



How to Create a Document Record

Long Term Sickness

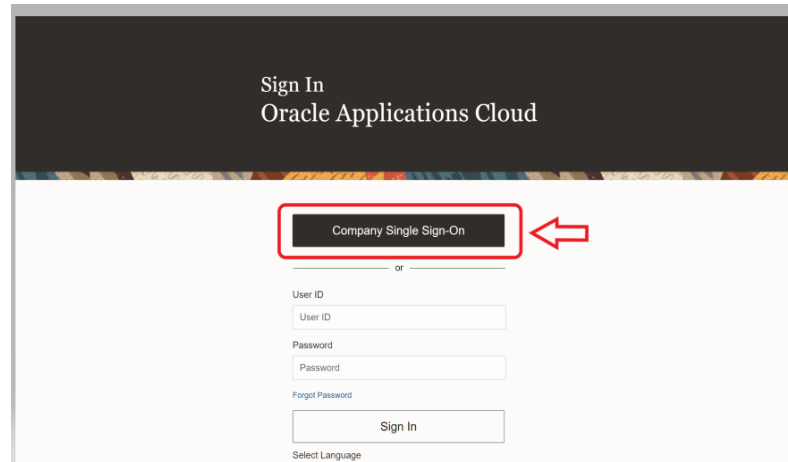
This Guide is for Line Managers

Author	Version	Edit Date
Joanna Pugh	1.0	30/06/24
Sophie Neale	2.0	12/07/24
Sophie Neale	3.0	26/07/24
Jenny Felton	4.0	17/07/2025

**Step
Number**
1

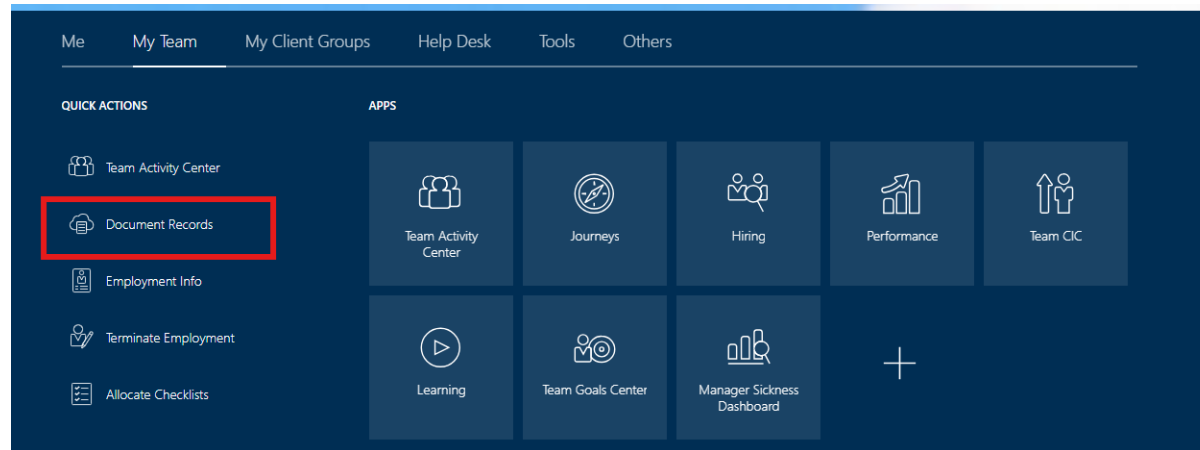
**Step
Description**
Sign into
OneSource.

Step Image



2

Select the My
Team tab and
then Document
Records on the
right-hand side.





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3

Select employee's name

Use either the search function, Click on employees name

Clear filter to show all

4

Select the Add icon

5

Select Long Term Sickness from document type



6

Provide a date for the 1st Welfare Visit if known Provide an update for the Welfare visits in the free text fields

Assignment number is employee number

Document Type
Long Term Sickness

Country
United Kingdom

Category
Absence

Employee Position

Assignment ID
Required

Absence Start Date

Absence End Date

1st Welfare Visit Date

1st Welfare Visit Notes (Max 150 Char)

2nd Welfare Visit Date

2nd Welfare Visit Notes (Max 150 Char)

3rd Welfare Visit Date

Do not exceed 150 characters or the text will disappear when submitted

7

Complete all fields with information

12th Welfare Visit Notes (Max 150 Char)

Step 1(8 weeks) Case Review Date(DD-MM-YYYY)

Step 1(8 weeks) Case Review Notes (Max 150 Char)

Step 2(12 weeks) Case Review Date(DD-MM-YYYY)

Step 3(16 weeks) Case Review Date(DD-MM-YYYY)

Step 3(16 weeks) Case Review Notes (Max 150 Char)

Step 3 Case Review(2) Notes (Max 150 Char)

July 2025

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		



- 14 Add any additional information by dragging files or click to add attachments

Attachments

Drag and Drop
Select or drop files here.

URL

Add URL

- 15 Check the mandatory fields are populated and submit

Cancel Submit

- 16 Add or Update to the Document Record by clicking the three dots next to the document

Long Term Sickness		...
Last Updated Date 17/07/2025 1:24 PM	Attachment Count 0	



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