## 1. Absence Processing on MyView

When an employee calls in sick the sickness should now be recorded via MyView. This will result in a number of improvements to the current sickness procedures:

- ✓ No need for paper notifications to be sent to Payroll
- ✓ No delay in absence data being updated due to it being keyed centrally
- ✓ Sickness information processed as quickly as possible
- ✓ Sickness input via MyView will automatically feed into the HR and Payroll system, Resourcelink
- ✓ The Barrachd absence management reporting system will update overnight to provide as up to date sickness data as possible
- ✓ Sickness will appear on the team planner alongside annual leave to give managers a true picture of employee attendance
- ✓ The document storage module on MyView can be used to upload supporting sickness documentation such as self certificates and return to work interview forms to give managers access to all the sickness information in one place
- ✓ No authorisation required – the manager enters the sickness and it feeds directly into Resourcelink ensuring a streamlined process

2. To Enter an Absence Entry for an Employee

- The sickness absence entry should be entered onto MyView **as soon as possible**, preferably on the **first day of the employees' absence**. Please **do not wait** for the employee to return from absence to create the sickness entry on MyView.

- To enter an absence for an employee log into MyView and select the **My People** tab then **My Team Absence** from the left hand side options.
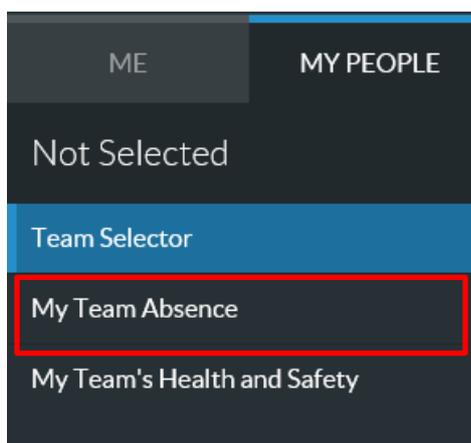
- The team selection screen will appear. Select the employee you would like to enter absence for by clicking in the empty white circle to the left of the employees name.

Employee Name	Employee Number	Post
MGR MANAGER	101993	MANAGER
⊞ ○ SARAH SMITH	015876	OFFICER
○ FORENAME MANAGER	109825	OFFICER
○ FORENAME SURNAME	104965	OFFICER
⊞ ○ MGR FORENAME MGR-SURNAME	112288	TEAM LEADER

- Click on the blue **Next** button found in the bottom right hand corner of the screen (see below):

Employee Name	Employee Number	Post	Employee Information
MGR MANAGER	101993	MANAGER	
⊕ ⦿ SARAH SMITH	015876	OFFICER	
○ FORENAME MANAGER	109825	OFFICER	
○ FORENAME SURNAME	104965	OFFICER	
⊕ ○ MGR FORENAME MGR-SURNAME	112288	TEAM LEADER	

Next

- The events calendar screen will appear for the selected employee. This screen will show any leave requests or other sickness entries the employee has had (see below):

Time Management - SARAH SMITH (015876) - OFFICER (CH0202)

Annual Leave Guidance
Authorising Annual Leave Guidance

Please note that the Planned Work Time screen holds standard work pattern information. All the hours details held here can be changed to reflect the actual hours you work. If the planned work time is not correct the incorrect number of hours could be deducted from your entitlement so it is essential that this is verified and amended as appropriate for each leave request.

Outstanding Balances

HOL : 118.4 Hours

Events Calendar

☑ Annual Leave   ☑ Sickness Absence   ☑ Unpaid Special Leave   ☑ Paid Special Leave   ☑ Flexi-Time

- Scroll down to the bottom of the screen to find the **Sickness Absence** option

- Select **Request New** next to **Sickness Absence** at the bottom of the screen (see below):

☑ Annual Leave   ☑ Sickness Absence   ☑ Unpaid Special Leave   ☑ Paid Special Leave   ☑ Flexi-Time

Absence / Attendance

Type	Description	Action	
ANNUAL	Annual Leave	Request New	Open ANNUAL History
FLEXI	Flexi-Time	Request New	Open FLEXI History
PAID	Paid Special Leave	Request New	Open PAID History
SICK	Sickness Absence	Request New	Open SICK History
UNPAID	Unpaid Special Leave	Request New	Open UNPAID History

- The sickness entry screen will appear (this replaces the paper notifications previously submitted to Payroll – please do not send any paper notifications if the sickness has been entered on MyView)

Complete the sickness entry screen, as per options below for open ended sickness (unsure of employee's return) or closed sickness (when you have an end date):

Comments:	Enter any comment you'd like to make about absence, this could be a description i.e. cold.
From:	Enter date absence started then select if absence was a full or part day*

(if part day, enter time and how many hours off, e.g. if the person went off sick at 3pm and was due to finish at 5pm there will be 2 hours sick absence recorded)

To:	Enter end date, or leave blank if open ended absence
Open Ended Flag:	Select this option if you are unsure when the employee will be returning (the vast majority of entries will be open ended initially as you will not know when the employee will return)
Reason:	Select from drop down list displayed to choose reason for absence
Cert Type:	Select from drop down list displayed to record type of certification
Auth Cert Produced:	Tick yes or no to record if a certification slip has been produced
Certificate Expiry Date:	Select date from calendar to record date that the certificate will expire
Return to Work	
Interview Date:	Enter the date that the Return to Work Interview took place

*Please note that the part day flag should only be used for an absence where the employee has not worked the total hours scheduled for the day. The part day flag does not need to be used for part-time employees unless it is an actual part-day absence for them. For example a part-time employee who is scheduled to work 5 hours but has to leave work due to absence after 3 hours would be a part day sickness. If the employee was scheduled to work 5 hours and did not come into work at all this would be a full day sickness.

The three options available in Cert Type are explained below:

Certified by a Doctor	Doctors' note supplied to the employee and then given to the manager. This would then be uploaded into document storage and the original sent to Payroll.
Not certified	No certification yet received – this would be the initial choice and can be amended once the employee has supplied one of the other two options
Self certified	An employee is absent for 7 days or less and has completed a self certification form which can then be uploaded into document storage.

Open Ended Sickness Example

The example below is based on an open ended sickness absence. At the time of creating the request the manager does not have a return date and does not have the certification from the employee.

Create Sickness Entry - SARAH SMITH (015876) - PAYROLL OFFICER (CH0202)

Please note that the Planned Work Time screen holds standard work pattern information. All the hours details held I you work. If the planned work time is not correct the incorrect number of hours could be deducted from your entitlem request.

Type	Sickness Absence
Comments	Sickness - Virus

	Dates	Full Day	Part Day	Open Ended
From *	13/03/2017	◉	○	
To *		○	○	◉

hours   mins   hrs decimal

Total Time	0.00	Confirm planned work time

Reason *	Infection/Virus Non Work Related ▼
Cert Type	Not Certified ▼
Auth Cert Produced	Yes ○ No ◉
Certificate Expiry Date	
Return To Work Interview Date	

Closed Sickness Example

The example below is based on an employee who has already returned from their sickness. In this case the manager may have not been able to enter the sickness until the following day which is why it can be completed fully as they will have all the relevant information from the employee.

Create Sickness Entry - SARAH SMITH (015876) - PAYROLL OFFICER (CH0202)

Please note that the Planned Work Time screen holds standard work pattern information. All the hours details held you work. If the planned work time is not correct the incorrect number of hours could be deducted from your entitle request.

Type	Sickness Absence
Comments	Stomach Bug

	Dates	Full Day	Part Day	Open Ended
From *	13/03/2017	●	○	
To *	13/03/2017			

	hours	mins	hrs decimal	
Total Time	7	24	7.40	Confirm planned work time

Reason *	Minor Ailment Non Work Related ▾
Cert Type	Self Certified ▾
Auth Cert Produced	Yes ● No ○
Certificate Expiry Date	
Return To Work Interview Date	14/03/2017

Once the **Create sickness screen** has been completed as appropriate, click on [Confirm planned work time]

The sickness entry screen uses the planned work time option in the same way as annual leave.

The below screen will appear showing a standard work pattern for the absence dates being entered:

Add Sickness Entry - SARAH SMITH (015876) - OFFICER (CH0202)

Annual Leave Guidance
Authorising Annual Leave Guidance

Please note that the Planned Work Time screen holds standard work pattern information. All the hours details held here can be changed to reflect the actual hours you work. If the planned work time is not correct the incorrect number of hours could be deducted from your entitlement so it is essential that this is verified and amended as appropriate for each leave request.

From	13/03/2017
To	13/03/2017

Week Ending	SUN hh:mm	MON hh:mm	TUE hh:mm	WED hh:mm	THU hh:mm	FRI hh:mm	SAT hh:mm	Weekly Hours hours	mins	hrs decimal
18/03/2017	0:00	7:24	7:24	7:24	7:24	7:24	0:00	37	0	37.00

Cancel   Save for Later

- The work pattern that appears will either be 37.00 hours or 35.00 hours based on the FTE of the employees post. Falkirk Council / Falkirk Community Trust do not hold detailed work patterns for employees which is why a standard one will appear.

- It is *essential* that the planned work time screen is completed accurately to reflect the hours the employee is due to work in that specific week. The hours entered will normally equal the employees contract hours. This may not be the case for employees who work a variable work pattern.

- Managers may encounter a red warning message when completing planned work time which says *"Alerts. Average hours entered is different from contract hours of XX. Are you sure you wish to continue?"*

- This message appears when the total hours recorded on the planned work time is different from the contract hours recorded on the system. This message is likely to appear for part-time employees on variable work patterns. The message is just a **warning** and as long as the manager is confident the planned work time has been completed correctly they can click on **save for later** and proceed with the sickness entry.

- **If the incorrect hours are entered on the planned work time screen this will have an impact on the absence recorded and potentially on the employees pay so it is essential that this is completed accurately.**

- Click **Save,** to save any changes you have made to the planned work time screen and return to the absence entry.

- Once you have saved any changes and are confident the sickness entry form has been completed correctly click on the purple **Submit** button found in the bottom right hand corner of the screen.

- In the case of an open ended absence a warning message about future dated leave may appear. This is just a warning to say the employee has future dated annual leave and you can proceed with submitting the sickness entry.

Warnings

- Future dated absence exists outside of period starting 19/06/2017 of type Annual Leave

The sickness entry will now appear on the employees calendar screen. If the sickness is a closed entry only the dates specified will appear as sickness on the calendar, the previous example dated 13/03/2017 can be seen below:

- If the sickness is an open ended absence the calendar will be populated up until the end of the current month. Please see the example below:

- An open ended absence will continue to roll forward on a month by month basis. This means if the absence is a long-term one you do not need to do anything to extend the sickness entry on MyView; it will automatically roll forward until an end date is entered in the open ended absence entry. In the print below the sickness can be seen rolling forward on the calendar.

- A bulk update process is scheduled to run every evening which updates the HR and Payroll system, Resourcelink. This removes the need for manual entry by Payroll.

- The Barrachd absence reporting system will also be updated overnight ensuring absence reports are as accurate and up to date as possible.

3.   Sickness Absence Documentation

- Payroll **no longer require** any paper notification of sickness. The MyView process will replace this.

- Payroll **no longer require** any paper self certification forms. These should be completed as normal when the employee returns from absence but instead should be uploaded onto MyView using the document storage module, My Team's Documents.

- Detailed guidance on how to do this can be found in the MyView Dashboard User Guide for Managers under the section "**10. How to View and Add your Team's Documents in MyView"**

    The Managers guidance can be found on the MyView intranet page at the link below:

    MyView Dashboard User Guide - Managers

- The navigate to **My Team's Documents** please follow the steps below**:**
- Click on **My People**
- **DO NOT CLICK ON MY TEAM ABSENCE** – the document storage module is not contained within this option
- Instead select the employee you wish to upload documents for from the Team Selector screen.
- To select the employee click on the **Select** button found at the right hand side of the employee's name

SARAH SMITH
OFFICER (CH0202)
🏷 015876

✉ EMPLOYEE-SELFSERVICE@falkirk.gov.uk

Select   ▬

Show Reports ›

- The **My Team's Documents** option will now appear in the left hand side of the screen

- Click on this and the document storage categories for that employee will appear

- The 1st category listed is **Absence Documents**

- Click on Absence Documents, any documents already uploaded into this category for the selected employee will appear. To upload a new document into document storage click on the **Upload a new document** option found in the blue section of the screen.
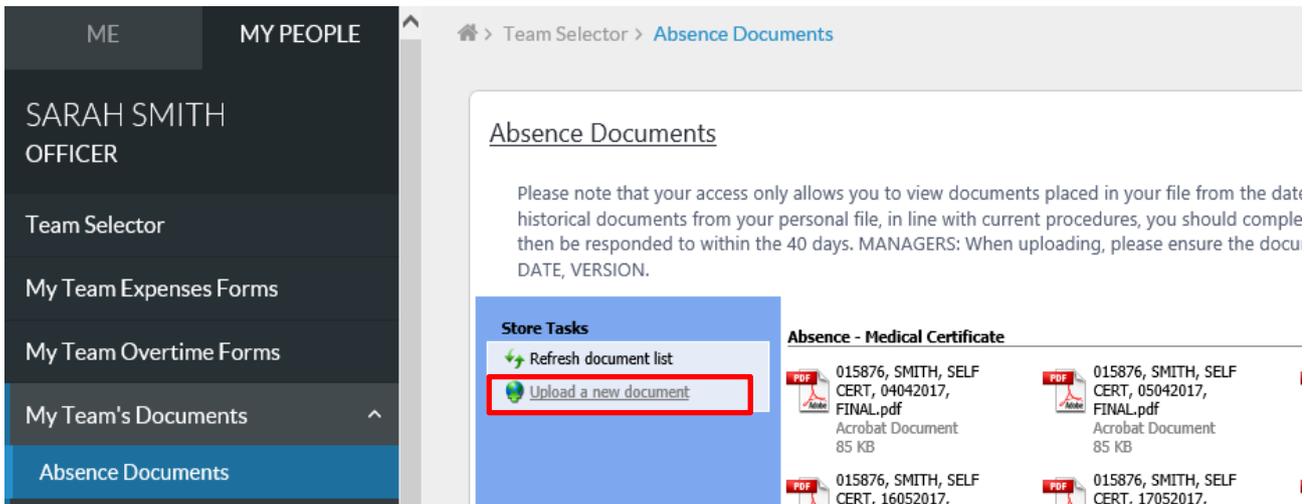
The upload document screen will appear, there are a number of different category options available in the drop down list:
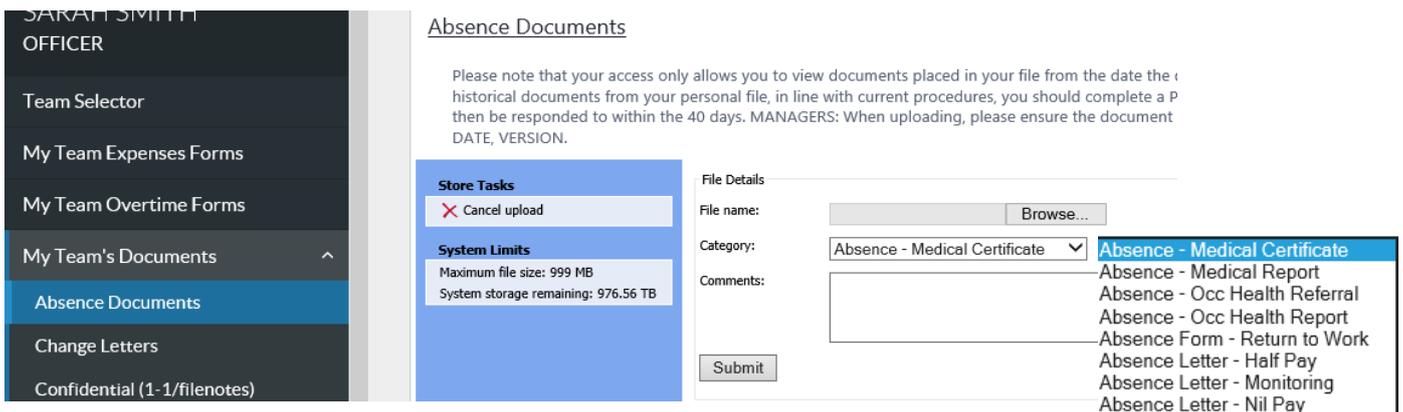
- Self certification forms should be saved in the **Absence Documents** section and then within **Absence – Medical Certificate** category.

- The naming convention for documents is very important. Self Certificates should be names as EMPLOYEE NUMBER, SURNAME, SELF CERT, DATE, VERSION
- For example **015876, SMITH, SELF CERT, 13032017, FINAL**

- The self certificate will be retained on MyView and can be viewed by the manager at any time. HR and Payroll will also have access to this information via the Resourcelink system.

- **Payroll do still require Doctors Certificates** to be sent to them. They should be uploaded via document storage in the same way as the self certificate but then sent to Payroll. The reason for this is payroll is required to retain the original doctors certificates for statutory sick pay and audit purposes.

- Doctors Certificates should be saved in the **Absence Documents** section and then within **Absence – Medical Certificate** category. When uploading doctors certificates they should be named as EMPLOYEE NUMBER, SURNAME, DOC CERT, DATE, VERSION

- For example **015876, SMITH, DOC CERT, 13032017, FINAL**

- Return to Work forms and Occupational Health Referrals and Reports can also be uploaded via document storage. This ensures all the sickness documentation is retained in the one place for the employee and can be easily accessed by the manager at any time. These documents should be saved in should be saved in the **Absence Documents** section and then within **the appropriate** category from the drop down list.
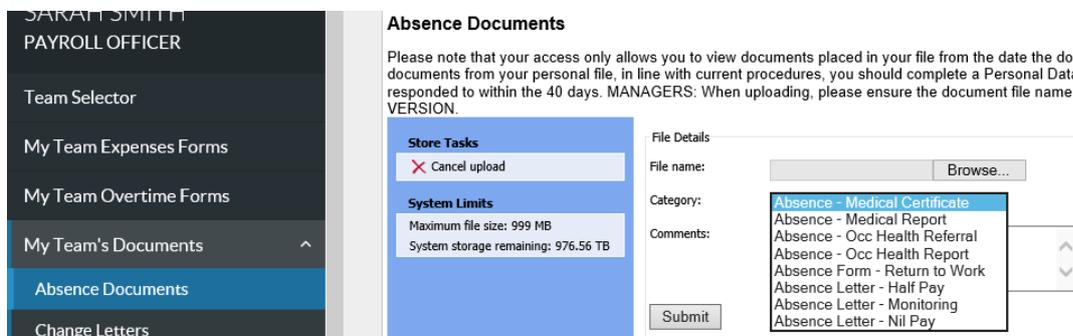
- The following naming conventions should be used:

➢ Return to work – EMPLOYEE NUMBER, SURNAME, RTW, DATE, VERSION
➢ Occupational health referral – EMPLOYEE NUMBER, SURNAME, OCC HEALTH REF, DATE, VERSION
➢ Occupational health report – EMPLOYEE NUMBER, SURNAME, OCC HEALTH REPORT, DATE, VERSION

- Managers do not have an option to delete documents from the document storage module on MyView. This is to minimise the risk of documents being deleted in error.

- Any documents, including self certificates and doctors certificates, uploaded in error can only be deleted by the corporate support team.

- If you have made a mistake when uploading a document please email docstoreupload@falkirk.gov.uk to request the deletion of a document.

- Please state the name of the document and which employee it is saved against when requesting the deletion.

4.   To amend an open ended absence for an employee

When an employee returns from an open ended absence the end date, certificate information and return to work information will need to be updated.

- On your Dashboard homepage, select the **My People** tab then **My Team Absence** from the left hand side options.

- Select the employee you would like amend the open ended absence for.

- Click Next.

- The leave calendar for that employee will appear.

-

- Scroll to the bottom of the screen and click on **Open Sick History**

- A list of previous sickness entries for the employee will appear.

- The open ended absence entry will be easy to identify as it will have **no date in the "To" field**.

- To amend the open ended absence click on the blue **Edit** button at the right hand side of the absence entry.

- The original absence entry screen will open and you will be able to make the necessary amendments.

- To enter the end date, uncheck the open ended option by selecting full or part day as necessary. Then enter the correct end date of the sickness absence.

- The reason, cert type, auth cert produced, certificate expiry date, return to work and interview date fields can all be completed or amended as necessary.

Edit Sickness Entry - SARAH SMITH (015876) - PAYROLL OFFICER (CH0202)

Please note that the Planned Work Time screen holds standard work pattern information. All the hours details he you work. If the planned work time is not correct the incorrect number of hours could be deducted from your entit request.

Previously Updated By	MGR MANAGER (101993) on 14/03/2017
Type	Sickness Absence
Comments	Sickness Virus

	Dates	Full Day	Part Day	Open Ended
From *	13/03/2017	●	○	
To *	16/03/2017	●	○	○

	hours	mins	hrs decimal	
Total Time	29	36	29.60	Confirm planned work time

Reason *	Infection/Virus Non Work Related
Cert Type	Self Certified
Auth Cert Produced	Yes ● No ○
Certificate Expiry Date	
Return To Work Interview Date	17/03/2017

- The planned work time screen should be checked and updated before the amendment is submitted.

- The open ended absence will now be amended to the correct length of time. This will be amended on the calendar and will no longer be populated to the end of the current month. The example below has changed from 13/03/2017 to 31/03/2017 to 13/03/2017 to 16/03/2017.

	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu
March															SCK	SCK	SCK	SCK						
April																								

- The sickness entry has now been successfully updated and no further action is necessary for this entry.

5. To edit an absence entry for an employee

- If an error has been made with any of the sickness information i.e. the dates or the reason, this can be amended via MyView.

- On your Dashboard homepage, select the **My People** tab then **My Team Absence** from the left hand side options.

- Select the employee you would like amend the absence for.

- Click Next.

- The leave calendar for that employee will appear.

- Click on **Open Sick History**

- A list of the previous sickness entries will appear.

- Find the entry you wish to amend and click on the blue **Edit button** found at the right hand side of the specific absence entry.

- Make the necessary amendments and click on **Submit.** The absence entry will now have been amended.

- There may be some historic sickness entries which cannot be edited. These examples will have the Edit and Delete button in grey rather than blue. These entries are historic sickness entries which have been migrated to the MyView system for entitlement purposes. They cannot be amended. If you have a query regarding one of these entries please contact the Payroll department on 01324 506222 or email payroll@falkirk.gov.uk

| 06/09/2016 | SARAH SMITH | SCK | Sickness Absence | 07/08/2015 | 07/08/2015 | View Edit Delete |