Stop the RTW Chaos: See How Seamless Automation Solves the Problem

Automating Return to Work Forms in Sage People

This guide walks you through configuring an automated Return-to-Work (RTW) form in Sage People. With this setup, the form is automatically generated and added to the manager's Actions list in WX as soon as they approve a specific type of absence—such as Sick Leave.

By automating this process, you ensure consistency, reduce manual effort, and make it easier for managers to complete essential compliance steps without delays.

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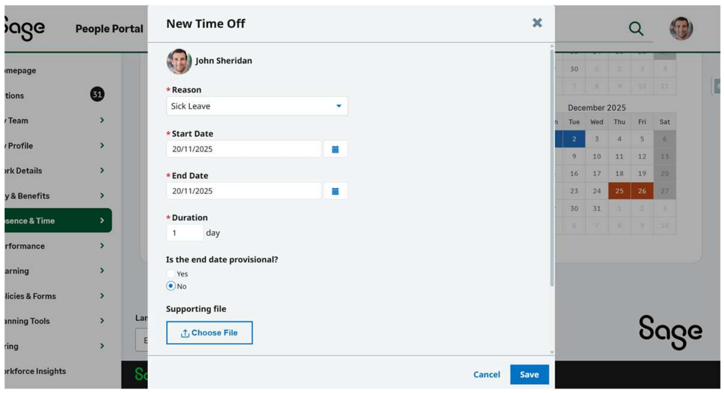
Overview:
User Journey

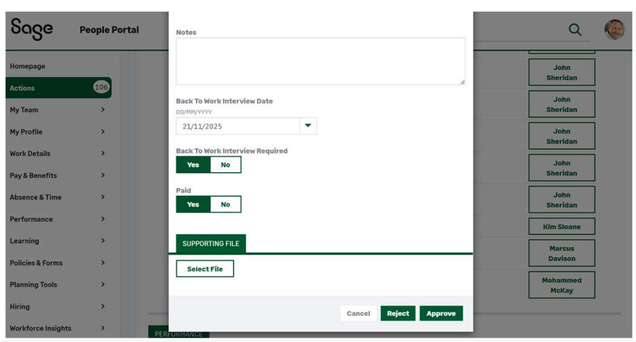
Team Member:

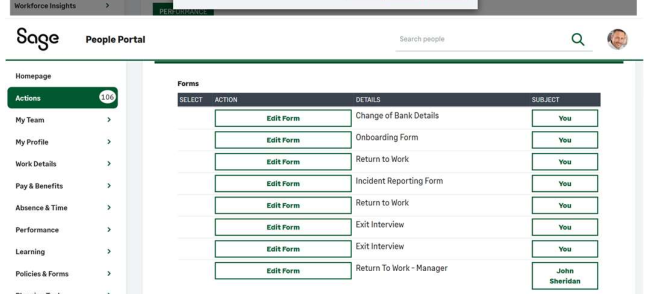
- Books Sick Leave as usual.

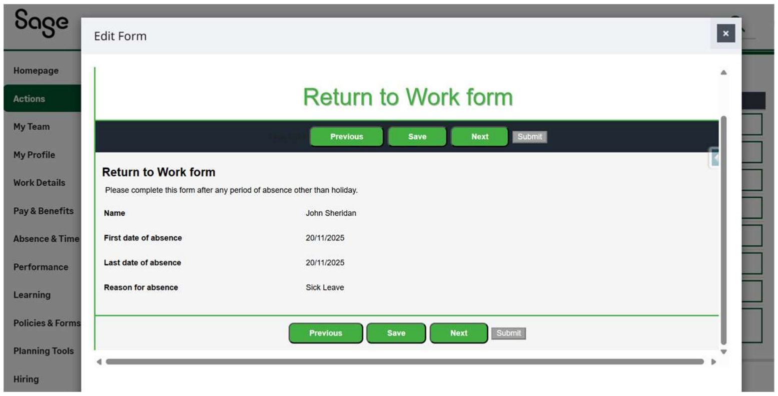


Manager:

- Approves Sick Leave.
- RTW Form is generated and added to WX Actions.
- Manager opens the form and sees related Absence details plus additional questions.







Outcome
After completing these steps:

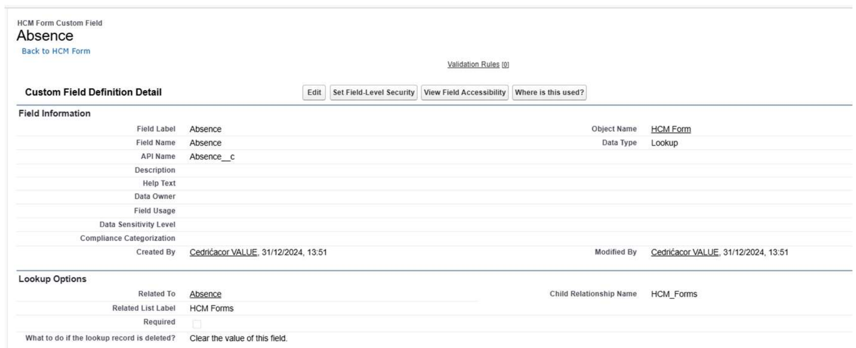
- Managers will see RTW forms in WX Actions after approving Sick Leave.
- Forms include Absence details and manager-specific questions.

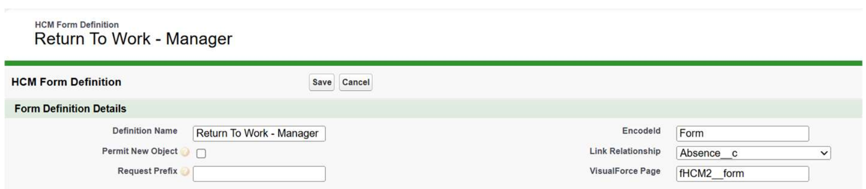
i **Tip** Ensure all permissions and object relationships are correctly configured before starting.

Step 1:
Create Lookup to Absence

Add a lookup field to the **Absence** object on the **HCM Form** object.

Result: Enables linking an HCM Form definition to an Absence record.



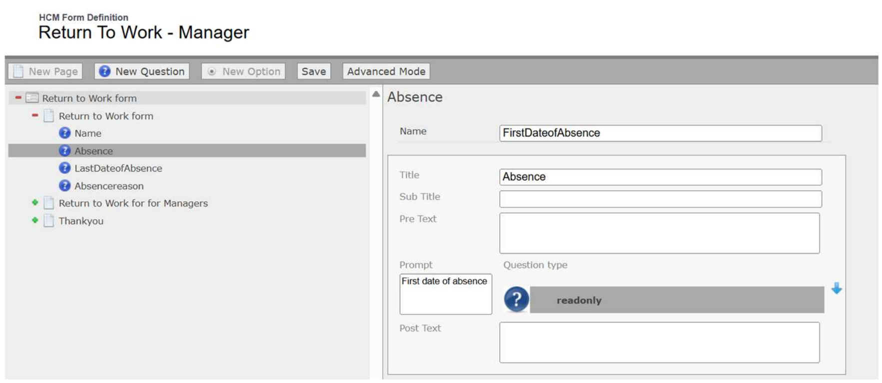


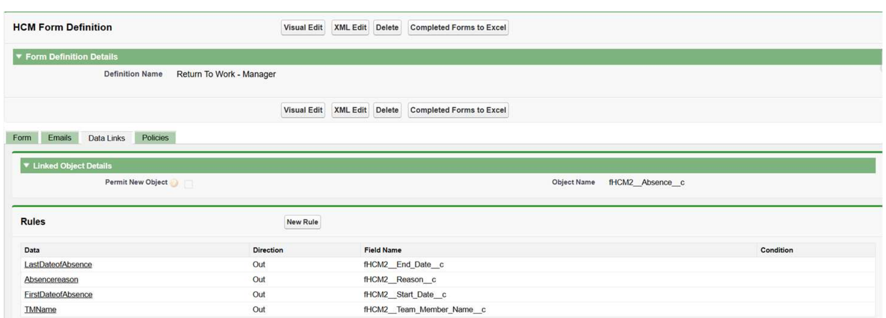
Step 2:
Configure the HCM Form

The form should display read-only Absence details and include additional questions for the manager.

Actions:

1. Add read-only questions (e.g., Name, Start Date, End Date, Reason).
2. Add **Out Data Links** for these fields (all sourced from the Absence object).





Step 3:
Configure Action Event

Link the RTW form to an Action Event so it appears in WX.

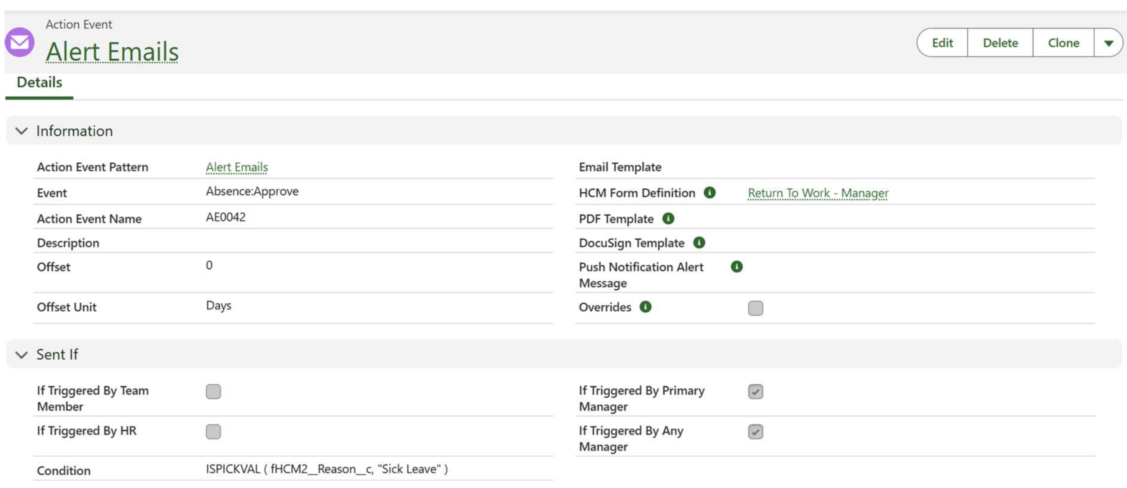
Settings:

- **Event:** Absence: Approve
- **Triggered By:** Manager options
- **Condition:** Only fire for Sick Leave absences:

ISPICKVAL(fHCM2__Reason__c, "Sick Leave")

- **Send To:** Manager only (sets manager as Form Actor)

> i **Note** Email template is optional. The form will appear in WX Actions and Action Digest regardless.



Action Event

Alert Emails

Edit | Delete | Clone

Details

Information

Action Event Pattern	Alert Emails	Email Template	
Event	Absence:Approve	HCM Form Definition	Return To Work - Manager
Action Event Name	AE0042	PDF Template	
Description		DocuSign Template	
Offset	0	Push Notification Alert Message	
Offset Unit	Days	Overrides	☐

Sent If

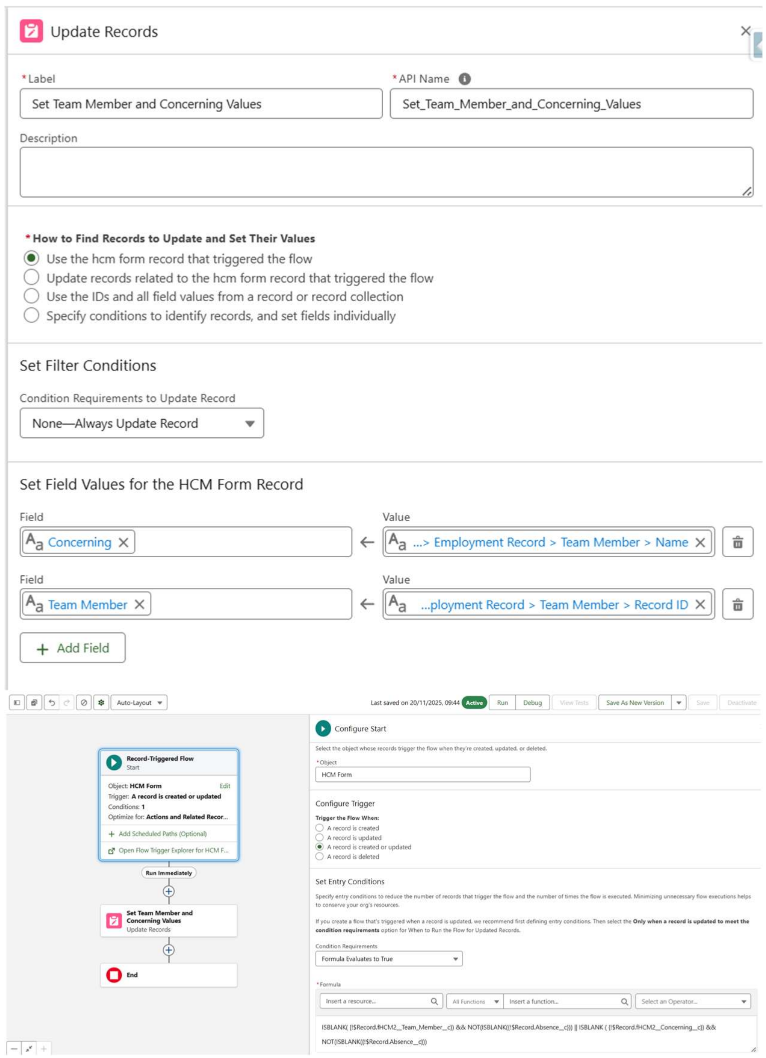
If Triggered By Team Member	☐	If Triggered By Primary Manager	☑
If Triggered By HR	☐	If Triggered By Any Manager	☑
Condition	ISPICKVAL (fHCM2__Reason__c, "Sick Leave")		

Recipients

No Email To User Triggering Event	☐	Send To Top Manager	☐
Send To Team Member	☐	Send To One Down Manager	☐
Send To Team Member Home	☐	Send To Two Down Manager	☐
Send To Manager	☑	Send To Three Down Manager	☐
Send To Cross Report Manager(s)	☐	Send To Three Up Manager	☐
Send To Direct Reports	☐	Send To Two Up Manager	☐
Send To Cross Reports	☐	Send To One Up Manager	☐
Send To Colleagues	☐	Send To User	
Send To Department Approver	☐	Send To Created By	☐
Send To Work Location Manager	☐	Send To Email Addresses	

Step 4:
Flow for Team Member and Concerning Fields

This flow ensures the form appears in WX Actions by populating missing values.



Logic:

- If Absence is linked and **Team Member** or **Concerning** is blank, update them.

Formula Condition:
NOT(ISBLANK({!$Record.Absence__c})) &&
(ISBLANK({!$Record.fHCM2__Team_Member__c}) || ISBLANK({!$Record.fHCM2__Concerning__c}))

Update Values:

- **Concerning:** {!$Record.Absence**r.fHCM2**Employment**r.fHCM2**Team_Member__r.Name}
- **Team Member:** {!$Record.Absence**r.fHCM2**Employment**r.fHCM2**Team_Member__r.Id}

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