



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.

**Sage People Portal**

**New Time Off**

John Sheridan

Reason: Sick Leave

Start Date: 20/11/2025

End Date: 20/11/2025

Duration: 1 day

Is the end date provisional?  
☐ Yes  
☒ No

Supporting file  
[Choose File](#)

Cancel Save

## 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.

**Sage People Portal**

Notes

Back To Work Interview Date  
 dd/mm/yyyy  
 21/11/2025

Needs To Work Interview Required  
☒ Yes ☐ No

Paid  
☒ Yes ☐ No

SUPPORTING FILE  
[Select File](#)

Cancel Adjust Approve

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**Sage People Portal**

Search people

Forms

SELECT	ACTION	DETAILS	SUBJECT
<input type="checkbox"/>	Edit Form	Change of Bank Details	You
<input type="checkbox"/>	Edit Form	Onboarding Form	You
<input type="checkbox"/>	Edit Form	Return to Work	You
<input type="checkbox"/>	Edit Form	Incident Reporting Form	You
<input type="checkbox"/>	Edit Form	Return to Work	You
<input type="checkbox"/>	Edit Form	Exit Interview	You
<input type="checkbox"/>	Edit Form	Exit Interview	You
<input type="checkbox"/>	Edit Form	Return To Work - Manager	John Sheridan

The screenshot shows a web application interface for Sage. On the left is a vertical sidebar with a dark grey background and white text links: Homepage, Actions, My Team, My Profile, Work Details, Pay & Benefits, Absence & Time, Performance, Learning, Policies & Forms, Planning Tools, and Hiring. The 'Actions' link is highlighted in green. The main content area is titled 'Return to Work form' in green text. Below the title is a dark green bar with four buttons: 'Previous' (green), 'Save' (green), 'Next' (green), and 'Submit' (grey). The form itself has a light grey background and contains the following fields: 'Name' with the value 'John Sheridan', 'First date of absence' with the value '20/11/2025', 'Last date of absence' with the value '20/11/2025', and 'Reason for absence' with the value 'Sick Leave'. At the bottom of the form area, there is another set of buttons: 'Previous' (green), 'Save' (green), 'Next' (green), and 'Submit' (grey). The window title bar at the top says 'Edit Form'.

## 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.



**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.

The screenshot shows the 'HCM Form Custom Field' configuration page for the 'Absence' object. The page has a header with 'Absence' and a 'Back to HCM Form' link. Below the header is a 'Validation Rules' section with a link to 'View Validation Rules'. The main section is 'Custom Field Definition Detail', which includes tabs for 'Edit', 'Set Field Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section contains a table with the following fields: Field Label (Absence), Field Name (Absence), API Name (Absence\_\_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Lookup Options' section includes 'Related To' (Absence), 'Related List Label' (HCM Forms), 'Child Relationship Name' (HCM\_Forms), and a 'Required' checkbox. A note at the bottom states: 'What to do if the lookup record is deleted? Clear the value of this field.'

The screenshot shows the 'HCM Form Definition' configuration page for the 'Return To Work - Manager' object. The page has a header with 'Return To Work - Manager' and a 'Save' button. Below the header is a 'Form Definition Details' section with the following fields: Definition Name (Return To Work - Manager), Permit New Object (checkbox), Request Prefix (text field), Encodeid (Form), Link Relationship (Absence\_\_c), and VisualForce Page (IHCM2\_form).

# 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).

The screenshot displays the HCM Form Definition interface for the 'Return To Work - Manager' form. The interface is divided into two main sections: a left sidebar for form structure and a right pane for field configuration.

**Left Sidebar (Form Structure):**

- Return to Work form
  - Return to Work form
    - Name
    - Absence
    - LastDateofAbsence
    - Absencereason
    - Return to Work for for Managers
    - Thankyou

**Right Pane (Field Configuration):**

The 'Absence' field is selected, showing its configuration details:

- Name: FirstDateofAbsence
- Title: Absence
- Sub Title:
- Pre Text:
- Prompt: First date of absence
- Question type: readonly (indicated by a blue question mark icon)
- Post Text:

**Bottom Section (HCM Form Definition):**

This section provides a summary of the form definition and linked objects.

**Form Definition Details:**

- Definition Name: Return To Work - Manager

**Linked Object Details:**

- Object Name: HCM2\_Absence\_\_c

**Rules:**

Data	Direction	Field Name	Condition
LastDateofAbsence	Out	HCM2_End_Date__c	
Absencereason	Out	HCM2_Reason__c	
FirstDateofAbsence	Out	HCM2_Start_Date__c	
TMName	Out	HCM2_Team_Member_Name__c	

# 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)



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

Action Event

Alert Emails

EditDeleteClone

Details

Information

Action Event PatternAlert Emails

EventAbsence:Approve

Action Event NameAE0042

Description

Offset0

Offset UnitDays

Email Template

HCM Form DefinitionReturn To Work - Manager

PDF Template

DocuSign Template

Push Notification Alert Message

Overrides

Sent If

If Triggered By Team Member

If Triggered By HR

ConditionISPICKVAL ( fHCM2\_\_Reason\_\_c, "Sick Leave" )

If Triggered By Primary Manager

If Triggered By Any Manager

▼ Recipients

No Email To User Triggering Event	<input type="checkbox"/>	Send To Top Manager	<input type="checkbox"/>
Send To Team Member	<input type="checkbox"/>	Send To One Down Manager	<input type="checkbox"/>
Send To Team Member Home	<input checked="" type="checkbox"/>	Send To Two Down Manager	<input type="checkbox"/>
Send To Manager	<input checked="" type="checkbox"/>	Send To Three Down Manager	<input type="checkbox"/>
Send To Cross Report Manager(s)	<input type="checkbox"/>	Send To Three Up Manager	<input type="checkbox"/>
Send To Direct Reports	<input type="checkbox"/>	Send To Two Up Manager	<input type="checkbox"/>
Send To Cross Reports	<input type="checkbox"/>	Send To One Up Manager	<input type="checkbox"/>
Send To Colleagues	<input type="checkbox"/>	Send To User	<input checked="" type="checkbox"/>
Send To Department Approver	<input type="checkbox"/>	Send To Created By	<input type="checkbox"/>
Send To Work Location Manager	<input type="checkbox"/>	Send To Email Addresses	<input checked="" type="checkbox"/>



# Step 4:

# Flow for Team Member and Concerning Fields

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

**Update Records**

\* Label: Set Team Member and Concerning Values

\* API Name: Set\_Team\_Member\_and\_Concerning\_Values

Description:

\* How to Find Records to Update and Set Their Values

- ☒ Use the hcm form record that triggered the flow
- ☐ Update records related to the hcm form record that triggered the flow
- ☐ Use the IDs and all field values from a record or record collection
- ☐ Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record: None—Always Update Record

Set Field Values for the HCM Form Record

Field	Value
A Concerning	A ...> Employment Record > Team Member > Name
A Team Member	A ...employment Record > Team Member > Record ID

+ Add Field

Flow Diagram:

```

graph TD
    Start([Start]) --> Trigger[Record-Triggered Flow]
    Trigger --> RunImmediately[Run Immediately]
    RunImmediately --> SetFields[Set Team Member and Concerning Values]
    SetFields --> End([End])
  
```

Configure Start

Select the object whose records trigger the flow when they're created, updated, or deleted.

\*Object: HCM Form

Configure Trigger

Trigger the Flow When:

- ☐ A record is created
- ☐ A record is updated
- ☒ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: Formula Evaluates to True

\*Formula:

```

ISBLANK({$Record.fHCM2__Team_Member__c}) && NOT(ISBLANK({$Record.Absence__c})) || ISBLANK({$Record.fHCM2__Concerning__c}) && NOT(ISBLANK({$Record.Absence__c}))
  
```

## 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.Absencer.fHCM2Employmenttr.fHCM2Team\_Member\_\_r.Name}
- **Team Member:** {!\$Record.Absencer.fHCM2Employmenttr.fHCM2Team\_Member\_\_r.Id}



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