



# MyPeople User Guide for Managers

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## 1 – Introduction

### 1.1 What is MyView Dashboard?

MyView Dashboard is a web-based self-service system which supports the Council's objective of making processes more efficient and streamlined.

MyView dashboard is available 24/7 via the internet both internally and externally. MyView supports enhance navigation, usability and appearance that can be accessed using all smart devices. MyView can be accessed via desktop browsers such as Google Chrome and Microsoft Edge as well as Safari via iOS devices.

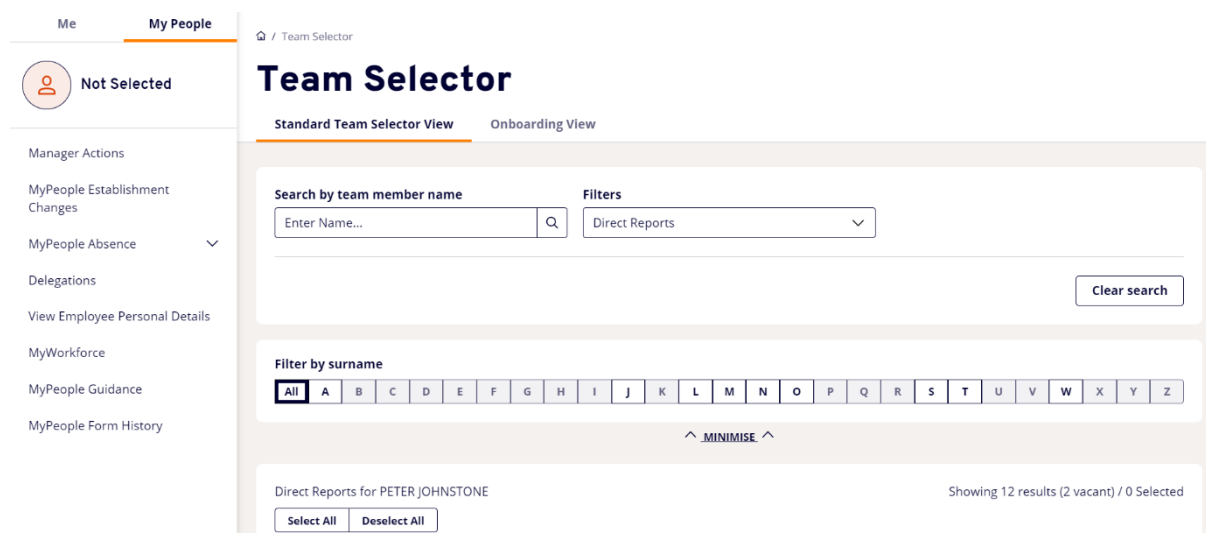
The dashboard supports the self-service functionality of the below:

- Customisable widgets that provide quick access to information
- View and update personal details including manager access to emergency contact details
- View, download and print payslips and P60 statements
- Update vehicle details e.g., Insurance end dates
- Update bank details
- Upload electronic documentation against HR record
- Submit mileage and expenses claims (as well as uploading receipts) including fully integrated experience with Google Maps as part of the process for claiming mileage
- Record, authorise and reject expense and leave submissions (for managers)
- View/submit/delete/approve annual leave and flexi leave requests
- Ability to view authorisation progress across all MyView Dashboard forms
- Access to HR/Payroll data via Reporting Services widgets (reports)
- Submit HR policy forms e.g., Code of Conduct, Vaccinations
- Submit contractual changes via My People Establishment Changes (for managers)
- Provide links to third party systems e.g., MyWorkforce, DLDS
- Undertake delegated MyView duties (submission/authorisation) on behalf of others

**Documentation to support the use of MyView Dashboard / Frequently Asked Questions are available via** the intranet for MyView Guidance Documentation.

## 2 – What is MyPeople?

As a manager, you will have your own set of actions and categories available to you because you have employees directly reporting to you. These actions and categories are available to you on the left-hand navigation menu under the “My People” tab.



The MyPeople module allows managers to:

- Submit and edit several forms of leave for their employees
- View and authorise employee requests/claims
- View real time establishment reports
- Submit various managers forms for employees
- Input/view appraisals dates for employees
- Submit electronic documentation for the employee lifecycle
- Input contractual changes for their employees
- Submit Induction Checklist completion dates for Agency Social Workers
- Create temporary delegated authority and responsibility.
- View Form History for previous requests through MyView for their employees
- View Emergency Contact/Next of Kin Details and Home Address Contact Details for employees.

**Please note:** Managers should refer to the relevant guidance documentation within the intranet for guidance on the manager functionality listed below:

- Leave Management (Sickness Absence and other types of leave)
- Travel and Expenses
- Reporting Services
- MyPeople Establishment Changes
- Onboarding

## 2.1 Accessing MyPeople

The MyPeople module is automatically available to a manager if they have employees reporting to them.

The MyPeople module will be available to managers when accessing MyView Dashboard from outside of the DCC network, but the access to modules will be limited.

If you access MyView Dashboard using Pulse Secure, you will have access to all aspects the MyPeople module as you are accessing the DCC network using the Pulse Secure connection software.

If the MyPeople module is not available to you, it will mean that there are no employees are currently reporting to you. In addition, you may notice that an employee who you manage does not appear within the **'standard team selector view'** and/or an employee whom you do not manage does appear. In these circumstances, please complete the **MyPeople Changes** form, which is available on the **ME** tab, as shown below –

The screenshot displays the MyView Dashboard for a user named PETER, who is a PES Team Leader. The dashboard is titled 'Welcome PETER' and includes an 'Edit dashboard' button. The main content area is divided into several sections:

- My Pay:** A notification states 'You've been paid' with a green checkmark, indicating that the payslip for 28 May is now available. A 'View Summary' button is present. Below this, there are two 'Payslip' cards for 28 May and 30 Apr, with a 'View All Pay Documents' link.
- Leave Balance:** This section shows 'Annual Leave' with a progress bar indicating 34 Days Available and 9 Days Taken. It also shows 'Flexi Leave' with a progress bar indicating -6 Days Available and 6 Days Taken. A 'Request' button is located at the bottom of this section.
- Unopened Docs:** A section showing 1 Unopened Doc.
- Authorisation:** A section showing 2 Expense Claims, with 0 Authorising and 0 Rejecting. A 'Submit' button is located at the bottom of this section.

The left-hand navigation menu includes the following items: Me, My People, PETER (PES Team Leader), Employee Actions, MyMessages, MyView FAQs, Guidance and Support Videos, Employee Payslips, Employee Personal Details, Employee Leave, Create Expenses Claim, Employee Vehicles, Electronic Documentation, and MyPeople Changes (which is circled in red).

If you submit a request to amend reporting lines, the MyView Helpdesk Team will endeavor to update reporting lines as soon as possible. However, we would ask that you allow us two working days to complete your request.

Any amendment to a reporting line will be 'live' as soon as it is made. However, full functionality for the employee within MyPeople may not be available until the next day.

Please don't hesitate to contact the team if you have any queries either via email or telephone: 03000 269 919.

## 2.2 – Navigating MyPeople

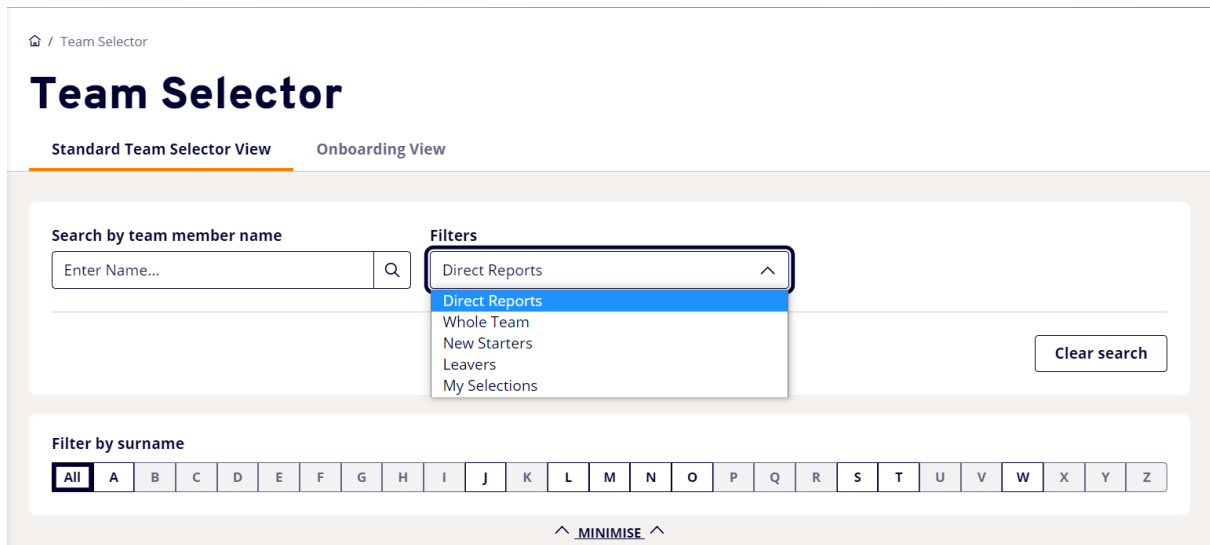
The MyPeople tab dynamically changes depending on whether you have selected employee(s) or not:

- If an employee is not selected, the MyPeople tab contains links to available categories and actions that are relevant to team management activities **e.g., MyPeople Absence, MyPeople Establishment Changes.**
- If an employee is selected, the MyPeople tab shows details of the selected employee, plus links to available categories and actions that are relevant to individual employees **e.g., MyForms, Electronic Documentation.**

The **Team Selector** enables managers to select the relevant employee within MyPeople. Upon displaying the MyPeople tab, the **Team Selector** is automatically displayed. You can perform actions without selecting employees, but these are limited to team management activities.

By default, your direct reports are listed, and you can find employees in several ways:

- Display your whole team instead of direct reports by selecting **Whole Team** from the drop-down list on the Team Selector. You can then filter the selection further by displaying employees reporting to a specific post if you have more than one post, by selecting the appropriate post from the drop-down list beneath the Team Filter.
- Search for an employee by entering all or the initial part of their name (first and/or surname) by using the **Search by team member name** field of the Team Selector. This searches the employees that are contained in the currently selected filter, for example, your direct reports.
- Click on a letter in the Surname filter bar to jump straight to employees whose surname begin with that letter. The Surname filter bar applies to employees that are contained in the currently selected filter, for example, your direct reports. Letters that do not correspond to any employee surnames are greyed out.
- Scroll through the list of employees contained in the currently selected filter, navigating between pages as required.



You can view further details about the employee by clicking their name (or picture if available).

- Click the **Select** button to select the required employee. You can select a different employee if required by clicking the **Select** button against them instead.
- You can select more than one employee by clicking the green plus icon next to the **Select** button of the additional employee.
- You can de-select an employee by clicking the red minus icon next to the **Select** button.
- If you have selected one employee, the name is displayed at the top of the left-hand navigation panel.
- You can filter the list to only display the selected employees by selecting **My Selections** from the drop-down list on Team Selector.
- If an employee is also a manager, then a **Show Reports** button is available. Click this button to show the employee's direct reports (with the employee highlighted at the top of the list). **This allows you to drill down through the reporting hierarchy in your area.**
- At any point when drilling down through the reporting hierarchy you can use the **Back to Peers** which you can click to return to the previous view.
- By clicking on an employee's name, it will open another window displaying their personal details and appointment history.

### 3 – View Employee Personal Details

Managers are now able to view Emergency Contact Details and D.O.B./Home Address Contact Details for the employees they manage.

**All employees are encouraged to maintain/update their Emergency Contact/Next of Kin Details/Home Address details via Employee Personal Details.**

- Within MyPeople, click **View Employee Personal Details**.
- Select the relevant form from the available options

The screenshot shows the 'View Employee Personal Details' page in the MyPeople system. The left sidebar contains navigation options like 'Manager Actions', 'MyPeople Establishment Changes', 'MyPeople Absence', 'Delegations', 'View Employee Personal Details' (highlighted), 'MyWorkforce', and 'MyPeople Guidance'. The main content area has a breadcrumb 'Team Selector / View Employee Personal Details' and a heading 'View Employee Details'. Below this, there are two links under the 'Processes' section: 'View Emergency Contact Details' (circled in red) and 'View D.O.B./Home Address Contact Details'.

- Select the relevant employee. Click on the plus sign to expand on the employees that report to the manager. To 'roll up' the display of employees, click on the minus sign. Once you have selected the correct employee, click **Next**.

The screenshot shows the 'View Emergency Contact and Next of Kin Details' page. The left sidebar is the same as in the previous screenshot. The main content area has a heading 'View Emergency Contact and Next of Kin Details'. Below this, there is a 'Search' section with a 'Search for Employee' button. Below the search section, there is a table with the following data:

| Employee Name         | Employee Number | Post                  | Employee Information  |
|-----------------------|-----------------|-----------------------|-----------------------|
| JOHNSTONE PETER MR    |                 | PES Team Leader       |                       |
| <input type="radio"/> |                 | Assistant PES Officer | Leaving on 03/09/2021 |

- After selecting **View Emergency Contact** you would click on **Close Contact** and then click **Cancel** to return to the 'View Employee Personal Details' page. Click **Team Selector** to return to the standard Team Selector view.
- After selecting **View Home Address Contact Details** click **Cancel** to return to the 'View Employee Personal Details' page. Click **Team Selector** to return to the standard Team Selector view.



## 4 – Employee Health, Safety and Wellbeing Induction Checklist

Within **MyPeople** select the relevant employee on **Team Selector**. The option for **MyPeople MyForms** will appear on the left-hand side toolbar. When **MyPeople MyForms** is selected the categories of MyForms will appear. The manager should then select **Manager Forms**.

The screenshot shows the 'Team Selector' interface. On the left, the 'Manager Forms' option is selected in the sidebar. The main content area has a search bar for team member names and a filter dropdown set to 'Direct Reports'. Below this is a 'Filter by surname' grid with letters A-Z, where 'K' is highlighted. Underneath, it displays 'Direct Reports for ALEXANDRIA LEWIS' with 'Select All' and 'Deselect All' buttons. At the bottom, a card for 'LOUISE KERRY' is shown with a 'Select' button circled in red.

In the **Manager Forms** section, there will be a form for **Health, Safety and Wellbeing Checklist**. To open this form, click **Start**.

The screenshot shows the 'MyPeople MyForms' interface. The left sidebar has 'Manager Forms' selected. The main content area displays four form cards: 'COVID Vaccination Declaration', 'Employee Flu Vaccination Declaration', 'Health, Safety and Wellbeing Induction Checklist', and 'Leaver Checklist'. The 'Health, Safety and Wellbeing Induction Checklist' card is circled in red, and its 'Start' button is highlighted.

The form is pre-populated with the current post for the employee that has been selected. Once the form has been completed, click **Submit**. The option to **Save** can be used to return to the form to complete later.

The screenshot shows the 'Health, Safety and Wellbeing Induction Checklist' form. The breadcrumb trail is 'Team Selector / Manager Forms / Start Health, Safety and Wellbeing Induction Checklist'. The user is Louise Kerry, PES Support Officer. The form has a 'Job Title' dropdown menu with 'PES Support Officer' selected. Below this is a section for 'Emergency Evacuation Procedure' with the text 'Is the member of staff aware of:'. At the bottom, there are 'Clear', 'Save', and 'Submit' buttons. A sidebar on the left lists 'Manager Actions' including 'MyPeople MyForms', 'Manager Forms', 'Code of Conduct Forms', 'Employee Appraisals', 'Employee Training History', 'Delegations', 'Employee Electronic Documents', 'MyWorkforce', and 'MyPeople Guidance'.

When the form has been submitted, this will show as **Authorised**. The employee will be able to see the completed form on their **Form History** in MyView. Alternatively, if the employee does not have access to MyView the manager can **Download** the form to provide the employee with a copy. If the form is completed incorrectly, the manager can contact MyView to remove the form from the employee's record.

The screenshot shows the 'Health, Safety and Wellbeing Induction Checklist' form in the 'MyPeople Form History' section. The breadcrumb trail is 'Team Selector / MyPeople Form History / Health, Safety and Wellbeing Induction Checklist'. The user is Louise Kerry, PES Support Officer. The form is marked as 'Authorised' with a green checkmark. Below this is a progress bar labeled 'Authorisation Progress' with a green line and a checkmark. The form includes a 'Job Title' dropdown menu with 'PES Support Officer (0075272)' selected. At the bottom, there is a 'Download' button highlighted with a red circle. A sidebar on the left lists 'Manager Actions' including 'MyPeople MyForms', 'Employee Appraisals', 'Employee Training History', 'Delegations', 'Employee Electronic Documents', 'MyWorkforce', and 'MyPeople Form History'.

## 5 – Authorisations

The requests pending authorisation are displayed in the Authorisations widget on the Dashboard. You can open a pending authorisation to view further details. You can authorise and reject authorisations directly from this widget too.

If you have requests awaiting authorisation you will have received an email from Resourcelink asking you to log into MyView Dashboard to authorise the request.

All authorisation requests need to be actioned before the request is automatically rejected back to the employee, who will then need to resubmit via Form History (Mileage/Expenses = seven calendar days, Annual/Flexi Leave = thirty calendar days).

To view/authorise requests pending authorisation:

- Click on the request for which you would like to view further details to display the form.
- If you are happy to authorise the request, you can add any notes in the 'Authorisation/Rejection Notes' section before clicking **Authorise** or **Reject**.

The screenshot displays the 'July Mileage' form for Carly Smith. The interface includes a sidebar with navigation options like 'Employee Actions', 'MyMessages', and 'MyView FAQs'. The main content area shows the form details, including a progress bar for 'Authorisation Progress', a table of claims, and a section for 'Authorisation/Rejection Notes'. A 'Your Expense Claim' summary is shown on the right side of the form.

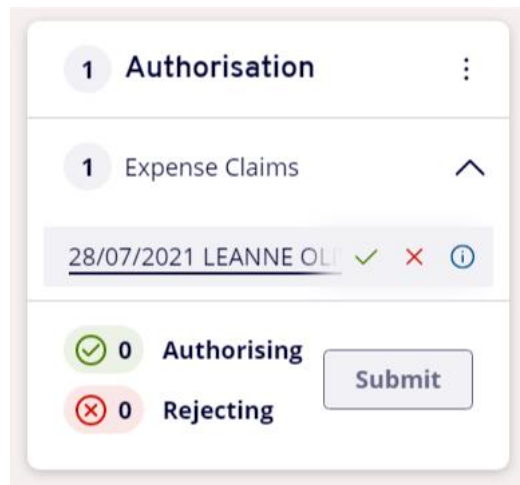
| Date of Claim | Group                   | Type | Value |
|---------------|-------------------------|------|-------|
| 20/07/2021    | BUSINESS MILEAGE CLAIMS |      | 23    |

After the request is authorised or rejected it is removed from the list of requests pending authorisation.

**If you reject a form, you should include sufficient text so that your member of staff understands the reason why the form was rejected.**

## 5.1 Quick Authorisation

If you hover over the request form name, you have the option to quickly authorise/reject the request without opening the request form to view the details.



- If you select the information icon, you can bring up summary details of the authorisation request.
- If you select the green tick or the red cross icon, you will then be able to click **[Submit]** to action the request. A further message will ask you to confirm the authorisation/rejection.
- A confirmation message will then appear. Click **[OK]**.

## 5.2 Authorising Mileage and Expense Claims

You can choose to authorise the whole expenses claim (as described above) or authorise just part of the claim.

To view/authorise a claim pending authorisation:

- Click on the request for which you would like to view further details to display the claim form
- If you want to authorise/reject the whole claim, you can add any notes in the 'Authorisation/Rejection Notes' section before clicking **Authorise** or **Reject**.

**Alternatively, you can authorise just part of the claim rather than having to reject the whole claim if there is an issue with individual line(s).**

- If you select the green tick or the red cross icons you can authorise/reject each individual line of the claim.
- If actioning a claim on a line by line basis, you will need to select an action for each line of the claim otherwise you will receive the error message **"You must select an action for each line"**.
- If authorising/rejecting part of a claim, you have the option to include separate authorisation and rejection notes.

- You will then click **Submit** to confirm authorisation/rejection of the selected claim lines.
- Alternatively, rather than actioning each line of the claim, you still have the option to **Authorise All** or **Reject All** lines of the claim.

**Please note:** Ensure that business mileage and excess travel/disturbance mileage have been claimed accordingly.

### *5.2.1 Checking Receipts*

You are reminded to check that appropriate VAT and expenses receipts have been attached to the claim.

**Receipts can be attached to the claim header (e.g., VAT receipt covering the whole claim) or against each individual line of a claim (e.g., an expenses receipt).**

If the claimant has attached a receipt, it will be shown against the claim header/line. This will appear as a hyperlink for you to click to open the attachment, which will open in a new window.

### *5.2.2 Claim Warning Messages*

The Mileage and Expenses Module has limits on expenditure types that will generate the warning message “There are warnings in this claim” when someone tries to claim over the warning limit.

**MyView will not automatically block a claim that is above the set amount. It is the manager’s discretion as to whether to authorise/reject the claim.**

**Please note:** Managers are encouraged to take additional consideration of claims made outside of a three-month period (90 days) of incurring the expenditure, particularly if there is a valid reason for the delay (e.g., long term sickness). An excessive workload is not an acceptable reason for failing to submit a claim within the desired timescale.

## *5.3 Authorising Leave Requests*

If your direct reports have access to book their leave requests via MyView, you will be able to authorise these requests via MyView Dashboard.

You have access to relevant guidance for this module via the intranet MyView Guidance documentation page under **Holiday, annual leave and flexi leave** as well as a video link to show the process.

If you have any queries on this process, please don’t hesitate to contact the MyView Helpdesk on 03000 269919.

## 6 – Employee Form History

You can view forms that have been submitted onto an employee's current post holding via **MyPeople Form History**. Within MyPeople Team Selector, click **Select** against the relevant employee. Click **MyPeople Form History** from the left-hand navigation panel to view the Form History relating the employee's current post holding.

This will bring up an unfiltered Form History for the selected employee's current post holding. You will need to select the relevant **Event Filter** and **Status Filter** to navigate to the relevant forms that you would like to view for that employee's current post holding.

Click on the form name under **Description** to open the relevant form. Alternatively, click on the downward arrow icon to display a summary of the form.

The form includes a section called **Authorisation Progress**. Click on the green/orange icon to view authorisation status details. An authorised form will show a green tick whilst a submitted form will show an orange icon.

When clicking either the green or orange icon, further details of the authorisation progress are displayed including who authorised it and date/time.

Once a form has been authorised the status will change from **Submitted** to **Authorised**.

## 7 – MyPeople Establishment Changes

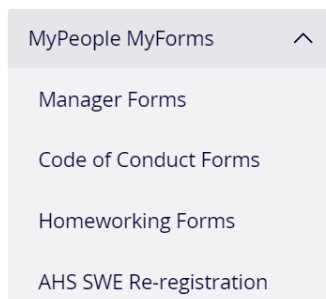
Several contractual changes for employees can now be input through MyView. These changes are in MyPeople Establishment Changes, any employee related changes not available in this module will be accessible in the MyWorkforce option. To view this option on the left hand-side toolbar, please ensure that there are no employees selected on Team Selector.

The screenshot shows the 'My People' section of the application. The left-hand navigation menu includes 'MyPeople Establishment Changes' and 'MyWorkforce', both of which are circled in red. The main content area is titled 'Team Selector' and features a search bar with the placeholder 'Enter Name...', a search icon, and a 'Clear search' button. Below the search bar is a 'Filter by surname' section with a grid of letters from A to Z, with 'All' selected. The interface also shows 'Standard Team Selector View' and 'Onboarding View' tabs.

The relevant guidance for the options available in **MyPeople Establishment Changes**, is located via the intranet for MyView Guidance documentation under **Establishment Changes**.

## 8 – MyPeople MyForms

Managers can input several forms against their employee on MyView. Once you have selected an employee on **Team Selector**, you will see the option for **MyPeople MyForms** appear on the left-hand side navigation panel. Select **MyPeople MyForms** and the relevant category needed.



For example, **Manager Forms** will display forms within the category as below –



You will the need to select **Start** on the form that is needed, which will then display the form to be completed.

### Employee Flu Vaccination Declaration



The Council is required to collect vaccination data (i.e. in relation to the flu jab and covid-19) to monitor the uptake of vaccinations and to allow for the safe return of employees to the workplace once this is possible. This is in line with the Data Protection Act 2018 and the HR and Covid-19 Privacy Notices which can be viewed by following the link attached to this form. However, as with all vaccinations, it remains voluntary for employees to provide this information to their manager. Information collected will be retained for the duration of the Covid-19 outbreak unless there is another lawful basis use the data.

 A screenshot of the "Employee Flu Vaccination Declaration" form. The form has a title "Declaration" and a sub-header "Declaration". It contains a checkbox with the text "I confirm that this employee has received the flu vaccination" and a red asterisk. Below this is a "Vaccination Date" field with a red asterisk and a date input field showing "dd/mm/yyyy" and a calendar icon. At the bottom left is a "Clear" button and at the bottom right is a green "Submit" button with a checkmark.

Once the form is completed, select **Submit**. The new form will then show as **Authorised**.



The screenshot shows a user interface with a green 'Authorised' status indicator at the top left. Below it is an 'Authorisation Progress' bar with two circular markers, the second of which is filled. The main content area is a 'Declaration' form. It features a checked checkbox with the text 'I confirm that this employee has received the flu vaccination' and a red asterisk. Below this is a 'Vaccination Date' field with a calendar icon, containing the date '23/11/2021'. The form is set against a light pink background.

## 9 – Employee Appraisals

Managers may need to input Employee Appraisals against their employee on MyView. Once you have selected an employee on Team Selector, you will see the option for **Employee Appraisals** appear on the left-hand side navigation panel. Once **Employee Appraisals** has been selected, click **Create** to open a new appraisal form for the employee.

You will then be asked to select the **Post** and **Type** of appraisal, then click **Next**. The next stage of the form will ask for the **Completion Date** and **Status** of the appraisal. Once this is completed, click **Submit**.

## 10 - Submit Induction Checklist Completion Date for Agency Social Workers

Managers can record an Induction Checklist Completion Date for Agency Social Workers that they manage. The recording of an Induction Checklist Completion Date only applies to Agency Social Workers. Managers do not need to record dates for DCC employees or any other agency workers.

- Within MyPeople, click **Manager Processes** then click on **Agency Worker Induction Checklist Date**.
- Select the relevant employee. Click on the plus sign to expand on the employees that report to the manager. To 'roll up' the display of employees, click on the minus sign. Once you have selected the correct employee, click **Next**.
- You will be presented with a summary of the employee's Employment History. Click **Next**.

You will then be presented with a form to complete. The following details should be recorded:

- **Change Reason** - select 'Other'
- **Effective Date** - select the same date as the 'Induction Checklist Completion Date'
- **Induction Checklist Completion Date** - record the date that the Induction Checklist was completed.
- Click **Submit**. Select **OK** when asked to confirm submission.
- Click **Team Selector** to return to the standard Team Selector view.

**Please note:** The recording of the **Induction Checklist Completion Date for Agency Workers** should be supplemented by uploading the completed documentation against the worker record. Managers should upload induction checklist documents via the '**Appraisal Documentation**' option within **Employee Electronic Documents**.

## 11 – Employee Electronic Documentation

Managers have access to upload electronic documentation onto an employee's record. This can be done by selecting the relevant employee within **Team Selector**. Once the employee is selected, there will be an option available on the left-hand side panel for **Employee Electronic Documentation**.

The screenshot shows the MyPeople interface. On the left, the navigation menu includes 'Employee Electronic Documents', which is circled in red. The main area is titled 'Team Selector' and contains search filters for team member names and surnames, along with a 'Clear search' button.

The categories that are currently available within Employee Electronic Documentation include –

- Appraisal Documentation
- Attendance Management
- CRM
- Leaver Checklist (view only)
- Reserve Forces
- Employee Vehicle Insurance Documents (view only)
- Armed Forces – CFAV
- Leaver Administration
- Employee Risk Assessment
- Vaccination Evidence
- Medical Exemption Evidence
- Occ Health Surveillance Report
- Schedule 2 Documentation
- Domestic Abuse Checklist

To upload a new document, select the relevant category that is required with **Employee Electronic Documentation** and select **Upload a new document**.

The screenshot shows a 'Store Tasks' panel with two buttons: 'Refresh document list' and 'Upload a new document'. The 'Upload a new document' button is circled in red. To the right of the panel is a search bar labeled 'Search documents'.

You will the need to **Choose file** and select the relevant **Category** for the document. Once this is done, click **Submit**.

The document will then be uploaded against the employee's record. If required, you can select the uploaded document to access options to View or Download the document.

If an incorrect document has been uploaded, please contact [MyView@durham.gov.uk](mailto:MyView@durham.gov.uk) with the following information for each document:

- Employee Number for the record of which the document needs removing from.
- The category which the incorrect document/document to be deleted is currently stored.
- The full name of the incorrect document/document to be deleted.
- (If applicable) confirmation the document has been re-uploaded to the correct category/correct employee.

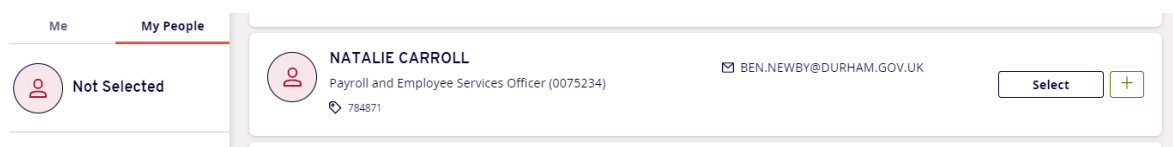
## 12 – Submitting Health Surveillance Documentation for relevant employees (GDPR Regulations)

Some roles in the council require employees to undergo health surveillance by the Occupational Health Service (OHS). When the OHS complete their reports, these are sent to the employee's manager for their information.

OHS surveillance reports should be uploaded to the relevant employee record by the manager via MyView. This is important as the document helps to inform the retention period for the employee's record (also known as a 'personal file') e.g., employee records for staff working with asbestos must be retained for 50 years after leaving.

Once you have logged into MyView Dashboard please select **MyPeople**.

Now select the employee you want to upload documentation against.



Select the **Employee Electronic Documents** action from the left-hand menu.



Select the option for **Occupational Health Surveillance Reports**. Select **Upload a new document**.

Now select the **Choose File** option to locate the scanned surveillance document and choose the appropriate **Occupational Health Surveillance Reports** category.

The screenshot shows a web interface for uploading an Occupational Health Surveillance Report. On the left is a navigation menu with 'Me' and 'My People' tabs. Under 'My People', 'Occ Health Surveillance Report' is selected. The main content area is divided into two sections: 'Store Tasks' and 'System Limits'. 'Store Tasks' contains a 'Cancel upload' button. 'System Limits' shows 'Maximum file size: 200 MB' and 'System storage remaining: 6.81 GB'. The 'File Details' section includes a 'File name' field with a 'Choose File' button and 'No file chosen' text, a 'Category' dropdown menu set to 'Occupational Health Surveillance Reports', a 'Comments' text area, and a 'Submit' button.

Once the appropriate file and category have been selected, please select 'Submit'.

This screenshot shows the same upload form as above, but with a file selected. The 'File name' field now displays 'OHS Surveil...r 2022.docx'. The 'Category' dropdown is still set to 'Occupational Health Surveillance Reports'. The 'Comments' field remains empty. The 'Submit' button is still present.

Once submitted, you can see the document that has been stored against the employee.

## 13 – Delegation of Responsibility and Authority

The delegation module enables managers to delegate responsibilities and authorisations to another individual – this could be a member of your team, or your manager at the next level.

For example, a manager may be going on holiday and wants to delegate expenses authorisations to another employee while they are away.

**Leave Management responsibilities cannot be delegated.** Your Line Manager is automatically set up to enter absences for your team when you are out of the office or not able.

**Please note: Before setting up a delegation rule, you should consider whether this is necessary or whether your team can wait for authorisation until you return to the office.**

There are two types of delegation rule:

- Authorisation – gives a delegate ability to authorise (Expenses)
- Responsibilities – gives a delegate ability to enter (Appraisals)

In MyPeople, click **Delegations** from the left-hand side navigation panel. Select **Add New** to create a new delegation and complete the relevant fields.

- **Rule Type** – You will then need to choose whether the delegation is for Authorisation or Responsibility
- **Description** – This should include the name of the individual or team that the delegation covers e.g., 'Delegation to Joe Bloggs'
- **Delegate To** – Click **Search** to find the individual to you are delegating the responsibility. Once the criteria have been inputted, click **Search** to display results. Select the required delegate and then click **Continue**.
- **Delegate For** – Click **Select** to choose the relevant employee and then click **Continue**.
- **Module/Process Group/View** – Click **Select** to choose the modules that you wish to delegate then click **Continue**.
- **Delegation Period** – Enter '**From Date**' and '**To Date**' for the delegation and click **Submit** to save the delegation rule.

A confirmation message is then displayed before returning to the delegation module where the delegation should now be shown at the bottom of the page.

### 13.1 Editing/Deleting a Delegation Rule

Delegation rules that you have created are listed in the Delegation section, which can be viewed, amended, and deleted as required. A delegation rule can only be deleted by the employee who created the rule.

To view, amend and delete a delegation rule:

- Click the description of the delegation rule that you want to amend to redisplay a view-only Delegation of Authority form
- Click **Edit** once the delegation has opened. If you want to delete the delegation rule, you can click **Delete** once you are in edit mode.
- After making any necessary amends, click **Save** to save the delegation rule changes.

## 14 – Permanent Working from Home Requests

Managers are now able to authorise / reject permanent home working applications submitted via MyView. Employees are encouraged in the first instance to have a discussion with the manager prior to submitting the form. For further information regarding permanent home working please refer to the Ways of Working Policy located via the intranet.

The application will require authorisation from the direct line manager and strategic manager, email alerts will be generated at each authorisation level to communicate the outcome of the request.

If an application has been submitted the manager will be notified via an email alert to log into MyView and review the form. **Please note:** the manager will have 30 working days to review the form before auto rejection by the system:

*“Dear Manager,*

*A permanent homeworking application has been received from <EMPLOYEE NUMBER> (FORENAME SURNAME).*

*Please log on to MyView Dashboard to authorise/reject this application.*

*Please review and consider the application against the set criteria as identified in the Ways of Working Policy (section 2.4) in addition to past performance of the employee and suitability.*

*Please consider the application within 30 working days. You should ensure that the rationale for approving or rejecting the application is made clear and in accordance with the policy.*

*Where applications are approved, the employee and manager will be notified, and the direct line manager will then be required to complete the home working agreement form.*

*Where applications are refused, the employee will be informed of the outcome via MyView outlining their application did not meet the required criteria and direct the employee to the direct line manager to discuss further if required.*

*You are reminded that if the request is not authorised within 30 calendar days it will be automatically rejected and returned to the employee.*

*If you require any support or guidance on assessing the application, please contact HR Advice and Support.”*

The manager will continue to receive email alerts every 7 days as a gentle reminder until the 30 working days have exceeded:

*“Dear Manager,*

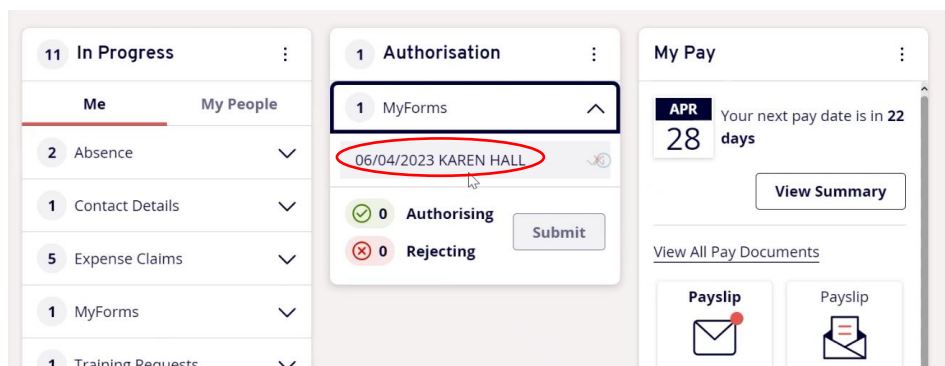
*Just a gentle reminder regarding the permanent homeworking application received from <EMPLOYEE NUMBER> (FORENAME SURNAME) for your consideration.*

*Please log on to MyView Dashboard to authorise/reject this application via MyView.*

*Please review and consider the application against the set criteria as identified in the Ways of Working Policy (section 2.4) in addition to past performance of the employee and suitability.*

*If you require any support or guidance on assessing the application, please contact HR Advice and Support.”*

On logging into MyView the form will be visible via the **‘Authorisation’** widget located on the dashboard (for more information around authorisations, please refer to section 5):



Select the form to review the information. The form includes an **‘Outcome’** section which the manager is required to add notes for the approval / rejection. The employee will be alerted via email of the outcome and will be able to review the status notes.

If the manager has authorised the form this will then move on to the strategic manager to review. The manager will be notified via an email alert of the outcome once the form has progressed to the next authorisation level:

If a form has been rejected at strategic manager level the direct line manager will receive the below email alert:

*“Dear Manager,*

*Further to the permanent homeworking application from <Employee Number> (EMPLOYEE FORENAME SURNAME), the request has now been considered by your Strategic Manager and has been refused due to not meeting the required criteria as outlined in the Ways of Working Policy (section 2.4).*

*Please refer to the form history in MyView to view the status notes concerning the application outcome.*

*The employee has been notified of the outcome and has been advised to contact you to discuss further should they wish.*

*If you require any support or guidance, please contact HR Advice and Support.”*

If the form has been approved at strategic manager level the manager will receive the below email alert:

*“Dear Manager,*

*Further to the permanent homeworking application from <Employee Number> (EMPLOYEE FORENAME SURNAME), the request has now been considered by your Strategic Manager and has been approved.*

*Please refer to MyPeople Form History in MyView to view the status notes concerning the application outcome.*

*You are now required to complete the home working agreement form in conjunction with the employee via MyView.*

*You will be required to confirm the date when the employee’s permanent homeworking commences. Please refer to the Ways of Working policy to the following points as a reminder to note/action:*

- *Give advanced notification of forthcoming dates/times required for workplace attendance (if known) i.e. team meetings / training / induction of new starters etc*
- *Agree/note home working arrangements should be reviewed and monitored as part of regular one2ones and PDRs, including the employee’s health, safety, and wellbeing considerations*
- *Inform other team members of the employee’s permanent homeworking arrangements*

*The employee has been advised to familiarise themselves with the Ways of Working Policy regarding their responsibilities including DSE risk assessments and property and insurance.*

*Once the agreement form has been submitted via MyView – their HR record will be updated to reflect they are now a permanent homeworker and will be issued a contract variation in due course.*

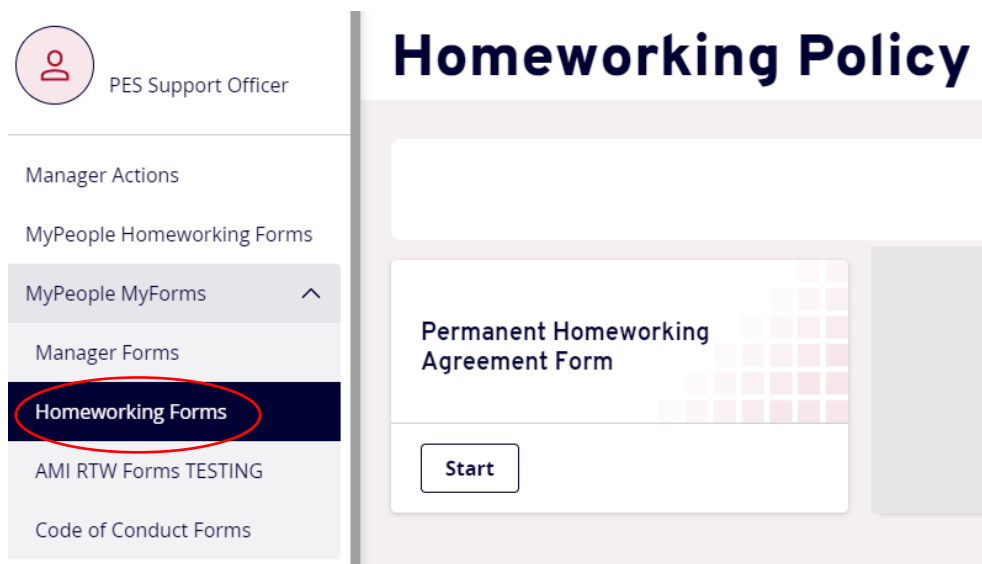
*If you require any support or guidance, please contact HR Advice and Support.”*

#### 14.1 – Permanent Home Working Agreement

If an application has passed through all required authorisation levels the manager will be required to submit the agreement with the employee.

Within **‘Team Selector’** select the relevant employee and **‘MyPeople MyForms’**. From the drop down select **‘Homeworking Forms’** and you will be presented with the Permanent Homeworking Agreement Form.





Select start to open the form and enter the required details before submission. The form will require a confirmed start date of the homeworking agreement, this will be the date provided within the contract variation to the employee by Payroll & Employee Services.

The form will require the following details:

- **Core Working Hours** – The agreed/general hours the employee will work
- **Responsibilities** – Responsibilities of all parties have been clarified and discussed (as detailed in the Ways of Working Policy).
- **Health & Safety** – A DSE Risk Assessment has taken place (date required), and information of follow up actions.
- **Objective & Performance Indicators** – Details to be provided.
- **Communication/Attendance in the Workplace** – Agreed methods of communication/how frequently this will take place. Details of any mandatory face to face meetings.
- **Lone Working** – If applicable, what process has been put in place to deal with lone working situations, homeworkers should have a specified contact whom they provide details of visits.
- **ICT** – Has the employee got a suitable workplace set up (sufficient broadband and connectivity).
- **Additional Checks**
- **Declaration**

## 15 - Help and Guidance

If you require any further advice or guidance on MyView Dashboard, you can refer to the 'Help' section. Alternatively, you can visit the intranet page for MyView Guidance documentation.