



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.

Sage

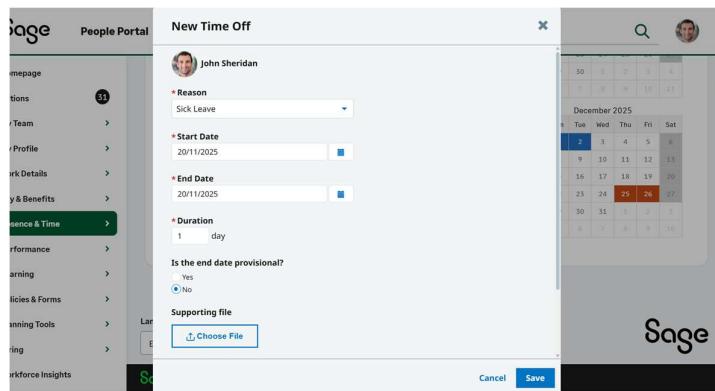
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Overview: User Journey

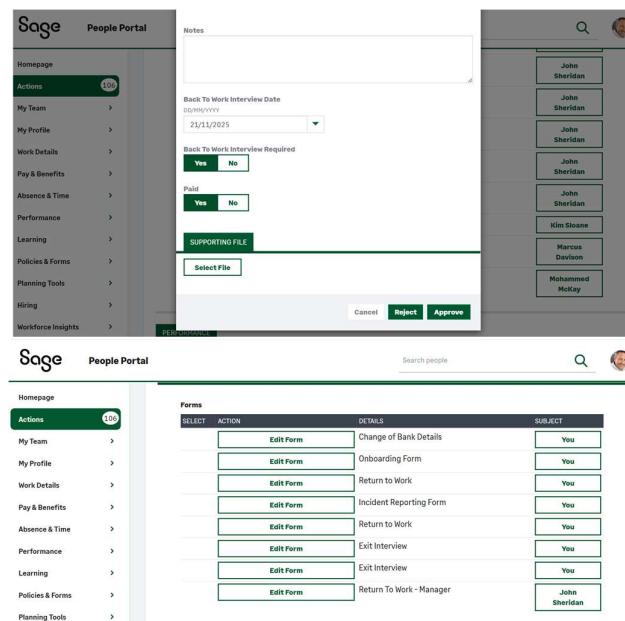
Team Member:

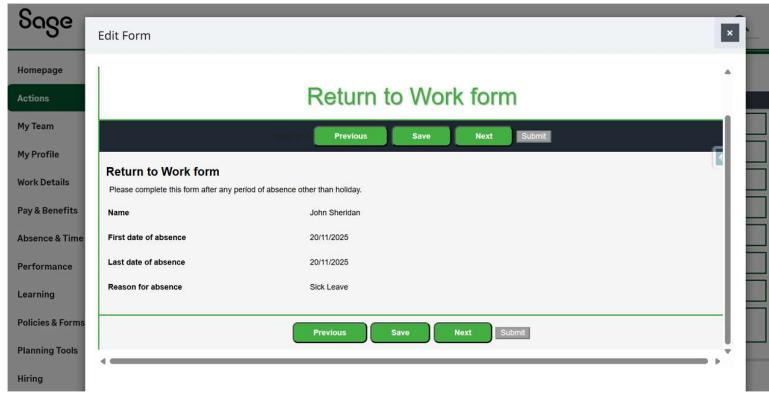
- Books Sick Leave as usual.



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.



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.

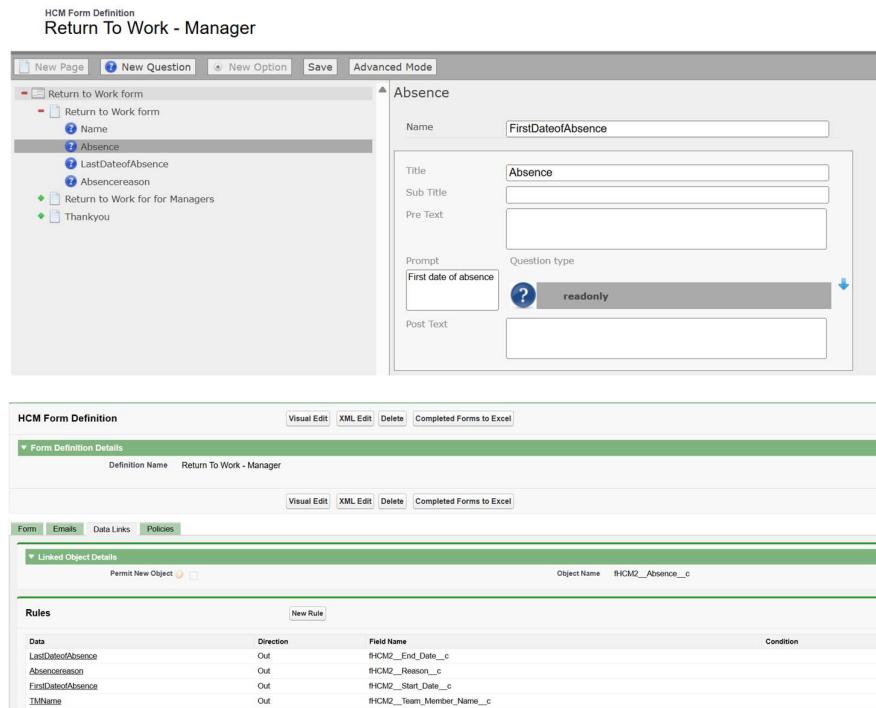
The top screenshot shows the 'Custom Field Definition Detail' page for an 'Absence' field on an 'HCM Form' object. The 'Field Information' section shows the field label 'Absence', field name 'Absence', and API name 'Absence_c'. The 'Object Name' is 'HCM Form' and the 'Data Type' is 'Lookup'. The 'Lookup Options' section shows 'Related To' as 'Absence' and 'Child Relationship Name' as 'HCM_Forms'. The bottom screenshot shows the 'HCM Form Definition' page for a 'Return To Work - Manager' definition. The 'Form Definition Details' section shows the 'Definition Name' as 'Return To Work - Manager', 'EncodedId' as 'Form', 'Link Relationship' as 'Absence_c', and 'VisualForce Page' as 'fHCM2_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 two windows of the HCM Form Definition tool. The top window is titled 'HCM Form Definition' and shows the 'Return To Work - Manager' form. It contains a tree view of questions: 'Return to Work form' (selected), 'Return to Work form' (expanded), 'Name' (radio button), 'Absence' (radio button, selected), 'LastDateofAbsence' (radio button), 'Absencereason' (radio button), 'Return to Work for Managers' (checkbox), and 'Thankyou' (checkbox). To the right of the tree view is a configuration panel for the 'Absence' question. It includes fields for 'Name' (set to 'FirstDateofAbsence'), 'Title' (set to 'Absence'), 'Sub Title' (empty), 'Pre Text' (empty), 'Prompt' (set to 'First date of absence'), 'Post Text' (empty), and 'Question type' (set to 'readonly'). The bottom window is also titled 'HCM Form Definition' and shows the 'Form Definition Details' for 'Return To Work - Manager'. It has tabs for 'Form', 'Emails', 'Data Links', and 'Policies'. The 'Data Links' tab is selected and displays the 'Linked Object Details' for the 'Absence' object. It shows a table of 'Rules' with columns for 'Data', 'Direction', 'Field Name', and 'Condition'. The rules listed are: 'LastDateofAbsence' (Out, fHCM2_End_Date_c), 'Absencereason' (Out, fHCM2_Reason_c), 'FirstDateofAbsence' (Out, fHCM2_Start_Date_c), and 'TMName' (Out, fHCM2_Team_Member_Name_c). The 'Object Name' is listed as 'fHCM2_Absence_c'.

Step 3: Configure Action Event

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

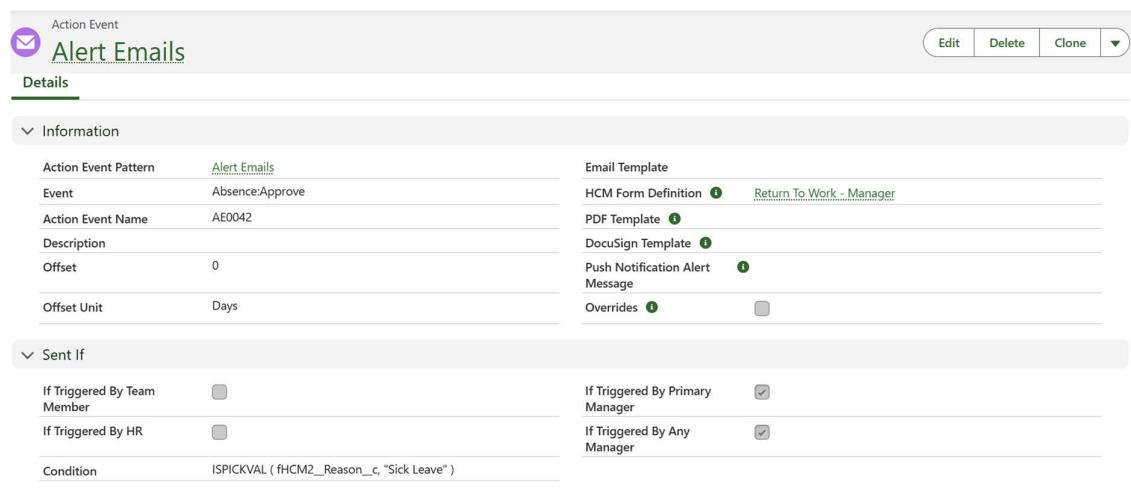
Settings:

- **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)

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



The screenshot shows the 'Alert Emails' configuration screen for an Action Event. The top navigation bar includes 'Edit', 'Delete', 'Clone', and a dropdown menu. The main area is divided into sections: 'Information' and 'Sent If'. The 'Information' section contains fields for 'Action Event Pattern' (Alert Emails), 'Event' (Absence:Approve), 'Action Event Name' (AE0042), 'Description', 'Offset' (0), 'Offset Unit' (Days), and 'Email Template' (Return To Work - Manager). The 'Sent If' section includes conditions for 'If Triggered By Team Member' (unchecked), 'If Triggered By HR' (unchecked), 'If Triggered By Primary Manager' (checked), and 'If Triggered By Any Manager' (checked). A condition field at the bottom is set to 'ISPICKVAL (fHCM2__Reason__c, "Sick Leave")'.

✓ 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 1	<input 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 1	<input type="checkbox"/>

Step 4: Flow for Team Member and Concerning Fields

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

The screenshot shows the Salesforce Flow Builder interface. The flow is titled "Set Team Member and Concerning Values" with API Name "Set_Team_Member_and_Concerning_Values". The "How to Find Records to Update and Set Their Values" section indicates that the flow uses the HCM Form record that triggered it. The "Set Filter Conditions" section shows a dropdown set to "None—Always Update Record". The "Set Field Values for the HCM Form Record" section contains two field-value pairs: "Concerning" is mapped to "Employment Record > Team Member > Name", and "Team Member" is mapped to "Employment Record > Team Member > Record ID". The flow details tab shows the flow was last saved on 20/11/2023, 09:41. The configuration tabs include Start, Trigger, Conditions, and Formula.

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.fHCM2Employmentr.fHCM2Team_Member__r.Name}
- **Team Member:** {\$Record.Absencer.fHCM2Employmentr.fHCM2Team_Member__r.Id}



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