Sickness Absence Documents of Record

Sandwell Metropolitan Borough Council

This guide will outline the steps to add sickness absence related documents to a team member's record.

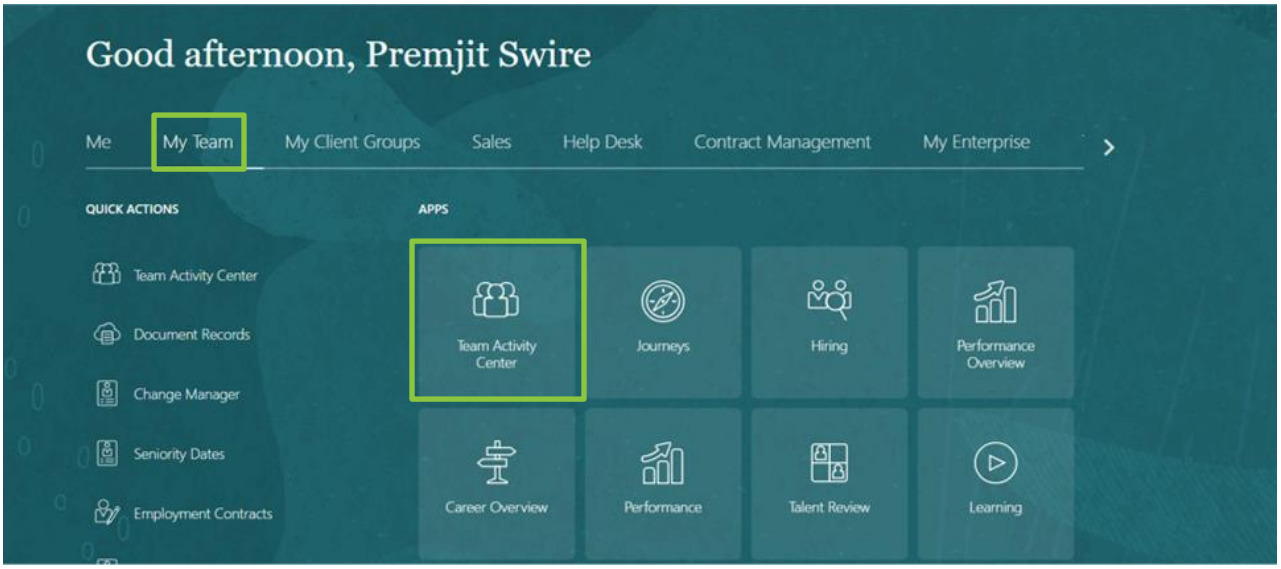
1. Add a Fit Note to an absence record

2. Add a Return-to-Work Document of Record

3. Add a Sickness Absence Management Process Document of Record

01

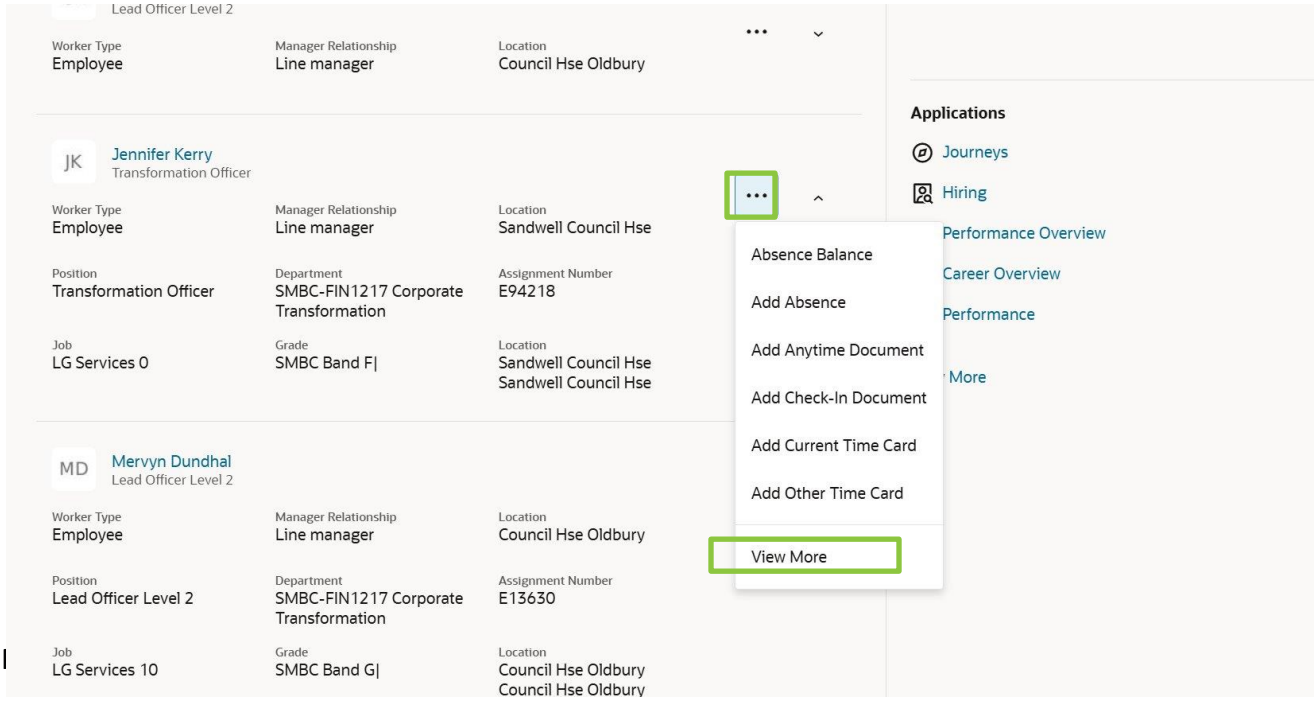
To add a doctors Fit Note to a sickness absence, you will need to edit the sickness absence record. To do this firstly navigate to the **My Team** tab on your Oracle Fusion homepage. Next select the **Team Activity Center** tile.



02

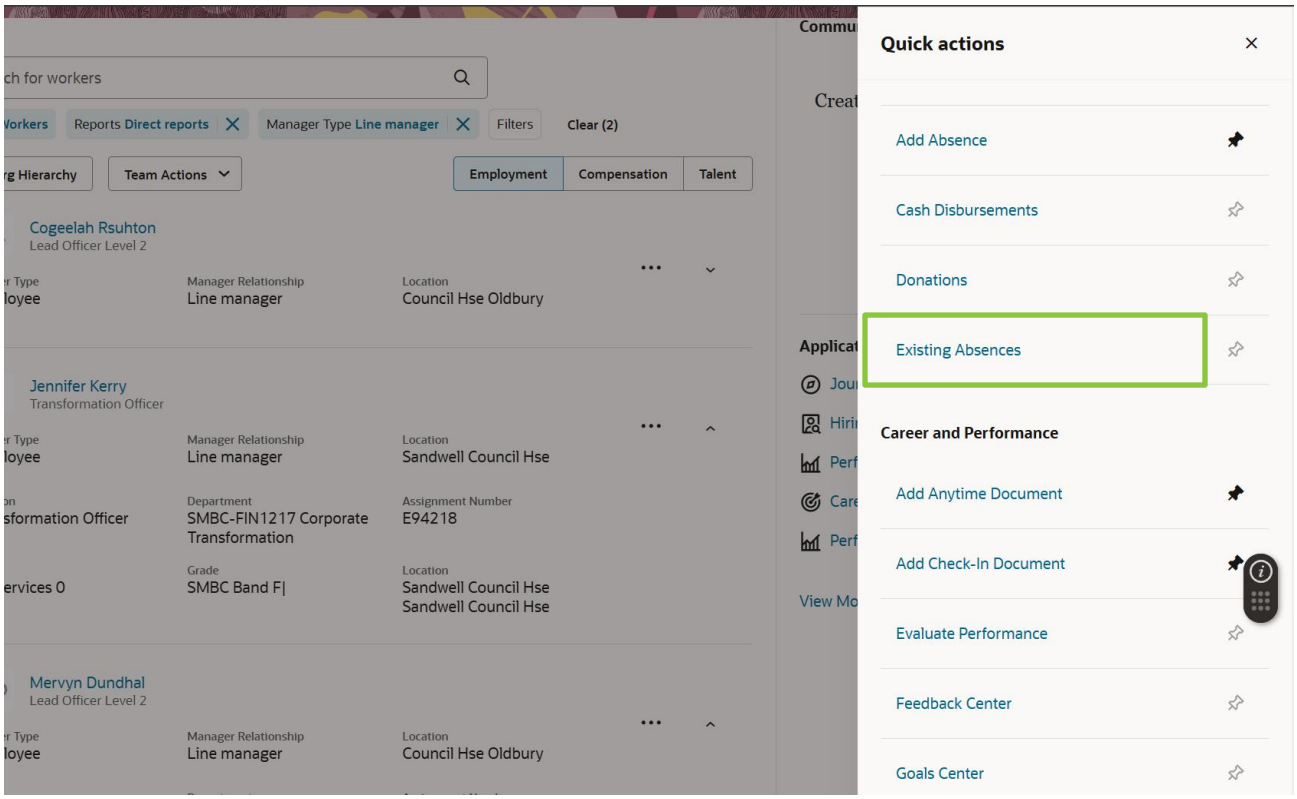
From the **Team Activity Center** page, select the **three dots icon** next to the relevant team member.

Next select **View More** from the dop-down options list.

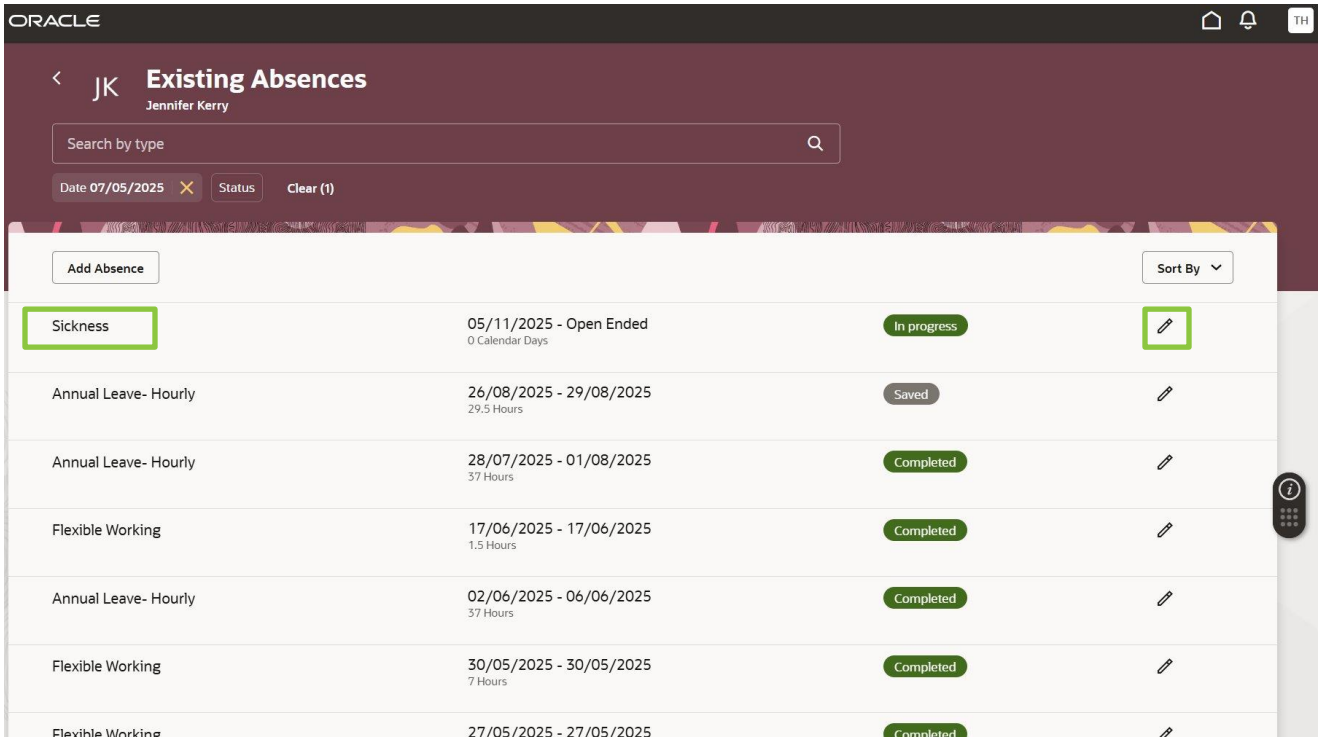


03 You will now see the **Quick Actions Menu**

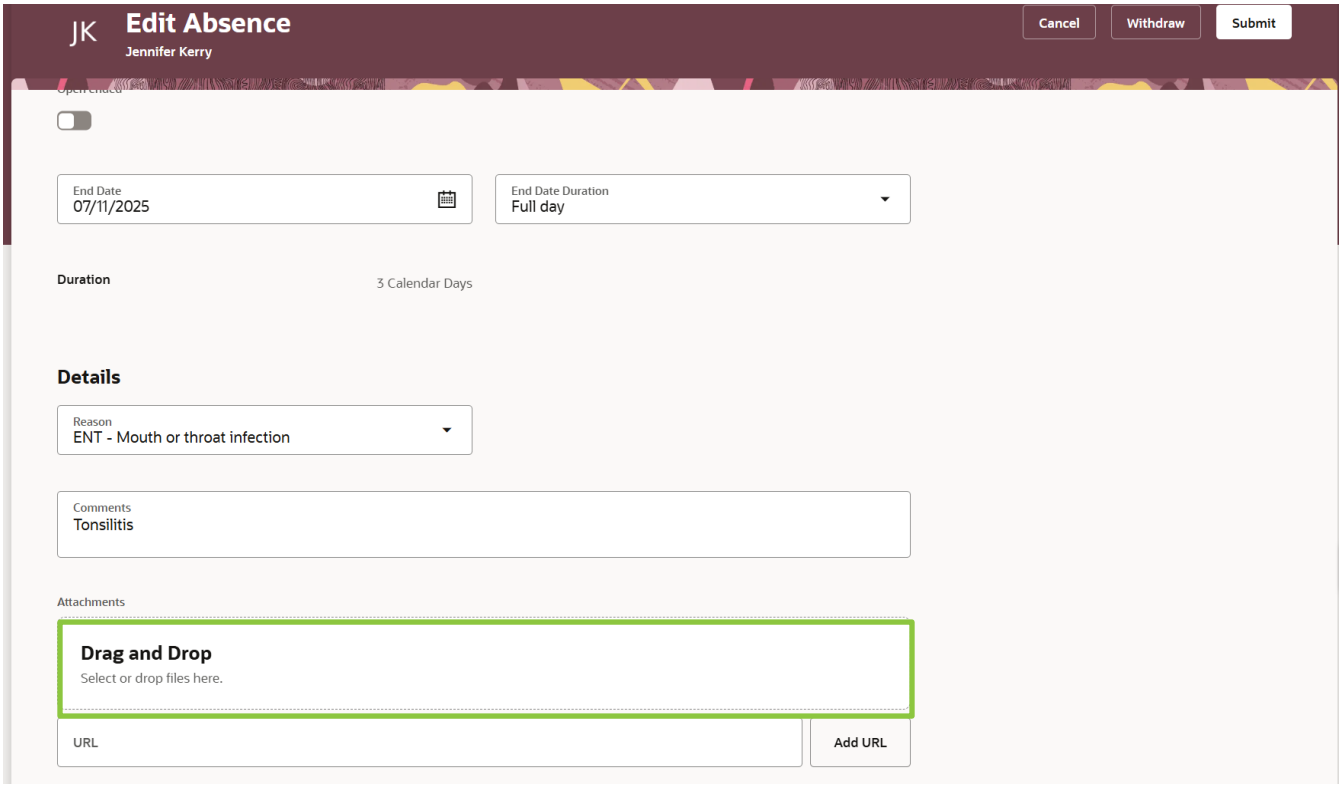
Select **Existing Absences** from the Quick Actions Menu



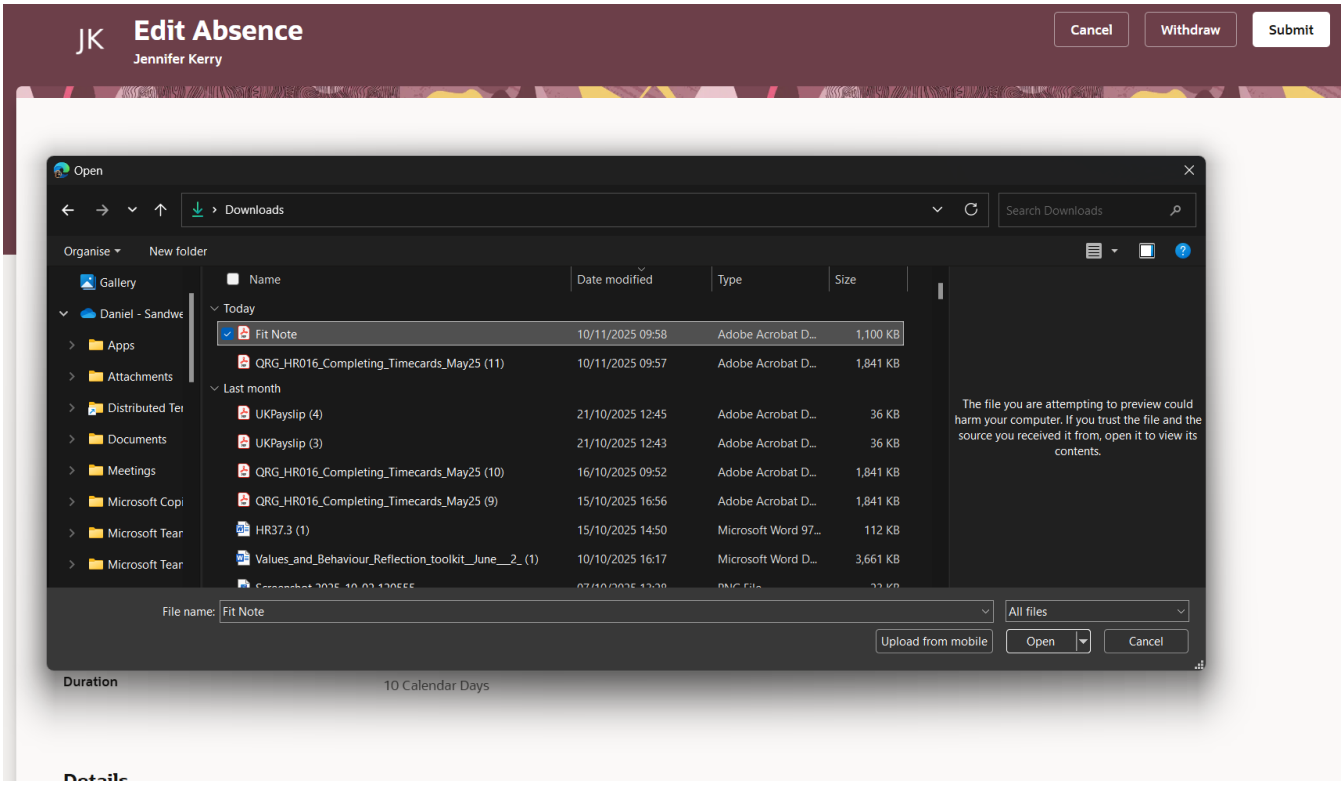
04 Identify the absence that the Fit Note relates to and select the **Pencil** icon next to the entry, or click the absence title if a pencil is not available



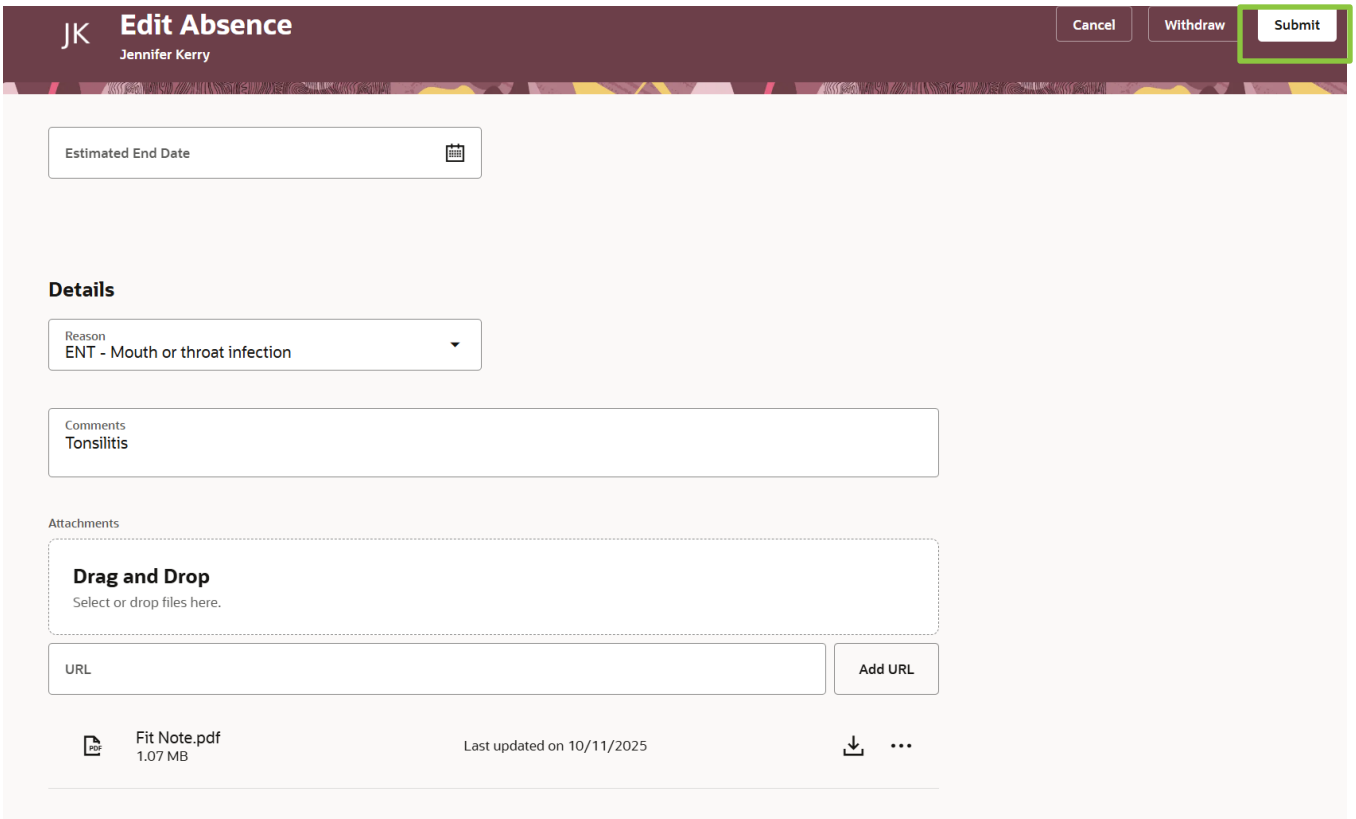
05 The **Edit Absence** screen is now displayed. Scroll down to the **Attachments** section. Select or drag the file to the **Drag and Drop** box



06 If selected, a file explorer window opens. Navigate to the document that you wish to attach and select it. Next, choose the **Open** button.



07 The Fit Note has now been attached to the absence record. Select the **Submit** button to complete the process.



08

In this next example you will see how to add a Return to Work Interview Document of Record.

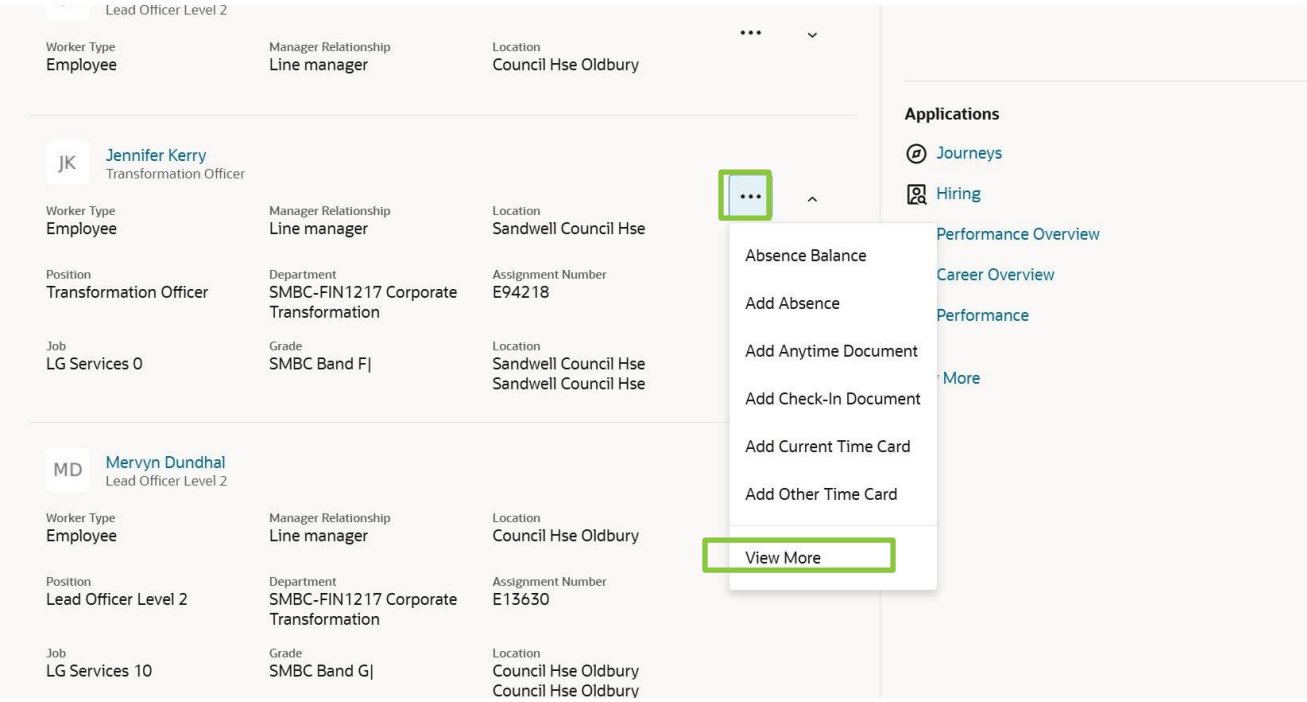
Begin by navigating to the **My Team** tab on your Oracle Fusion homepage. Next select the **Team Activity Center** tile.



09

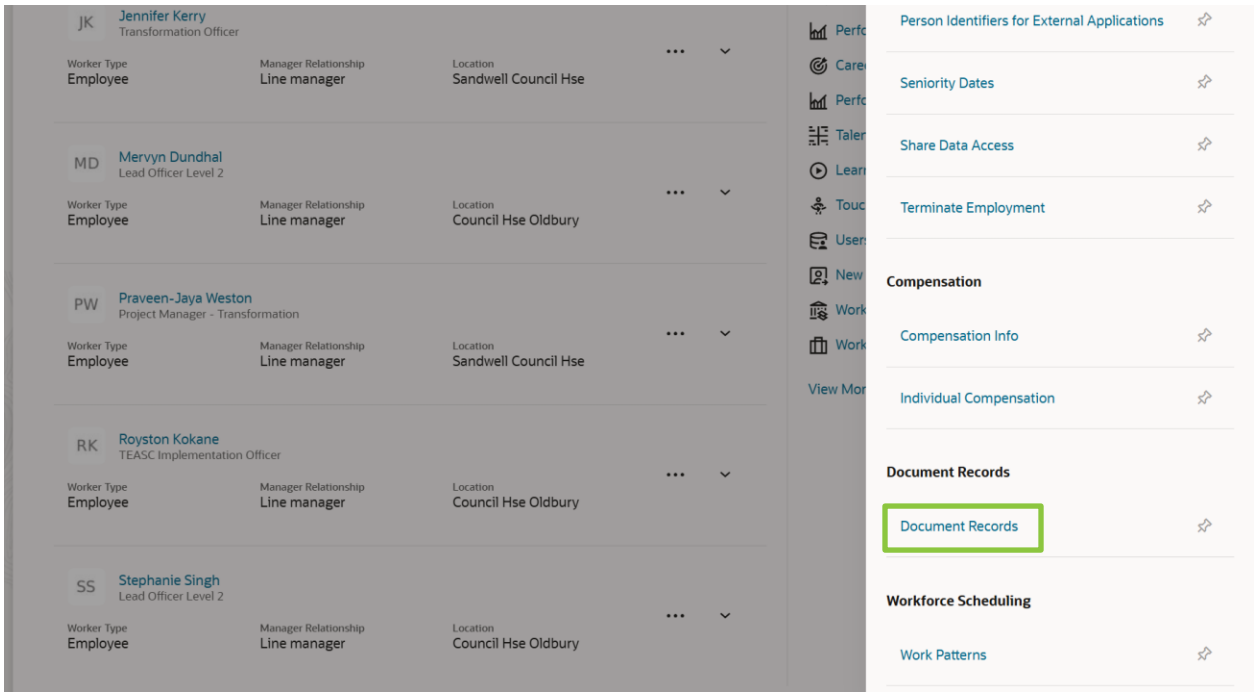
From the **Team Activity Center** page, select the **three dots icon** next to the relevant team member.

Next select **View More** from the dop-down options list.

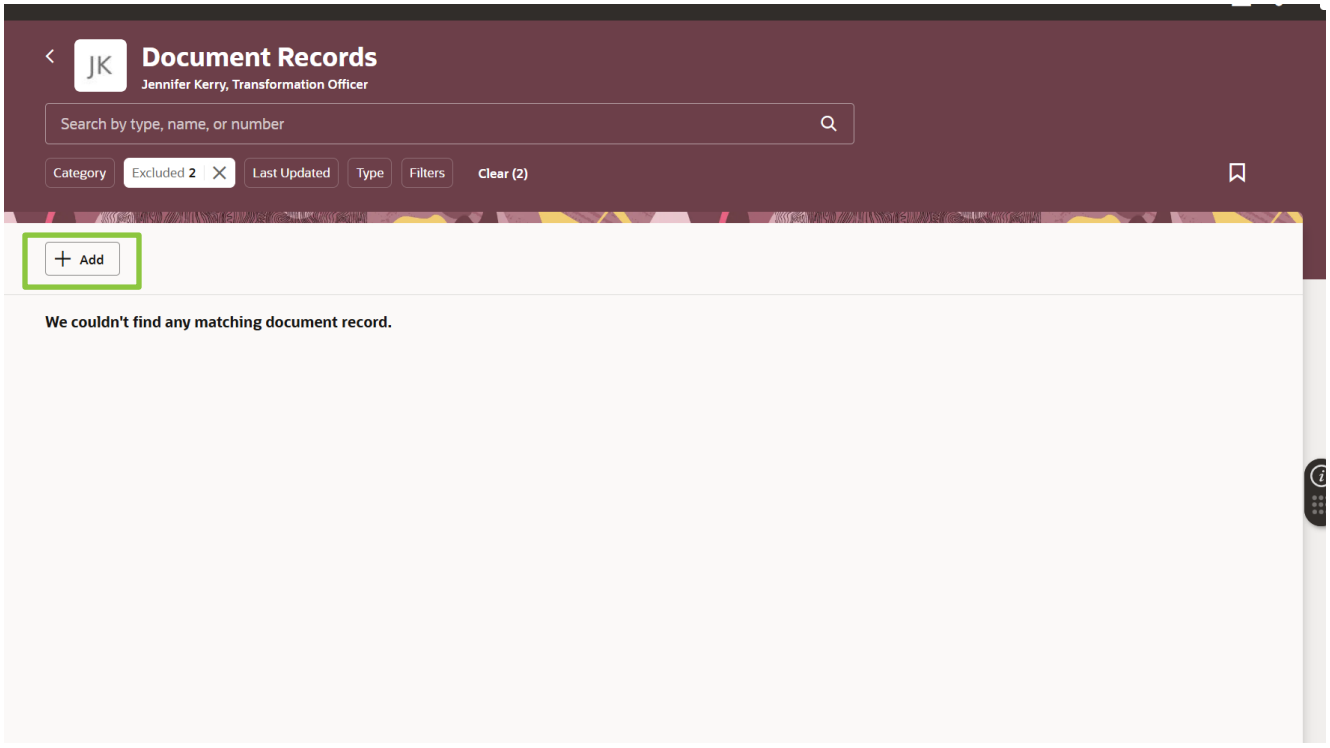


10 You will now see the **Quick Actions Menu**

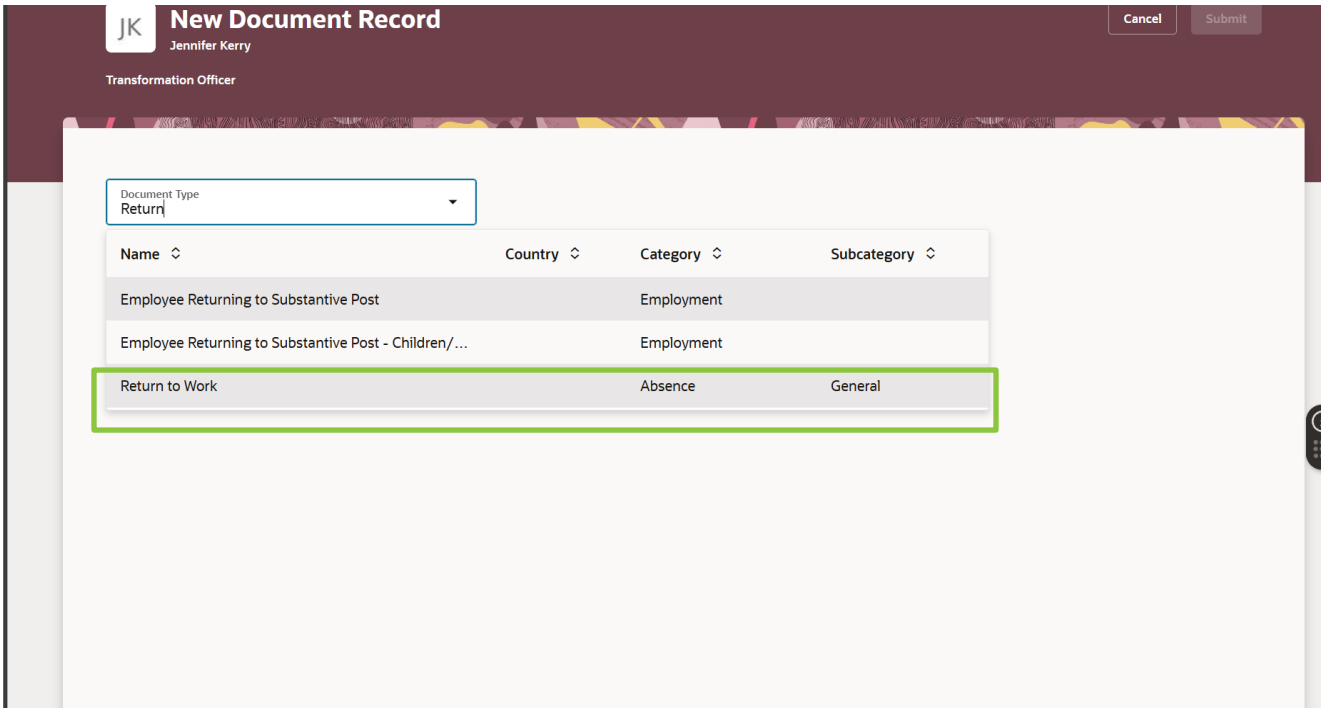
Scroll Down and select Document Records from the Quick Actions Menu



11 The Document Records page is displayed. Select the **Add** button.



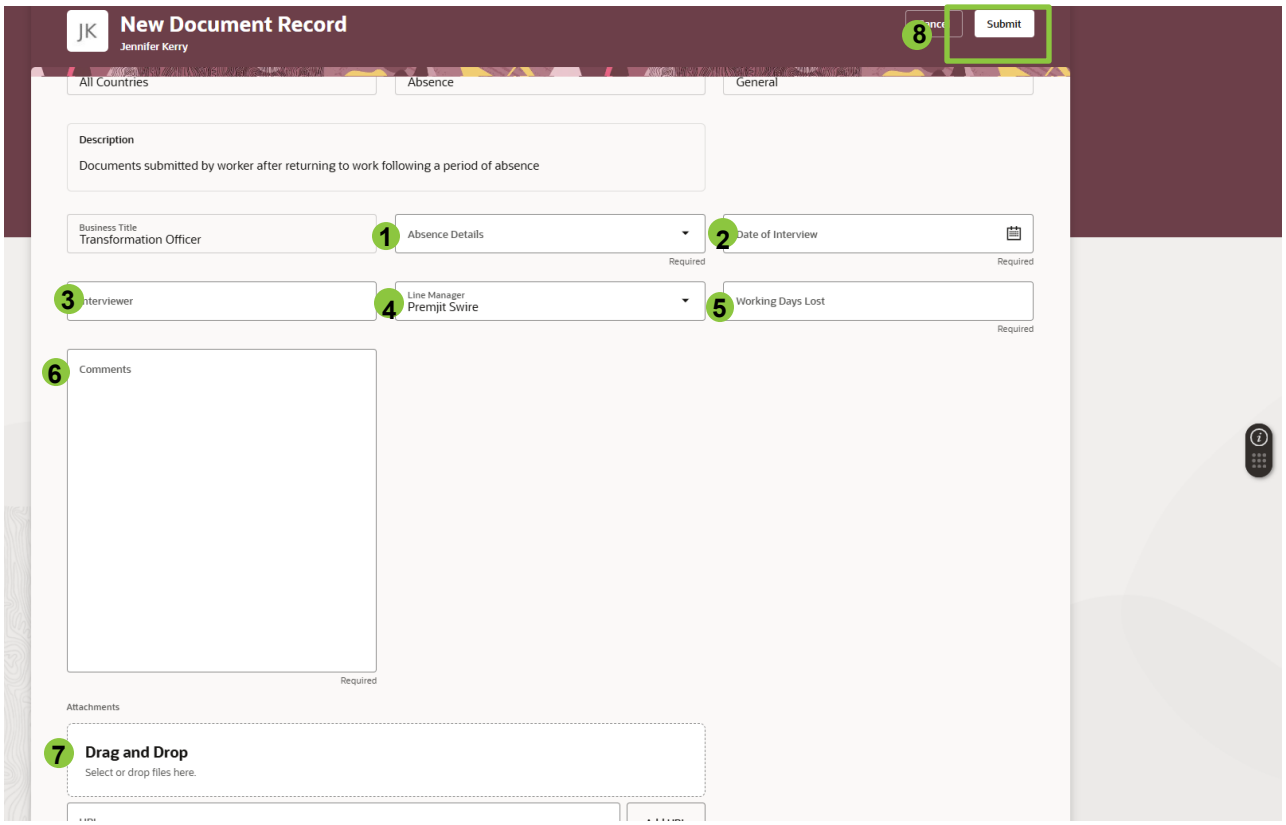
12 The **Add Document** page is displayed. Select **Return to Work** from the **Document Type** drop-down options list.



13

Once Return to Work has been selected, more fields are now displayed. Mandatory fields are marked with an asterix.

Complete the document of record as per the steps in the table below.



Step	Description
1. Absence Details	Select the absence that the Return to Work interview relates to from the drop-down list.
2. Date of Interview	Use the date picker tool to select the date of interview
3. Interviewer	Insert the name of the person conducting the Return to Work interview.
4. Line Manager	Add the name of the interviewee's line manager.
5. Working Days Lost	Add the number of working days that the colleague has been absent from work due to this sickness absence.
6. Comments	Add a summary of the discussion held during the interview.
7.Attachments	It is possible to add any documents that are relevant to the interview.
8. Submit	Once the form has been completed, select the Submit button to add a copy of the Document of Record to the colleague's file.

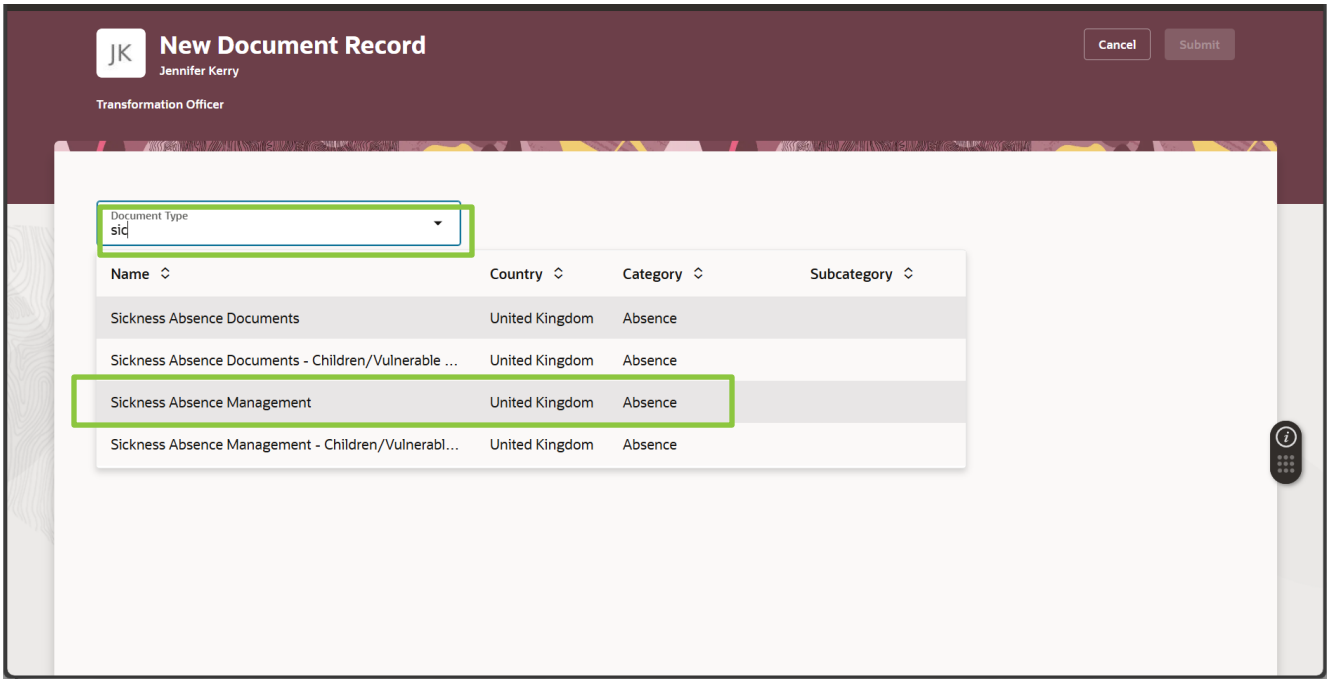
Once the document of record has been submitted, the process is complete. A notification is forwarded to both the colleague and the line manager advising that the document of record is now on file.

14

The process to add a Sickness Absence Management Process Document of Record is the same as that for adding a Return to Work interview Document of Record. It is only the form itself that differs.

To begin, follow steps eight, nine, ten, and eleven in this Quick Reference Guide.

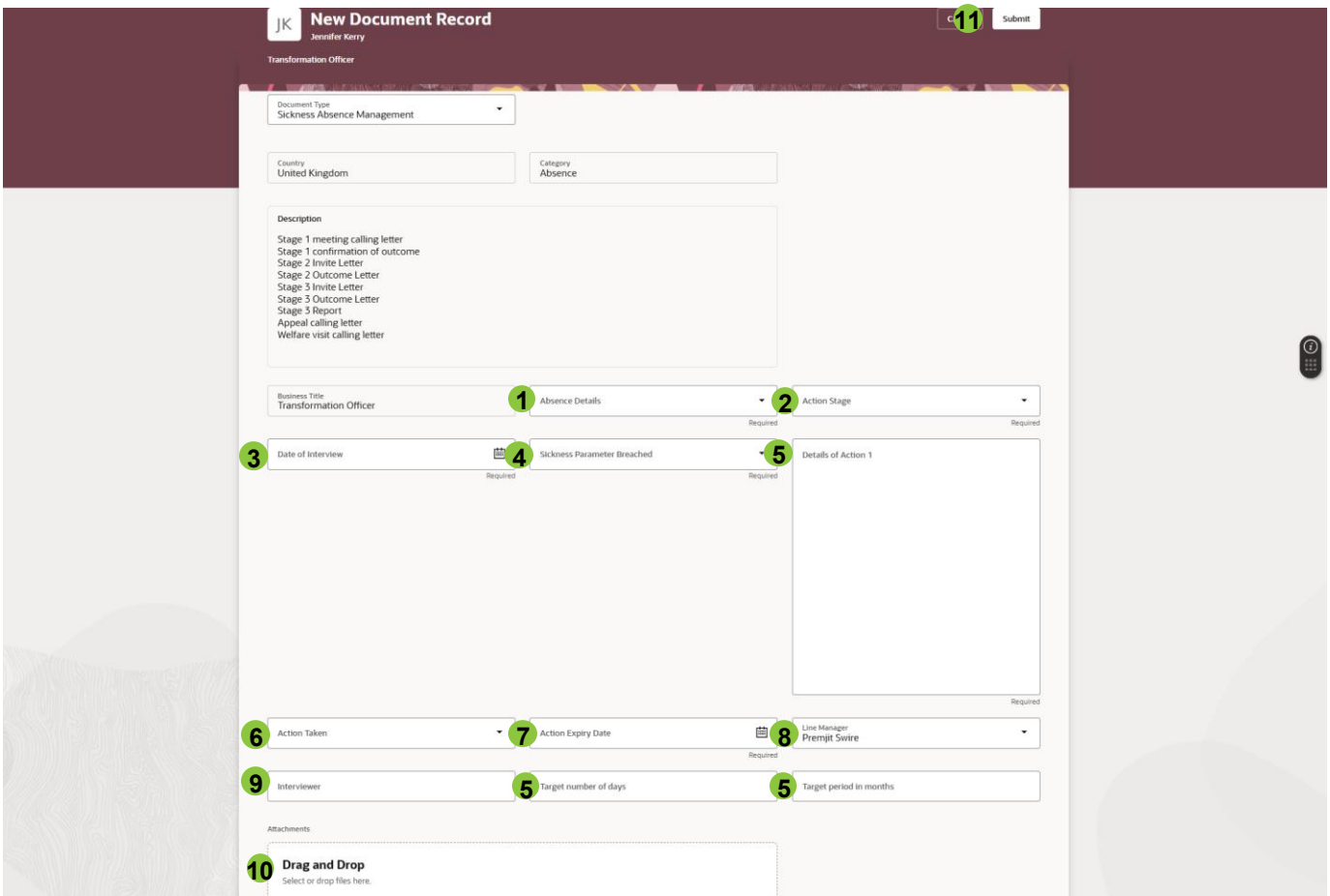
At the **Add Document** page, select **Sickness Absence Management** from the **Document Type** drop-down options list.



15

Once Sickness Absence Management has been selected, more fields are now displayed. Mandatory fields are marked with an asterix.

Complete the document of record as per the steps in the table on the following page.



Step	Description
1. Absence Details	Select the sickness absence that this interview relates to from the drop-down options list.
2. Action Stage	Select the Sickness Absence Management Policy stage that the interview relates to from the drop-down options list.*
3. Date of Interview	Select a date using the date picker tool.
4. Absence Parameter Breached.	Select the reason why the interview is taking place from the drop-down option list.*
5 Details of Actions	List the actions that have been agreed with the interviewee including any agreed targets.*
6. Action Taken	Select the type of action that has been agreed from the drop-down options list.
7. Action Expiry Date	Use the date picker tool to enter a date when agreed actions will be completed by / improvement targets to be achieved by.
8. Line Manager	Enter the interviewee's line manager's name.
9. Interviewer	Enter the name of the person that conducted the interview
10. Attachments	Further down the page there is the option to add any attachments to the record.
11. Submit	Select the Submit button to complete the process and add the Document of Record to the colleague's file.



*For more details refer to the Sickness Absence Management Policy.

Once the Document of Record has been submitted, a notification will be sent to both the employee and their line manager advising that a Document of Record has been added to the employee's file.

That brings this Quick Reference Guide to an end.