A Line Manager's Guide to EPM Connect

EPM Connect Guide



Document Control

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

This document was approved by Keren Prior, Director of Operational Excellence on 3rd September 2026 and is issued on a version-controlled basis under her signature.

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Overview

Line Managers have the ability to view and edit data related to direct reports within the relevant module and the ability to approve certain requests, related to for example Absence and Time and Expenses.

Line Managers are determined by the **Reports To** field within the **Job information** section of the **Employee Profile**. The access and abilities of each Line Manager are assigned by the System Access user within your school or Trust via permissions and module settings.

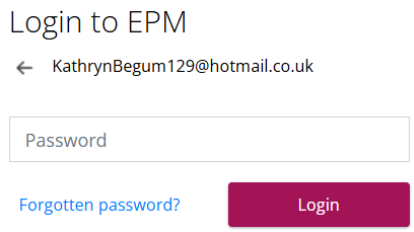
This guide provides a step-by-step guide to key Line Manager responsibilities in EPM Connect. However, we understand that these responsibilities vary from school to school, so please speak to your HR Team for clarification of the tasks you are expected to undertake. If you cannot view a particular area or complete a specific task your System Access user may need to adjust your permissions.

Approval requests and tasks assigned to you as a Line Manager will appear as tasks within **My Tasks** in **My Portal**.

Accessing the system

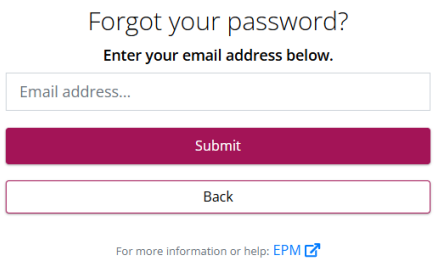
To Access the system for the first time

1. Using your preferred browser, enter **epmportal.uk**
2. The first time you login you will need to create a new password via **Forgotten Password**.
3. Click **Forgotten Password.**



4. Enter your work email address and click **Submit**.

   For those with multiple email addresses, it is important that you enter the work email address that your school registered with the EPM Implementation Team.



5. An email will be sent to you with instructions. Open the email and click **Please click on this link to reset your password**. A webpage will open.

6. In the **Email Address** field, enter your email address.

   Your new password should be:

   - 10 characters long
   - include a combination of upper and lower case letters
   - include at least one special character
   - include one number.

7. Re-enter your password and click **Reset**.

   Your password has been reset. Please return to the website and enter your **Login** and **Password**.

To Access the EPM Connect Platform

1. Using your preferred browser, enter **www.epmportal.uk**.
2. Enter your work email and click **Login**.
3. Enter your password and click **Login**.

To Find the School

If you have access to multiple properties, you must first select the school that you wish to view.

1. On the left-hand side of the EPM Connect window, select **Select Property**. The **Select Property** window is displayed.

   If you are a standalone school, the system will default to your school and the school name will be displayed in the top, left-hand corner of the screen.

2. To search for the school, click on the magnifying glass icon next to **Property Title**. The search function is displayed.



3. From the drop-down list, select the search rule you want to apply.
4. In the text box, type the name of the school or the word you want to search for.
5. Click on **Apply**. A list of schools matching your search criteria is displayed.
6. In the list, click on the name of the school you want to view. The window is updated and you are directed to the **Home** page for the school you have selected. The name of the school is displayed at the top of the page.

Tasks and Approval Requests

Approval requests and tasks assigned to you as a Line Manager will appear as tasks within **My Tasks** in **My Portal**.

My Tasks provides a list of your tasks **To Do** and tasks **Completed**.

Any absence, or time or expense requests will automatically generate a task. These tasks will take you directly to the relevant request. There is therefore no need to mark these tasks as completed.

Details of how to complete these tasks can be viewed within the **Absence Management** and **Time & Expenses** sections below.

1. From the left-hand navigation pane, select **My Tasks**. Your **My Tasks** page is displayed.
2. Select the **To Do** tab.
3. View the task **Title** and **Description** for information regarding the task.
4. In the **Response** text box, enter a response.
5. Once complete, from the **Status** drop-down menu, select **Completed**.
6. If relevant click the **Upload File** button to upload a file.
7. Click **Save** to finish. The task will now be displayed within the **Completed Tasks** tab within the main **My Tasks** page.



Absence Management

The **Enhanced Absence Management** module provides all the benefits of the **Core Absence Management** module, with the additional benefits of self service. Self service allows your employees to submit their own **Holiday**, **General Absence** and **TOIL** ready for approval, saving valuable admin time.

Line Managers have the ability to view the **Team Calendar** for their department, view and edit absences for Direct Reports and approve absences for assigned tags.

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 enhanced **Absence Management Module** allows absences to be entered either by HR and Admin staff within **Absence Records**, or by the employee themselves, via the self-service function within **My Portal**.

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, select Absence Management. A list of further menu options is displayed.
2. Select **Approve** . 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 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** section.

   The **Approve As**: section will be displayed with a suffix describing the **Approver Tag** the Approver holds – for example *Approve as Line Manager*, *Approve as HR* etc.

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.

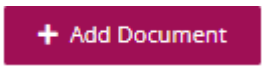
   

7. Scroll down to the bottom of the page to the **Documents**, **Notes** and **Audit Trail** tabs.

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.



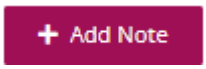
3. In the **Title (Optional)** field, add a title.
4. Click **Save** to finish.



Notes

Here you can view and add 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

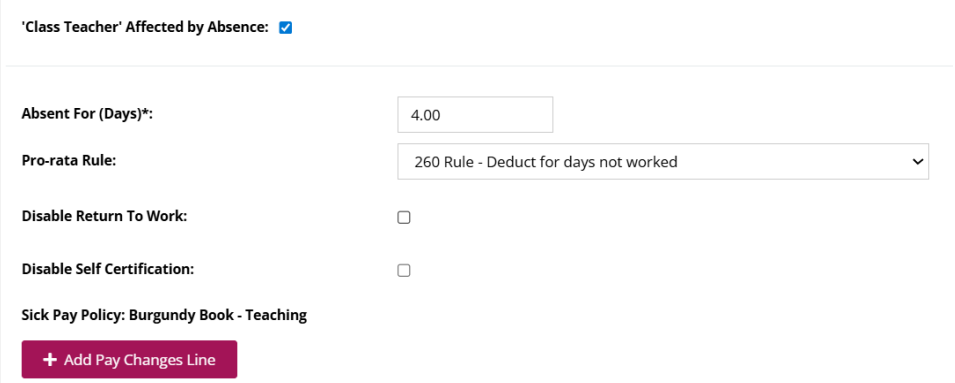
Each absence request has a full audit trail, with the ability to view all changes made.

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 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.

If the **Return to Work** form is not relevant, tick the **Disable Return To Work** box. The Return to Work button will still be available to complete but a task will not be sent to complete it.



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

1. Click on the **Edit Details** button.

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

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

   Ticking the box will display a **Did you report the accident?** box is displayed. Tick if relevant.

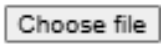
10. In the **Are you taking any medication that work needs to be aware of?** field enter any relevant medications if applicable.
11. In the **Support Offered** field, enter any support offered.
12. In the **Further Action Taken** field, enter any relevant further action taken.
13. Click **Save** to finish.

Upload an alternative form

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

1. Click **Choose File** 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.

Audit Trail

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

Add Documents

Once an absence has been created, **Documents** can be added to the absence.

Important

Letters related to the absence should not be added as documents but instead created following the process outlined within the **Absence Letters and Documents Guide**.

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**.



Delete/ Archive an absence

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** page is displayed showing all absence instances.
3. In the **Absence Search** box, type the name of the employee
4. Filter the columns with the **magnifying glass** to find the Absence you need.
5. In the far-right hand column, click on the red cross to **Archive Absence**
6. Scroll down and click on the **View Archived Absences** button 

7. Filter the columns with the **magnifying glass** to find the Absence you need.
8. In the far-right hand column, click on the red cross to **Delete Absence**
9. A pop up will appear asking you to confirm if you want to permanently delete the absence. Click on the **Delete** button to do so or click on the **Cancel** button.



Edit/update an absence within Absence Records

There are two methods for amending a sickness absence. Absences can be amended via Absence Records, which is useful when you wish to amend an absence related to a specific employee. Alternatively absences can be amended via Absence Instances, this is useful when you wish to view and update recent absence end dates.

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 Record** page 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.
8. Click **Save** to finish.



Time & Expenses

Our Enhanced Time & Expenses Module allows employees to add timesheets, expense and time claims via My Portal, significantly reducing administration for your team. Self-service provides a simple process for your employees whilst saving your admin teams valuable time.

Approvals

Timesheets, Time and Expenses claims awaiting approval can be viewed within the **Approvals** section of the **Time & Expenses** module. In addition, each approval will send as a task to the Approver. These can be viewed within **My Tasks**.

Approve or reject Time or Expense Claims

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Approvals**. The **Claims and Timesheets Requiring Approval** page is displayed.

   Review claims and timesheets assigned to you for approval in the **My Required Approvals** tab. Subsequent reviews by other approvers may be required later.

   For claims, you can approve or reject each line assigned to you. For **Timesheets**, you must approve or reject the whole timesheet.

   View all **Claims** and **Timesheets** with issues preventing approvals, find resolutions, and update them after resolution.
3. Select the **My Required Approvals** tab to view all items awaiting approval.
4. Find the item you wish to review and click the tick icon in the far-right column to review the item.

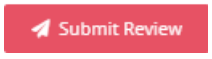
   The following steps will only work for time and expense claims. For Timesheets, follow the **Approve or reject Timesheets** section below.
5. Review the details and ensure all information is correct.

   Approvers cannot change details but can request changes to be made.
6. Scroll down to **Approve**.
7. From the **Action** drop-down menu, select **Accept**, **Raise query or Request change**, or **Reject**.

   Raise Query or **Request Change** allows the approver to ask the employee who has submitted the claim or timesheet to make changes rather than resubmit the claim from scratch. This is useful for claims with small errors or where further clarification is needed.

   Reject will entirely reject the claim and not allow the employee to make changes.
8. In the **Message** field, enter a message.

   This is if you have selected **Raise query or Request change.** The message will be sent to the employee who added the claim.
9. Click **Submit Review** to finish.



Approve or reject Timesheets

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Approvals**. The **Claims and Timesheets Requiring Approval** page is displayed.

   Review claims and timesheets assigned to you for approval in the **My Required Approvals** tab. Subsequent reviews by other approvers may be required later.

   For claims, you can approve or reject each line assigned to you. For timesheets, you must approve or reject the whole timesheet.
3. Select the **My Required Approvals** tab to view all items awaiting approval.
4. Find the item you wish to review and click the tick icon in the far-right column to review.

   The following steps will only work for time and expense claims. For Timesheets, follow the **Approve or reject Time and Expense Claims** section above.
5. Review the details and ensure all information is correct.

   Approvers cannot change details but can request changes to be made.
6. From the **Action** drop-down menu, select either **Accept**, **Raise query or Request change**, or **Reject**.
7. **Raise query or Request change** will allow the employee who has submitted the timesheet to make changes and re-submit it.

   Reject will entirely reject the timesheet and not allow the employee to make changes.

   If you have selected **Raise query or Request change**, in the **Message** field enter a message
8. Click **Submit Review** to finish.



My Historic Reviews

My Historic Reviews includes claims and timesheets that you have previously approved or sent back. These cannot be changed but can be viewed for further information.

1. Select the **My Historic Reviews** tab to view all your previous reviews.
2. Find the item you wish to review and click the eye icon in the far-right column to view the item. The main details of the claim are displayed.
3. Click on the **Query/Change Required** arrow to view the approval history, including any changes requested or reasons for rejection.

   A new window is displayed with the approval history and reasons for rejection or changes required.
4. Click **Close**. The window closes.
5. Click **Close** again.

If you have any further questions, please do not hesitate to raise a ticket to the EPM Connect Support Team.