **Absence Management**.

Earn TOIL

1. On the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Click **Absence Records**. The **Absence Management** module is displayed showing all absence records.
3. Find the employee record you wish to view.

4. Click the eye icon next to the employee you wish to view. The employee's absence record is displayed.
5. Click the **Add TOIL** button at the top of the screen. Further options are displayed.


6. Select **Earn TOIL**. A new **Add Time Off in Lieu Earned** window is displayed.
7. In the **Start of TOIL** field, select a date.
8. In the **End of TOIL** field, select a date.
9. From the **TOIL** Reason drop-down menu, select a reason.
10. In the **Notes** field, enter any relevant notes.
11. Select all **Roles** that apply.
12. In the **TOIL Hours Earned** field, enter the total number of hours.
13. Click **Save**. A number of additional options will appear at the bottom of the page


Any errors or incomplete information will be displayed within an error message.

    Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.
14. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Spend TOIL

1. On the left-hand side of the system window, click **Absence Management**. A list of further menu options is displayed.
2. Click **Absence Records**. The **Absence Management** module is displayed showing all absence records.
3. Find the employee record you wish to view.

4. Click the eye icon next to the employee you wish to view. The employee's absence record is displayed.
5. Click the **Add TOIL** button at the top of the screen. Further options are displayed.

6. Select **Spend TOIL**. A new **Spend Time Off in Lieu Earned** window is displayed.
7. In the **Start of TOIL** field, select a date.
8. In the **End of TOIL** field, select a date.
9. From the **TOIL Reason** drop-down menu, select a reason.
10. In the **Notes** field, enter any relevant notes.
11. Select all **Roles** that apply.
12. In the **TOIL Hours Earned** field, enter the total number of hours.
13. Click **Save**. A number of additional options will appear at the bottom of the page

Any errors or incomplete information will be displayed within an error message.

Once an absence has been created, **Notes** and **Documents** can be added to the absence (this applies to all absence types). Please see **Edit Absences within Absence Records** section of this guide for more information. Any changes made to the absence will appear within the **Audit Trail** tab.

14. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

View and Approve Absence Requests

This page shows all absence requests that you can approve. The absences you can approve are managed via **Approval Tags** within **Absence Settings** and the **Job Information** page of the **Employee Record**. The core **Absence Management Module** allows absences only to be entered by your HR and Admin staff within **Absence Records**.

To manage **Absence Approvers**, see our **Absence Management Settings** Guide.

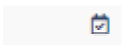
Open Absence Requests are requests that are yet to be approved or denied, while **Closed Absence Requests** have already been approved.

1. On the left-hand side of the system window, click Absence Management. A list of further menu options is displayed.
2. Select **Approve Absences**. The **Approve Absence Requests** page is displayed. This will show all open and closed absences.

Approve Absence Requests

This section displays all open absence requests. Each request will display the **Employee Name**, **Reason**, **Start Date**, **End Date**, **Details** and **Roles**, in addition to the total days requested. From here the approver can approve, reject or request changes.

1. Find the employee's absence you wish to view.



2. Click on the name of the requester or the icon in the actions column. The absence request is displayed within a new window.
3. Scroll down to the **Approve as 'Line Manager'** section.
4. In the **Status** field, select a status.

   The **Request Changes** status allows the user to ask the person who has entered the absence to make changes and resubmit the absence, for example reducing the number of days requested, without the need to re-create the entire absence request.

5. In the **Message** field, add a message.
6. Click **Save** to finish.

7. Scroll down to the bottom of the page to the **Documents**, **Notes** and **Audit Trail** tabs.

Documents

Here you can view and add documents to the absence.

1. Click the **+ Add Document** button to add a document.

2. Click the **Upload File** button.

3. In the **Title (Optional)** field, add a title.

4. Click **Save** to finish.

Notes

Here you can view and notes to the absence.

1. Click the **+ Add Note** button to add a note.

2. In the **Note** field, add a note.
3. Click **Save** to finish.

Audit Trail

Each absence request has a full audit trail, with the ability to view all changes made.

Import Absences

Should you wish to import absence data en-masse, this can be done within the **Import Absences** area of the module. This can also be used for mass changes. Unlike the Import Employees spreadsheet information can only be added, not edited via the Import Spreadsheet.

When adding absences within the **Download Import Spreadsheet**, absences should be recorded consistently as either **Hours** or **Days**. If you decide to use days, absences which are less than a day, can be recorded as a decimal, for example 0.17 days. We therefore recommend that absences are recorded in days, rather than hours. This can be amended within **Settings**.

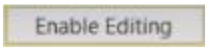
1. On the left-hand side of the system window, select Absence Management. A list of further menu options is displayed.
2. Select **Import Absences**. The **Import Absences** page is displayed. This will show all absence records.
3. Click the **Download Import Spreadsheet** button.

4. A **Downloading - please wait** message will appear.

5. Once downloaded, an Excel spreadsheet will open. Click the **Enable Editing** button in the top yellow bar of the document. This will open an instructions page. Read this carefully.

   The columns within the spreadsheet match the details within the **Absence Management** module and the same mandatory fields apply.

   Re-look at the **Instructions** tab to check the formatting information that applies to each coloured cell.

   The tabs along the bottom of the spreadsheet include all types of absences included within Absence Records.

6. Click on the relevant tab at the bottom of the spreadsheet for example the **General Absence** tab.

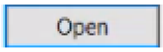
   

7. Add a **User ID**. This is the email address of the employee and must match the email address stored against the employee within the system.
8. Add the information within each column.
9. Move through the additional tabs and add any other information.

Import the spreadsheet and check for errors

1. Save the document by clicking **File > Save** and return to the system screen.
2. Scroll down to the **To Import Your Data** section and click the **Choose File** button. This will open up a new **Open** window.

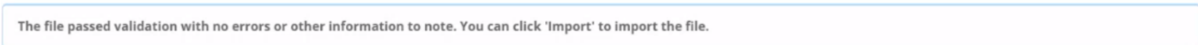
3. Go to **Downloads** and open up the last file you downloaded and click **Open** at the bottom of the window. You will return to the main screen.



4. Click the green **Validate** button and the system will check the document through for any warnings or errors within the document.

5. A message will appear to show the document is being checked.

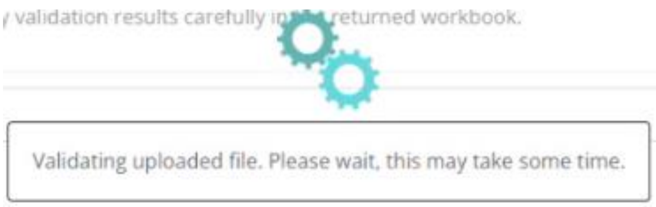
6. If the file passes validation you will see the following message within the screen.



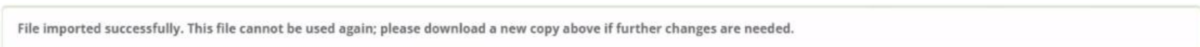
7. If this message appears click the **Import** button. If a message appears displaying any errors and warnings, see **Errors and Warnings** below.

8. A **Confirm Import** window will appear. Please be aware that any information you have changed within the spreadsheet will overwrite any information in the system, if you do not wish to over-ride these changes click **Cancel** or to override these, click **Import**.

9. A message will appear whilst the system imports the information and the data within the spreadsheet will be imported into the module.



10. Once the information is imported you will see the following message within the screen:

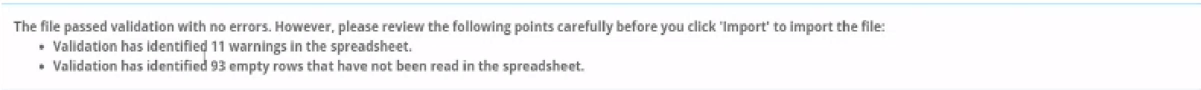


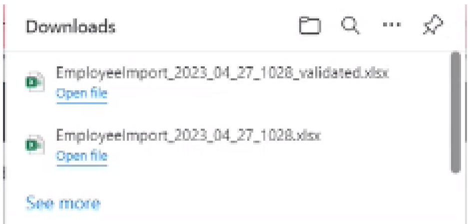
11. To view the details you have added, go to the left-hand side of the system and click **Absences**. A list of further menu options will appear.
12. Click **Import Absences**. The **Absences** page is displayed. This will show all absence records.

    Once imported the spreadsheet you have used before cannot be used again. Therefore, should you need to repeat the process you will need to repeat the process again, downloading the spreadsheet again.

Errors and Warnings

If a message appears displaying any errors and warnings, follow the instructions below.


The file passed validation with no errors. However, please review the following points carefully before you click 'Import' to import the file:
- Validation has identified 11 warnings in the spreadsheet.
- Validation has identified 93 empty rows that have not been read in the spreadsheet.

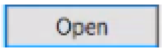


If there are no errors, only warnings, you can still import the spreadsheet. However, we recommend reviewing these warnings before uploading.

1. Go to **Downloads**. Open up the file with 'validated' in the title. The file will open.
2. The **Instructions** tab is displayed. Read through the instructions carefully.
3. Click the **General Absence** tab. The **General Absence** tab is displayed.
   – Any tabs highlighted in red denote a **Critical Issue**.
   – Any tabs highlighted in yellow denote a **Warning**.
   – Any tabs highlighted in green denote **OK** and do not need to be changed.
4. Click on any of the yellow or red tabs.
   – Any cells highlighted in red denote a **Critical Issue**.
   – Any cells highlighted in yellow denote a **Warning**.
   – Column A confirms whether there are any **Warnings** or **Critical Issues**. Hover over the cells in column A and the cell the **Warning** or **Critical Issue** relates to will be shown.
5. Make any changes to the highlighted cells.
6. Move through each tab highlighted in red or yellow and repeat the steps above.
7. Click the **Reset** button
8. Save the validated version by clicking **File > Save** and return to the system screen.

9. Scroll down to the **To Import Your Data** section and click the **Choose File** button. This will open up a new **Open** window.

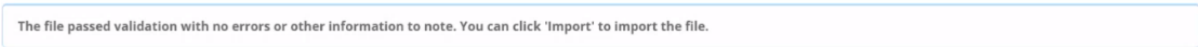
10. Go to **Downloads** and open up the last file you downloaded and click **Open** at the bottom of the window. You will return to the main screen.



11. Click the green **Validate** button and the system will check the document through for any warnings or errors within the document.

12. A message will appear to show the document is being checked.

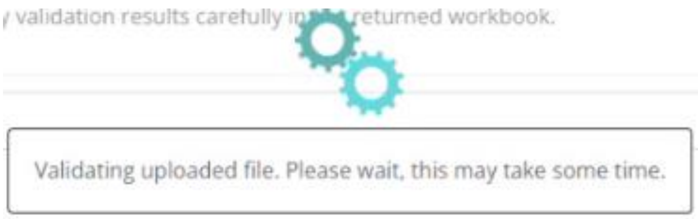
13. If the file passes validation you will see the following message within the screen

14. 

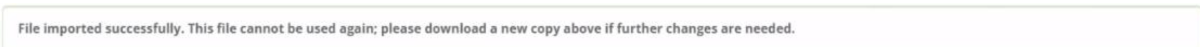
and warnings, see **Errors and Warnings** below.

15. A **Confirm Import** window will appear. Please be aware that any information you have changed within the spreadsheet will overwrite any information in the system, if you do not wish to over-ride these changes click **Cancel** or to override these, click **Import**.

16. A message will appear whilst the system imports the information and the data within the spreadsheet will be imported into the module.



17. Once the information is imported you will see the following message within the screen:



18. If this message is not seen and instead replaced by remaining errors and warnings, repeat the steps above until no errors and warnings are shown.

Warnings relate to potential errors identified by the system. If you agree with all the information displayed within these cells, the warnings will still appear, but you are able to import the spreadsheet.

19. To view the details you have added, go to the left-hand side of the system and click **Absence Management**. A list of further menu options will appear.
20. Click **Import Absences**. The **Absence Management** page is displayed. This will show all absence records.

    Once imported the spreadsheet you have used before cannot be used again. Therefore, should you need to repeat the process you will need to repeat the process again, downloading the spreadsheet again.

Absence Instances

This is a really useful area to view all absence data and to customise and export reports. The information within Absence Instances replicates the information within **Absence Records** but displays each instance individually. This area also allows you to view any open absences which need to be updated with a close date.

1. On the left-hand side of the system window, select **Absence Management**. A list of further menu options is displayed.
2. Select **Absence Instances**. The **Absence Management** module is displayed showing all absence instances.

    Next to each instance there are a number of icons in the far right-hand column.

Click here to view the employee record within the **Employees** module of the employee related to the instance.

Click here to view the Absence Instance of the employee.

Click here to view the full Absence Record of the employee within the **Absence Records** section of the Absence Management module. This can be useful when looking to consider patterns and trends and all absence instances relating to the employee.

Click here to edit the Absence Instance.

Click here to archive the absence. The absence will now appear within the Previous Employee Absence, along with absences relating to previous employees.

Should you wish to restore an archived absence, click the dual arrow icon and the absence will be shown within the main Absences above.

3. Select the instance you wish to view and select the relevant icon in the far-right hand column.

Module Tip!
When absences are added, the users may not always enter an end date. To ensure that all absences are kept updated, set a weekly task to review end dates. Double click on the title of the End Date column. This will show any absences without an end date. Click on any of the absences without an end date and update the end date.

Absence Reporting

Standard absence reports can be viewed within **Absence Instances** and **Absence Reports**. In addition, you can export any of the data tables at any time.

Data Exports

1. On the left-hand side of the system window, select **Absence Management**. A list of further menu options is displayed.
2. Select **Absence Instances**. The **Absence Management** module is displayed showing all absence instances.

   Data can be exported at any time by clicking the **Export** button. Select from **Word** or **Excel**. The file will appear within your downloads.

   Use the **Absence Date Filter** box to select the period you wish to view, entering the **Start Date** and **End Date**.

4. Use the magnifying glass next to each column heading to filter the information to create a bespoke report. For example, a report which includes only Sickness and Teachers within Key Stage 3.
4. Click the **Export** button.

5. Select from **Word** or **Excel**. The file will appear within your downloads.

Absences by Department

1. Select the **Absences by Department** tab to search based on department.
2. Use the **Department Filter** box on the right-hand side of the page.

3. Use the magnifying glass next to each column heading to filter the information to create a bespoke report. For example, a report which includes only Sickness and Teachers within Key Stage 3.
4. Click the **Export** button.

5. Select from **Word** or **Excel**. The file will appear within your downloads.

Absences by Job Role

1. Select the **Absences** by **Job Role** tab to search based on job role.
2. Use the **Job Role Filter** box on the right-hand side of the page.

3. Use the magnifying glass next to each column heading to filter the information to create a bespoke report. For example, a report which includes only Sickness for KS3 Teaches..
4. Click the **Export** button.

5. Select from **Word** or **Excel**. The file will appear within your downloads.

Standard Absence Reports

Reports can be downloaded using the **Reports** button at the top of the **Absence Records** page.

Reports include:

- Attendance Percentage
- Holidays by Department
- Working Time Lost
- Absence Triggers Hit
- Absences Paid/Unpaid
- Outstanding Self Cert and RTW forms
- Sickness Absence by Reason
- All Absence Instances

1. On the left-hand side of the system window, select **Absence Management**. A list of further menu options is displayed.
2. Click **Absence Records**. The **Absence Management** module is displayed.
3. Click the **Reports** button. A list of options is displayed.

4. Click the report you wish to view.The report will appear within your downloads.

The icon next to each reports denotes the format of the report.

Trust Overview

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.

Summary

This page shows all employees, click on the employee's name to see their absence record.

If you wish to view employees from a certain property select the **Employees by Property** tab.

You can also use the **Absence Record Search** box on the far right-hand side, to search for a word or phrase in all table columns.

Click the eye icon next to the employee you wish to view, to view and update absences for that employee. This will take you to the relevant property or school within the system.

1. On the left-hand side of the system window, select Trust Overview.
2. Select **Absence Management**. A list of further options is displayed.
3. Select **Summary**. The Absence Management module is displayed, and a variety of metrics are displayed.

   Absence data will default for the current absence period defined within **Settings**.

   Absence Period can be amended by entering an **Absence Period Start** and **Absence Period End**.

   Trust users can view their Attendance Rate Compared to MAT.

4. View **Absences to Approve** on the right-hand side of the screen.
5. To view more details, click the arrow in the top right of any of these metrics to move into specific details, the training courses these relate to and the users they were assigned to.
6. Scroll down to view further infographics.
7. Scroll down to the bottom of the screen to view information regarding **Triggers**.
8. Triggers are configured in **Settings**.
9. Scroll down to view **All Absences By Type**.

All Absences

This page shows all employees, click on employee's name to see their absence record.

If you wish to view employees from a certain property select the **Employees by Property** tab.

You can also use the **Absence Record Search** box on the far right-hand side, to search for a word or phrase in all table columns.

Click the eye icon next to the employee you wish to view, to view and update absences for that employee. This will take you to the relevant **Absence Record** within the related property (school) in the system.