

Simply Personnel Personnel Manager

Absences

Simply Personnel: Absences

This document provides step-by-step guide for users to give an easy understanding on setting up and recording your absences

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

Before you can log an absence you need to set up the categories, reasons and absence scheme (if you use one), first go to system **set up** from the main dashboard, then to business rules and look down the mandatory section on the left

▶ **System Setup**
Set up your system

▶ **Business Rules**
Define your business rules

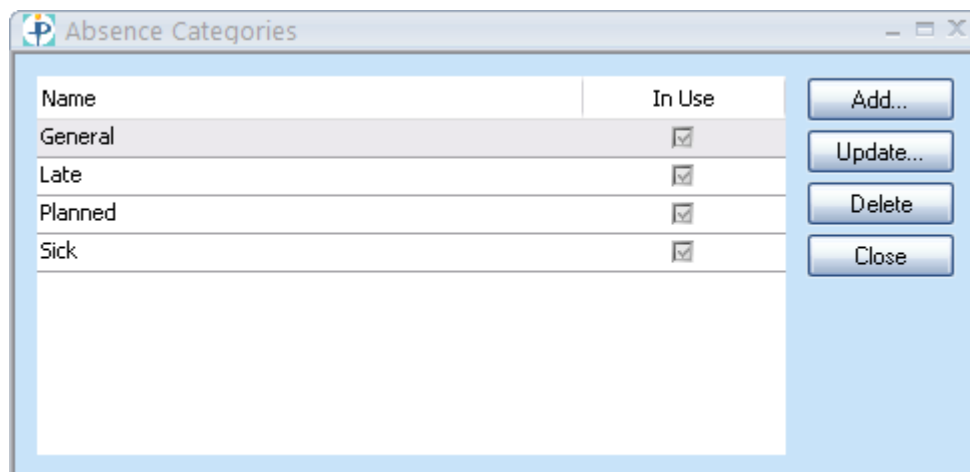
The four Absence headings are grouped together

- Absence Categories
- Absence Reasons
- Absence Schemes
- Absence Entitlements

Absence Categories

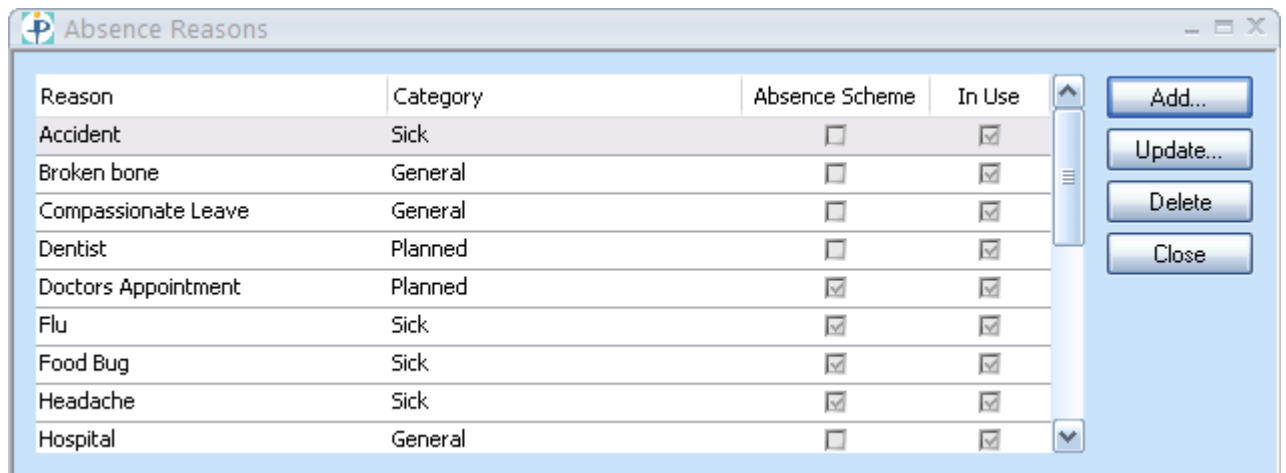
You can split all of your different absence reasons in to different categories this will refine the reasons you get in a drop down list when you record an absence against an employee.

To add a category select the option in the table and then a window will appear click on add.



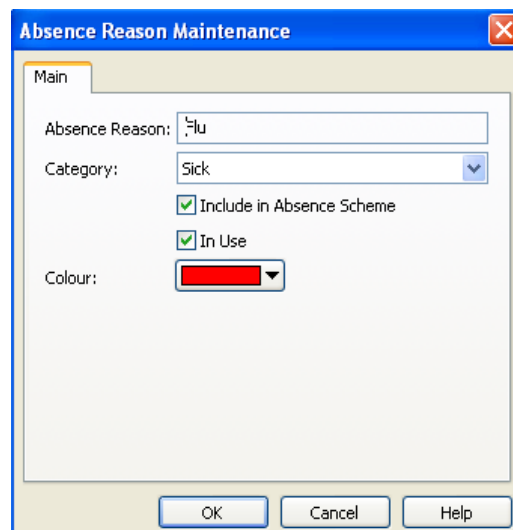
Absence Reasons

Select this option to add your different absence reasons. The following window will appear,



Reason	Category	Absence Scheme	In Use
Accident	Sick	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Broken bone	General	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Compassionate Leave	General	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Dentist	Planned	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Doctors Appointment	Planned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Flu	Sick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Food Bug	Sick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Headache	Sick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hospital	General	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Back to absence reasons, to add an absence click on **Add** and the next window will appear.



Absence Reason Maintenance

Main

Absence Reason:

Category:

Include in Absence Scheme

In Use

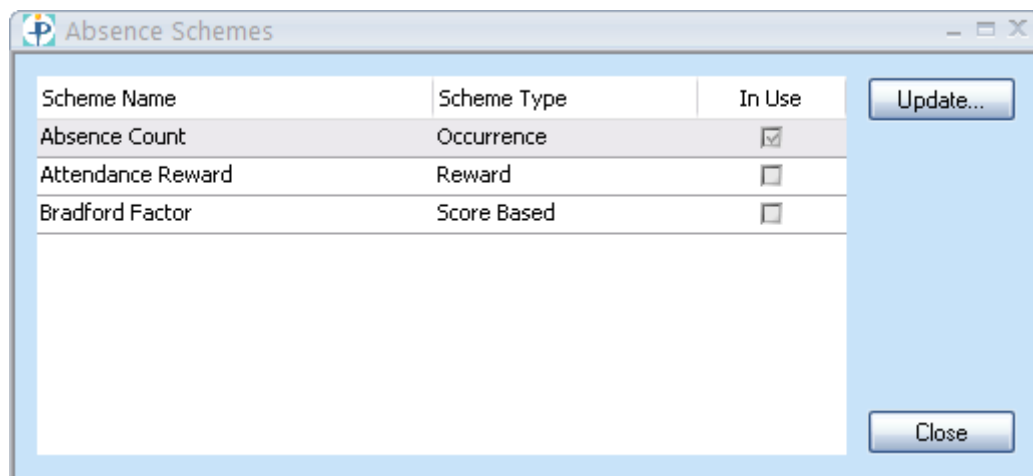
Colour:

OK Cancel Help

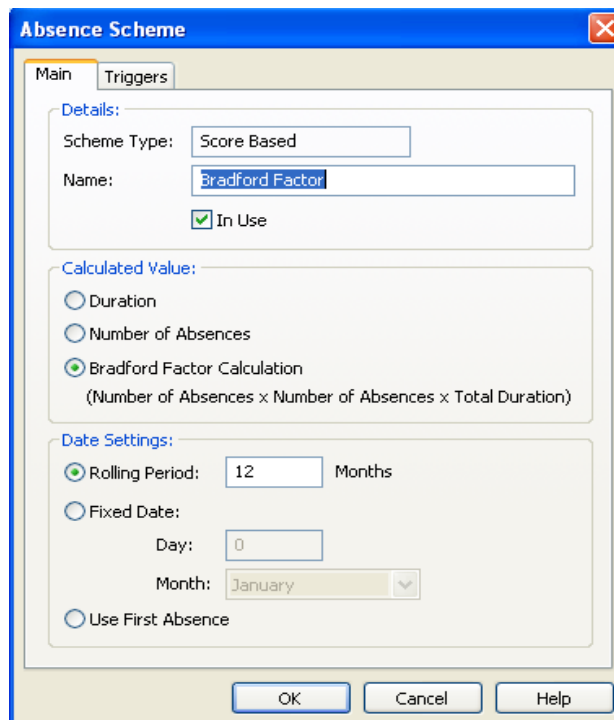
Type in the name of your absence, select a category tick the box to state whether you want this absence reason to be included in the absence scheme and choose a colour (this will show on the attendance record for each employee and also on the holiday planner if the option is selected).

Absence Schemes

The system has got the rule for the Bradford Factor already but if you decide that you wanted to run a different scheme i.e based on number of days or number of occurrences then you will need to add it to the system. Click on **add** and the window below will show



Select your absence type (note you can only run one absence scheme at a time), this window will appear.



Absence Scheme

Main Triggers

Details:

Scheme Type: Score Based

Name: Bradford Factor

In Use

Calculated Value:

Duration

Number of Absences

Bradford Factor Calculation
(Number of Absences x Number of Absences x Total Duration)

Date Settings:

Rolling Period: 12 Months

Fixed Date:

Day: 0

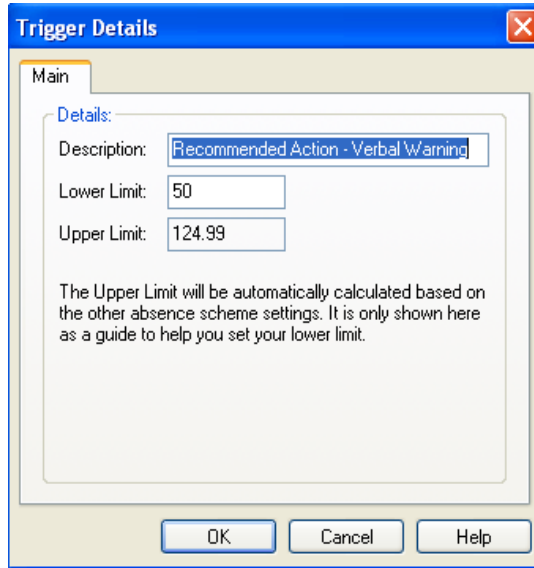
Month: January

Use First Absence

OK Cancel Help

Make sure that if you want to use this scheme that the **in use** box has got the green tick in it. You can change the name set the calculation value, date setting and then set your trigger. This means that when an employee reached a certain score (Bradford factor) of had XX number of days off it will tell you in your task list what you are required to do.

To set the triggers, type in your description and enter the lower limit i.e. the points of days click ok and then add your next trigger with the lower limit, the higher limit will automatically be worked out and put in the box.



Trigger Details

Main

Details:

Description: Recommended Action - Verbal Warning

Lower Limit: 50

Upper Limit: 124.99

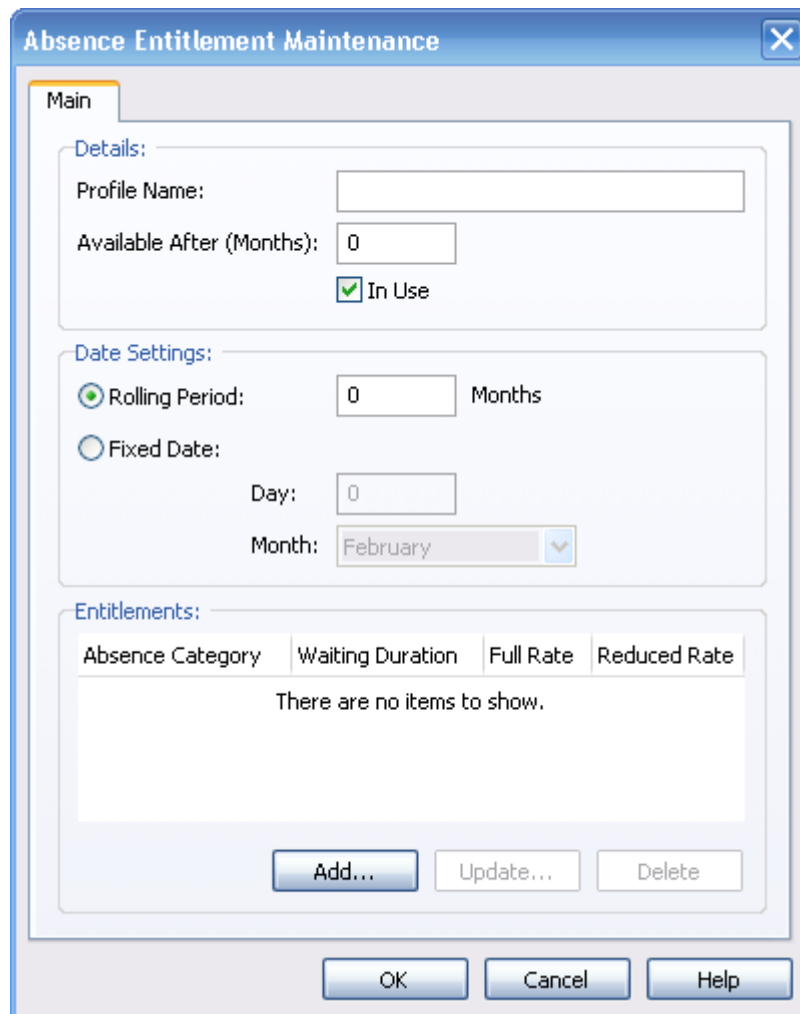
The Upper Limit will be automatically calculated based on the other absence scheme settings. It is only shown here as a guide to help you set your lower limit.

OK Cancel Help

Absence Entitlements

The absence entitlements functionality will allow calculations of entitlements. i.e how many days an employee will get full pay for and then a reduced rate for their sick pay.

Add a new profile and you will see the screen below.

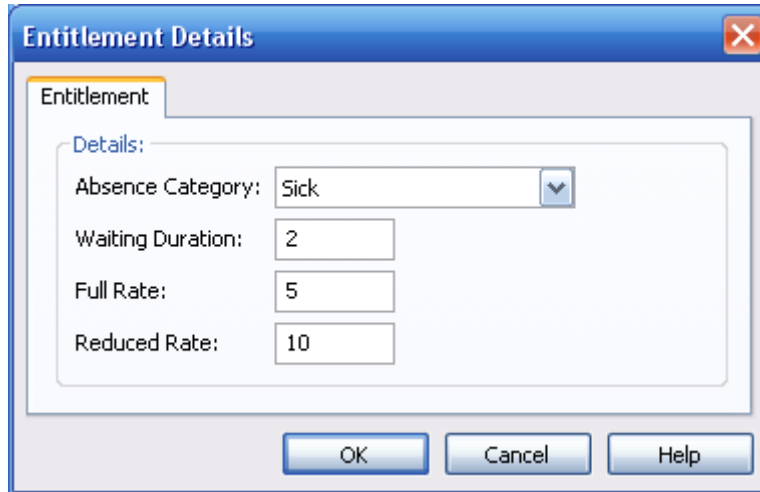


Enter a profile name (e.g. Manager, Employee, Full Time, Part Time, etc) and enter the number of months an employee will have to wait before they become eligible for the entitlements. This can be used, for example, so that employees on a three month probationary period do not get the entitlements but will after this time.

The entitlement calculations can either run on a rolling period of a set number of months from today's date backwards, or can go from today's date back to a fixed date, such as the 1st January every year.

Click on the Add button to add an absence category into the list of entitlements. It is recommended that your absence reasons be grouped into

categories that will either be used by the profile or not used by it. You cannot have an absence category that contains a mixture of absence reasons that entitlements will be applied to and reasons that they won't be applied to. Users can add as many absence categories to a profile as required.



Select the absence category you want to add and enter the values for the waiting duration, full rate and reduced rate.

The waiting duration is the period at the start of each absence that the employee will be unpaid before the company sick pay scheme comes into effect.

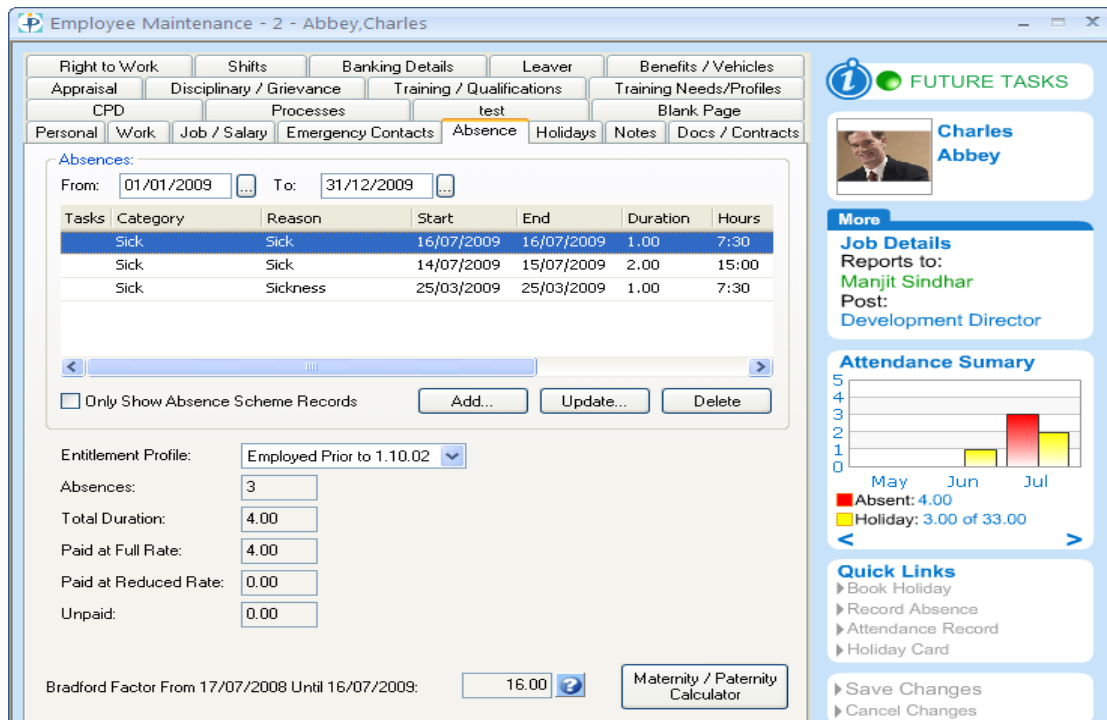
Following the waiting duration, the full rate value is the number of days in the absence that the employee will be paid at the normal rate.

After full rate duration, the employee will be paid the reduced rate for the specified duration.

Any days left in the absence after the reduced rate has expired will be unpaid.

Recording an Absence against an employee

To record an absence against an employee you must first go into an employee record and then select the **Absence** tab



Employee Maintenance - 2 - Abbey, Charles

Right to Work | Shifts | Banking Details | Leaver | Benefits / Vehicles
 Appraisal | Disciplinary / Grievance | Training / Qualifications | Training Needs/Profiles
 CPD | Processes | test | Blank Page
 Personal | Work | Job / Salary | Emergency Contacts | Absence | Holidays | Notes | Docs / Contracts

Absences:
 From: 01/01/2009 To: 31/12/2009

Tasks	Category	Reason	Start	End	Duration	Hours
	Sick	Sick	16/07/2009	16/07/2009	1.00	7:30
	Sick	Sick	14/07/2009	15/07/2009	2.00	15:00
	Sick	Sickness	25/03/2009	25/03/2009	1.00	7:30

Entitlement Profile: Employed Prior to 1.10.02
 Absences: 3
 Total Duration: 4.00
 Paid at Full Rate: 4.00
 Paid at Reduced Rate: 0.00
 Unpaid: 0.00

Bradford Factor From 17/07/2008 Until 16/07/2009: 16.00

Maternity / Paternity Calculator

FUTURE TASKS

Charles Abbey

More

Job Details
 Reports to: Manjit Sindhar
 Post: Development Director

Attendance Summary

5
4
3
2
1
0

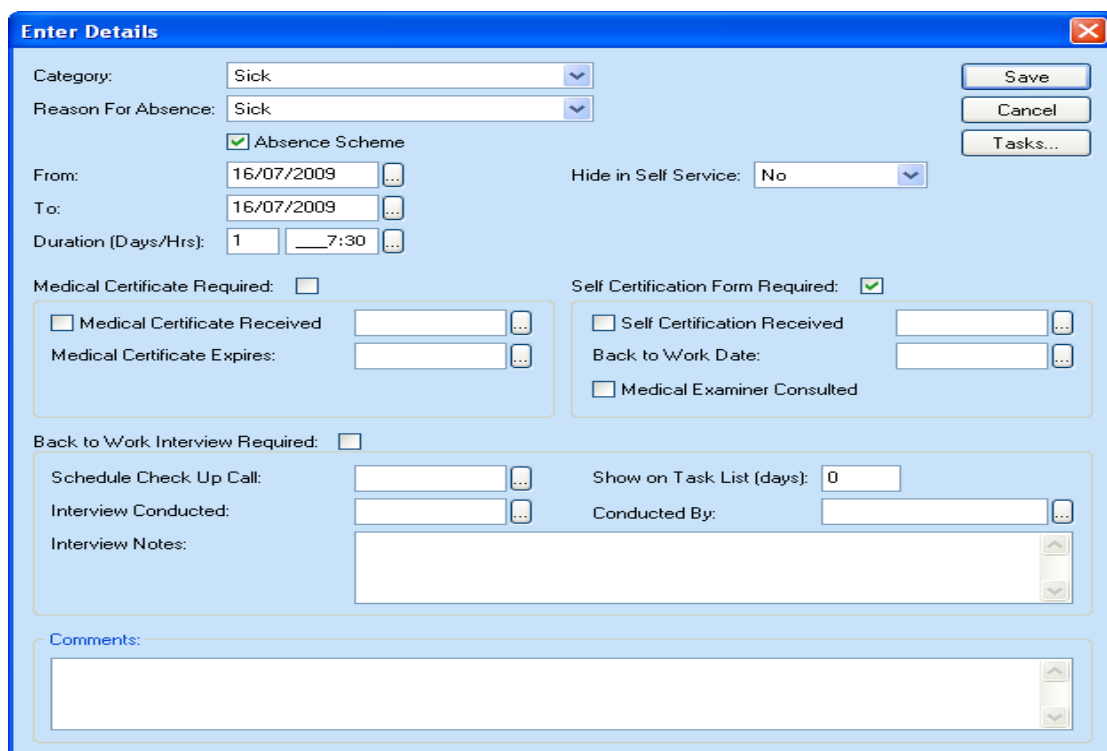
May Jun Jul

■ Absent: 4.00
 ■ Holiday: 3.00 of 33.00

Quick Links

- ▶ Book Holiday
- ▶ Record Absence
- ▶ Attendance Record
- ▶ Holiday Card
- ▶ Save Changes
- ▶ Cancel Changes

Select **Add** in the centre of the page and the following window will appear.



Enter Details

Category: Sick
 Reason For Absence: Sick
 Absence Scheme

From: 16/07/2009 To: 16/07/2009
 Duration (Days/Hrs): 1 7:30
 Hide in Self Service: No

Medical Certificate Required:
 Medical Certificate Received
 Medical Certificate Expires:
 Self Certification Form Required:
 Self Certification Received
 Back to Work Date:
 Medical Examiner Consulted

Back to Work Interview Required:
 Schedule Check Up Call:
 Interview Conducted:
 Interview Notes:
 Show on Task List (days): 0
 Conducted By:

Comments:

Save
 Cancel
 Tasks...

Select you category, reason and then enter the dates to and from. If one of the bottom boxes are ticked i.e. Self Certification Form Required, this will show up in your task list and will continue to until you have received it and put the date in that it has been received, then click on Save

The absence will then show on a history screen stating the reason and duration, here you can change the dates to show absences with in required time frames or just absences the have been included with in your absence scheme.

Absences:

From: ... To: ...

Tasks	Category	Reason	Start	End	Duration	Commei
	Sick	Flu	02/03/2009	06/03/2009	5.00	

Only Show Absence Scheme Records

On the bottom half of the screen you will see the following information.

Entitlement Profile: ▾

Absences:

Total Duration:

Paid at Full Rate:

Paid at Reduced Rate:

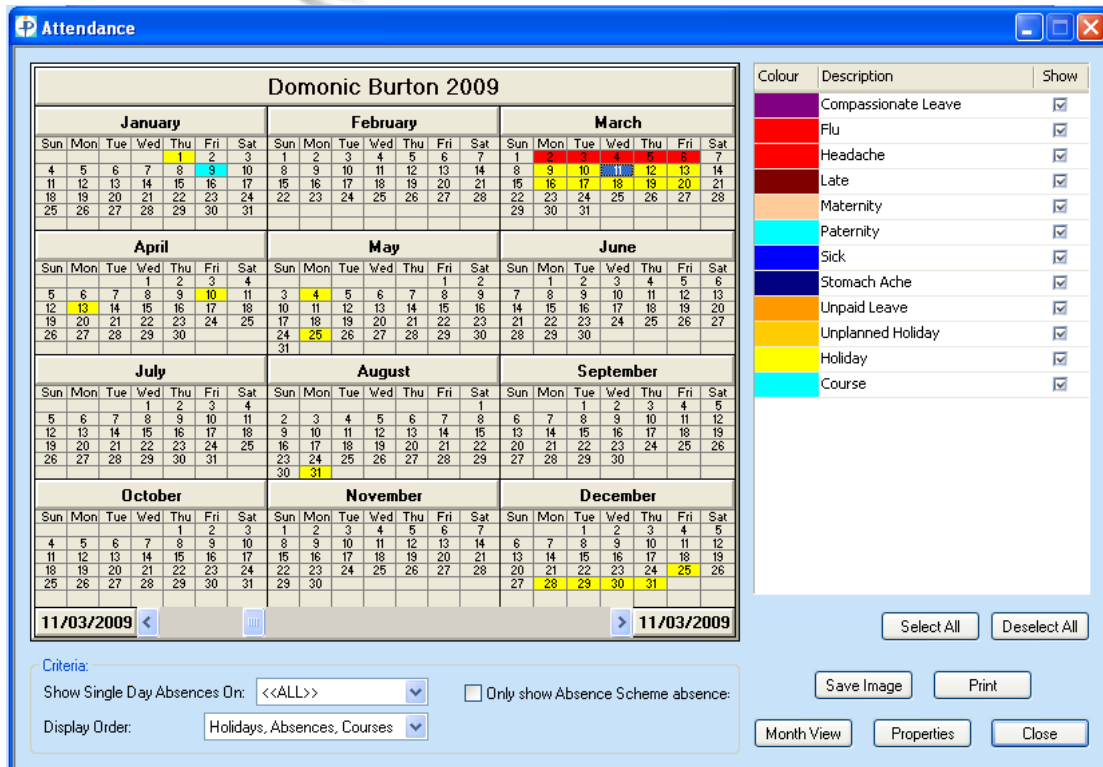
Unpaid:

Select you entitlement profile against the employee.

On the far right of an employee's record there is a button that stated **Attendance Record**



Select this and a calendar will open for that employee



Attendance

Domonic Burton 2009

January							February							March						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3		1	2	3	4	5	6	7	1	2	3	4	5	6	7
4	5	6	7	8	9	10	8	9	10	11	12	13	14	8	9	10	11	12	13	14
11	12	13	14	15	16	17	15	16	17	18	19	20	21	15	16	17	18	19	20	21
18	19	20	21	22	23	24	22	23	24	25	26	27	28	22	23	24	25	26	27	28
25	26	27	28	29	30	31								29	30	31				

April							May							June						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4				1	2	3	4	1	2	3	4	5	6	7
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30				
							31													

July							August							September						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12
12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19
19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26
26	27	28	29	30	31		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

October							November							December							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			1	2	3	4				1	2	3	4				1	2	3	4	5
5	6	7	8	9	10	11	5	6	7	8	9	10	11	6	7	8	9	10	11	12	
12	13	14	15	16	17	18	12	13	14	15	16	17	18	13	14	15	16	17	18	19	
19	20	21	22	23	24	25	19	20	21	22	23	24	25	20	21	22	23	24	25	26	
26	27	28	29	30	31		26	27	28	29	30			27	28	29	30	31			
							29	30													

11/03/2009 < > 11/03/2009

Criteria:
 Show Single Day Absences On: <<ALL>> Only show Absence Scheme absence:
 Display Order: Holidays, Absences, Courses

Select All Deselect All
 Save Image Print
 Month View Properties Close

This will show all of the holidays that have been taken or are allocated and will also show all the absences that have been recorded against them and will be shown as the colour (the one that you selected when you enter you absence reasons)

You are able to print out this calendar for to show the whole year or you can select **month view** and print that off.