

## **VISION SUPPORT TEAM**

# **ABSENCE MANAGEMENT & RECORDING PROCEDURES**

## **USING THE VISION SYSTEM**

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## Overview

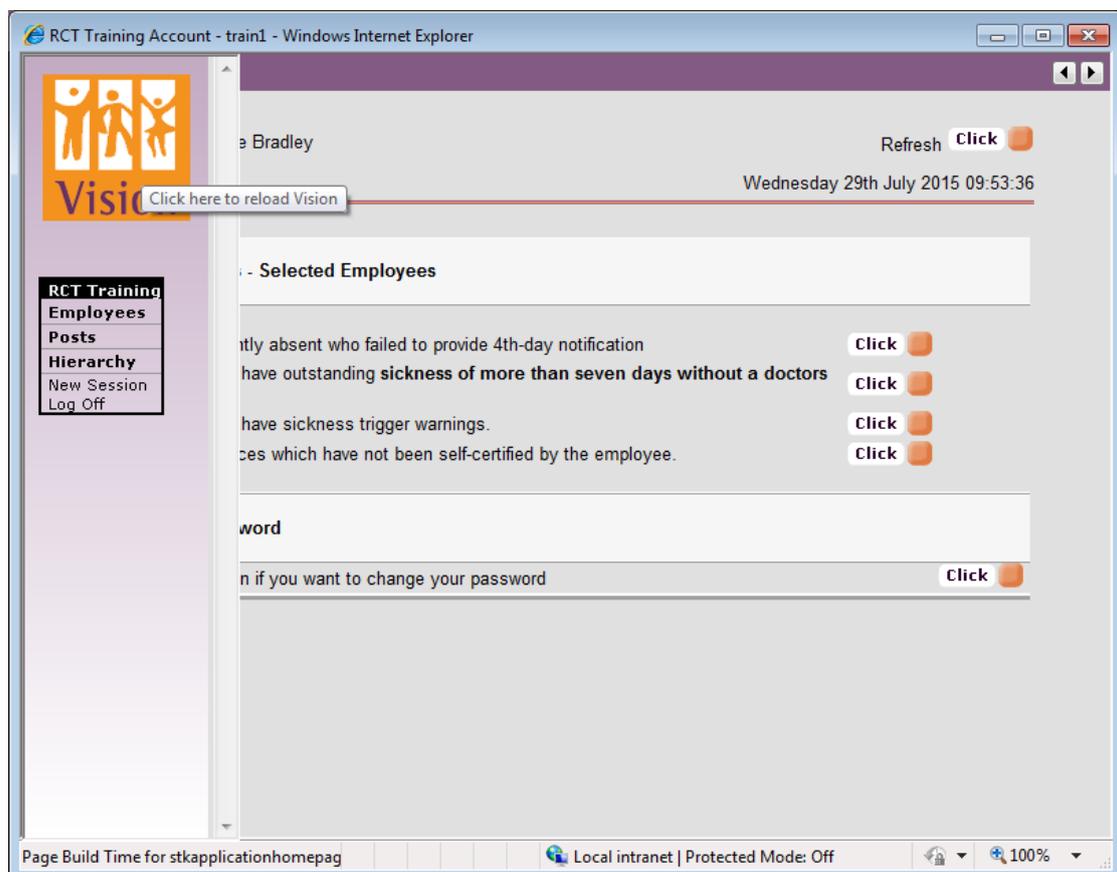
### What is Vision?

Vision is the Council's integrated Human Resources (HR) and Payroll operating system, which has been in use for a number of years. The functionality within the system removed the need for paper-based absence recording and replaced it with a more efficient electronic alternative. Managers have instant access to employee information and the facility to manage and record staff absences, including trigger point information, available on the homepage. Other modules include e-Forms i.e. electronic timesheets which enable the manager to claim casual and overtime hours in order to submit directly to Payroll. Please refer to the separate e-Form manuals should you need any instruction in this area.

Managers are encouraged to log into the system on a regular basis and take appropriate action on any trigger information present on the homepage.

### How to use Vision

Access to the various screens within Vision is governed by the use of a 'floating menu' that appears when you drag your mouse cursor over to the left-hand side of the screen. From this you can access the relevant sections of Vision.



The options available to you from the menu depend on the level of access your post requires to the Vision system and the functions your post is required to perform. All users are also allocated a level of security access that determines what actions a post-holder is able to carry out when they are logged in (e.g. read only, holiday input, sickness input, management etc.).

**For this reason, you should keep your User Identification details secure, and not divulge them to anyone.**

Users can navigate around Vision by following on screen instructions and/or clicking on icons on the screen that have a particular function attached to them (a list of the icons you will see and use, together with a description of their function, is included in Appendix 1).

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## **Logging on to the System**

You will have been shown how to access Vision using Internet Explorer. The address is <http://rctpayroll/vision> and if you click on the link here you will be taken to the log on screen. Or, you can click on the Vision icon on your desktop; details of how to create the icon will have been sent to you following training, if it is not already on your PC.

The screenshot shows a web browser window with the following content:

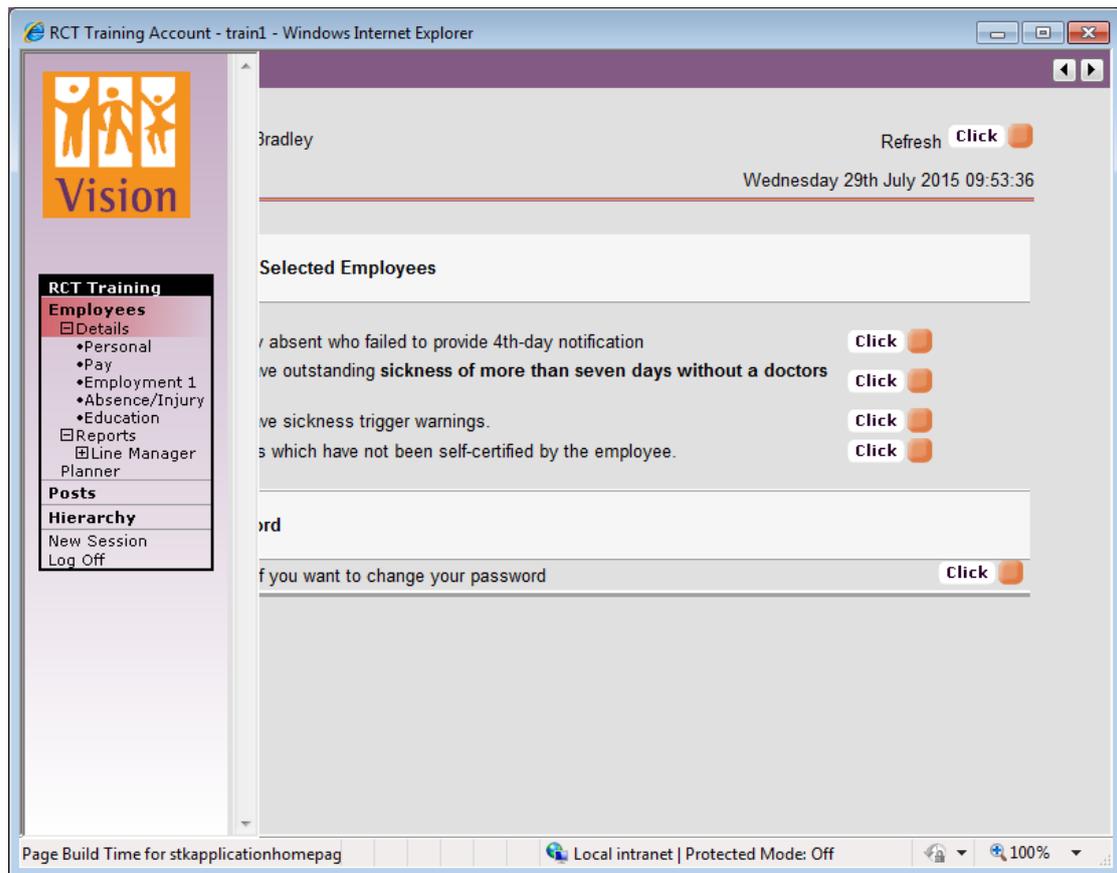
- Address bar: <http://rctpayroll/scripts/vision.dll?pagename=renderlogon&sessionid=554850114668599554663433437> - Windows Int...
- Logo: Selima Software
- Section: **Vision**
- Tagline: *Innovation through technology for payroll and human resources*
- Form: Do you have a Username and Password ?
- Fields: User Name, Password, Company (RCT)
- Button: Click
- Taskbar: Page Build Time for renderlogor, Local intranet | Protected Mode: Off, 100%

Enter your username and password in the appropriate fields. These will have been provided to you by the Vision Team and they are case sensitive. [Click](#) will take you to your homepage.

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## **Absence Screen Overview**

Using the menu as described previously, clicking on 'Employees' then 'Details' will list the options available to you.



Selecting 'Personal' will take you to the **Personal - Details** screen:

Entering the employee number in the appropriate field and clicking the load/search icon will populate the screen with the details of the employee (Vision security settings will mean that you will only have access to the records of employees for whom you have management responsibility).

Should you not know the employee number, you are able search by entering details you may know about the employee (surname etc) in any of the fields

and clicking . Clicking  without entering any details will load all employees you have access to. Either method will open a new window where you can select the employee you want by clicking on their details (Vision security settings will apply as described above). This will now populate the Personal Details screen.

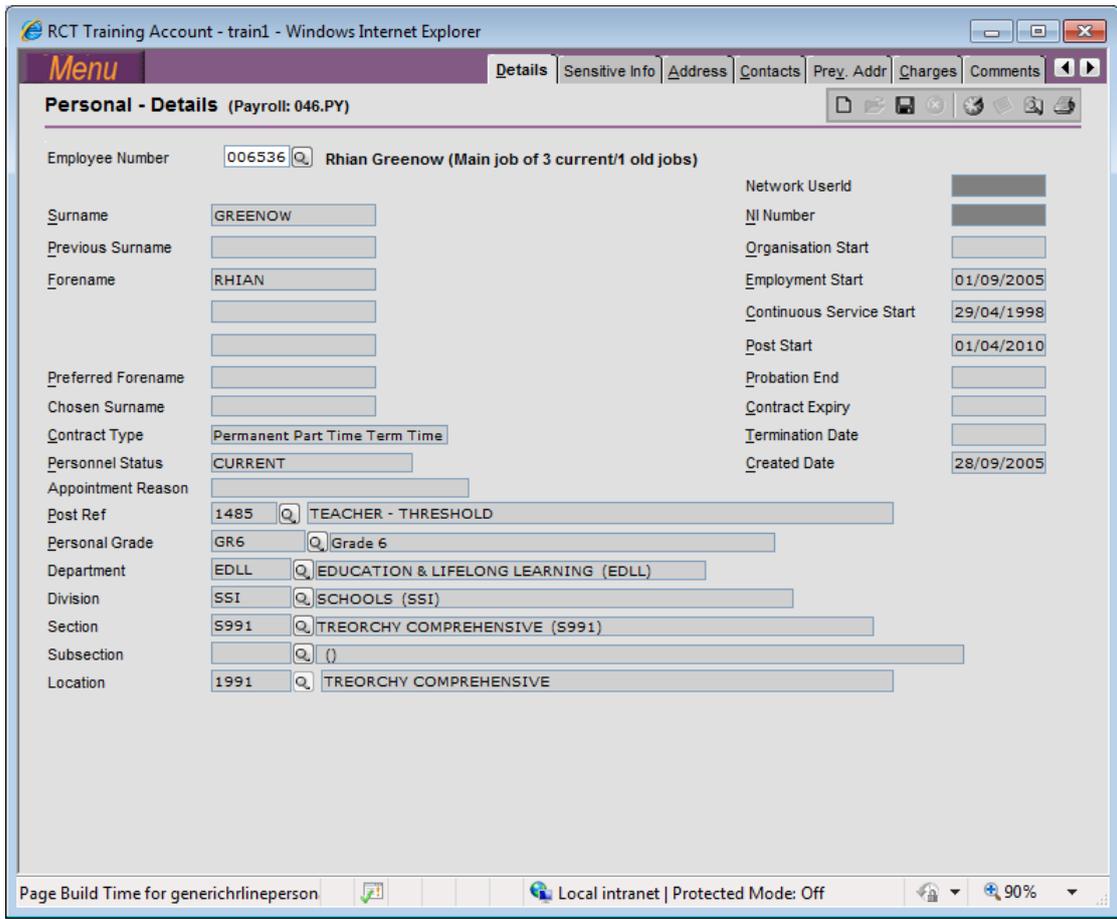
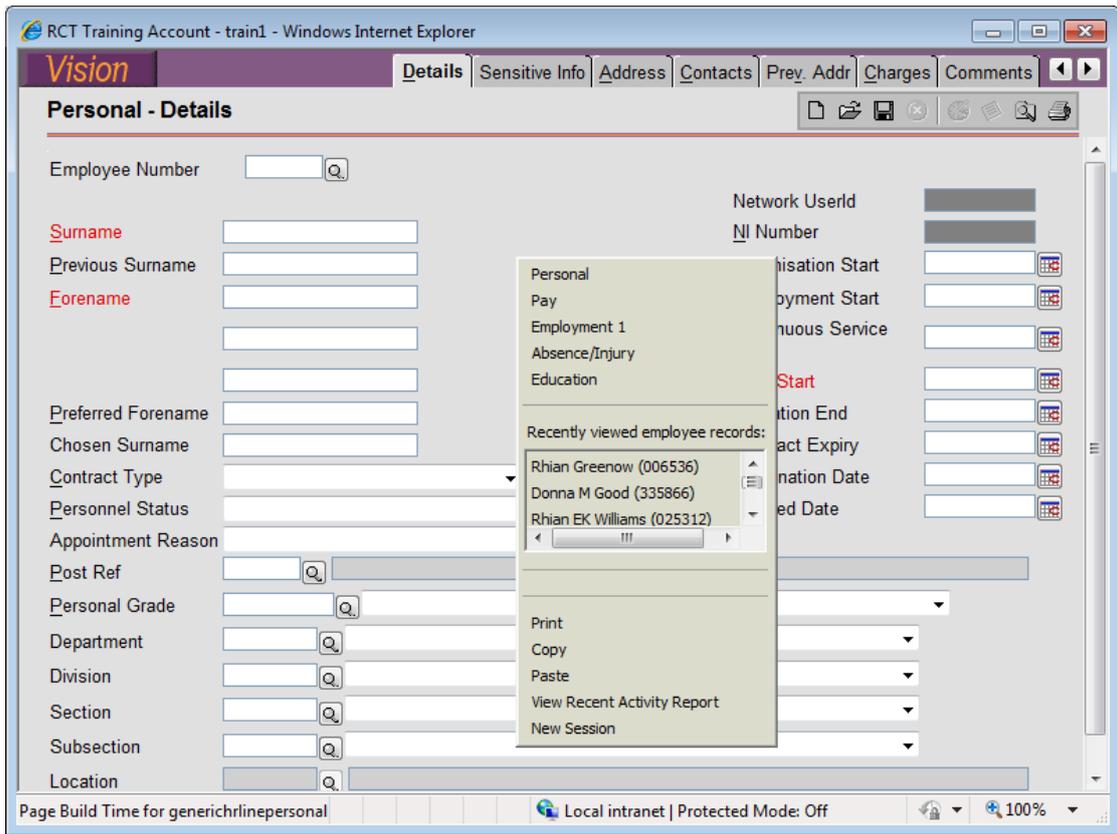
The screenshot displays a web application interface with a table of employee records and a details form. The table lists employee information including Employee ID, Name, Surname, Forename, Second Forename, Post Ref, Job Title, and Job Dt. The details form includes fields for Personal Information, Contract Details, and Employment Dates.

Employee	Name	Surname	Forename	Second Forename	Post Ref	Job Title	Job Dt
000009	THOMAS D	THOMAS	DEAN		1485	1160	TE
000261	PRATT LA	PRATT	LOUISE	ANN	1505	3076	TE
000270	HOLLOWAY GC	HOLLOWAY	GAYNOR	C	1485	1160	TE
000277	EVANS J	EVANS	JANE		1485	1160	TE
000358	OWENS M	OWENS	MICHAEL		6385	0133	G
000442	COBURN-HUGHES IG	COBURN-HUGHES	I	G	1486	1020	TE
000532	MUSGROVE LA	MUSGROVE	LINDA	ANN	1485	1160	TE
000553	SMITH R	SMITH	RACHEL		1485	1160	TE

The details form includes the following fields:

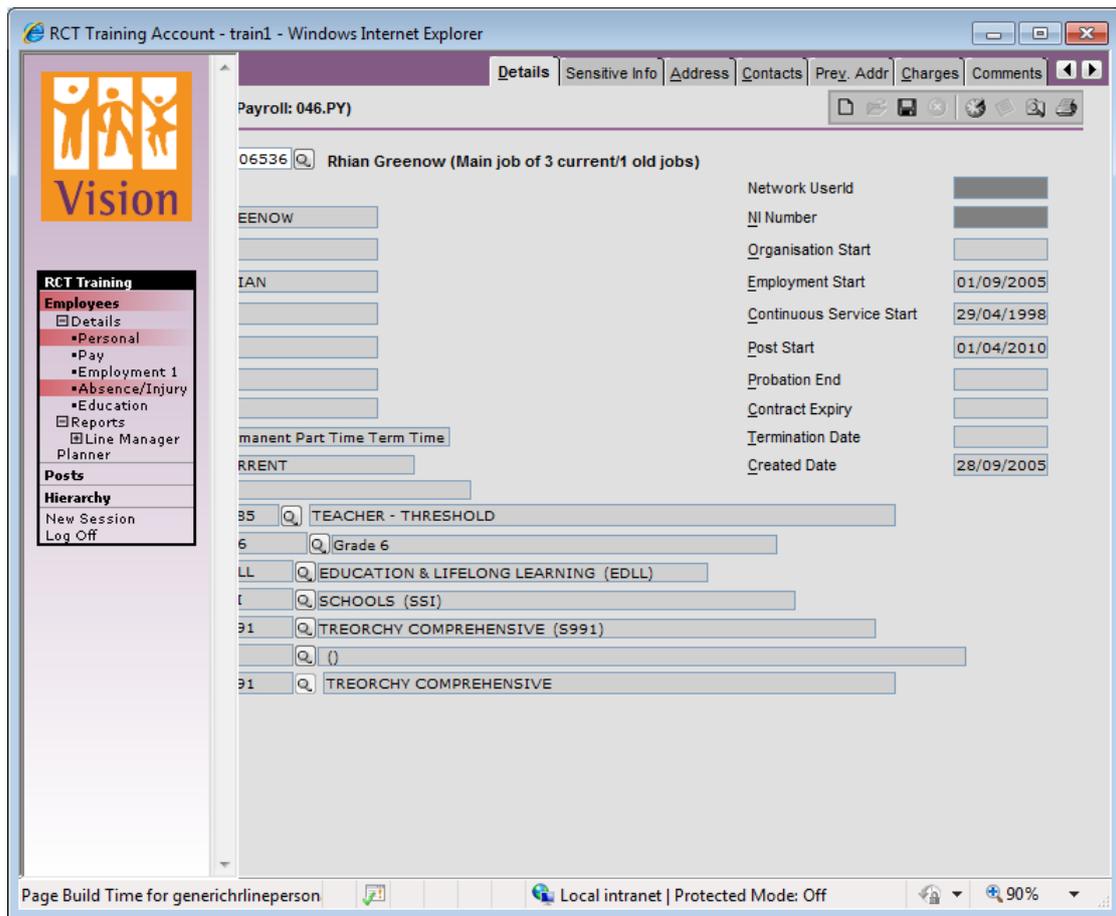
- Preferred Forename
- Chosen Surname
- Contract Type
- Personnel Status
- Appointment Reason
- Post Ref
- Personal Grade
- Department
- Division
- Section
- Subsection
- Location
- Network Userid
- Number
- Organisation Start
- Employment Start
- Continuous Service Start
- Post Start
- Probation End
- Contract Expiry
- Termination Date
- Created Date

Alternatively, if you have recently entered employees' records on Vision, you can easily re-visit their records, without entering their pay number. Once you are in the **Personal – Details** screen, right-click on your mouse and a window will appear displaying recently viewed employee records. Simply select the appropriate name and you will access their record.

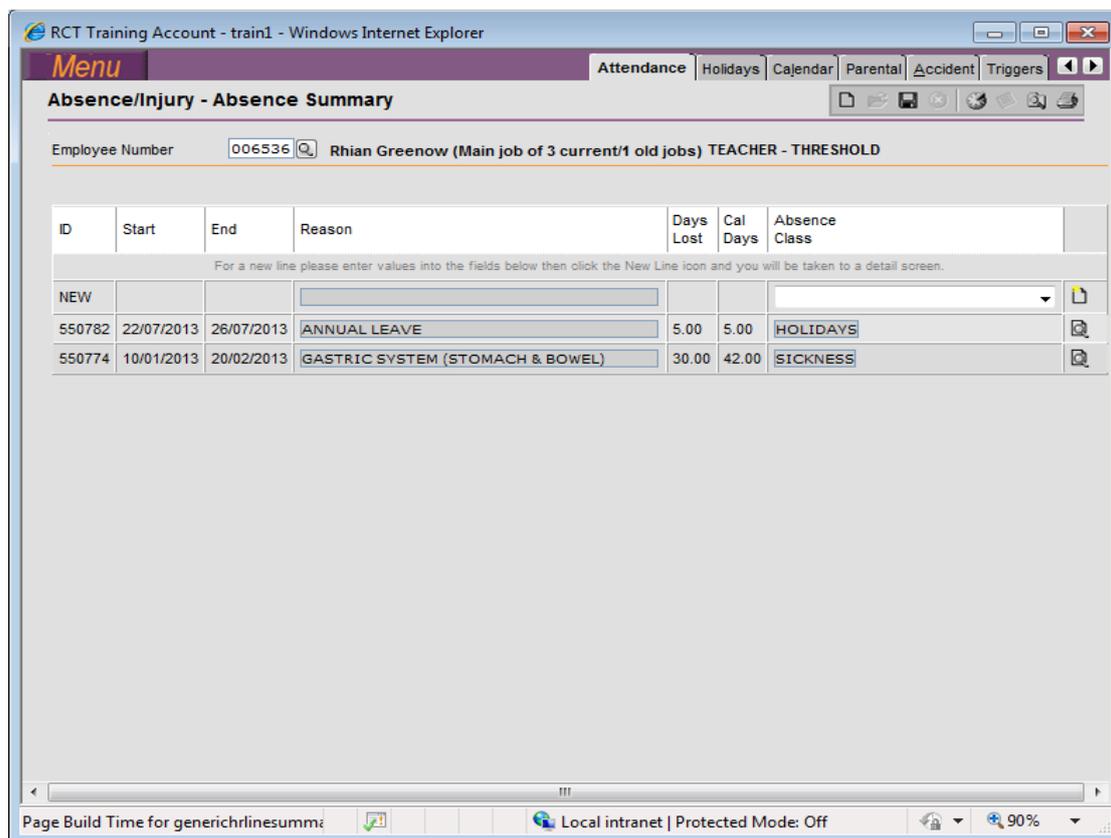


When you have selected an employee, return to the menu on the left hand side of the screen and select 'Absence/Injury' or you can go directly to the

Absence/Injury screen from the floating menu and enter the employee number on this screen or perform the search as described previously.



You will then be taken to the **Absence Summary** screen where you are able to view previous absence details for the employee and enter new absence details:



You will notice a series of tabs on the top right hand side of this screen. Selecting the appropriate tab will allow you to enter/view specific absence details :

**Attendance:** This allows you to view/enter absence details.

**Holidays:** This allows you to view annual leave details and set up a new year's entitlement.

**Calendar:** There is no functionality available at present.

**Parental:** For HR use only.

**Accident:** For Health and Safety use only.

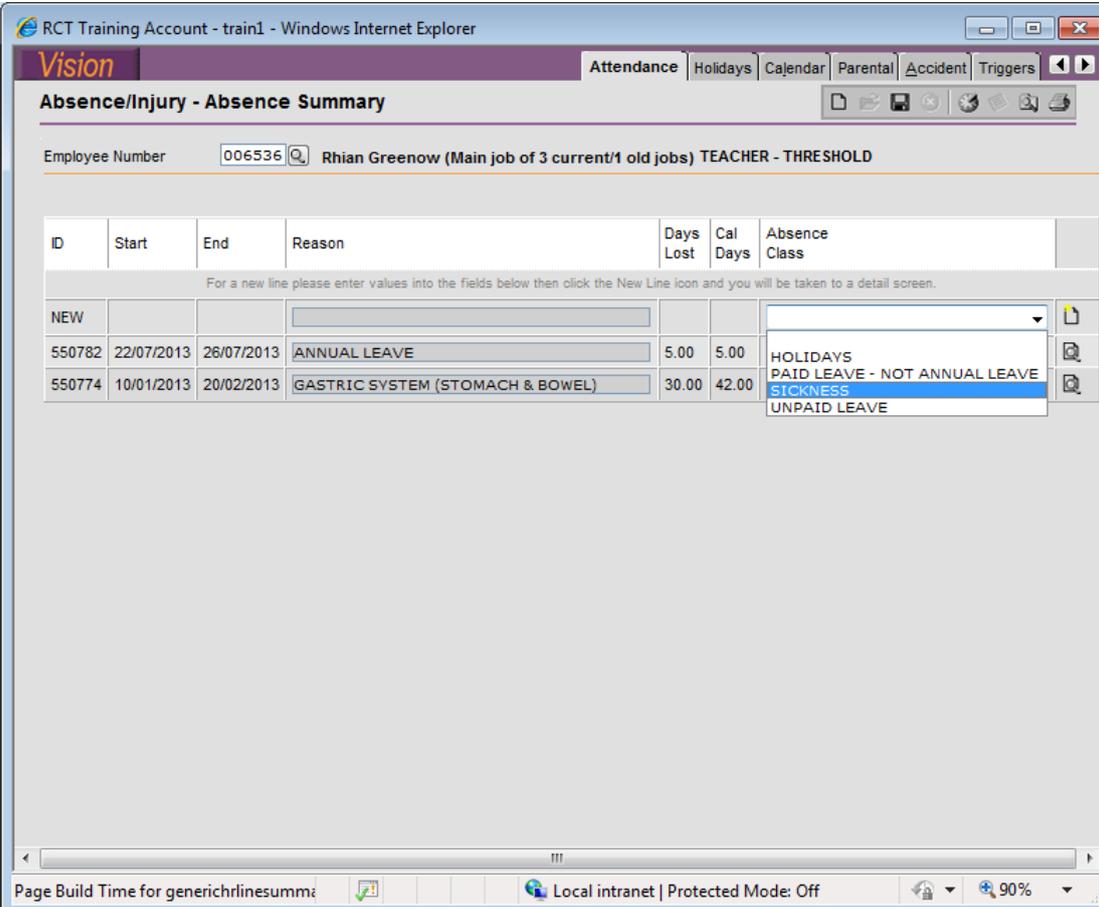
**Triggers:** This allows you to view the sickness entries that have contributed to the trigger point and enables you to enter appropriate information in order to resolve the trigger and remove from the homepage.

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## Entering Sickness Absence Details

Absence information should be entered in accordance with the Council's **Sickness Absence Policy**. The Policy is available via The Source, but if you do not have access to this, please contact your Human Resources representative and any queries relating to the policy should be discussed with your HR representative.

Staff should follow the notification arrangements set out in the policy for advising their manager of an absence. It is important to ensure that absence details are entered on Vision immediately, following receipt of a telephone call from the member of staff, advising you of their absence. Access the employee's record as described above, and select the 'Absence/Injury' option from the Vision menu. Under the heading 'Absence Class' select 'Sickness' from the drop-down menu:



The screenshot shows the 'Vision' HR system interface. The main heading is 'Absence/Injury - Absence Summary'. The employee information is: Employee Number 006536, Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD. The table below shows absence records:

ID	Start	End	Reason	Days Lost	Cal Days	Absence Class
NEW						
550782	22/07/2013	26/07/2013	ANNUAL LEAVE	5.00	5.00	HOLIDAYS
550774	10/01/2013	20/02/2013	GASTRIC SYSTEM (STOMACH & BOWEL)	30.00	42.00	PAID LEAVE - NOT ANNUAL LEAVE

A dropdown menu is open for the 'Absence Class' column, showing options: HOLIDAYS, PAID LEAVE - NOT ANNUAL LEAVE, **SICKNESS** (highlighted), and UNPAID LEAVE. A 'New Line' icon is visible to the right of the dropdown.

Then click  to the right of the 'Sickness' selection to go to the **Absence Detail – Sickness Details** screen in order to enter details of the new absence:

## Absence Detail – Sickness Details screen

RCT Training Account - train1 - Windows Internet Explorer

**Vision** Sickness Details Time Lost Return To Work History

**Absence Detail - Sickness Details (Payroll: 046.PY)** OK Cancel

Employee Number 006536 Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID NEW

Start Date [ ] [Calendar] To delete the absence, select a deletion reason [ ]

End Date (Include non-working days for OSP/SSP calculations) [ ] [Calendar]

Earliest Expected End Date [ ] [Calendar] Working Days Lost [ ] Full Pay End Date [ ]

Did the employee work part of the first day of absence?  Calendar Days [ ] Half Pay End Date [ ]

Did the employee work part of the last day of absence?  Working Hours Lost [ ]

Is the employee visiting a doctor?

Has employee Self-Certification been received? No

Absence Class SICKNESS

Absence Reason [ ]

Detailed Reason [ ]

Employee considers this absence an? [ ]

DSS Payment  Check this box if sick pay is paid by the DSS for this absence

Related Accidents / Diseases / Incidents [ ]

**Notifications and Medical Certification**

Notified By	Date	Time	Reason	Medical Certificate?	Doctors Note Valid From	Certificate Expiry Date	Earliest Expected End Date	Explanation of Absence (symptoms/reason)
For a new line please click below and you will be taken to a detail screen.								

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## Completing the Absence Detail – Sickness Details Screen

The '**Absence Class**' field has already defaulted to 'Sickness'.

Input the first date of absence in the Start Date field. You can do this by clicking on the calendar icon and selecting the appropriate day or, as a shortcut, enter the letter 't' in the Start Date field and press enter on the keyboard to populate with today's date.

### Additional Information of Sickness

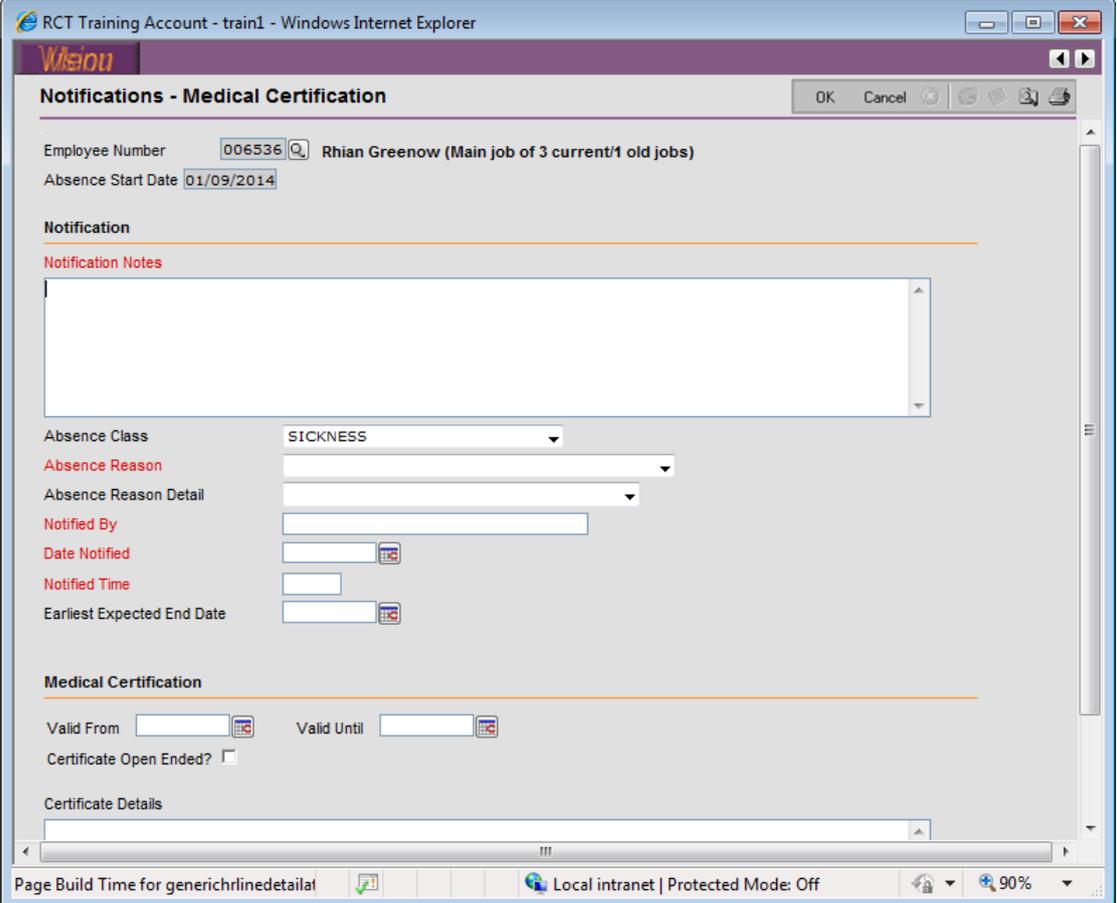
1. If the employee worked part of their first day of absence, tick the box opposite the statement to highlight it.
2. Similarly, if the employee advises you that they have seen/will be seeing their doctor tick the box opposite the statement to highlight it.
3. **If the employee considers their absence to be the result of an accident at work, industrial injury etc., this should be identified by**

selecting the appropriate reason from the drop down menu. You should also clarify whether this absence is relating to their disability (if applicable) and if so, use this menu to record it.

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## First Day of Absence

The next step is to record the absence notification details. To begin, go to the bottom right-hand corner of the screen in the '**Notification and Medical Certification**' section. Click . This will take you to a new screen:



The screenshot shows a web browser window titled 'RCT Training Account - train1 - Windows Internet Explorer'. The page is titled 'Notifications - Medical Certification'. It contains the following fields and sections:

- Employee Number: 006536, Rhian Greenow (Main job of 3 current/1 old jobs)
- Absence Start Date: 01/09/2014
- Notification Notes: A large text area for entering notes.
- Absence Class: SICKNESS (dropdown menu)
- Absence Reason: (dropdown menu)
- Absence Reason Detail: (dropdown menu)
- Notified By: (input field)
- Date Notified: (input field with calendar icon)
- Notified Time: (input field)
- Earliest Expected End Date: (input field with calendar icon)
- Medical Certification: A section with fields for Valid From, Valid Until, and a checkbox for Certificate Open Ended?.
- Certificate Details: (input field)

1. Complete the Notification Notes field. This is a mandatory field and must be completed. Typing Day 1 into this field is sufficient, however, you have the option to record other information you feel may be of relevance.
2. Select the reason for absence given by the employee by using the drop down menu opposite the '**Absence Reason Detail**' field (the list is in alphabetical order). If the reason for absence given by the employee is not on the list, please contact the VISION Support Team. Do not select a reason from the Absence Reason drop-down menu: this will populate automatically once you have selected the Absence Reason Detail.
3. When the Absence Reason Detail is selected, you will notice the '**Absence Reason**' field above has now been populated (these are

categories of absence reasons that have been identified by Occupational Health and are used for reporting purposes only).

4. Complete the Notified By (initials are sufficient), Date Notified and Notified Time fields. You can use the calendar icon or enter 't' for today's date as described previously.
5. The '**Earliest Expected End Date**' for the absence **MUST** be entered at this stage on the Notifications – Medical Certification screen and the employee should give an indication of this during contact but if this is not known or not given then enter the date of the 4<sup>th</sup> day (the next day the employee should contact you, if the absence continues, in accordance with the Council's Sickness Absence Procedure).

RCT Training Account - train1 - Windows Internet Explorer

**Menu**

**Notifications - Medical Certification** [OK] [Cancel]

Employee Number: 006536 Rhian Greenow (Main job of 3 current/1 old jobs)

Absence Start Date: 01/09/2014

**Notification**

Notification Notes

Day 1

Absence Class: SICKNESS (Field value = "Day 1")

Absence Reason: INFECTIONS

Absence Reason Detail: COLD

Notified By: RG

Date Notified: 01/09/2014

Notified Time: 8:00

Earliest Expected End Date: 04/09/2014

**Medical Certification**

Valid From: [ ] Valid Until: [ ]

Certificate Open Ended?

Certificate Details

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6. When you are happy that the screen is complete, click **OK** in the top right hand corner of the screen. You will then return to the '**Absence Detail**' screen, where all relevant fields have now been populated.

**Absence Detail - Sickness Details**

Employee Number: 006536 Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: NEW

Start Date: 01/09/2014  
 End Date:   
 Earliest Expected End Date: 04/09/2014

Did the employee work part of the first day of absence?   
 Did the employee work part of the last day of absence?   
 Is the employee visiting a doctor?   
 Has employee Self-Certification been received? No

Absence Class: SICKNESS  
 Absence Reason: INF INFECTIONS  
 Detailed Reason: INF17 COLD

Working Days Lost: 0.00  
 Calendar Days: 332.00  
 Working Hours Lost: 0:00

Notified By	Date	Time	Reason	Medical Certificate?	Doctors Note Valid From	Certificate Expiry Date	Earliest Expected End Date	Explanation of Absence (symptoms/reason)
RG	01/09/2014	08:00	INFECTIONS	<input type="checkbox"/>			04/09/2014	Day 1

When the information relating to the absence is complete, you **MUST** complete the 'Time Lost' screen by selecting the Time Lost tab in the top right hand corner of the screen.

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### Completing the Time Lost Screen

This screen is used to input the hours/days lost by an employee during their expected absence. The content of this screen will vary depending on the method used to pay the employee. Employees are classed as either **Negative** or **Positive** for pay purposes:

**Negative Employees:** These are employees who have contractual hours held on the system. The contractual hours worked each day needs to be entered in hours and minutes e.g. three and a quarter hours must be entered as 3:15.

**Positive Employees:** These are casual employees who have zero hours held on the system. The start and finish times for each day of absence needs to be completed, as long as they were scheduled to work, and the timesheets must be passed to payroll in the usual manner.

**\*\* The VISION system has a Negative/Positive indicator on all employees so the appropriate 'Time Lost' screen will appear automatically \*\***

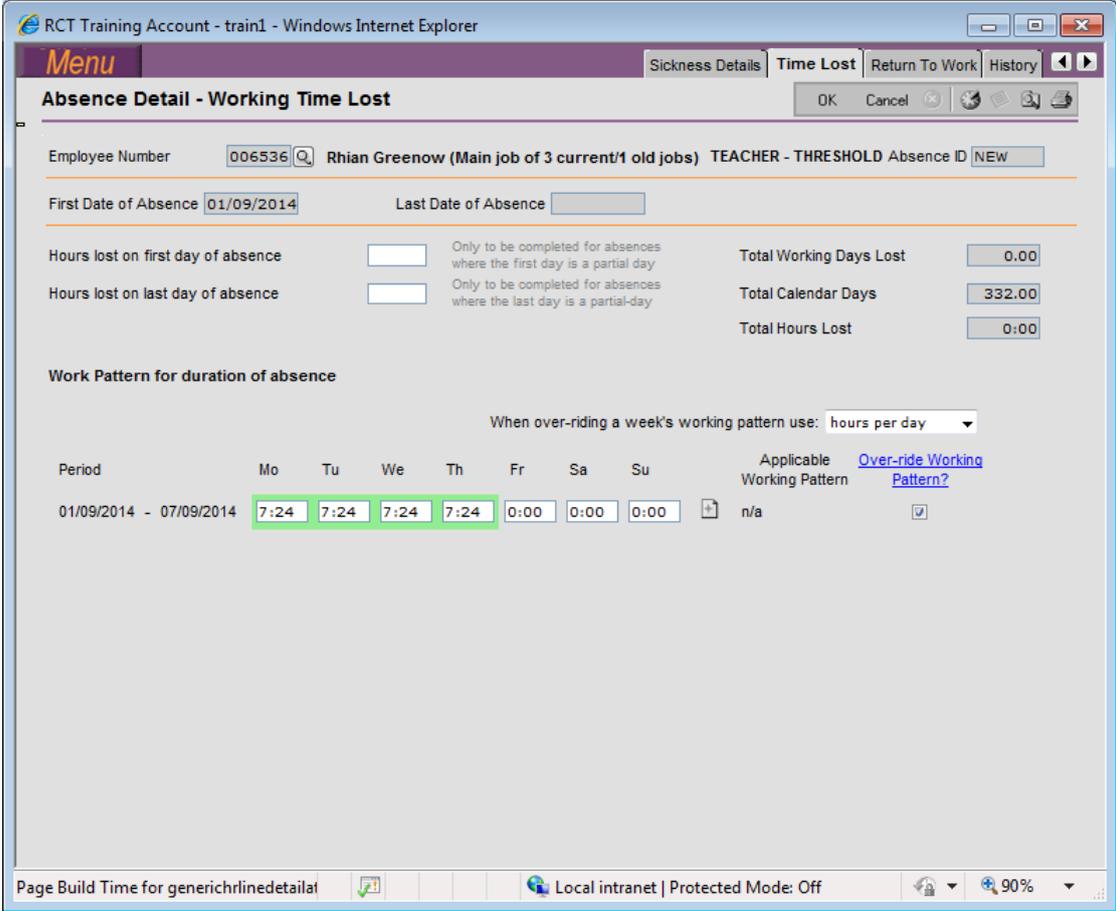
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## For Negative Employees

**Only** complete the 'Hours lost on first day of absence' and 'Hours lost on last day of absence' fields if an employee went home ill during their working day i.e. if you have ticked that they have worked part of the first/last day of absence. In this field record the **actual** hours the employee lost because of sickness on that day.

Complete the employee's working pattern with the number of hours worked per day (only complete the relevant days highlighted in green which is dictated by the '**Earliest Expected End Date**' entered earlier). Should a bank holiday fall during this period, you should treat it as a normal working day. If the employee worked part of the first or last date of their absence record the **normal** hours they would have worked on that day in this field. Only enter hours on the days that they would have worked had they not been absent due to sickness. Leave the other days populated with zeros.

If the absence runs over a week, the working pattern for a full week can be copied using the  icon. Click on this icon and, keeping the button clicked down, drag the cursor over the subsequent crosses below until all weeks have been covered. Let go of the button and the boxes should have been populated automatically.



The screenshot shows a web browser window titled "RCT Training Account - train1 - Windows Internet Explorer". The page displays the "Absence Detail - Working Time Lost" form. At the top, there are tabs for "Sickness Details", "Time Lost", "Return To Work", and "History". The "Time Lost" tab is active. The form includes the following fields and sections:

- Employee Number:** 006536, **Employee Name:** Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID NEW
- First Date of Absence:** 01/09/2014, **Last Date of Absence:** (empty)
- Hours lost on first day of absence:** (empty), **Hours lost on last day of absence:** (empty)
- Total Working Days Lost:** 0.00, **Total Calendar Days:** 332.00, **Total Hours Lost:** 0:00
- Work Pattern for duration of absence:** When over-riding a week's working pattern use: hours per day
- Table:** A table with columns for days of the week (Mo, Tu, We, Th, Fr, Sa, Su) and a column for "Applicable Working Pattern". The row for "01/09/2014 - 07/09/2014" shows 7:24 for Mo, Tu, We, Th, 0:00 for Fr, Sa, Su, and "n/a" for the pattern. There is a copy icon next to the pattern cell and a checked checkbox for "Over-ride Working Pattern?".

Once complete click  to return to the 'Sickness Details' tab on the main '**Absence Detail**' screen.

**For Positive Employees**

**Only** complete the ‘Hours lost on first day of absence’ and ‘Hours lost on last day of absence’ fields if an employee worked part of those days. In this field record the **actual** hours the employee lost because of sickness on that day.

Complete the employee’s working pattern with the start time and finish time of each shift(s) worked per day using 24 hour clock times (only complete the relevant days highlighted in green which is dictated by the ‘**Earliest Expected End Date**’ entered earlier). Should a bank holiday fall during this period, you should treat it as a normal working day. You have the option to select 1 or 2 shifts per day depending on the employee’s working pattern. If the employee worked part of the first or last date of their absence record the **normal** hours they would have worked on that day in this field. Only enter hours on the days that they would have worked had they not been absent due to sickness. Leave the other days populated with zeros.

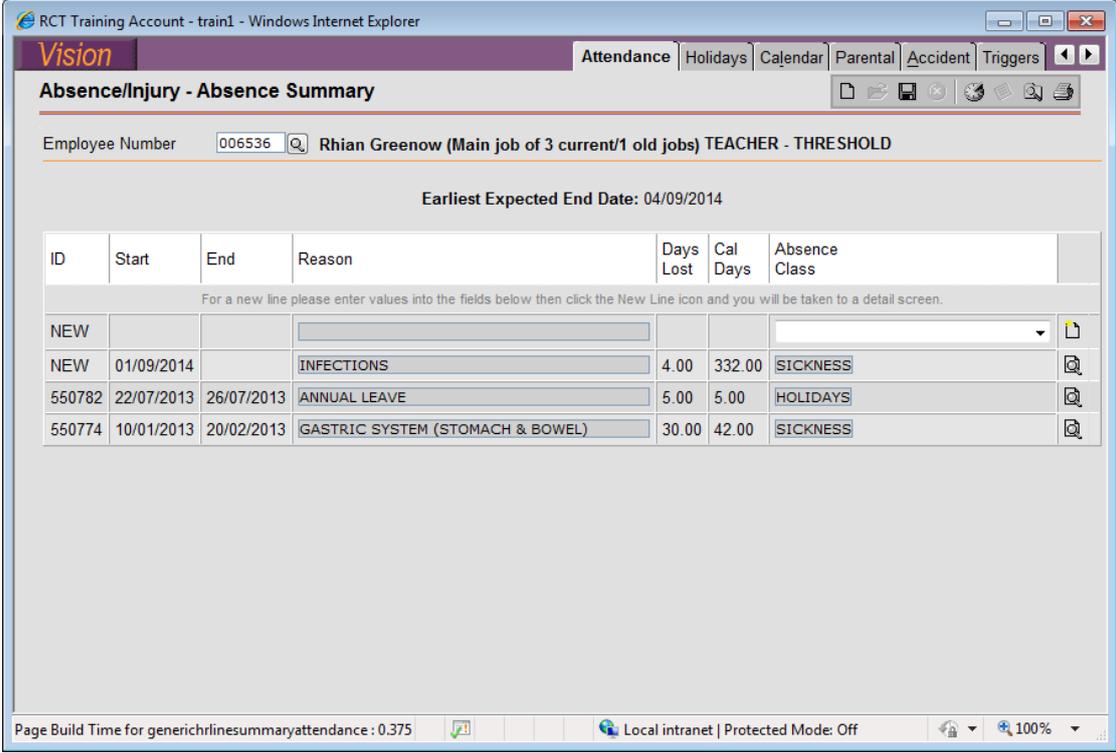
If the absence runs over a week, the working pattern for a full week can be copied using the  icon alongside the first week. Using your mouse, click and hold down this icon whilst dragging it over the replica icons below until you have covered all the weeks highlighted in green. Release the button on the mouse and the weeks should have been populated as per the first week you copied.

Once complete click  to return to the ‘Sickness Details’ tab on the main ‘Absence Detail’ screen.

See *Appendix 3* for further examples on how to complete the time lost screen.

## Saving the Absence Record

Once back on the main 'Absence Detail' screen, click  to return to the 'Absence Summary' screen.

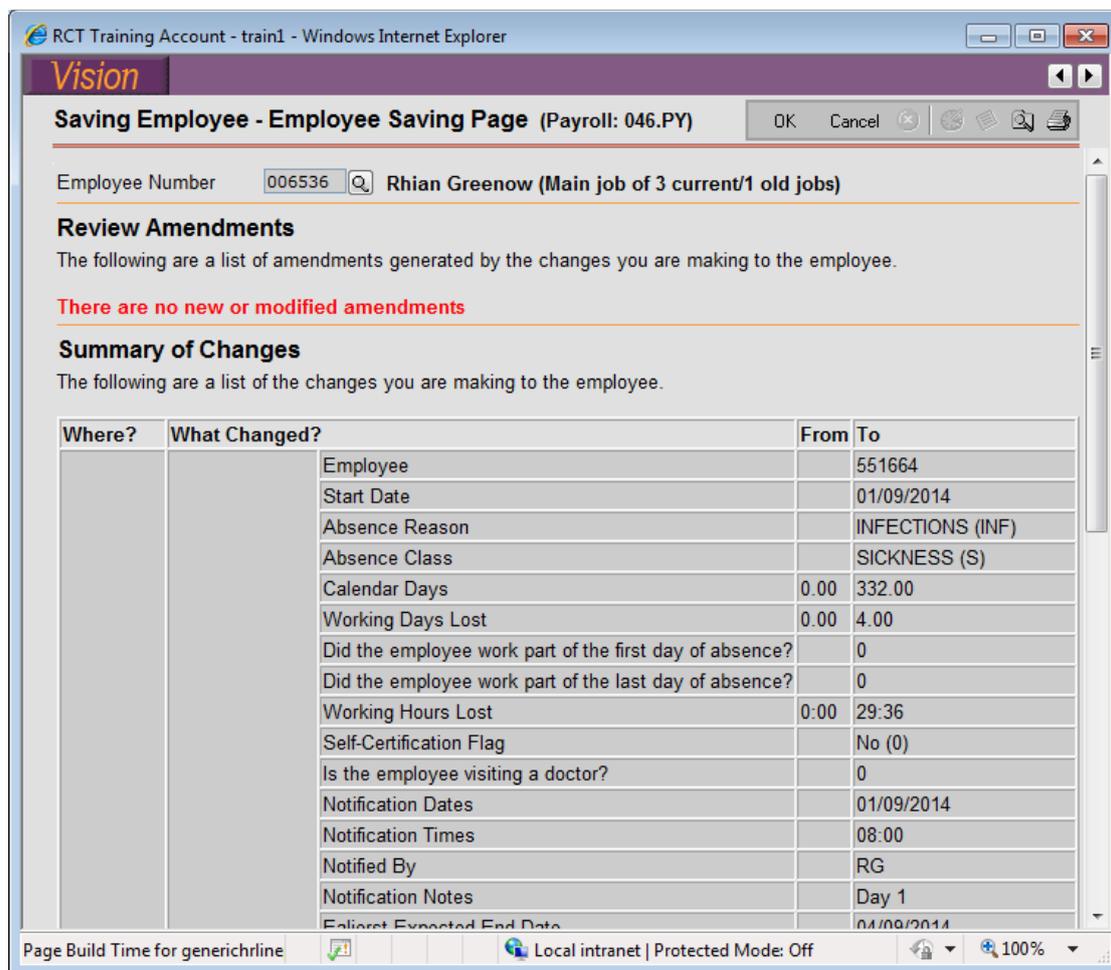


The screenshot shows the 'Absence/Injury - Absence Summary' screen in the Vision HR system. The employee is Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD, with Employee Number 006536. The earliest expected end date is 04/09/2014. The screen displays a table of absence records with columns for ID, Start, End, Reason, Days Lost, Cal Days, and Absence Class. A 'NEW' button is visible in the top right of the table area.

ID	Start	End	Reason	Days Lost	Cal Days	Absence Class
NEW						
NEW	01/09/2014		INFECTIONS	4.00	332.00	SICKNESS
550782	22/07/2013	26/07/2013	ANNUAL LEAVE	5.00	5.00	HOLIDAYS
550774	10/01/2013	20/02/2013	GASTRIC SYSTEM (STOMACH & BOWEL)	30.00	42.00	SICKNESS

An entry will now appear detailing the new absence. Clicking  will produce a summary of the absence information you have entered.

**\*\*THE ABSENCE DETAILS WILL NOT BE SAVED UNTIL YOU CLICK THE SAVE ICON  ON THE ABSENCE SUMMARY SCREEN. NOT DOING SO WILL MEAN ALL INFORMATION COMPLETED TO THIS POINT BEING LOST\*\***



Click  to confirm the Summary of Changes and save the record and click OK to the message informing you that the record has been saved.

## Dealing with Multiple Employments

This refers to employees with more than one job with the Council who therefore should have more than one pay number. Each manager is responsible for the employee absence record within their own area and some managers may be responsible for the main and secondary employment(s) should an employee have multiple jobs within your service area.

You will not be able to view records from another service area as your post security details determine record accessibility.

If you are managing an employee whose main record is held elsewhere (and this could even be outside of the Council), please ensure that the employee provides a self-certification of sickness (SA3) for the employment with you and ask the employee to provide you with copies of the Statement of Fitness for Work forms during the period of sickness absence, as the information must be recorded and maintained against each job i.e. each pay number.

## Maintaining/Updating the Sickness Absence

During the course of a particular sickness absence, the employee's record must be updated with any developments or further information received (e.g. continued absence, statement received, return to work etc.)

Open the employee's record as described previously and access their '**Absence/Injury**' screen. A list of all absences will be detailed (by default they are in chronological order with the most recent at the top of the list. At this time the absence will not have a date in the '**End**' column).

RCT Training Account - train1 - Windows Internet Explorer

Vision Attendance Holidays Calendar Parental Accident Triggers

**Absence/Injury - Absence Summary** (Payroll: 046.PY)

Employee Number 006536 Rhian Greenow (Absent for 332 days) (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD

Earliest Expected End Date: 04/09/2014

ID	Start	End	Reason	Days Lost	Cal Days	Absence Class
NEW						
551664	01/09/2014		INFECTIONS	4.00	332.00	SICKNESS
550782	22/07/2013	26/07/2013	ANNUAL LEAVE	5.00	5.00	HOLIDAYS
550774	10/01/2013	20/02/2013	GASTRIC SYSTEM (STOMACH & BOWEL)	30.00	42.00	SICKNESS

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Click  at the end of the line to select the absence to be updated. The original '**Absence Detail**' screen will now open and you will see the Day 1 notification under Notifications and Medical Certification.

**Absence Detail - Sickness Details** (Payroll: 046.PY)

Employee Number: 006536 Rhian Greenow (Absent for 332 days) (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: 551664

Start Date: 01/09/2014  
 End Date: (Include non-working days for OSP/SSP calculations)  
 Earliest Expected End Date: 04/09/2014

Working Days Lost: 4.00 Full Pay End Date:  
 Calendar Days: 332.00 Half Pay End Date:  
 Working Hours Lost: 29:36

Did the employee work part of the first day of absence?   
 Did the employee work part of the last day of absence?   
 Is the employee visiting a doctor?   
 Has employee Self-Certification been received? No

Absence Class: SICKNESS  
 Absence Reason: INF INFECTIONS  
 Detailed Reason: INF17 COLD

Employee considers this absence an?  
 DSS Payment:  Check this box if sick pay is paid by the DSS for this absence

Related Accidents / Diseases / Incidents

**Notifications and Medical Certification**

Notified By	Date	Time	Reason	Medical Certificate?	Doctors Note Valid From	Certificate Expiry Date	Earliest Expected End Date	Explanation of Absence (symptoms/reason)
RG	01/09/2014	08:00	INFECTIONS	<input type="checkbox"/>			04/09/2014	Day 1

For a new line please click below and you will be taken to a detail screen.

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## Recording 4<sup>th</sup> Day Notification

1. When the employee makes contact on the 4<sup>th</sup> day of absence, record as you would on Day 1 by clicking , the new line icon at the bottom right hand side of the screen, under the heading '**Notification and Medical Certification**', to create a new notification. Please note, if the first day of absence was a partial day worked, you do not count this as day 1 when calculating where day 4, 7 and 14 fall. The first **full** day of absence is regarded as Day 1 and so this needs to be taken into account when considering the mandatory contact days.

'**Absence Class**', '**Absence Reason**' and '**Absence Reason Detail**' will be automatically populated from the main '**Absence Detail**' screen.

2. Complete the Notification Notes field. This is a mandatory field and must be completed. Typing Day 4 into this field is sufficient, however, you have the option to record other information you feel may be of relevance.
3. Then complete the Notified By (initials are sufficient), Date Notified and Notified Time fields. You can use the calendar icon or enter 't' for today's date as described previously.
4. The '**Earliest Expected End Date**' for the absence **MUST** be entered at this stage on the notifications screen but if this is not known or not given then enter the date of the 7<sup>th</sup> day (as a statement is due from Day

8 should the absence continue) in accordance with the Council's Sickness Absence Procedure.

5. If the sickness reason has changed since day 1, you can select a new sickness reason from the '**Absence Reason Detail**' menu.
6. When you have completed the notification entries, click  in the top right hand corner of the screen. You will then return to the '**Absence Detail**' screen, where all relevant fields have now been populated.
7. You will need to visit the Time Lost tab (if you have extended the Earliest Expended Date you will be prompted to do so) and will note the green boxes have been extended based on the new '**Earliest Expected End Date**' and you should continue to populate with the normal work pattern for the employee. If the employee does not work weekends as part of the normal contract you should not enter data into these fields and, similarly, if you have a part-time employee, do not enter anything into the fields on non-working days; simply leave the boxes displaying zeros.
8. When you are happy that the screen is complete, click  in the top right hand corner of the screen. You will then return to the '**Absence Detail**' screen, where all relevant fields have now been populated. Click OK again and save the record as described previously.

If the 4<sup>th</sup> day is not a working day for the employee, you **must** still record the 4<sup>th</sup> calendar day in the Date Notified field i.e. the 4<sup>th</sup> day of the absence regardless of the working days.

**E.g.** Employee is absent due to illness on Thursday 9<sup>th</sup> April 2015 therefore Day 1 is the 9<sup>th</sup> and Day 4 is Sunday 12<sup>th</sup> April 2015. The employee makes contact on Friday 10<sup>th</sup> April 2015 as this is the last working day before the 4<sup>th</sup> day. If the 10<sup>th</sup> April is recorded as the 4<sup>th</sup> day, Vision will not recognise the Day 4 notification and it must, therefore, be recorded as below:

As the 4<sup>th</sup> calendar day of absence is Sunday, you will not be able to record the above details until the following Monday (18<sup>th</sup> March in this example).

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## **Recording 7<sup>th</sup> Day Notification**

When the employee makes contact on the 7<sup>th</sup> day of absence, record as you would on Day 1 and Day 4 by clicking , the new line icon at the bottom right hand side of the screen, under the heading '**Notification and Medical Certification**', to create a new notification.

'**Absence Class**', '**Absence Reason**' and '**Absence Reason Detail**' will again be automatically populated from the main '**Absence Detail**' screen but if the reason has changed in the meantime, you will need to select the new reason from the Absence Reason detail drop-down menu.

Follow steps 1 – 7 as above, recording Day 7 in the Notification Notes and again, be aware of recording the 7<sup>th</sup> calendar date in the Date Notified field if this is not a working day for the employee.

## Recording 14<sup>th</sup> Day Notification

When the employee makes contact on the 14<sup>th</sup> day of absence, record as you would on Day 1, Day 4, and Day 7 by clicking  , the new line icon at the bottom right hand side of the screen, under the heading '**Notification and Medical Certification**', to create a new notification.

'**Absence Class**', '**Absence Reason**' and '**Absence Reason Detail**' will again be automatically populated from the main '**Absence Detail**' screen but if the reason has changed in the meantime, you will need to select the new reason from the Absence Reason detail drop-down menu.

Follow steps 1 – 7 as above, recording Day 14 in the Notification Notes and again, be aware of recording the 14<sup>th</sup> calendar date if this is not a working day for the employee.

This is also the time that the employee should be referred to the Occupational Health and Wellbeing Unit for assessment if the absence does not come under a Muscular Skeletal or Mental Health condition, in which case, referral should be considered from day 1, as per the Sickness Absence Policy.

## Recording 21<sup>st</sup>, 28<sup>th</sup>, 35<sup>th</sup> etc. Notifications

A new notification line can be created following the steps above on a weekly basis, for as long as the absence continues, but this is not a mandatory procedure. You will not receive a notification on your homepage to prompt you to do this.

## Recording the SA3 (Self-Certification)

When the employee's SA3 form has been received, visit the absence as described previously and select **yes** on the field 'Has employee Self-Certification been received?' on the '**Absence Detail – Sickness Details**' screen and save the record by clicking OK and performing the save process as described previously.

All employees are required to complete an SA3 for every absence due to sickness even if the absence is for half a day. The only instance when the requirement can be waived is if a Statement of Fitness for Work has been provided from day 1. You will still need to select 'Yes' in the self-certification field, however, as Vision will not recognise the Statement of Fitness for Work covering the whole period.

**Absence Detail - Sickness Details** (Payroll: 046.PY)

Employee Number: 006536 Rhian Greenow (Absent for 332 days) (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: 551664

Start Date: 01/09/2014  
 End Date: (Include non-working days for OSP/SSP calculations)  
 Earliest Expected End Date: 07/09/2014  
 Working Days Lost: 5.00 Full Pay End Date:  
 Calendar Days: 332.00 Half Pay End Date:  
 Working Hours Lost: 37:00

Did the employee work part of the first day of absence?   
 Did the employee work part of the last day of absence?   
 Is the employee visiting a doctor?   
 Has employee Self-Certification been received? No

Absence Class: SICK No  
 Absence Reason: INF INFECTIONS  
 Detailed Reason: INF17 COLD

DSS Payment:  Check this box if sick pay is paid by the DSS for this absence

Related Accidents / Diseases / Incidents:

Notified By	Date	Time	Reason	Medical Certificate?	Doctors Note Valid From	Certificate Expiry Date	Earliest Expected End Date	Explanation of Absence (symptoms/reason)
RG	04/09/2014	08:00	INFECTIONS	<input type="checkbox"/>			07/09/2014	Day 4
RG	01/09/2014	08:00	INFECTIONS	<input type="checkbox"/>			04/09/2014	Day 1

The **SA3** form **must** be sent to the Payroll Section once you have updated the record.

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### Recording the Statement of Fitness for Work (Doctor's Note)

When a Statement is received you are required to record the details as a new notification in a similar manner to Day 1 and Day 4 etc. and it is from the notifications screen that you amend the '**Earliest Expected End Date**' based on the end date of the statement. Each Statement received must be recorded as a new notification. See *Appendix 4* for an explanation on the sections of the statement of fitness for work.

'**Absence Class**', '**Absence Reason**' and '**Absence Reason Detail**' will be automatically populated from the main '**Absence Detail – Sickness Details**' screen. If the sickness reason stated on the certificate has changed since the last update, select the new reason from the Absence Reason Detail drop-down menu. If there is more than one reason indicated on the statement, please select the primary reason and list all reasons stated in the Certificate Details field at the bottom of the screen.

1. Complete the Notification Notes field. This is a mandatory field and must be completed. Entering 'Med cert received' is sufficient, however, you have the option to record other information you feel may be of relevance.

2. Then complete the Notified By (initials are sufficient), Date Notified and Notified Time fields. You can use the calendar icon or enter 't' for today's date as described previously.
3. The '**Earliest Expected End Date**' for the absence **MUST** be entered at this stage on the notifications screen and this must match the 'valid until' date indicated on the statement. Sometimes, this is not explicitly stated; it is up to you to calculate this date depending on date of signing etc.
4. In addition, please complete the '**Medical Certification**' section providing the '**Valid From**' and '**Valid Until**' dates and the '**Valid Until**' date will always match the '**Earliest Expected End Date**' field as this is the last day covered by the statement.
5. You may want to record the length of the paper in the '**Certificate Details**' box or make a note that you have amended the '**Absence Reason Detail**' if appropriate, however, this is optional.

The screenshot shows a web browser window titled "RCT Training Account - train1 - Windows Internet Explorer". The page is titled "Notifications - Medical Certification". At the top right, there are "OK" and "Cancel" buttons. The form contains the following fields and values:

- Employee Number: 006536
- Employee Name: Rhian Greenow (Absent for 332 days) (Main job of 3 current/1 old jobs)
- Absence Start Date: 01/09/2014
- Notification Notes: Med cert received.
- Absence Class: SICKNESS
- Absence Reason: RESPIRATORY (CHEST / LUNGS)
- Absence Reason Detail: BRONCHITIS
- Notified By: RG
- Date Notified: 08/09/2014
- Notified Time: 9:00
- Earliest Expected End Date: 14/09/2014
- Medical Certification Valid From: 08/09/2014
- Medical Certification Valid Until: 14/09/2014
- Certificate Open Ended?:
- Certificate Details: (empty text box)

The browser's status bar at the bottom shows "Page Build Time for generichrlinedetailattendanceabs", "Local intranet | Protected Mode: Off", and "92%".

6. When you have completed the notification entries, click  in the top right hand corner of the screen. You will then return to the '**Absence Detail – Sickness Details**' screen, where all relevant fields have now been populated.
7. You will now need to visit the Time Lost tab (you should be prompted to do this) and will note the green boxes have been extended based on the new '**Earliest Expected End Date**' and you should continue to populate with the normal work pattern for the employee. Once you have a complete week, use the copy facility using the  icon

alongside the first week, click and drag down the screen to populate all the appropriate green boxes.

8. When you are happy that the screen is complete, click  in the top right hand corner of the screen. You will then return to the '**Absence Detail**' screen, where all relevant fields have now been populated. Click OK again and save the record as described previously.
9. Forward the original Statement of Fitness for Work to payroll, making sure you write the six-figure Employee Number on it before sending, in order to make cross-referencing easier.

See **Appendix 3** for an explanation of the sections of the fit note and also guidance for employers and line managers

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## Updating the Time Lost Screen

The Time Lost screen has to be updated if an absence progresses. Should you make an amendment to the details of an absence as described above, and then try to save the record you will receive a warning message to advise you that the Time Lost screen also needs to be amended:

The screenshot shows the 'Absence Detail - Sickness Details' page in a web browser. A modal dialog box titled 'Message from webpage' is centered on the screen, displaying a warning icon and the text: 'The Earliest Expected End Date has changed. Please ensure that all appropriate time lost information has been supplied on the Time Lost tab.' Below the message is an 'OK' button. The background page includes fields for 'Start Date' (01/09/2014), 'End Date', 'Earliest Expected End Date' (14/09/2014), and 'Working Days Lost' (5.00). A table at the bottom lists 'Notifications and Medical Certification' with columns for 'Notified By', 'Date', 'Time', 'Reason', 'Medical Certificate', 'Doctors Note Valid From', 'Certificate Expiry Date', 'Earliest Expected End Date', and '(symptoms/reason)'. The table contains three rows of data for notifications on 08/09/2014, 04/09/2014, and 01/09/2014.

Click OK and select the 'Time Lost' tab and complete the working pattern as described previously (the new dates to be added will again be highlighted):

RCT Training Account - train1 - Windows Internet Explorer

**Vision** Sickness Details **Time Lost** Return To Work History

**Absence Detail - Working Time Lost** OK Cancel

Employee Number  Rhian Greenow (Absent for 332 days) (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID

First Date of Absence  Last Date of Absence

Hours lost on first day of absence  Only to be completed for absences where the first day is a partial day Total Working Days Lost

Hours lost on last day of absence  Only to be completed for absences where the last day is a partial-day Total Calendar Days

Total Hours Lost

**Work Pattern for duration of absence**

When over-riding a week's working pattern use:

Period	Mo	Tu	We	Th	Fr	Sa	Su	Applicable Working Pattern	Over-ride Working Pattern?
01/09/2014 - 07/09/2014	7:24	7:24	7:24	7:24	7:24	0:00	0:00	n/a	<input checked="" type="checkbox"/>
08/09/2014 - 14/09/2014	7:24	7:24	7:24	7:24	7:24	0:00	0:00	n/a	<input checked="" type="checkbox"/>

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Complete the time lost as described previously, using the copy facility as necessary, click OK and save the record.

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### **Long Term Absence**

For the duration of a long-term absence, continue to add the details of further **Statements of Fitness for Work** as and when the employee sends them in. Remember to add the details as a new notification and update the **'Earliest Expected End Date'** field from the notification screen and populate the **'Time Lost'** screen as described above. Always use the expiry date of the Statement as the **'Earliest Expected End Date'**.

RCT Training Account - train1 - Windows Internet Explorer

Vision Sickness Details | Time Lost | Return To Work | History

**Absence Detail - Sickness Details** OK Cancel

Employee Number: 006536 Rhian Greenow (Absent for 332 days) (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: 551664

Start Date: 01/09/2014  
 End Date:   
 Earliest Expected End Date: 28/09/2014  
 Did the employee work part of the first day of absence?   
 Did the employee work part of the last day of absence?   
 Is the employee visiting a doctor?   
 Has employee Self-Certification been received? No

To delete the absence, select a deletion reason:

Working Days Lost: 15.00 Full Pay End Date:   
 Calendar Days: 332.00 Half Pay End Date:   
 Working Hours Lost: 111:00

Absence Class: SICKNESS  
 Absence Reason: RS RESPIRATORY (CHEST / LUNGS)  
 Detailed Reason: RS2 BRONCHITIS  
 Employee considers this absence an?:   
 DSS Payment:  Check this box if sick pay is paid by the DSS for this absence  
 Related Accidents / Diseases / Incidents:

**Notifications and Medical Certification**

Notified By	Date	Time	Reason	Medical Certificate?	Doctors Note Valid From	Certificate Expiry Date	Earliest Expected End Date	Explanation of Absence (symptoms/reason)
RG	15/09/2014	08:00	RESPIRATORY (CHEST / LUNGS)	<input checked="" type="checkbox"/>	15/09/2014	28/09/2014	28/09/2014	Med cert received.
RG	14/09/2014	08:00	RESPIRATORY (CHEST / LUNGS)	<input type="checkbox"/>			20/09/2014	Day 14
RG	08/09/2014	09:00	RESPIRATORY (CHEST / LUNGS)	<input checked="" type="checkbox"/>	08/09/2014	14/09/2014	14/09/2014	Med cert received.
RG	07/09/2014	08:00	RESPIRATORY (CHEST / LUNGS)	<input type="checkbox"/>			14/09/2014	Day 7
RG	04/09/2014	08:00	INFECTIONS	<input type="checkbox"/>			07/09/2014	Day 4
RG	01/09/2014	08:00	INFECTIONS	<input type="checkbox"/>			04/09/2014	Day 1

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## Recording Annual Leave during Long Term Sickness

If an employee elects to take Annual Leave during a period of long term sickness you record the Annual Leave within the sickness record as a new notification.

Click  at the end of the current sickness absence line on the **Absence/Injury – Absence Summary** screen to access the '**Absence Detail – Sickness Details**' screen. Create a new notification and in Notification Notes record that the employee has opted to take annual leave during long term sick. Use the drop down menu under **Absence Reason** to select **HOLIDAY TAKEN DURING LONG TERM SICKNESS**. The Absence Reason Detail becomes blank.

RCT Training Account - train1 - Windows Internet Explorer

**Menu**

**Notifications - Medical Certification** [OK] [Cancel]

Employee Number  Rhian Greenow (Absent for 337 days) (Main job of 3 current/1 old jobs)

Absence Start Date

**Notification**

Notification Notes

Absence Class: SICKNESS

Absence Reason: RESPIRATORY (CHEST / LUNGS)

Absence Reason Detail: BILARY SYSTEM (LIVER), CARDIOVASCULAR SYSTEM (HEART & CIRC.), DERMATOLOGY/SKIN, EAR, NOSE & THROAT, ENDOCRINE SYSTEM (GLANDS), GASTRIC SYSTEM (STOMACH & BOWEL), GENITOURINARY SYSTEM (URINARY/REPRO/KID), **HOLIDAY TAKEN DURING LONG TERM SICKNESS**, HOSPITALISATION, INFECTIONS, MENTAL HEALTH, MUSCULAR SKELETAL, NEUROLOGICAL (BRAIN), ONCOLOGY (CANCERS), OPHTHALMIC (EYES), ORAL (MOUTH & TEETH)

Medical Certification

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Once this is selected you will be able to record the Annual Leave details. In the Notification Notes field you will need to indicate that annual leave is being taken during a long term sickness absence, as below.

RCT Training Account - train1 - Windows Internet Explorer

**Vision**

**Notifications - Medical Certification** [OK] [Cancel]

Employee Number  Rhian Greenow (Absent for 337 days) (Main job of 3 current/1 old jobs)

Absence Start Date

**Notification**

Notification Notes

Employee opted to take annual leave during long term sickness absence.

Absence Class: SICKNESS

Absence Reason: HOLIDAY TAKEN DURING LONG TERM SICKNESS

Absence Reason Detail:

Notified By: RG

Date Notified: 06/10/2014

Notified Time: 9:00

Holiday Start Date: 06/10/2014

Holiday End Date: 10/10/2014

Number of Half Days: 0

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Enter the details of the period of annual leave, ensuring the Notified By, Date Notified and Notified Time fields are also completed. The field 'Number of Half Days' is only used if the employee uses a half day Annual Leave on either the first or last day of the holiday period. After entering the details click **OK** to return to the main '**Absence Detail**' screen. You will notice a new notification line HOLIDAY TAKEN DURING LONG TERM SICKNESS.

The screenshot shows the 'Absence Detail - Sickness Details' form. Key fields include:

- Employee Number: 006536 Rhian Greenow (Absent for 337 days) (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: 551664
- Start Date: 01/09/2014
- End Date: (Include non-working days for OSP/SSP calculations)
- Earliest Expected End Date: 28/09/2014
- Working Days Lost: 15.00
- Calendar Days: 337.00
- Working Hours Lost: 111:00
- Absence Class: SICKNESS
- Absence Reason: RS RESPIRATORY (CHEST / LUNGS)
- Detailed Reason: RS2 BRONCHITIS

The 'Notifications and Medical Certification' table is as follows:

Notified By	Date	Time	Reason	Medical Certificate?	Doctors Note Valid From	Certificate Expiry Date	Earliest Expected End Date	Explanation of Absence (symptoms/reason)
RG	06/10/2014	09:00	HOLIDAY TAKEN DURING LONG TERM SICKNESS	<input type="checkbox"/>			28/09/2014	Employee opted to take annual leave during long term sickness.
RG	15/09/2014	08:00	RESPIRATORY (CHEST / LUNGS)	<input checked="" type="checkbox"/>	15/09/2014	28/09/2014	28/09/2014	Med cert received.
RG	14/09/2014	08:00	RESPIRATORY (CHEST / LUNGS)	<input type="checkbox"/>			20/09/2014	Day 14
RG	08/09/2014	09:00	RESPIRATORY (CHEST / LUNGS)	<input checked="" type="checkbox"/>	08/09/2014	14/09/2014	14/09/2014	Med cert received.
RG	07/09/2014	08:00	RESPIRATORY (CHEST / LUNGS)	<input type="checkbox"/>			14/09/2014	Day 7

Click **OK** again and save the record.

Go back into the record, navigate to the Holidays tab from the Absence/Injury – Absence Summary screen and you can see that the Holiday Entitlement has been reduced.

RCT Training Account - train1 - Windows Internet Explorer

**Vision** Attendance Holidays Calendar Parental Accident Triggers

**Absence/Injury - Holidays** (Payroll: 046.PY)

Employee Number: 335866 Donna M Good (Main job of 2 current jobs)

Current Entitlement Code: NJC Staff - Days Entitlement Full Year: 30

Start Date	End Date	Type	Total Entitlement	Standard Entitlement	Additional Entitlement	Carried Over	Booked	TOIL, etc	Remaining
01/04/2014	31/03/2015	DAYS	27	27	0	0	5		22

Click this button to start a new holiday year **Click**

Start Date	End Date	Classification	Reason	Number of Days	Number of Hours	Comments	Ref
<b>2014</b>							
06/10/2014	10/10/2014	SICKNESS	HOLIDAY TAKEN DURING LONG TERM SICKNESS	5.0	37.00		551620

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### Closing an Absence

When the employee returns to work, complete the 'End Date' field in the main Absence Detail - Sickness Details screen and save the record (this is the last date of the employee's absence **NOT** the first day they return to work or when they are fit for work), again also completing any additional time lost information. This will automatically feed through to the Payroll system, which will calculate Occupational and Statutory Sick Pay accordingly.

RCT Training Account - train1 - Windows Internet Explorer

**Menu**      Sickness Details    Time Lost    Return To Work    History

**Absence Detail - Sickness Details**      OK    Cancel

Employee Number: 006536    Rhian Greenow (Absent for 338 days) (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: 551664

Start Date: 01/09/2014    To delete the absence, select a deletion reason

End Date (include non-working days for OSP/SSP calculations): 28/09/2014

Earliest Expected End Date: 28/09/2014    Working Days Lost: 15.00    Full Pay End Date: [ ]

Did the employee work part of the first day of absence?     Calendar Days: 28.00    Half Pay End Date: [ ]

Did the employee work part of the last day of absence?     Working Hours Lost: 111:00

Is the employee visiting a doctor?

Has employee Self-Certification been received? No

Absence Class: SICKNESS

Absence Reason: RS    RESPIRATORY (CHEST / LUNGS)

Detailed Reason: RS2    BRONCHITIS

Employee considers this absence an?: [ ]

DSS Payment:  Check this box if sick pay is paid by the DSS for this absence

Related Accidents / Diseases / Incidents: [ ]

**Notifications and Medical Certification**

Notified By	Date	Time	Reason	Medical Certificate?	Doctors Note Valid From	Certificate Expiry Date	Earliest Expected End Date	Explanation of Absence (symptoms/reason)
RG	06/10/2014	08:00	HOLIDAY TAKEN DURING LONG TERM SICKNESS	<input type="checkbox"/>			28/09/2014	Employee opted to take annual leave during long term sickness.
RG	15/09/2014	08:00	RESPIRATORY (CHEST / LUNGS)	<input checked="" type="checkbox"/>	15/09/2014	28/09/2014	28/09/2014	Med cert received.

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Employees are no longer required to provide a signing off/fit for duty note, however, should the employee provide a Statement confirming the date they are fit to return to work , record the details as a notification, as described previously.

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### **Recording the Return to Work Interview**

When conducting the Return To Work Interview with the employee, open the relevant employee record and navigate to the Absence/Injury – Absence Summary screen. Enter the relevant absence record by clicking on the looking glass at the end of that line. If it is not appropriate to conduct the interview at your PC, a screen shot of the screen detailed below can be printed off and completed, and Vision updated later.

Within the main Absence Detail – Sickness Details screen, select the ‘Return To Work’ tab:

The screenshot shows a web browser window titled 'RCT Training Account - train1 - Windows Internet Explorer'. The page is titled 'Absence Detail - Return To Work' and has a navigation bar with 'Sickness Details', 'Time Lost', 'Return To Work', and 'History'. The main content area is divided into two sections: 'Absence Detail' and 'Return to Work Interview'.

**Absence Detail:**

- Employee Number: 006536
- Employee Name: Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD
- Absence ID: 551664
- First Date of Absence: 01/09/2014
- Last Date of Absence: 28/09/2014
- Absence Reason: RESPIRATORY (CHEST / LUNGS): BRONCHITIS

**Return to Work Interview:**

- Last date before return to work (include non-working days): 28/09/2014
- Date of Return to Work interview: [Empty field]
- Was this absence related to a previous absence?
- Did the Doctor/Consultant give any advice in respect of the employee's return to work?
- Is there any likelihood of recurrence?
- Are there any underlying problems relating to the absence?
- Did the employee seek advice from their Doctor/Consultant?
- Was the employee prepared to inform you of the advice given?
- Does the employee require further medical treatment?

Each 'If so, please provide details ...' question has a corresponding text input area.

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## **Completing the 'Return To Work' Screen**

The absence date fields at the top left hand side of the screen will show the dates and reason for the absence for which you are carrying out the Return to Work Interview.

- 1) Enter the 'Date of Return to Work Interview'.
- 2) As you conduct the interview, should you wish to record any relevant information discussed with the employee, tick the box next to the relevant section. A free text box will then appear to allow you to record the information.
- 3) When you have determined the appropriate Outcome/Conclusion of the interview, again ticking the appropriate box (no further action, management support etc) will again open a free text box to allow you to record the information:

**Absence Detail - Return To Work**

Employee Number: 006536 Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: 551664

First Date of Absence: 01/09/2014  
 Last Date of Absence: 28/09/2014  
 Absence Reason: RESPIRATORY (CHEST / LUNGS): BRONCHITIS

**Return to Work Interview**

Last date before return to work (include non-working days): 28/09/2014  
 Date of Return to Work interview: 30/09/2014

Was this absence related to a previous absence?   
 If so, please provide details ...

Did the Doctor/Consultant give any advice in respect of the employee's work/work pattern?   
 If so, please provide details ...

Is there any likelihood of recurrence?   
 Did the employee seek advice from their Doctor/Consultant?   
 Was the employee prepared to inform you of the advice given?   
 If so, please provide details ...  
 Complete rest and antibiotics administered.

Are there any underlying problems relating to the absence?   
 If so, please provide details ...

What advice/support has been offered/given to the employee?

Does the employee require further medical treatment?   
 If so, please provide details ...

**Outcome / Conclusion**

No Further Action  
 Managerial Support  
 Referral to Counselling Services  
 Referral to Occupational Health  
 Referral to Designated Officer for Review  
 Referral for Disciplinary Action

Outcome Details  
 Considered fully recovered from illness.

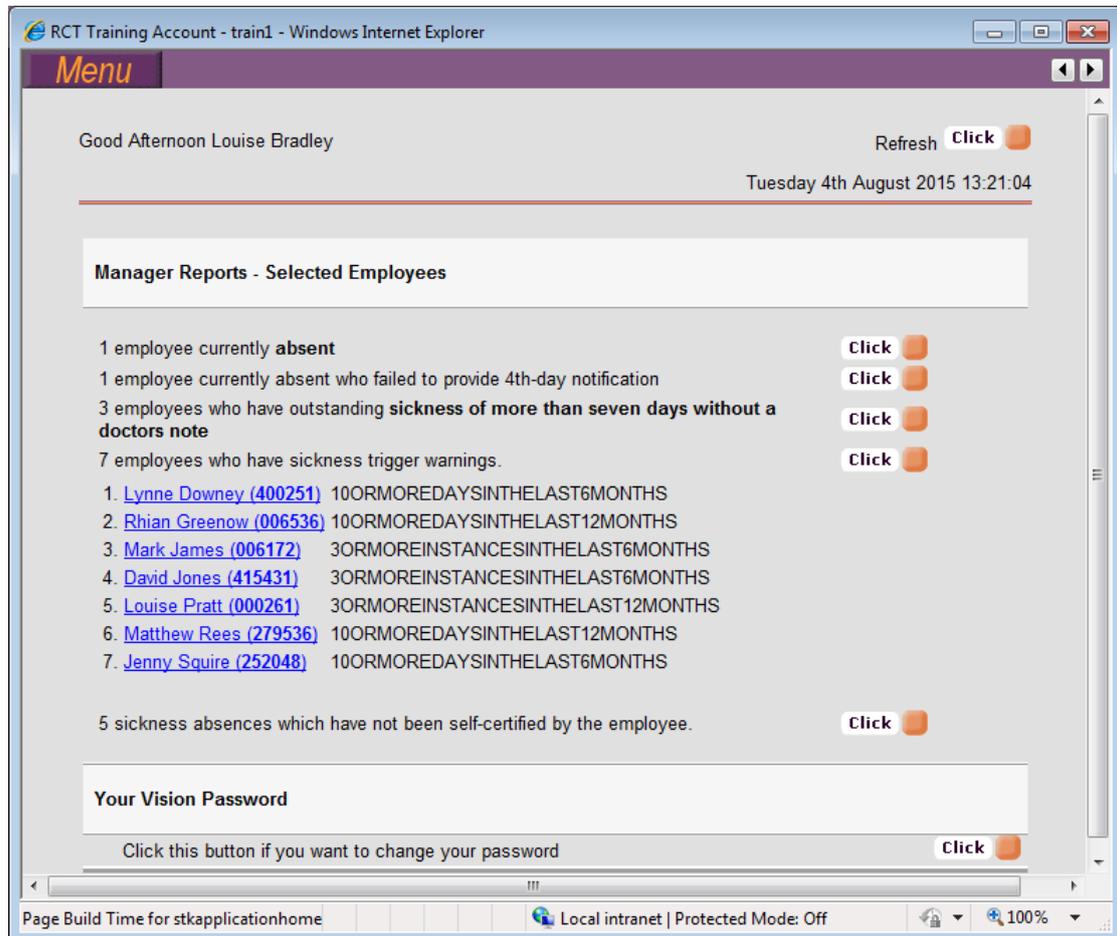
**\*Should the outcome require any further action (referral to Occupational Health etc), then managers should continue to follow existing procedures to enable the appropriate action to be carried out. The Vision system will not carry out these actions for you i.e. there is no automatic referral to Occupational Health from the system.**

- 4) A signing off certificate for sickness absences over 14 days is no longer required.
- 5) Click **OK** to return to the main 'Absence Detail' screen and save the update as described previously.

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## Absence Triggers

The absence module is designed to create a notification on the VISION homepage when sickness triggers are hit and are a guide to assist with the recording and management of sickness absence. The triggers are set out in the Sickness Absence Policy which is available via The Source. If you do not have access to The Source, please contact your Human Resources representative.



**Logging in to Vision on a regular basis will provide managers with the necessary tools and information in order to assist with the management of absence and to ensure employees are complying with the policy. Logging in on a regular basis is also necessary in order to view the trigger screen, take appropriate action and then remove the trigger/s by selecting an appropriate resolution etc. If the trigger screen is left unattended for long periods of time, the data will continue to increase on the homepage until appropriate action is taken.**

The triggers/notifications present on the homepage can include: -

- 1) Employees who are currently absent because of sickness or annual leave.
- 2) Employees who are absent because of sickness and due to make 4<sup>th</sup> day contact.

- 3) Employees who are absent due to sickness but are expected to have returned.
- 4) Employees who are absent because of sickness who have not provided self- certification (SA3 form).
- 5) Employees who have been absent due to sickness for more than seven days and have not provided a Statement of Fitness for Work (Doctor's note).
- 6) Employees with 3 or more instances of sickness in the last twelve months.
- 7) Employees with 10 or more days of sickness in the last twelve months.
- 8) Employees who have been absent for 14 calendar days or more consecutively.

If you are logging on regularly whilst maintaining the absence records as set out in this manual, you will reduce the number of homepage notifications and triggers accordingly. This includes:

- When an employee returns to work, the sickness must be ended by entering the last day of sickness as the end date as soon as possible. This will avoid unnecessary Statutory or Occupational Sick Pay being processed through the payroll.
- If an employee makes contact on the 4<sup>th</sup> day notification the absence record must be updated accordingly. Please note, if the 4<sup>th</sup> day falls on the weekend and this is not a working day for the employee you must record the actual 4<sup>th</sup> calendar day as the date notified under notifications even if this is a non-working day.
- Recording a Statement of Fitness for Work and updating the 'Earliest Expected End Date' accordingly.
- If an employee provides self-certification (SA3) you are required to enter a 'Yes' to the question on the Absence Detail - Sickness Details screen.
- If an employee has 3 or more instances of sickness absence within a twelve month period, or, 10 days or more accumulatively within a twelve month period, or, 14 days or more consecutively in one absence period, the manager should visit the 'Trigger' tab and select the appropriate action to remove this trigger from the homepage. The trigger tab will indicate which trigger/s the employee has hit.
- If an employee has been referred to Occupational Health following the normal process, (for muscular skeletal or mental health conditions referral should be considered from day 1) the manager should visit the 'Trigger' tab and select the appropriate action i.e. 'Referral to Occupational Health' to remove this trigger from the homepage.

- If a decision is taken not to refer after 14 days, the trigger can be removed as described above, using the Resolution Type, 'No Further Action' and a note should be placed in the box to explain why the employee is not being referred.

In order to resolve the trigger, click directly on the name of the employee you are dealing with on the homepage:

The screenshot shows a web application interface for an RCT Training Account. The browser window title is "RCT Training Account - train1 - Windows Internet Explorer". The page has a purple header with a "Menu" button. Below the header, it says "Good Afternoon Louise Bradley" and "Refresh Click" with a button. The date and time are "Tuesday 4th August 2015 14:04:15".

The main content area is titled "Manager Reports - Selected Employees". It lists several categories of employee triggers, each with a "Click" button:

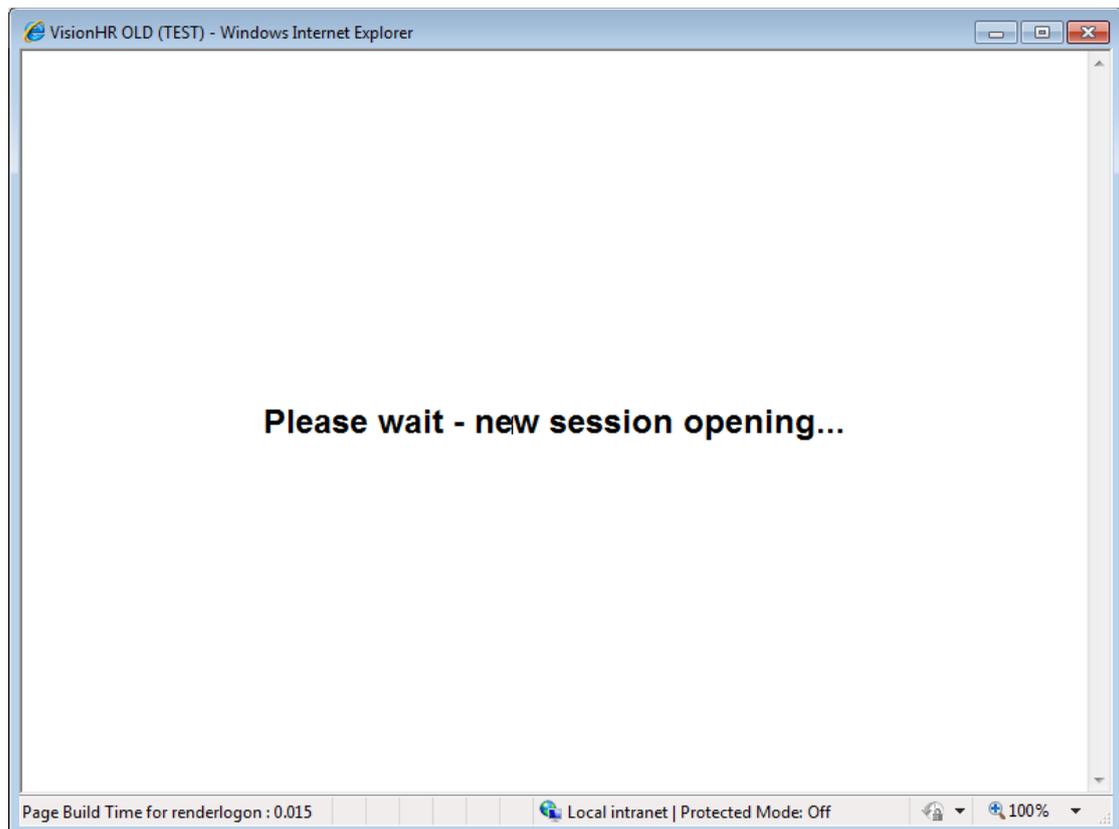
- 1 employee currently **absent** Click
- 1 employee currently absent who failed to provide 4th-day notification Click
- 3 employees who have outstanding **sickness of more than seven days without a doctors note** Click
- 7 employees who have sickness trigger warnings. Click

Below these are seven numbered items, each with a link to an employee's name and ID, followed by a trigger count and a description:

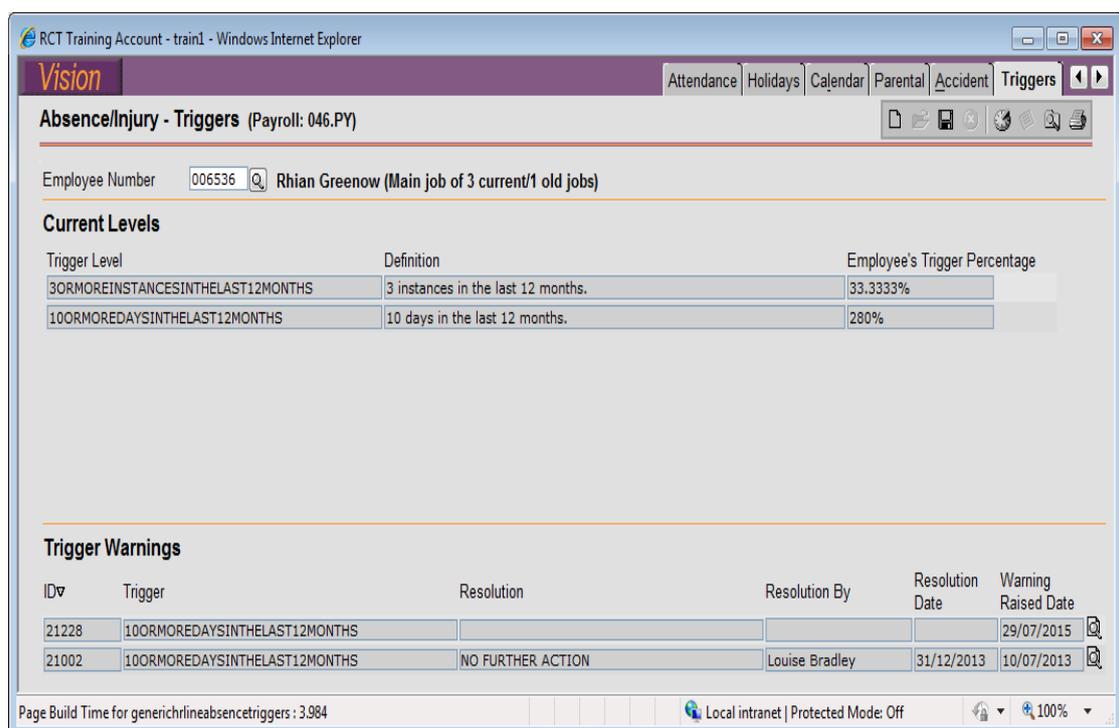
1. [Lynne Downey \(400251\)](#) 10ORMOREDAYSINTHELAST6MONTHS
2. [Rhian Greenow \(006536\)](#) 10ORMOREDAYSINTHELAST12MONTHS
3. [Mark James \(006172\)](#) 3ORMOREINSTANCESINTHELAST6MONTHS
4. [David Jones \(4154\)](#) Click here to go to Employee Attendance. 10ORMOREDAYSINTHELAST6MONTHS
5. [Louise Pratt \(000261\)](#) 3ORMOREINSTANCESINTHELAST12MONTHS
6. [Matthew Rees \(279536\)](#) 10ORMOREDAYSINTHELAST12MONTHS
7. [Jenny Squire \(252048\)](#) 10ORMOREDAYSINTHELAST6MONTHS

At the bottom of the list, it says "5 sickness absences which have not been self-certified by the employee." with a "Click" button.

The footer of the browser window shows "Page Build Time for stkapplicationhomep:", "Local intranet | Protected Mode: Off", and "100%" zoom level.



This will open up a new session in a separate window and take you straight into the trigger screen:



Click on the looking glass at the end of the trigger line you are resolving. If there is more than one trigger, each one will have to be resolved separately.

RCT Training Account - train1 - Windows Internet Explorer

**Menu**

**Trigger Details - Trigger Detail (Payroll: 046.PY)** [OK] [Cancel]

Employee Number: 006536 Rhian Greenow (Main job of 3 current/1 old jobs)

Trigger Level: 10ORMOREDAYSINTHELAST12MONTHS

Absence IDs	Start Dates	End Dates	Calendar Days	Working Days	Reason
551664	01/09/2014	28/09/2014	28.00	15.00	RESPIRATORY (CHEST / LUNGS)

These are the absences that contributed to the trigger level being reached

Trigger Warning Raised On: 29/07/2015 13:40

Resolution Type: [Dropdown]

Resolution Notes: [Text Area]

Resolution Action By: [Text Box]

Resolution Date: [Text Box]

Resolution Time: [Text Box]

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Select the appropriate Resolution Type from the drop-down list and provide information in the 'Resolution Notes', (this is mandatory), and click **OK**.

RCT Training Account - train1 - Internet Explorer

**Vision**

**Trigger Details - Trigger Detail (Payroll: 046.PY)** [OK] [Cancel]

Employee Number: 006536 Rhian Greenow (Main job of 3 current/1 old jobs)

Trigger Level: 10ORMOREDAYSINTHELAST12MONTHS

Absence IDs	Start Dates	End Dates	Calendar Days	Working Days	Reason
553171	01/11/2016	06/01/2017	67.00	49.00	RESPIRATORY (CHEST / LUNGS)
553218	25/02/2017	01/03/2017	5.00	3.00	GASTRIC SYSTEM (STOMACH & BOWEL)
553285	06/03/2017				

These are the absences that contributed to the trigger level being reached

Trigger Warning Raised On: [Text Box]

Resolution Type: [Dropdown] (List: MANAGERIAL SUPPORT, NO FURTHER ACTION, OTHER (PLEASE PROVIDE EXPLANATION), REFERRAL TO COUNSELLING SERVICES, REFERRAL FOR DISCIPLINARY ACTION, REFERRAL TO DESIGNATED OFFICER FOR REVIEW, REFERRAL TO OCCUPATIONAL HEALTH)

Resolution Notes: [Text Area]

Resolution Action By: [Text Box]

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This will then take you back to the Trigger tab and it can be seen that the trigger has been resolved.

The screenshot shows a web application interface for 'Absence/Injury - Triggers'. At the top, there is a navigation menu with options: Attendance, Holidays, Calendar, Parental, Accident, and Triggers. Below the menu, the employee's name 'Rhian Greenow (Main job of 3 current/1 old jobs)' and employee number '006536' are displayed. The 'Current Levels' section contains a table with the following data:

Trigger Level	Definition	Employee's Trigger Percentage
3ORMOREINSTANCESINTHELAST12MONTHS	3 instances in the last 12 months.	33.3333%
10ORMOREDAYSINTHELAST12MONTHS	10 days in the last 12 months.	280%

The 'Trigger Warnings' section contains a table with the following data:

ID	Trigger	Resolution	Resolution By	Resolution Date	Warning Raised Date
21228	10ORMOREDAYSINTHELAST12MONTHS	NO FURTHER ACTION	Louise Bradley	04/08/2015	29/07/2015
21002	10ORMOREDAYSINTHELAST12MONTHS	NO FURTHER ACTION	Louise Bradley	31/12/2013	10/07/2013

At the bottom of the page, there is a status bar showing 'Page Build Time for genericrlineabsencetriggers : 0.203', 'Local intranet | Protected Mode: Off', and a zoom level of 92%.

Click the save  icon to save the record. Click  to the summary and a message will inform the user that the employee record has been saved.

If the employee has more than one trigger then each trigger needs to be resolved individually. Only when all the triggers have been resolved will the employee no longer be listed on the Homepage.

As a new window has been opened to resolve the trigger(s) you will need to close it by clicking on the cross in the top right-hand corner of the screen, once the update has been saved. Click the refresh button in the top right-hand corner of your homepage and the trigger notification should have disappeared.

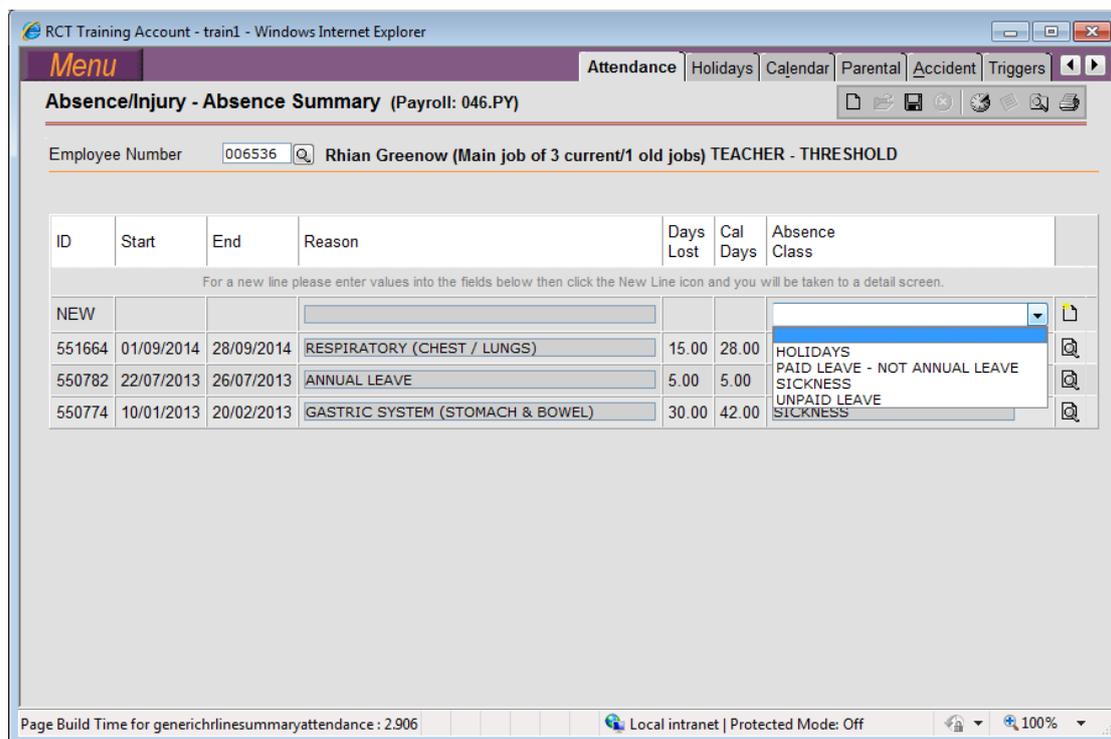
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## **Other Absences**

Absences other than sickness must also be recorded on Vision.

### **Absence Types**

When you have accessed an employee's record in the Absence/Injury menu and have located the Absence/Injury – Absence Summary screen you then need to create a NEW absence record by selecting an absence reason from the drop down menu in the Absence Class section:



Within the drop down menu there are options for:

- **Holidays**
- **Paid Leave – Not Annual Leave**
- **Sickness**
- **Unpaid Leave**

Within the absence categories there are sub categories that allow you to choose the specific reason for absence.

Below is a breakdown of the absence reasons contained under each absence categories (**Suspension, SMP, Maternity Support Leave and Adoption Leave will continue to be administered by Human Resources and, therefore, managers will not need to record these details**):

### Holidays

Annual Leave  
 Flexi Leave  
 Time Off In Lieu – Accrued  
 Time Off In Lieu - Taken

### \*Paid Leave – Not Annual Leave

Attendance at interview  
 Attending Conference/Seminar  
 Attending funeral  
 Bereavement Leave  
 Bone Marrow Donation

College attendance  
Councillor Duties  
Discretionary (Director approval only)  
Discretionary (Governors approval only)  
Election duties  
Emergency Leave  
Examination Leave (Sitting an Exam)  
Giving Blood  
Governor Support Leave  
Graduation  
Hospital appointment  
Inset – Schools use only  
Inspecting a School  
Medical appointment  
Memorial Service  
Moving house – Schools use only  
School Visit Abroad - School use only  
Study Leave  
Territorial Army Special Leave  
Trade Union Duties  
Training  
Wedding – Schools use only

\*Please consult the Leave of Absence Policy before granting any leave with pay. The policy is available via The Source, but if you do not have access to The Source, please contact your Human resources representative for advice.

### **\*Unpaid Leave**

Authorised Unpaid Leave  
Child Absent – Schools Use Only - Auth  
J.P. Duties  
Jury Service  
Unauthorised Unpaid Leave  
Witness in Court

\*Other than Sickness, Unpaid Leave is the only option affecting pay and reports are automatically produced by the Vision team to notify payroll to deduct pay (managers do not need to inform payroll of unpaid leave, the Vision entry is sufficient).

Whilst the manager should record details of an employee on Unpaid leave due to JP duties, it is the individual employee's responsibility to provide details to payroll of the payment made for J.P. Duties which will be recovered from pay.

Jury Service should be recorded as unpaid leave and the court will provide the employee with a loss of earnings form prior to the commencement of the Jury Service; this should be sent to payroll for completion ASAP. Once the dates are entered onto Vision, payroll will recover the days from pay as per the details provided on the form (maximum amount set). It is the individual employee's responsibility to send the loss of earnings form to payroll and it is

the manager's responsibility to record the information as unpaid leave via the 'Attendance' tab.

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## Recording Holidays

### Attaching an Entitlement to an Employee

To enable you to record employee holidays on the system you must first input their holiday entitlement on Vision. This will need to be completed every financial year. Clicking on the 'Holidays' tab on the Absence/Injury – Absence Summary screen will take you to the Absence/Injury – Holidays screen where you can enter their entitlement, if it is not already entered.

The screenshot shows the 'Vision' HR system interface. The main title is 'Absence/Injury - Holidays (Payroll: 046.PY)'. The employee is identified as Rhian Greenow (Main job of 3 current/1 old jobs) with Employee Number 006536. The 'Current Entitlement Code' is set to 'NJC Staff - Days Entitlement' with a 'Full Year' of 30. Below this is a table of historical entitlements:

Start Date	End Date	Type	Total Entitlement	Standard Entitlement	Additional Entitlement	Carried Over	Booked	TOIL, etc	Remaining
01/04/2014	31/03/2015	DAYS	27	27	0	0	0		27
01/04/2013	31/03/2014	DAYS	27	27	0	0	5		22

Below the table is a button that says 'Click this button to start a new holiday year' with a 'Click' button next to it.

At the bottom, there is a table of recorded holidays:

Start Date	End Date	Classification	Reason	Number of Days	Number of Hours	Comments	Ref
<b>2014</b>							
06/10/2014	10/10/2014	SICKNESS	HOLIDAY TAKEN DURING LONG TERM SICKNESS	0.0	0.00		551664
<b>2013</b>							
22/07/2013	26/07/2013	HOLIDAYS	ANNUAL LEAVE	5.0	37.00		550782

Click on the drop down menu 'Current Entitlement Code' which will offer you the option of:

- Chief Officer Entitlement**
- NJC Staff - Days Entitlement**
- NJC Staff - Hours Entitlement**

Then select the appropriate option for the employee.

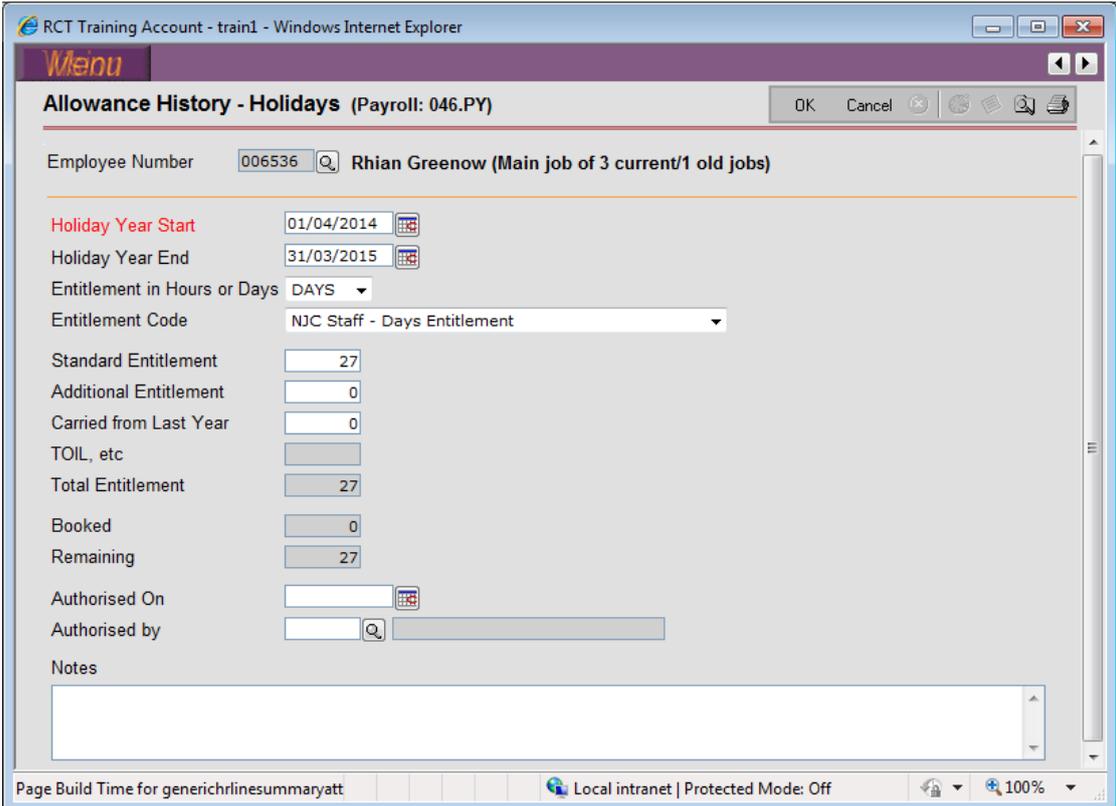
### Recording Annual Leave in Days

Select the **NJC - Days Entitlement** option from the drop down menu and then click on the button to start a new holiday year. The system will automatically calculate from their continuous service date the entitlement for the full year. If

you have part-time employees, the system may not accurately calculate the correct entitlement as set out in the Annual Leave policy and you may need to adjust the defaulted number of days as described below. The Annual Leave Policy is available via The Source, but if you do not have access to this, please contact your Human Resources representative.

If the employee has commenced part way through the leave year you will need to calculate their entitlement for the completed months they will work.

\*If you need to adjust the defaulted number of days, clicking  at the end of the appropriate year will open a new screen:



RCT Training Account - train1 - Windows Internet Explorer

**Menu**

**Allowance History - Holidays (Payroll: 046.PY)** [OK] [Cancel] [Looking Glass] [Print] [Refresh] [Home]

Employee Number   Rhian Greenow (Main job of 3 current/1 old jobs)

Holiday Year Start  

Holiday Year End  

Entitlement in Hours or Days

Entitlement Code

Standard Entitlement

Additional Entitlement

Carried from Last Year

TOIL, etc

Total Entitlement

Booked

Remaining

Authorised On  

Authorised by  

Notes

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You can then overtype the figure in the 'Standard Entitlement' field with the adjusted figure and include an explanatory note in the 'Notes' field. Click  then return to the main 'Absence Detail' screen and save the record as described previously.

### Purchase of Additional Annual Leave Scheme

If an employee has their request to purchase additional leave accepted, it is necessary to record the agreed additional number of days on the Vision system. This is done by accessing the appropriate financial year on the 'Holidays' tab by clicking on the corresponding looking glass icon.

RCT Training Account - train1 - Internet Explorer

**Vision** Attendance Holidays Calendar Parental Accident Triggers

**Absence/Injury - Holidays (Payroll: 046.PY)** Load/Search (Ctrl+L)

Employee Number  Rhian Greenow (Main job of 3 current/1 old jobs)

Current Entitlement Code  
 Full Year

Start Date	End Date	Type	Total Entitlement	Standard Entitlement	Additional Entitlement	Carried Over	Booked	TOIL, etc	Remaining
01/04/2016	31/03/2017	DAYS	27	27	0	0	12		15
01/04/2015	31/03/2016	DAYS	27	27	0	0			27
01/04/2014	31/03/2015	DAYS	28	27	0	0	0.5	1	27.5
01/04/2013	31/03/2014	DAYS	27	27	0	0	5		22

Click this button to start a new holiday year

Start Date	End Date	Classification	Reason	Number of Days	Number of Hours	Comments	Ref
<b>2017</b>							
02/03/2017	03/03/2017	HOLIDAYS	ANNUAL LEAVE	2.0	0.00		553212
20/02/2017	24/02/2017	HOLIDAYS	ANNUAL LEAVE	5.0	0.00		553178
<b>2016</b>							
21/11/2016	25/11/2016	SICKNESS	HOLIDAY TAKEN DURING LONG TERM SICKNESS	5.0	37.00		553171
<b>2014</b>							

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You can then type the number of purchased days into the 'Additional Entitlement' field **including an explanation in the 'Notes' field.**

RCT Training Account - train1 - Internet Explorer

**Vision** Allowance History - Holidays OK Cancel

Holiday Year Start

Holiday Year End

Entitlement in Hours or Days

Entitlement Code

Standard Entitlement

Additional Entitlement

Carried from Last Year

TOIL, etc

Total Entitlement

Booked

Remaining

Authorised On

Authorised by

Notes

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Click OK, and follow the usual saving process.  
Please ensure the employee's annual leave card and Vision both balance at all times.

### **Recording Annual Leave in Hours**

Select the **NJC - Hours Entitlement** option from the drop down menu and then click on the button to start new holiday year. The system will automatically calculate from their continuous service date the entitlement for the full year in hours. If the employee has commenced part way through the leave year you will need to calculate their entitlement for the completed months they will work.

\*If you need to adjust the defaulted number of hours, the procedure will be the same as above.

### **Staff with Chief Officer Entitlement**

This option only applies to employees who are paid a percentage of the Chief Executive's salary.

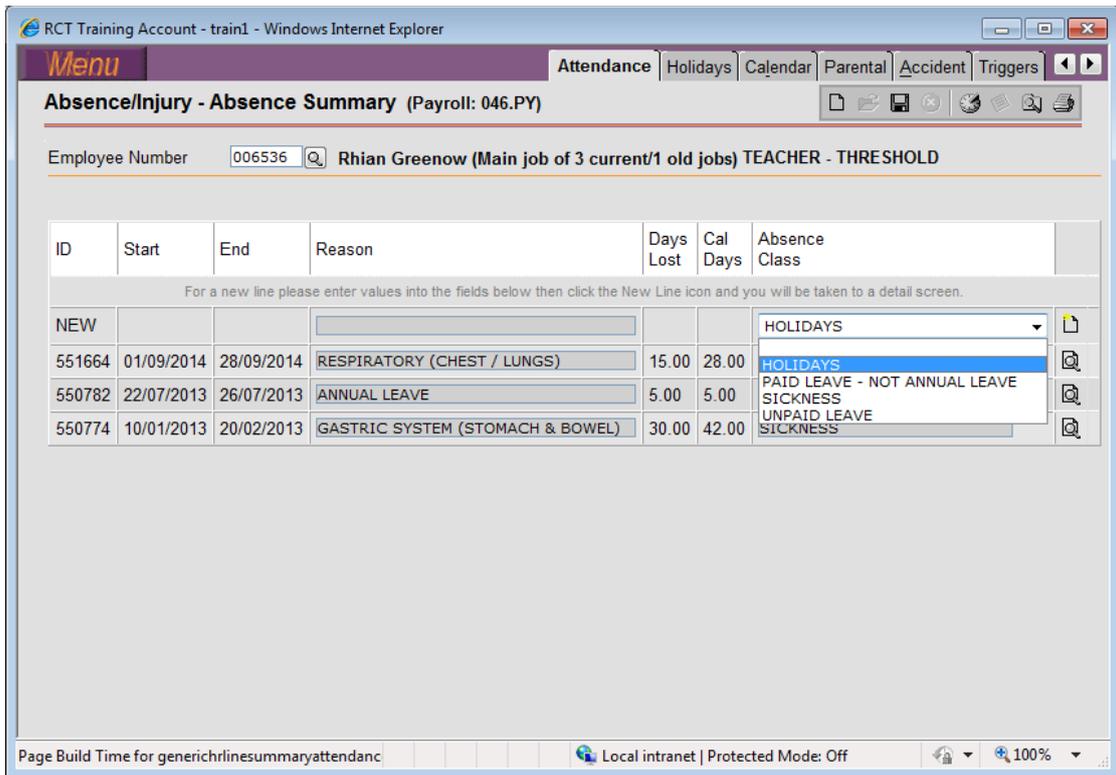
The procedure is as described above with the exception of selecting **Chief Officer Entitlement** from the drop down menu.

You will need to adjust the default leave entitlement as the system will automatically calculate the leave entitlement on the percentage of the Chief Executives Salary. You can amend the entitlement as described above.

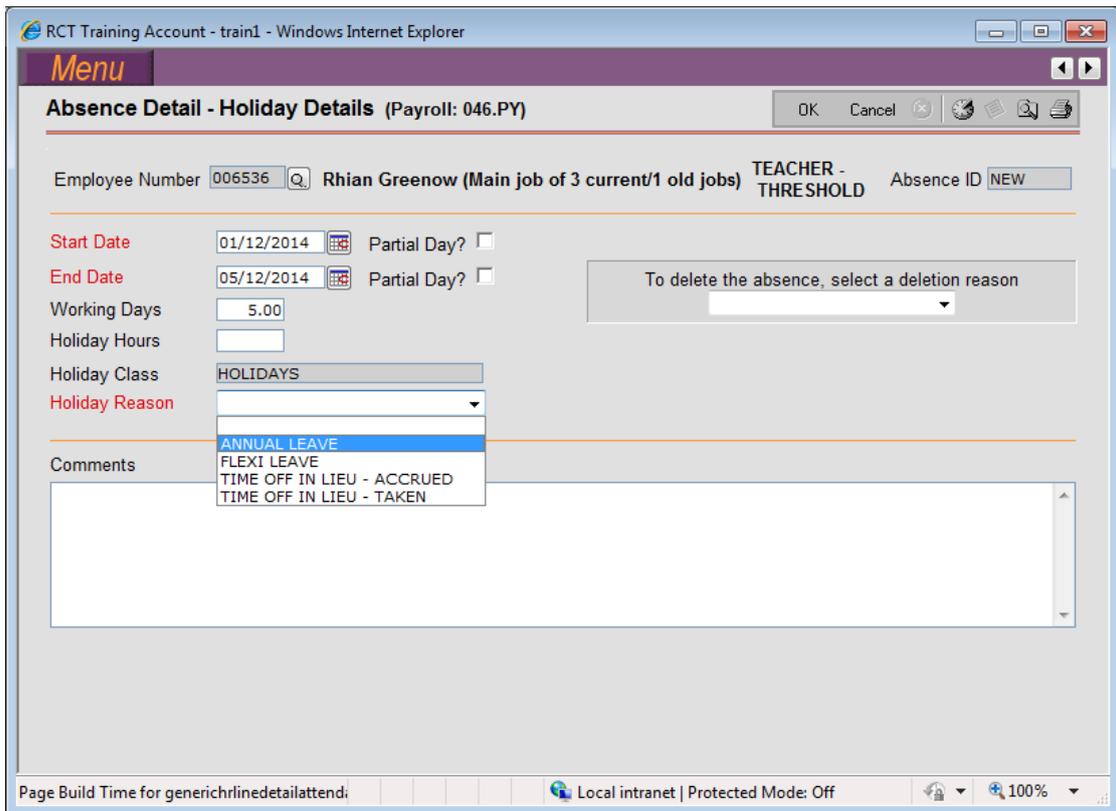
### **Recording Annual Leave**

When the employee has had an annual leave entitlement attached to their record you are then able to record their annual leave on Vision.

Select your employee from the Absence/Injury – Absence Summary screen by entering the employee number in the Employee Number field or search as described previously. From the '**Absence Class**' drop down menu you must click and select the '**Holidays**' option and then click  to the right of it to record a new absence.



You are navigated to the Absence Detail – Holiday Details screen to allow you to enter the details of the holiday:



You are required to enter the 'Start Date' of the leave period, and 'End Date' of the leave period (for one-half day's leave, both dates will be the same).

Ticking the 'Partial Day' field would confirm that a half day leave has been taken. **NB** only **one** of the Partial Day boxes should be ticked: the top one is A.M., the bottom one is P.M.

You then need to input the number of working days taken in the 'Working Days' field and/or the total number of 'Holiday Hours' in order to allow the system to deduct the correct amount from their balance. For leave taken in days, the 'Working Days' field is mandatory and the 'Holiday Hours' field is optional. For leave taken in hours, the 'Holiday Hours' field is mandatory and the 'Working Days' field is optional.

When you have completed the required fields click  at the top right hand side of the screen and the system will then take you back to the Summary screen where you **MUST** click  to save the record.

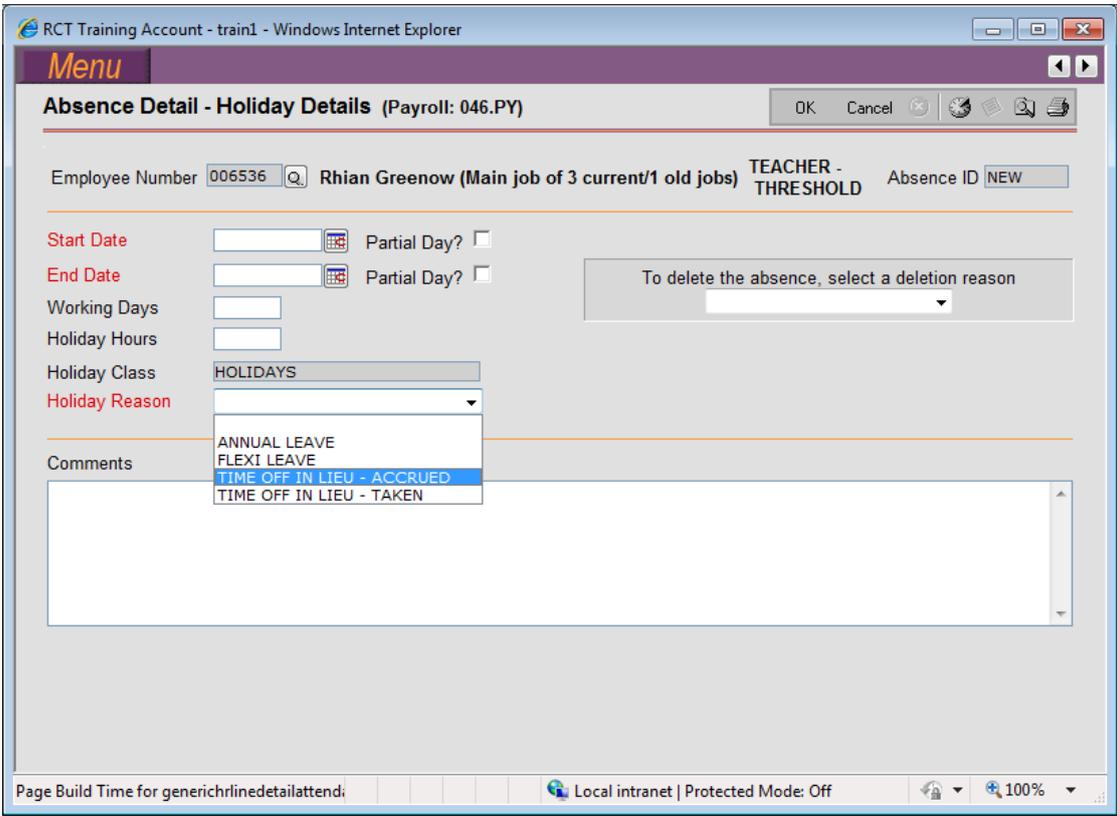
If you wish to view, amend or delete the entry you can do that by clicking  next to the relevant entry once you have gone back into the employee's record.

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## Recording TOIL

TOIL can be recorded on Vision, although it is not mandatory to do so, and 'TOIL accrued' must be recorded before 'TOIL taken' can be recorded. However, it is important to remember that to use this facility you have to record TOIL in the same format as you have set up the employee's annual leave entitlement i.e. days **OR** hours. Therefore, if an employee's leave record is calculated in days you will only be able to record TOIL in full or half working days. Similarly, if an employee's leave record is calculated in hours you will only be able to record TOIL in hours.

To record TOIL, select the 'Holidays' option in the Absence Class drop-down menu from the Absence/Injury – Absence Summary screen, as described previously, and click the  icon to navigate to the Absence Detail - Holiday Details screen:



The screenshot shows the 'Absence Detail - Holiday Details' form. The employee is Rhian Greenow (Employee Number 006536) with a job of 'TEACHER - THRESHOLD'. The absence ID is 'NEW'. The 'Holiday Class' is set to 'HOLIDAYS'. The 'Holiday Reason' dropdown menu is open, showing options: 'ANNUAL LEAVE', 'FLEXI LEAVE', 'TIME OFF IN LIEU - ACCRUED' (highlighted), and 'TIME OFF IN LIEU - TAKEN'. The form also includes fields for Start Date, End Date, Working Days, and Holiday Hours, along with checkboxes for 'Partial Day?'. A 'Comments' text area is at the bottom. The browser title is 'RCT Training Account - train1 - Windows Internet Explorer'.

Select the 'Time Off in Lieu – Accrued' option from the drop down menu. Record the details of the TOIL that has been accrued and save the record as described above. Details of the TOIL accrued will now appear against the employee's entitlement:

RCT Training Account - train1 - Windows Internet Explorer

**Menu** Attendance Holidays Calendar Parental Accident Triggers

**Absence/Injury - Holidays (Payroll: 046.PY)**

Employee Number  Rhian Greenow (Main job of 3 current/1 old jobs)

Current Entitlement Code  
 NJC Staff - Days Entitlement Full Year

Start Date	End Date	Type	Total Entitlement	Standard Entitlement	Additional Entitlement	Carried Over	Booked	TOIL, etc	Remaining
01/04/2014	31/03/2015	DAYS	28	27	0	0	0	1	28
01/04/2013	31/03/2014	DAYS	27	27	0	0	5		22

Click this button to start a new holiday year

Start Date	End Date	Classification	Reason	Number of Days	Number of Hours	Comments	Ref
<b>2014</b>							
08/12/2014	08/12/2014	HOLIDAYS	TIME OFF IN LIEU - ACCRUED	1.0	0.00		551665
06/10/2014	10/10/2014	SICKNESS	HOLIDAY TAKEN DURING LONG TERM SICKNESS	0.0	0.00		551664
<b>2013</b>							
22/07/2013	26/07/2013	HOLIDAYS	ANNUAL LEAVE	5.0	37.00		550782

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To record details of TOIL taken, follow the same procedure but select 'Time Off In Lieu – Taken' from the drop down menu on the 'Holiday Details' screen. Again, once the entry is saved the employee's balance will be amended accordingly.

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## Recording Flexi Leave

Flexi can be recorded on Vision, although it is not mandatory to do so. Follow the same procedure as entering annual leave with the exception of clicking on the **Flexi Leave** option from the Holiday Reason drop down menu. The record of flexi leave will then appear in the Absence summary:

RCT Training Account - train1 - Windows Internet Explorer

**Menu** Attendance Holidays Calendar Parental Accident Triggers

**Absence/Injury - Holidays (Payroll: 046.PY)**

Employee Number  Rhian Greenow (Main job of 3 current/1 old jobs)

Current Entitlement Code  
 NJC Staff - Days Entitlement Full Year

Start Date	End Date	Type	Total Entitlement	Standard Entitlement	Additional Entitlement	Carried Over	Booked	TOIL, etc	Remaining
01/04/2014	31/03/2015	DAYS	28	27	0	0	0	1	28
01/04/2013	31/03/2014	DAYS	27	27	0	0	5		22

Click this button to start a new holiday year

Start Date	End Date	Classification	Reason	Number of Days	Number of Hours	Comments	Ref
<b>2014</b>							
09/12/2014	09/12/2014	HOLIDAYS	FLEXI LEAVE	1.0	0.00		551666
08/12/2014	08/12/2014	HOLIDAYS	TIME OFF IN LIEU - ACCRUED	1.0	0.00		551665
06/10/2014	10/10/2014	SICKNESS	HOLIDAY TAKEN DURING LONG TERM SICKNESS	0.0	0.00		551664
<b>2013</b>							
22/07/2013	26/07/2013	HOLIDAYS	ANNUAL LEAVE	5.0	37.00		550782

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Please note, Vision will not produce a notification if the number of flexi days goes beyond an employee's entitlement.

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## Recording Paid Leave – Not Annual Leave

If an employee has taken paid leave other than annual leave, then this should also be recorded on Vision.

Follow the same procedure as entering annual leave with the exception of clicking on the 'Paid Leave – Not Annual Leave' option from the drop down menu in the Absence/Injury – Absence Summary Screen.

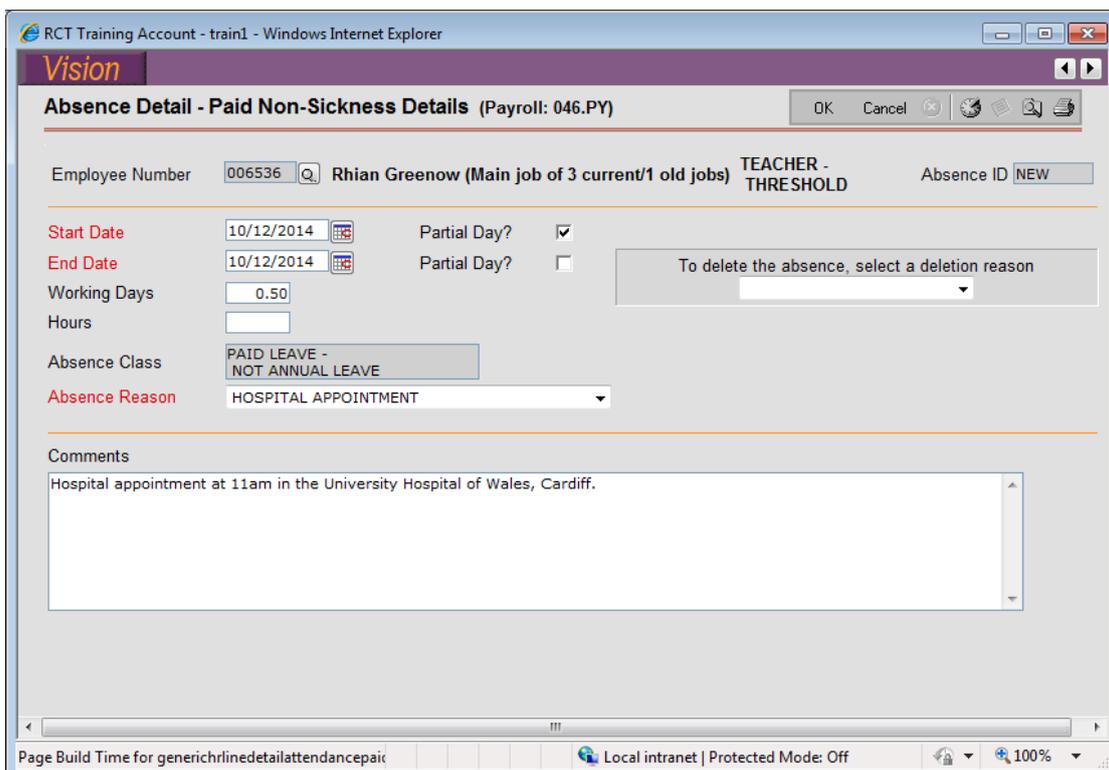
A new window will open where you can record the details of the leave. In the Absence Reason drop-down menu you can select from the reasons listed, although some are only applicable to school-based staff. When you have entered the details you must save the record by clicking **OK**, then  and then **OK** once more to accept the amendment.

You can view the Council's Leave of Absence Policy on The Source, but if you do not have access to this, please contact your Human Resources representative.

## Recording different types of leave for the same day

On occasions, an employee may take different types of paid leave on the same day (e.g. hospital appointment in the morning, annual leave in the afternoon). This needs to be recorded in the following way:

- 1) Record the **Start Date**, **End Date** (these will be the same) **Working Days** (this will be 0.5) and choose the **Absence Reason** from the drop down menu. Tick the top **Partial Day** field to the right of the 'Start Date' for A.M. Save the record as described previously:



RCT Training Account - train1 - Windows Internet Explorer

**Vision**

**Absence Detail - Paid Non-Sickness Details** (Payroll: 046.PY) OK Cancel

Employee Number: 006536  Rhian Greenow (Main job of 3 current/1 old jobs) **TEACHER - THRESHOLD** Absence ID:

Start Date:  Partial Day?

End Date:  Partial Day?

Working Days:  To delete the absence, select a deletion reason

Hours:

Absence Class:

Absence Reason:

Comments:

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- Record the annual leave taken for the afternoon and tick the **'Partial Day'** field to the right of **'End Date'** and save the record as described previously:

**Absence Detail - Holiday Details** (Payroll: 046.PY)

Employee Number: 006536 Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD Absence ID: NEW

Start Date: 10/12/2014 Partial Day?

End Date: 10/12/2014 Partial Day?

Working Days: 0.50

Holiday Hours:

Holiday Class: HOLIDAYS

Holiday Reason: ANNUAL LEAVE

Comments: Annual leave PM following hospital appointment.

- When both types of leave have been saved, the main **'Absence/Injury'** screen will be updated showing both types of leave, once you have gone back into the record.

**Absence/Injury - Absence Summary** (Payroll: 046.PY)

Employee Number: 006536 Rhian Greenow (Main job of 3 current/1 old jobs) TEACHER - THRESHOLD

ID	Start	End	Reason	Days Lost	Cal Days	Absence Class
NEW			<input type="text"/>			<input type="text"/>
551667	10/12/2014	10/12/2014	ANNUAL LEAVE	0.50	0.50	HOLIDAYS
551668	10/12/2014	10/12/2014	HOSPITAL APPOINTMENT	0.50	0.50	PAID LEAVE - NOT ANNUAL LEAVE
551666	09/12/2014	09/12/2014	FLEXI LEAVE	1.00	1.00	HOLIDAYS
551665	08/12/2014	08/12/2014	TIME OFF IN LIEU - ACCRUED	1.00	1.00	HOLIDAYS
551664	01/09/2014	28/09/2014	RESPIRATORY (CHEST / LUNGS)	15.00	28.00	SICKNESS
550782	22/07/2013	26/07/2013	ANNUAL LEAVE	5.00	5.00	HOLIDAYS
550774	10/01/2013	20/02/2013	GASTRIC SYSTEM (STOMACH & BOWEL)	30.00	42.00	SICKNESS

## Recording Unpaid Leave

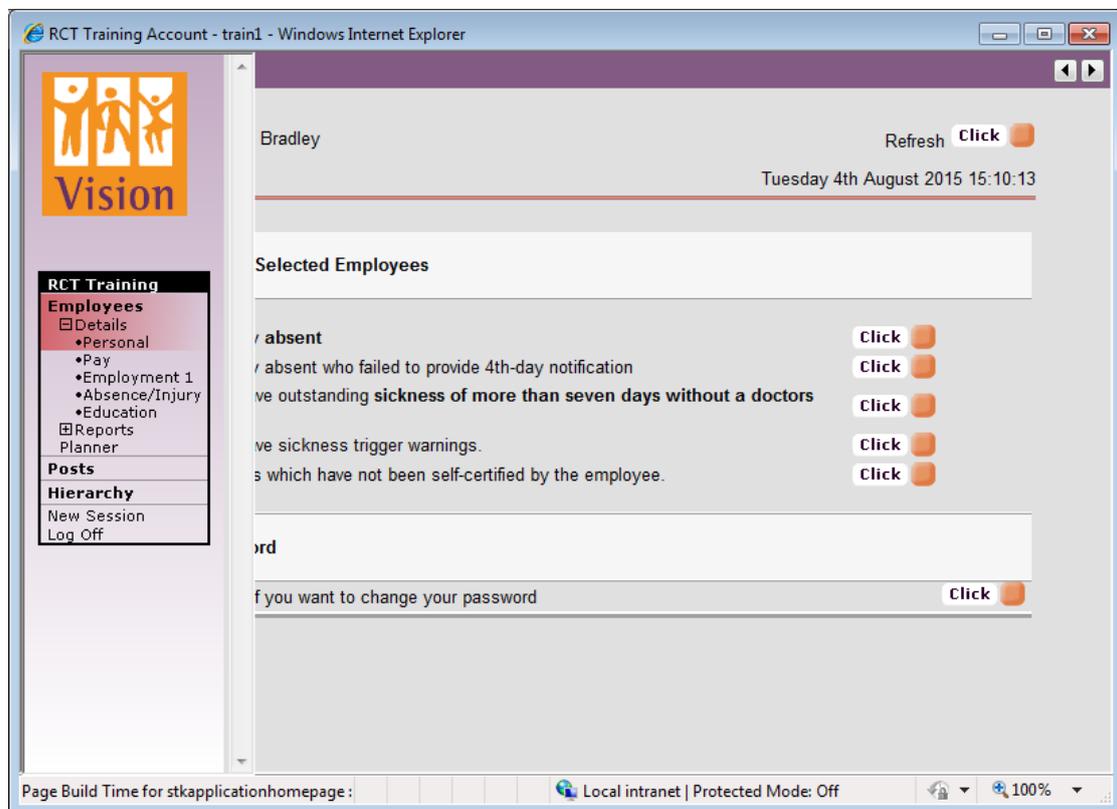
If an employee has taken unpaid leave select the 'Unpaid Leave' option from the Absence Class drop-down menu in the '**Absence-Injury - Absence Summary**' screen and click on the New Line icon on the right.

You are navigated to the **Absence Detail – Unpaid Non-Sickness Details** screen where you can record the details of the leave. In the 'Absence Reason' drop-down menu you can select from **Authorised Unpaid Leave, Unauthorised Unpaid Leave, J.P. Duties, Jury Service, Witness in Court or, Child Absent – Schools Use Only**. When you have entered the details you must save the record by clicking **OK**, then  and then **OK** once more accept the amendment. As detailed previously, payroll are provided with a report of unpaid leave and will deduct the sum from the employee's salary retrospectively.

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## Amending Employee Address and Contact Details

Managers are responsible for **updating and amending employee address and contact details** in the Vision system. Bring up the menu on the left-hand side of the screen and select 'Employees', 'Details' and 'Personal'.



From the 'Personal – Details' screen, enter the Employee Number or search as described previously. Select the **Address** tab at the top of the screen.

The screenshot shows a web browser window titled 'Rhondda Cynon Taf - wagh01 - Windows Internet Explorer'. The page is titled 'Personal - Current Address'. At the top, there is a navigation menu with tabs: 'Details', 'Sensitive Info', 'Address', 'Contacts', 'Prev. Addr', 'Charges', and 'Comments'. The 'Address' tab is selected. The form contains the following fields:

- Employee Number: [text input]
- Current Address: [multiple text input lines]
- Telephone Number: [text input]
- Mobile: [text input]
- Post Code: [text input]
- Housing Type: [dropdown menu]
- Date Moved Into Current Address: [calendar icon]
- Update Previous Address: [dropdown menu]
- Time at Address: [checkbox] Years [checkbox] Months
- Personal Email: [text input]
- Work Email: [text input]
- Payslip Delivery: [dropdown menu]
- Service Manager: [text input]
- Work Tel No.: [text input] Ext [text input]
- Work Mobile: [text input]
- Work Fax: [text input]

Enter the correct address by using the appropriate lines to the right of Current Address and you have the ability to update any incorrect details or enter a new address. Choose 'YES' to Update Previous Address, click OK to the message and, as with every update, save the new information. Click the **Contacts** tab at the top of the screen in order to enter or update the contact details and save the record as described previously.

The screenshot shows a web browser window titled 'Rhondda Cynon Taf - wagh01 - Windows Internet Explorer'. The page is titled 'Personal - Emergency Contacts Details'. At the top, there is a navigation menu with tabs: 'Details', 'Sensitive Info', 'Address', 'Contacts', 'Prev. Addr', 'Charges', and 'Comments'. The 'Contacts' tab is selected. The form contains the following fields:

- Employee Number: [text input]
- Main Contact:
  - Title: [dropdown menu]
  - Surname: [text input]
  - Forename: [text input]
  - Address: [multiple text input lines]
  - Post Code: [text input]
  - Relationship: [dropdown menu]
  - Daytime Telephone: [text input]
  - Evening Telephone: [text input]
  - Mobile Telephone: [text input]
- Secondary Contact:
  - Title: [dropdown menu]
  - Surname: [text input]
  - Forename: [text input]
  - Address: [multiple text input lines]
  - Post Code: [text input]
  - Relationship: [dropdown menu]
  - Daytime Telephone: [text input]
  - Evening Telephone: [text input]
  - Mobile Telephone: [text input]

## **Useful Telephone Numbers**

Should you have any queries or require assistance when using the **Vision system**, please contact the **Vision Support Team** on:

(01443) 680763, 680764 and 680760

Alternatively, email the team with the query to [visionsupport@rctcbc.gov.uk](mailto:visionsupport@rctcbc.gov.uk)

Should you have any queries regarding the **Council's Sickness Absence and Leave policies** please contact your **HR** representative at Ty Elai, Williamstown on:

**Chief Executive and Corporate Services team** (01443) 444533, 444580, 444530 and 444532

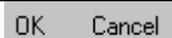
**Community & Children's team** (01443) 444506, 444507, 444508 and 444514

**School Support & Lifelong Learning Team** (01443) 444524, 444525, 444526 and 444536

**Schools Team** (01443) 444539, 444519, 444537 and 444556

## Appendices

### Appendix 1 - Screen Icon Functions

ICON	FUNCTION
	Move the cursor over this icon to access the main menu
	Click this icon to select the function listed opposite.
	Click the 'New' icon to clear a record you are viewing.
	Click the 'Load/Search' icon to find the details of an employee
	Click the 'Calendar' icon to select a date to populate the date fields on the absence screens
	Click the 'New Line' icon to create a new absence and enter notification details
	Click 'OK' or 'Cancel' to accept or cancel any changes made to an absence record
	Click and drag this icon to copy working patterns on the 'Time Lost' screen
	Click the 'Save' icon to save an absence record
	Click this icon to view the details of an absence
	Click this icon to view the details of a trigger

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## Appendix 2 - Annual Leave Entitlement Table

Conditions of service	Less than 5 years service	More than 5 years service
<u>NJC for Local Government Services</u>	25 days	30 days

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## Appendix 3 – Completing Time Lost Screen

The example below shows time lost for a full time employee who works a 37 hr contract Monday – Friday

**Absence Detail - Working Time Lost**

Employee Number: Julie Milakovic (Main job of 1 current/1 old jobs) WORKFORCE DEVELOPMENT ASSISTANT Absence ID: NEW

First Date of Absence: 01/09/2014 Last Date of Absence: 07/09/2014

Hours lost on first day of absence:  Only to be completed for absences where the first day is a partial day

Hours lost on last day of absence:  Only to be completed for absences where the last day is a partial-day

Total Working Days Lost: 0.00

Total Calendar Days: 7.00

Total Hours Lost: 0:00

**Work Pattern for duration of absence**

When over-riding a week's working pattern use: hours per day

Period	Mo	Tu	We	Th	Fr	Sa	Su	Applicable Working Pattern	Over-ride Working Pattern?
01/09/2014 - 07/09/2014	7:24	7:24	7:24	7:24	7:24	0:00	0:00	n/a	<input checked="" type="checkbox"/>

The example below shows time lost for a part-time employee who works an 18hr contract over 3 days, Monday – Wednesday.

**Absence Detail - Working Time Lost**

Employee Number: Julie Milakovic (Main job of 1 current/1 old jobs) WORKFORCE DEVELOPMENT ASSISTANT Absence ID: NEW

First Date of Absence: 01/09/2014 Last Date of Absence: 14/09/2014

Hours lost on first day of absence:  Only to be completed for absences where the first day is a partial day

Hours lost on last day of absence:  Only to be completed for absences where the last day is a partial-day

Total Working Days Lost: 0.00

Total Calendar Days: 14.00

Total Hours Lost: 0:00

**Work Pattern for duration of absence**

When over-riding a week's working pattern use: hours per day

Period	Mo	Tu	We	Th	Fr	Sa	Su	Applicable Working Pattern	Over-ride Working Pattern?
01/09/2014 - 07/09/2014	6:00	6:00	6:00	0:00	0:00	0:00	0:00	n/a	<input checked="" type="checkbox"/>
08/09/2014 - 14/09/2014	6:00	6:00	6:00	0:00	0:00	0:00	0:00	n/a	<input checked="" type="checkbox"/>

The example below shows time lost for an employee who works a 15hr contract over 3 days, with an alternating pattern of :

Week one Monday – Wednesday  
 Week two Wednesday - Friday

**Absence Detail - Working Time Lost**

Employee Number: Julie Milakovic (Main job of 1 current/1 old jobs) WORKFORCE DEVELOPMENT ASSISTANT Absence ID: NEW

First Date of Absence: 01/09/2014 Last Date of Absence: 28/09/2014

Hours lost on first day of absence:  Total Working Days Lost: 0.00  
 Hours lost on last day of absence:  Total Calendar Days: 28.00  
 Total Hours Lost: 0:00

Work Pattern for duration of absence

When over-riding a week's working pattern use: hours per day

Period	Mo	Tu	We	Th	Fr	Sa	Su	Applicable Working Pattern	Override Working Pattern?
01/09/2014 - 07/09/2014	5:00	5:00	5:00	0:00	0:00	0:00	0:00	n/a	<input checked="" type="checkbox"/>
08/09/2014 - 14/09/2014	0:00	0:00	5:00	5:00	5:00	0:00	0:00	n/a	<input checked="" type="checkbox"/>
15/09/2014 - 21/09/2014	5:00	5:00	5:00	0:00	0:00	0:00	0:00	n/a	<input checked="" type="checkbox"/>
22/09/2014 - 28/09/2014	0:00	0:00	5:00	5:00	5:00	0:00	0:00	n/a	<input checked="" type="checkbox"/>

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# Explaining the sections of the fit note

### Statement of Fitness for Work For social security or Statutory Sick Pay

**1** Patient's name:

**1** I assessed your case on:  and, because of the following condition(s):

**2** I advise you that:  you are not fit for work,  you may be fit for work taking account of the following advice:

**3** If available, and with your employer's agreement, you may benefit from:  
 a phased return to work  amended duties  
 altered hours  workplace adaptations

**4** Comments, including functional effects of your condition(s):  

SAMPLE

**5** This will be the case for  to  or from  to

**6** I will/will not need to assess your fitness for work again at the end of this period. (Please delete as applicable)

**7** Doctor's signature:

**8** Date of statement:  Doctor's address:

Unique ID: Med 3 04/10-

---

**For the patient – what to do now**  
Please read the notes below then fill in your details and, if you are claiming social security benefits, sign and date the declaration. If you cannot fill in your details yourself, ask someone else to do it for you.

**What your doctor's advice means**  
**Not fit for work:**  
Your doctor will advise this when they believe that your health condition means you should refrain from work for the stated period of time.  
**May be fit for work taking account of the following advice:**  
Your doctor will recommend this when they believe that you may be able to return to work with some support from your employer. Sometimes it may not be possible for your employer to act on the doctor's advice and you will not be able to return to work until you have further recovered. You do not need to get a further Statement from your doctor to confirm this.  
**If you are employed**  
If you are not fit for work, or your employer cannot support your return to work, your employer should consider paying Statutory Sick Pay (SSP) based on the information provided. If SSP cannot be paid, or your SSP is ending, your employer will give you Form SSP1 to claim social security benefits. If you are self-employed, you may be able to claim social security benefits because of your health condition.  
**Social security benefit claimants**  
If you are claiming social security benefits because of your health condition, send this form to your Jobcentre Plus office. If you are claiming social security benefits for any other reason, you should contact a Personal Adviser to discuss the advice on the form. If you do any work you must inform Jobcentre Plus of your change of circumstances.  
**If you want to make a new claim to social security benefits you can:**  
• download a claim form at [www.direct.gov.uk/benefits](http://www.direct.gov.uk/benefits), or  
• phone 0800 055 6688 (8am to 6pm Monday to Friday). Textphone users call 0800 023 4888.

**Your details – Please use BLOCK CAPITALS**

Surname:

Other names:

Address:

Date of birth:

National Insurance (NI) number:

Postcode:

**Declaration – for social security benefit claimants only**  
I agree that my doctor may give the Department for Work and Pensions or a healthcare professional acting on its behalf information which is needed to process my claim for benefit and any request for it to be looked at again.

Signature:

Date:

If you have signed this form for someone else, please tick here:

- 1 The date your employee was assessed by their doctor. This could be a face-to-face or telephone consultation, or consideration of a written report from another doctor or healthcare professional.
  - 2 The condition(s) affecting your employee's fitness for work.
  - 3 The doctor's assessment as to whether your employee is either:
    - **Not fit for work**
      - Your employee is not fit for work of any kind.
- OR
- **May be fit for work taking account of the following advice**
    - Your employee may be fit for work, taking account of the doctor's advice in the fit note. This does not necessarily mean doing their normal role.
  - 4 The doctor's advice about how you can support your employee to return to work. See [The tick boxes](#) and [The comments box](#) for more information.
  - 5 The period that the fit note covers. This will either be from the date of the assessment (Box 1), or between particular start and end dates. The dates are inclusive, (so a fit note dated from 2 April to 10 April will no longer apply from 11 April onwards).

This section may cover an earlier period if your employee's doctor judges that their condition affected their fitness for work before the assessment date.

The dates in this section (including any which cover an early period) can be for any period that your employee's doctor considers appropriate.

- 6 This box tells you whether your employee's health condition is expected to affect them after their current fit note expires.

I will not need to assess your fitness for work again at the end of this period  
Your employee's health condition is not expected to affect their fitness for work once the fit note has expired.

I will need to assess your fitness for work again at the end of this period  
Means your employee's health condition may still affect their fitness for work beyond the end of the fit note (so they may need a new fit note at that point).

- 7 Your employee's doctor needs to sign the fit note.
- 8 The date the fit note was issued – this may not always be the same as the date of the assessment.

**IMPORTANT:** Your employee can go back to work at any time (including before the end of the fit note) without going back to see their doctor - even if their doctor has indicated that they need to assess them again. This will not breach your Employers Liability Compulsory Insurance, providing a suitable risk assessment has taken place if required.

“

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