

Line Manager Guidance – Recording Sickness or Industrial Injury in Business World ERP

If an employee is absent from work, this must be recorded in the Business World ERP. This guidance details how to record absence related to sickness or industrial injury. You can record absence for all employees below you in the hierarchy and not just your direct reports.

This guide covers –

1. [Recording sickness - telephone contact from 1st day of sickness](#)
2. [Recording sickness on payroll absence screen](#)
3. [Attaching a fit note in Business World ERP](#)
4. [Closing a period of sickness](#)
5. [Closing sickness when payroll have transferred the absence](#)
6. [Completing an absence return to work form](#)
7. [Completing a managing absence review form](#)
8. [Completing a managing absence appeal form](#)

Managers Business World Checklist

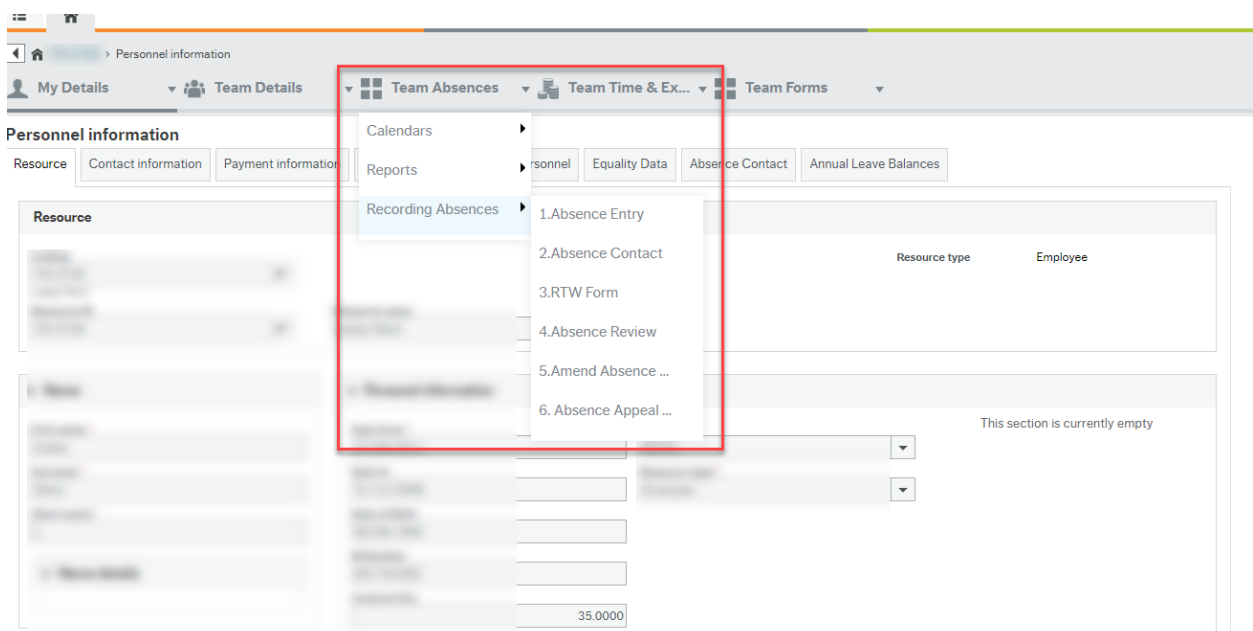
Step	Action	When
1	Record absence contact within personnel screen	Day 1 of Absence
2	Record Absence on payroll absence entry screen	Day 1 of Absence
3	Record additional absence contact within personnel screen	Day 2 of Absence
4	Record additional absence contact within personnel screen	Day 3 of Absence
5	If fit note is received attach to period of absence within the absence entry screen.	Ongoing
5	Continue to record all additional absence contacts for remainder of absence period	Ongoing
6	Record last day of absence within personnel screen (where required complete the amend absence form)	When employee returns to work
7	Complete return to work form	When employee returns to work
8	Where required complete managing absence review form	Following RTW
9	Where required complete managing absence appeal form	As required

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Line Manager Workspace

You will need to access several screens within Business World ERP to record and manage an employees unplanned absence. Throughout this guidance we show you how to access these from the homescreen main menu, but you can also access all these screens from your line manager workspace, which will appear when you first log into the system.

Within the workspace, navigate to **Team Absences > Recording Absences** and open the relevant screen to update.



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Recording Sickness or Industrial Injury - Telephone Contact

When an employee is too ill to attend work they should make contact with their line manager on the 1st, 2nd, 3rd and 7th day of absence (if any of these fall on a non-working day, they should make contact on the next day of work). This should be by phone where possible and at least one hour before they are due to start work. In certain circumstances and if required, someone else may contact the line manager on the employee's behalf.

In exceptional circumstances a manager may agree that an employee does not need to make contact on the 2nd or 3rd day as they are not expected to return within this period and there is unlikely to be any change to their situation. In these instances, managers should still record the 2nd and 3rd contact within the Absence Contact Screen.

Follow this guidance to record the details of the discussion each time the employee contacts you.

1

The screenshot shows the ERP interface with a 'Menu' on the left and a 'Personnel' section on the right. The 'Personnel' section has a red box around 'Your employees'. Below it, there is a 'Resource' section with a 'Lookup' field containing '0000001'. A dropdown list shows four test employees: Test Employee A (0000001), Test Employee B (0000002), Test Employee C (0000003), and Test Employee D (0000004).

Navigate to **Personnel > Your employees**.

In the **Lookup** field press the spacebar and click on the name of the employee who you are recording sickness for. Alternatively, start typing their name or employee number then click on the employee's name from the list.

Don't forget to click your Tab key on your keyboard to pull through all the employees information.

Navigate to the **Absence Contact Tab**

The screenshot shows the 'Your employees' tab with a red box around the 'Absence Contact' button. Other tabs visible are 'Resource', 'Contact information', 'Personnel', and 'Employee Checks'.

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2

Click the **Add** button and complete all fields. Repeat these steps for each contact made by the employee. If you have agreed that the employee does not need to make contact, you should select **Waived at Managers Discretion** in the **Contact Type** adding "agreed with employee that no contact was required" to comments.

Recording Sickness or Industrial Injury on Payroll Absence Screen

3

Recording on the Payroll Absence Screen is important to ensure the employees pay is calculated correctly and that absence reporting to the Councils Senior Management Team is accurate.

To access the Payroll Absence screen, go back to your **main menu** and navigate to **Your employment**, then under the **Your employment heading**, click on **Absences**.

To create a new period of Sickness or Industrial Injury, click on the **“Add”** button at the bottom of the table.

This will open-up fields for you to complete within **“Absence Entry”** which you will see when you scroll down to the bottom of your screen.

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Save Clear Open

Once all fields are complete and accurate, click on the “Save” and ensure you receive a success message.

Absence entry

Resource ID* 0000003 Test Employee A	Absence code* SICK Sick Leave	Position 115940 TEST Employee A
Absence reason Cold A23	Description	Preliminary end date* 31/12/2023
Date from* 21/11/2023	Open ended absence <input checked="" type="checkbox"/>	

4

Resource ID - press the spacebar and click on the name of the employee who is sick, or start typing their name, then click on the employee’s name. Press your tab key.

Absence Code - select SICK or INDINJURY.


Absence Reason - enter the absence reason for example, Cold. You can click in the field and press your space bar to see the full list of reasons or simply start typing the reason.

Date from - Enter the first date of absence

Open Ended – tick this box

Date to – this field will pre-populate with a fixed date in the future that has been programmed into the system. Please note if this date is after the employee’s employment end date, you will need to overwrite it. **Do not change this until you know the last day of sickness.**

Do not update the **Time from, Time to, Days, Hours** and **Planned Hours** fields. These are automatically calculated.

Time from 00:00	Time to 07:10	
Days 58	Hours 406.50	

Sickness Type – This can be Normal Sickness; Pregnancy-related; or Disability-related. Click in the field and press your space bar to access the picklist.

1|

- 1 1=Normal Sickness
- 2 2=Pregnancy-related
- 3 3=Disability-related

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Attaching a Fit Note

If an absence continues beyond 7 days, a Fit Note must be provided from a certified medical practitioner or an appropriate healthcare professional.

Open the **Payroll Absence** screen as per step 3.

Click the **Open** button at the bottom of the screen and the Open previous absences box will appear.

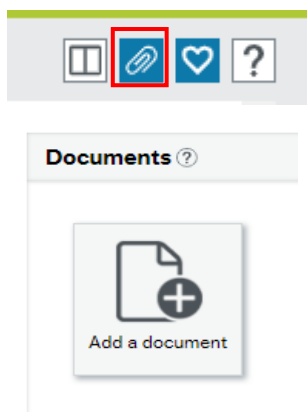
Type the absent employees name in the **Resource** field and click the **Load** button.

5

All the employee's previous absences will appear. Click on the row with the current absence you wish to attach a Fit Note to, and it will turn blue.

<input type="checkbox"/>	Workflow state	Resource ID	Absence co...	Position	Absence re...	Description	Date from	Date to
<input checked="" type="checkbox"/>	No workflow	Test Employee A	SICK	TEST Emplo...	Cold		01/01/2024	09/01/2024

6



All Fit Notes should be saved in the below format –

**YYYYMMDD, Fit Note,
Employees Name**
for example: **20190213, Fit
Note, Joe Bloggs**

To **attach a Fit Note** (*medical certificate*), click on the paperclip button towards the top right of your screen (ensuring the absence line is blue to show it is selected). Wait a few seconds and a pop-up screen will appear.

Click on **Add a document** button.

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Additional properties

#	Name	Value
1	Valid From *	10/05/2022
2	Valid To *	24/05/2022

Another pop up will appear on your screen, fill in the fields as follows -

Document type – select **Fit Note** from the picklist.

Click on the upload button. This will take you to your network drives. Double click on the document you have saved using the format above and it will upload.

You can add a **description** if you wish but not essential.

Now scroll down and **add the Valid From date** (*start date of fit note*), press Tab and **enter the Valid To date** (*end date of fit note*).

Click the **“Save”** button. You can now close the document screen.

Business World will send you an alert when the fit note expires using the Valid to date.

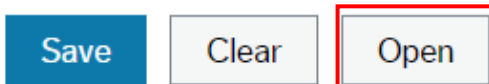
Closing a Period of Sickness

When an **employee returns to work** after a period of sickness or industrial injury. You must update the **Payroll Absence Screen**.

To access the Payroll Absence screen, go back to your **main menu** and navigate to **Your employment**, then under the **Your employment heading**, **click on Absences**.

When the screen opens click the **“Open”** button at the bottom of the screen.

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When the **“Open previous absences”** box appears, click in the **“Resource”** field, and click the spacebar to select the name of the appropriate employee. Alternatively, start typing their name or employee number then click on the employee’s name from the list. Make sure that only the **Active** and **Partly-Transferred** boxes are ticked.

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Click **Load**. When the list of absences appear, select the period of absence you wish to update, ensuring it turns blue.

Absences

Absences					
<input type="checkbox"/>	Workflow state	Resource ID	Absence co...	Position	Absence reas...
<input type="checkbox"/>	Workflow in progress	Test Employee D	SICK	Test ERP Su...	Upset Stoma...

You should now untick the “**Open ended**” box then navigate to the “**Date to**” field and enter the correct last date of absence.

Once updated, ensure you click the “**Save**” button and that you receive the successful message.

Date from *
01/01/2024

Open ended absence

Date to *
09/01/2024

Closing or Amending the Absence when Already Transferred by Payroll

Please correct the following:

- **Preliminary end date:** The absence has been partly transferred until 06/02/2019. The Date to field cannot be set earlier than this date.
- **Date to:** The absence has been partly transferred until 06/02/2019. The Date to field cannot be set earlier than this date.

Errors: 2

If you get the above message, when you try to enter the correct **Date to** or when amending the **Absence Reason** or **Absence Type**, this is because **the employee has already been paid sick pay for all/some of their absence dates or payroll are in the process of running the next pay.**

You will be unable to update the “**Date to**” field, or the reason for absence when this happens and must contact Payroll to ask them to update on your behalf. To request that they update the absence, you must complete the Amend Absence Details form in Business World ERP.

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Please ensure you read the detail included within the **Information Section on the Absence Details tab**, as it provides further guidance on when and how you should use the form and next steps.

Absence Details

Information

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Homescreen menu

Forms

Your employment

Forms

Amend Unplanned Absence

Display Screen Self Assessment

Incident Report

To access the form, navigate to **Homescreen Menu > Forms > Amend Unplanned Absence.**

You should complete the **Absent Employee Details** section, your details will populate in the **Line Manager** and **Line Manager Position** fields. You can change the Line Manager details if you are completing this form on behalf of another manager.

Use the picklist to select the employee whose absence details need updated and once selected, click your tab key and the **Employee Position** and **Payrun** will populate.

Absent Employee Details

Line Manager *
TEST SUPPORT MANAGER
0000001

Absent Employee *
0000002
TEST EMPLOYEE A

Payrun
Payrun 07
P07FW

Created By
TEST SUPPORT MANAGER
0000001

Line Manager Position *
114986
TEST ERP SUPPORT MANAGER

Employee Position *
114987
TEST ERP SUPPORT OFFICER A

Date Submitted
19/10/2022

The form is split into sections so you can request specific updates –

You only need to complete the section(s) relevant to your request reason.

Amend Absence End Date – the last day of reported sickness absence is different to what is currently on Business World ERP.

Amend Absence Reason – the original reason for absence has changed e.g. cold is now flu.

Amend Absence Code – only use if the absence has changed from sickness to industrial injury or vice-versa.

When the relevant section is complete, click **Submit Form**.

The form will now workflow to Employee Services Transactional Team and when amendments are made you will be notified via a Business World ERP alert.

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Completing an Absence Return to Work Form

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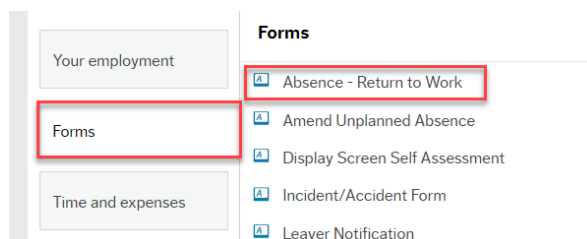
Prior to completing a Return-to-Work form, you should check if the employee has reached an absence review point, you can view their full absence history in Business World. To access an employee’s absence history, navigate to **Your Employment>Absences>Open**. Enter your employees name in Resource field and click **Load**.



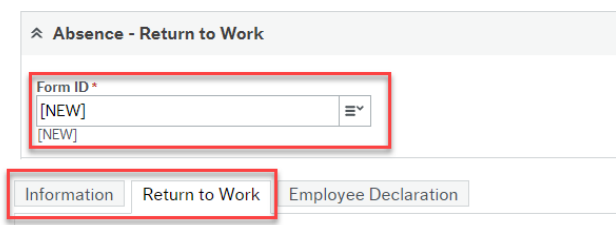
This will display all the employee’s periods of unplanned absence.

You can calculate if the employee has hit an absence review point using the number of periods of absence they have had and the number of days. This will also allow you to show the employee their previous periods of absence during the return-to-work interview so they can confirm they are accurate.

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When you have arranged a time to meet with your employee to carry out the Return-to-Work Interview, you should access the form in Business World to record the details. To do this, navigate to your **Main Menu** and select **Forms**. Then select the **Absence – Return to Work Interview** form from the list.



When the form opens-up, the **Form ID** will auto-populate as **NEW**, this should not be changed. Ensure you read the details provided within the **Information** tab and complete all fields within the **Return-to-Work** tab.



When complete click **Submit Form**, it will workflow to the employee they should review and approve the form or return for amendments. Where an absence is less than 7 days and is not covered by a fit note, they should complete the Employee Declaration.

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Completing a Managing Absence Review Form

If an employee reaches an absence review point, a **Managing Absence Review** should be carried out and the details of this meeting should be recorded in the Business World ERP.

Homescreen menu

The screenshot shows the 'Homescreen menu' with several buttons: 'Your employment', 'Forms', 'Time and expenses', 'Personnel', and 'Payroll'. The 'Forms' button is highlighted with a red box. Below the menu, there are two options: 'Managing Absence Appeal' and 'Managing Absence Review', with the latter also highlighted by a red box.

To access to the **Managing Absence Review** form, navigate to your **Main Menu** and select **Forms**. Then select the **Managing Absence Review** form from the list.

When the form opens-up, the **Form ID** will auto-populate as **NEW**, this should not be changed.

The form is split into four separate tabs. Please ensure you read the **Information** tab and complete all mandatory and relevant fields in the remaining tabs.

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The screenshot shows the 'Managing Absence - Review' form. The 'Form ID' field is highlighted in yellow and contains the text 'NEW'. Below the form, there are four tabs: 'Information', 'Employee Details', 'Absence Meeting', and 'Follow Up Meeting(s)'.

You should now click **Save as Draft**

You will need to save a draft of the form if–

- You are unable to complete the form fully due to missing details.
- You will carry out follow up meetings. You should record these meetings within the **Follow up Meeting(s)** tab of the form.
- You want to attach documentation relating to supporting attendance to the form.
- You have agreed actions during the meeting which you still have to action or conclude.
- You want to discuss the content with HR prior to sending to the employee.
- If the employee is still absent from work due to sickness (you will need to write to the employee to confirm the meeting details and ask them to let you know if they require any amendments before you submit the form – remember, submitting the form means it will workflow to the employee before you have had a chance to amend it).

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To access forms previously saved as draft, go to **Forms > Managing Absence Review Form**. When the form opens delete [NEW] in the **Form ID** field. Press your spacebar or type the **Form ID** you took a note of earlier and select from the list. Hit your tab key and the details you previously saved will populate and you can update as required. You can then update or amend as required, including the Follow up Meeting(s) tab.

Managing Absence Review

Managing Absence - Review

Form ID*

MAR-1000

MAR-1000 0000002

14

To submit the form click on the **Submit form** button at the bottom of the form. You must ensure you have completed all mandatory fields prior to doing so.

Ensure you receive a Success message and take a note of the **Form ID**, e.g. ATT-101026, to allow you to easily access the form later.

The form will now workflow to the employee to review and approve.

Clear Print preview **Submit form** Save as draft Export

Completing a Managing Absence Appeal Form

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Should an appeal be made by or on behalf of an employee because of action taken following a **Managing Absence Review**, the details should be recorded within the Business World ERP.

Homescreen menu

Your employment

Forms

Time and expenses

Personnel

Payroll

Managing Absence Appeal

Managing Absence Review

Navigate to your **Homescreen Menu** and select **Forms**.

Then select the **Managing Absence Appeal** form from the list.

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Managing Absence - Appeal

Form ID*
[NEW]

Information Employee Details Appeal Details Appeal Board Tribunal

Information

Submit form Save as draft

When the form opens-up, the **Form ID** will auto-populate as **NEW**, this should not be changed.

The form is split into five separate tabs. Ensure you read the **Information** tab and complete the **Employee Details** and **Appeal Details** tabs.

When complete, click **Submit Form** and ensure you receive a success message. The form will now workflow to the employee to approve/decline.

Should the employee not agree with the outcome of the appeal, they should reject the form, following subsequent Appeal Boards or Tribunals you should complete these tabs and resubmit the form.