



Walsall Council

How to Create a Document Record

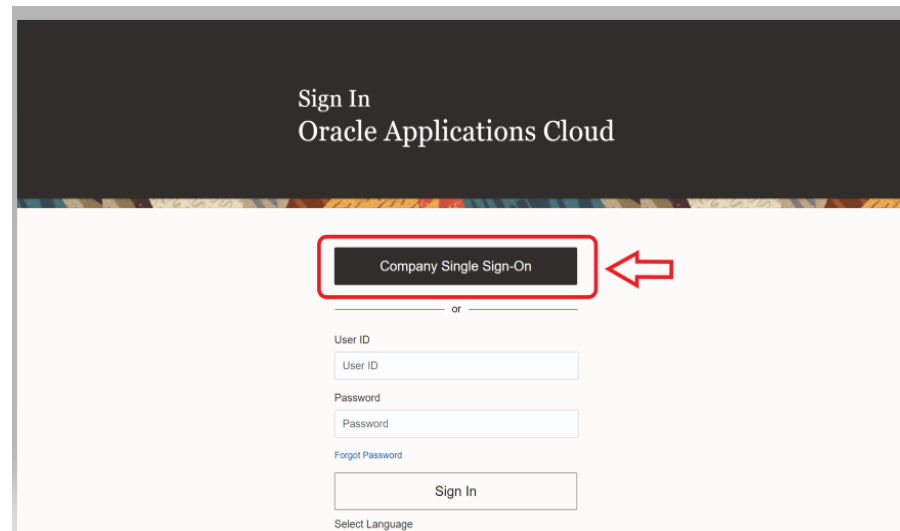
Sickness Certificate

This Guide is for Line Managers

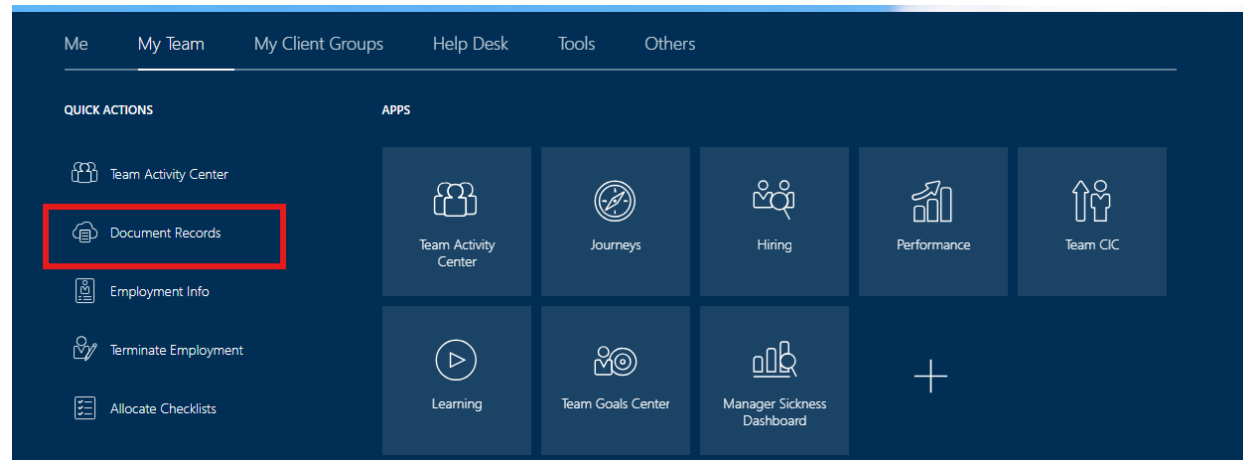
Author	Version	Edit Date
Joanna Pugh	1.0	30/06/24
Sophie Neale	2.0	12/07/24
Sophie Neale	3.0	26/07/24
Jenny Felton	4.0	17/07/2025

Step Number	Step Description
1	Sign into OneSource.

Step Image



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

3

Select employee's name

< Document Records

Search by name, person number, or assignment number

Reports Direct reports X Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (3)

Sort By Relevance

Name	Business Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
Employee Test	Administrator			Active - Payroll Eligible	Employee	

Use either the search function, Click on employees name

Clear filter to show all

4

Select the Add icon

< ET Document Records

Employee Test, Administrator

Search by type, name, or number

Category Excluded Last Updated Type Filters

+ Add

After you add a document record, you can view it here.

5

Select document type using the dropdown box

ET New Document Record

Employee Test, Administrator

Document Type



6

Complete fields
and use
calendar icon to
add dates

ET New Document Record
Employee Test, Administrator

Document Type: Sickness Certificate

Country: United Kingdom Category: Absence

Employee job title Assignment Id Absence Start Date

Absence End Date Certification Type Certificate Reason

First Certificate Start Date First Certificate End Date Second Certificate Start Date

Second Certificate End Date Third Certificate Start Date Third Certificate End Date

Assignment
number is
Employee
number

7

Further details
can be added
into the note
section
underneath the
certificate start
dates

Sixteenth Certificate Start Date (DD/MM/YYYY) Sixteenth Certificate End Date(DD/MM/YYYY) Seventeenth Certificate Start Date(DD/MM/YYYY)

Seventeenth Certificate End Date(DD/MM/YYYY) Eighteenth Certificate Start Date(DD/MM/YYYY) Eighteenth Certificate End Date(DD/MM/YYYY)

Nineteenth Certificate Start Date(DD/MM/YYYY) Nineteenth Certificate End Date(DD/MM/YYYY) Notes (Max 150 Char)

Attachments

Do not Exceed
150 characters
and submit as
your text will be
lost

8

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

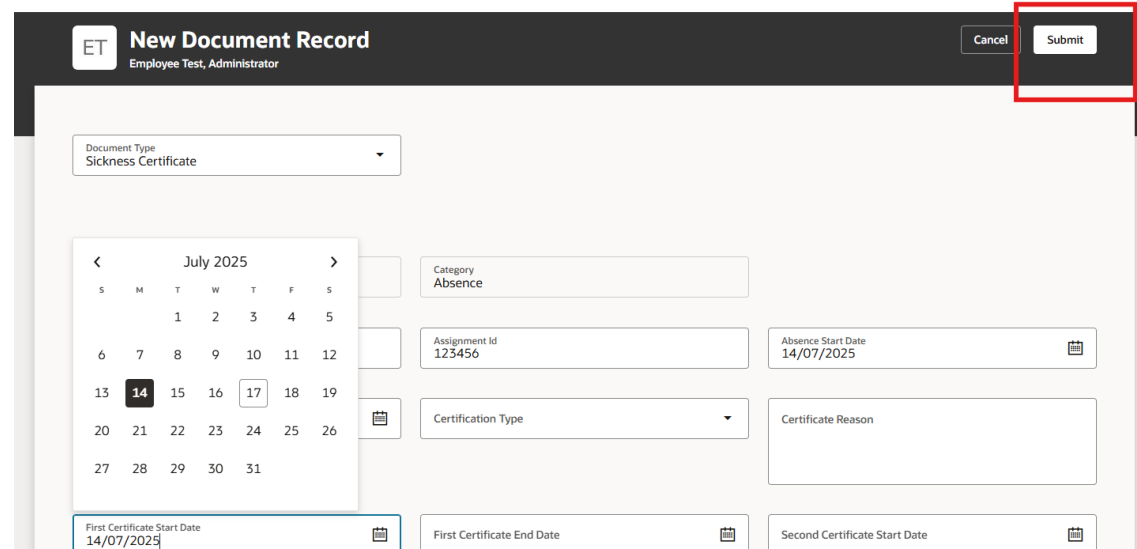
Attachments

Drag and Drop
Select or drop files here.

URL Add URL

9

Select Submit in
the top right



ET New Document Record
Employee Test, Administrator

Document Type: Sickness Certificate

Category: Absence

Assignment Id: 123456

Absence Start Date: 14/07/2025

Certification Type: [Dropdown]

Certificate Reason: [Text Area]

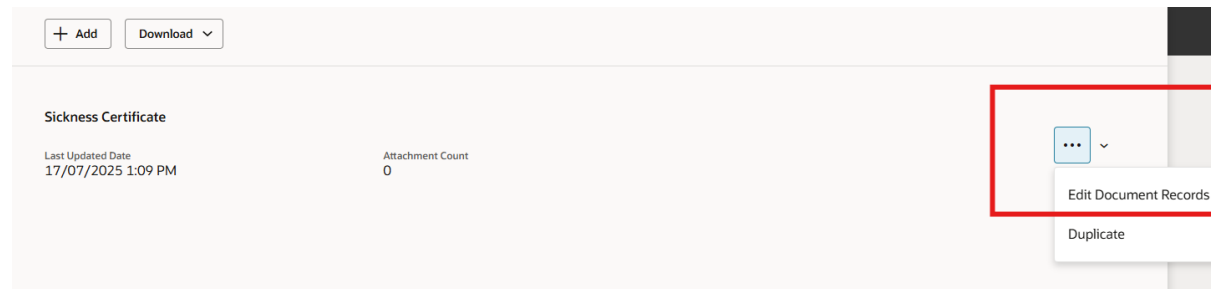
First Certificate Start Date: 14/07/2025

First Certificate End Date: [Calendar Icon]

Second Certificate Start Date: [Calendar Icon]

10

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



+ Add **Download** [Dropdown]

Sickness Certificate

Last Updated Date: 17/07/2025 1:09 PM

Attachment Count: 0

[Three Dots Menu Icon]

- Edit Document Records
- Duplicate



Walsall Council

For more information on OneSource [Visit the OneSource news page.](#)

To Access our [FAQ's](#).

Or Scan this QR code below.

