

## HR21 Employee & Manager Self Service

## **Employee User Guide**

HR Services July 2019 – Version 18

Data Label: OFFICIAL

#### Contents

- 1. WHAT IS HR21
- 2. PASSWORD PROTECTION
  - 2.1 Password Rules
  - 2.2 Password Expiry
  - 2.3 Locked Accounts/Password Resets
- **3.** GETTING STARTED
- 4. WHAT YOU CAN SEE AND DO
  - **4.1** Changing your name
  - 4.2 Changing your address and

4.2a Emergency Contact details

- 4.3 Submit a Claim for Overtime
- 4.4 Submit a Claim for Mileage4.4a Submit a Claim for Expenses
- 4.6 View and Print a Print Payslip

4.6a View and print your P60

- 4.7 View your Payroll Record
- 4.8 View your Leave Record
- **4.9** View your HR Record
- 5. HOW TO EXIT HR21

#### 1. WHAT IS HR21

HR21 is a secure online system which will allow you to view and update your personal HR information held in the council's HR and Payroll system. This means that you can be sure that important HR information about you is always up to date.

You can also view basic job related information including payments made to you and submit an electronic request for any mileage and expenses incurred to your manager for approval. If you do not have access to the overtime facility, please continue to submit overtime in the format you use now. There is an online help function and relevant user information provided on each screen.

Details	Manager	Employee
Personal details	View	Update
Home address and contact details	View	Update
Emergency Contact details	View	Update
Current position details	View	View
The grade of your current post	View	View
Allowances paid to you	View	View
Previous payments		View
Bank Account details		View
Your tax code		View
Salary paid to you		View
Deductions from salary		View
Your pension contribution rate		View
Pay adjustments		View
Payslip		View/Print
2019 - P60		View/Print
Sick Leave	View	View
Maternity / Paternity leave	View	View
Leave for family care purposes	View	View
Overtime claims (if applicable)	Authorise	Update
Mileage and Expenses claims	Authorise	Update
Licence & Cert. Details	Add/Update	View

#### 2. PASSWORD PROTECTION

Employee Self Service is designed with security and accessibility in mind.

#### 2.1 Password Rules

All passwords must contain at least 8 characters and a mix of alphabetical letters and must end in a number.

#### E.g. Selfservice99

Users can change their password whenever they wish, however passwords are only valid for 60 days and you are unable to re-use previous passwords.

Please Note: Special characters are no longer required in the password construction

#### 2.2 Password Expiry

The system will notify you in advance of your password expiring. A message will be displayed when you log in. "Password has expired" – You must repeat the old password in the pink box then create a new password" – Access has been denied". You must enter your old password in pink box before creating a new password. Your old password is the password sent by HR21Queries.

#### 2.3 Locked Accounts

If an incorrect password is entered a message advising you of this is shown and after three attempts you will be locked out of the system.

If your account is locked any requests for unlocks should be emailed to HR21 helpdesk at: <u>Hr21queries@westlothian.gov.uk</u> and your account will be unlocked.

#### Self Service password resets

You can reset your own password in HR21.

Click on HR	<u></u>	
	INVESTORS Gold Recogned for working	West Lothian Council
	Login	
	Login ID Password Enter Contact Hs if you have forgotten your password.	

Enter your login ID (Employee number) – click ok

Reset Pa	ssword
Login ID	
ок	Cancel

#### Message appears



		West Lothian Council
	Login	
	Login ID Password Enter	
Employee and Manager Self Service	<u>Version</u>   Copyright © 2018 Frontier Software, All rights reserve HR & Payroll Solutions - Software / Services   <u>unvx.frontiersoftwa</u>	d. Frontier

Copy/paste password sent by email from HR21 Queries into white box.

This is the screen which will appear when you have entered the password in the white box (emailed by HR21 Queries), before you create a new password you must re-enter your **old** password in the pink box. (Passwords received by email from HR21 Queries are always your "old password")

	Login	
Before enter new password you must enter your old password again in pink box	Login ID       BRE017:Password expired - You must repeat the old password in the pink box then create a new password BRE103:Access has been denied.         Password       Enter         Contact HR if you have forgotten your password.	
Employee and Manager Self Service	Version   Copyright © 2013 Frontier Software, All rights reserved. HR & Payroll Solutions - Software / Services   <u>www.frontiersoftware.com</u>	r

#### 3. GETTING STARTED

You can access HR21 through the Council's Intranet or Google Chrome - HR21, or by going to <u>https://hr21.westlothian.gov.uk/</u>

## Please note that the system can only be accessed from a PC connected to the council network.

When you are first set up on the system you will receive an email with one time password to allow you to access the system from HR Services

All employees have their own unique user id, which is their **employee number** and you will be asked to create a password when first accessing the system.

This is the screen which will appear when you have entered the one time password issued by HR, before you create a new password you must re-enter your old password in the pink box. (Passwords received by email from HR21Queries are always your "old password")

		Login	
	Before enter new password you must enter your old password again in pink box	Login ID       BRE017:Password expired - You must repeat the old password in the pink box then create a new password         Password       BRE103:Access has been denied.         New Password       Enter         Contact HR if you have forgotten your password.	
HR	Employee and Manager Self Service	<u>Version</u>   Copyright © 2013 Frontier Software, All rights reserved. HR & Payroll Solutions - Software / Services   <u>www.frontiersoftware.com</u>	Frontier

Once logged in, your details will appear in the tool bar.

**Do not use the back button**, to navigate through screens as this will lock you out of the system. To go back to a previous screen, click on <u>*Previously Visited Pages*</u>.

There is an online help function and relevant user information provided on each screen.

If an incorrect action is performed an Error message will show. It is advisable to clear these messages after each incorrect action by clicking on Clear button. Some fields are mandatory and an error message will appear if missed.

This is the navigation screen, allowing you access to all areas of the system:



#### 4. WHAT YOU CAN SEE AND DO

#### 4.1

Changing your nameSelect the Details option under HR on the drop down menu

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Previously Visited Previously Vi	ages		etails	
Employ Self Se	ree and Manager rvice	Equal Opportunitie <u>Site Map</u> HR & Pay	<sup>15</sup>   <u>Version</u>   Copyright © 2018 Frontier Software, All rights r roll Solutions - Software / Services   <u>www.frontiersoftware.</u>	com Frontier

- Input your new name, marital status and date of change
- Click Save •

	STORS DUNG PLE	INVESTORS Gold	EFQM Recognised for excellence 5 star - 2016	Living Wage English		West Lothian Council
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Staff Member 3	Title Mrs Surname & Initi	als Test T M First Nan	ne <b>Tester</b> Date Joined	31/07/1989 Position Se	ction Leader	MC
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		<u>Refresh</u> Add <u>Ver</u>	ify <u>Save</u> Delete	Notes Attach Pri	<u>nt Help</u>	
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Second Name	Tester					
Surname	Test					
Preferred Name			-			
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Marital/Civil Status	Married	×	Marital Status Dat	4/07/20	18	
Employee and Self Service	d Manager	Site Map   Version   Co HR & Payroll Solutions	opyright © 2018 Frontier - Software / Services   <u>s</u>	Software, All rights reserve www.frontiersoftware.com	d.	Frontier

#### 4.2 Changing your address and Emergency Contact Details

If you move it is important that you advise us of your new address.

• Select the Addresses option under HR on the drop down menu

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- In Address Type choose Current Home Address
- Over key new address on address shown on screen
- Enter Date of change
- Click Save

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CURRENT HOME ADDRESS		18 Version Front	ier	Upgra	de						

Personal mobile numbers and email address can also be added

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#### 4.2a Emergency Contact Details

Staff are requested to provide the Council with emergency contact details and is expected to keep these up to date. This will allow the Council in the event of an emergency to know who the most appropriate person to contact is.

#### **To add Emergency Contact Details**

- Click Add
- In Address Type choose Emergency Contact Info from drop down list Input the new details
- Enter Date of Change
- Click Save

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#### To update Emergency Contact Details

- In Address Type choose Emergency Contact Info from drop down list
- Over key information already there with new details
- Enter Date of Change
- Click Save

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#### 4.3 Submit a Claim for Overtime (if applicable)

Only normal overtime working can be submitted in HR21. Standby payments / Standby overtime / Call outs and Sleep Ins claims **cannot** be submitted in HR21 and these should therefore continue to be submitted in the format used prior to the introduction of HR21.

#### Arrangements for Payment of Overtime

Overtime at enhanced rates will only apply when 36 hours a week have been worked.

Overtime will only be paid for complete 30 minutes of work.

Employees working overtime must take a break after 6 hours, this break will be unpaid.

Employees graded Band I and over are not entitled to overtime payments.

All claims are submitted and paid a month in arrears and will be processed up to the payroll deadline date for that month. Any claims approved after the Payroll deadline date will be carried forward to the next pay period.

(Payroll deadline dates can be found on My Toolkit and in HR21 under the Options tab)

If an overtime payment does not show in your salary as you expect you should check the status of your claim by selecting Request Enhanced Timesheet from the Payroll drop down menu. If the status of your claim is "Approved" but you have not received the payment this means that it was approved by your manager after the submission deadline and you will receive the payment the following month. Overtime claims which have been processed by Payroll will be visible in Timesheet History.

#### Submitting a Claim for Overtime

To make a claim for overtime select the Request Enhanced Timesheet option from the Payroll drop down menu.

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Employee and Manage Self Service	r <u>Site Map   Version</u>   Co HR & Payroll Solutions	pyright © 2018 Frontier Software, All rights - Software / Services   <u>www.frontiersoftwar</u>	s reserved. e.com

- Click Add to start claim
- **Period End Date** The day you are actually making the overtime claims is the date that should be keyed to Period End Date. E.g. Monday 20th August is the day you are keying your overtime claims in HR21 this is the date that should be entered in "Period End Date". System will only accept claims up to this date.
- **Date Worked** input the date(s) you are claiming overtime for. The system will not allow a duplicate claim to be made i.e. if you already have a claim "Holding" or Requested" with the same dates you will not be able to submit a further claim and the system will not allow the same times within one claim.

- **Pay element** select from the drop down box whether payment is at plain time, time and half or double time.
- Details Input the reason for the overtime working.
- **Time From and Time To** select the appropriate start and finish times remembering to exclude any breaks you have had. Please be aware when clicking on Time To you must choose a time from the drop down list, if a Time To is not chosen it will default to midnight and hours worked will be incorrect.
- If more than six hours overtime has been worked in one day you must key two entries in your claim to show a break has been taken.
- **Cost Centre** When you save your overtime claim this will automatically be charged to your own cost centre you do not have to manually key it. If it has to be charged to different cost centres please do as follows
  - o Click on the box containing 3 dots next to the Cost Centre field
  - The dialogue box that appears contains a full list of cost centres. You have the option to search by code, cost centre or description by selecting the option you wish to use from the drop down list at the top left of the dialogue box
  - After selecting the search option, enter the details of the code, cost centre or description in the search box at the top right of the dialogue box and then double click on cost centre required to update your claim. Pease ensure the correct cost centre is used
  - Please note that not all cost centres are available in HR21 e.g. Capital Budget Codes. If you cannot find the cost centre you require please speak to your manager.

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eriod End equence	25/07/2018						Λ	will
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#### New - Once all details have been completed tick Requested button and then click save



You will receive a message to confirm that your entry has been added successfully and an email will be sent to your inbox, confirming that your claim has been forwarded to your manager for approval.

If you want to save your claim as you may have more entries to enter before you submit it to your manager – Tick Holding and click save

You will receive a further email advising whether your claim has been approved or rejected or declined.

If your claim is rejected you should contact your manager in the first instance to discuss this. If your claim requires to be amended please **amend claim** and resubmit for approval by ticking Requested button and save. **Do not submit a new claim**.

If your claim has been declined by your manager it will be deleted from your view. Please discuss with your manager their reason for declining the claim.

Your manager must approve your claim within the 7 day escalation period (7 day period begins from the date you have submitted your claim and includes Saturday and Sunday) after this time claim will escalate to his / her manager for approval. Any claim approved after the payroll deadline date will be carried forward to the next pay period. (Payroll deadline dates can be found on My Toolkit and in HR21 under the Options tab)

#### Timesheet History

By selecting the Timesheet History option from the drop down menu you can view all overtime claims processed and paid to you in previous salaries.

#### 4.4 Submit a Claim for Mileage

#### Arrangements for Paying Mileage

Before submitting a claim for mileage, you must ensure you are authorised to use your own car for business journeys. You must have a valid Driving Licence / Insurance (which covers Business use) / MOT if applicable; if your car is not eligible for an MOT you must present your car registration document to your manager. As a new user you should also have completed an Own Vehicle Use Authorisation form.

You must present your valid documents to your manager and **only your manager** can update Licence & Details screen in HR21. If there are no documents recorded or if one or all of your documents are no longer valid the system will not allow you to submit a claim.

You can view the status of all of your documents by selecting the Licenses & Cert.Details option from the HR drop down menu. If any of your documents are missing or require to be updated you must present your valid documents to your manager. Only your manager can update Licence & Cert.Details screen. These documents should be reviewed on an annual basis by your manager.

#### Changing Your Car

If you change your car the current insurance document and MOT (if applicable) effectively become invalid. Therefore you must present your new insurance and MOT (if applicable) documents to your manager. If your car is not eligible for an MOT you must present your new car registration document to your manager.

Your manager is required to check and update Licence & Certs.Details screen in HR21 before approving any claims.

Claims for mileage and expenses must be made in accordance with the council's Business Travel and Subsistence Policy which can be found at: http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1665&p=0

## All claims are submitted and paid a month in arrears and claims will be processed up to the Payroll deadline date for that month.

If a mileage payment does not show in your salary as you expect you should check the status of your claim by selecting Mileage Claim from the Payroll drop down menu. If the status of your claim is "Approved" but you have not received the payment this means that it was approved by your manager after the submission deadline and you will receive the payment the following month. Mileage claims which have been processed by Payroll will be visible in Mileage History.

#### Submitting a Claim for Mileage

Select the Mileage Claim option from the Payroll drop down menu

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- Click Add to start a new claim
- **Month Ended Date** enter the last day of the month for which you are claiming mileage, e.g. for a submission for mileage incurred in August the month ended date would be 31/08/2018.
- **Date of Claim** input the date(s) you are claiming mileage for. The system will not allow a duplicate claim to be made i.e. if you already have a claim "Holding" or "Submitted" with the same dates then you will not be able to submit a further claim.
- Claim Reason Must include a detailed account of the purpose of the journey "Meeting" is not sufficient.
- **Business Miles Code** Click on the drop down list and select the appropriate journey. This is the Council's schedule of mileage and should always be used in the first instance

Mileage Claim					×		
DATA LABEL: OFFICIAL-Sensitive							
Claims must be made in accordance with the <u>Business</u> Claim reason must include full purpose of journeys. Sy when making a claim.	Claims must be made in accordance with the <u>Business Travel &amp; Subsistence Policy</u> and the <u>Schedule of Mileages</u> . Claim reason must include full purpose of journeys. Specifying just "Meeting" is not enough. In the first instance the Council's schedule of mileages should always be used when making a claim.						
You must keep all receipts for 6 complete tax years.							
Ref	resh Add Verify	Save Delete	Notes Attach	Print Help			
Month Ending Date 31/07/2018	Se	quence	1				
Date of Claim Claim Reason	Journey From	Journey To	<b>Business Miles</b>	Business Miles Code			
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				[Adale]-[Linlithgow CB]			
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				[Adale]-[Whitburn Cross]			
				[Bburn]-[Bellsquarry]			
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Cost Centr				[BPC]-[Addiewell] [BPC]-[Armadale Acad]	~		
Select your car from the list. If your car is not on the	list-email <u>hr21querie</u>	s@westlothian.gov.u	<u>ik</u>	[BPC]-[Armadale Cross]			
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Registration number							

- Journey From/Journey To Do not key anything in these fields, these will automatically update when the relevant journey is selected from the Schedule of mileages in Business Miles Code field.
- Business Miles Do not key anything in these fields, these will automatically update when the relevant journey is selected from the Schedule of mileages in Business Miles Code field.

- **Cost Centre** When you save your mileage claim this will automatically be charged to your own cost centre you do not have to manually key it. If it has to be charged to different cost centres please do as follows
  - Click on the box containing 3 dots next to the Cost Centre field
  - The dialogue box that appears contains a full list of cost centres. You have the option to search by code, cost centre or description by selecting the option you wish to use from the drop down list at the top left of the dialogue box
  - After selecting the search option, enter the details of the code, cost centre or description in the search box at the top right of the dialogue box and then double click on cost centre required to update your claim. Pease ensure the correct cost centre is used
  - Please note that not all cost centres are available in HR21 e.g. Capital Budget Codes. If you cannot find the cost centre you require please speak to your manager.
- Registration Number To find your Car registration number click on the drop down box and a list of car registrations will appear. To find your own car enter your registration number in Search. If your car is not on list you must email <u>hr21queries@westlothian.gov.uk</u> with registration, make, model, and engine CC. You will receive a confirmation email when your car has been added.

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- Tick the boxes confirming that you have a valid VAT receipt, driving licence, MOT (if applicable) insurance for business use and own vehicle user form.
- If you have more than 6 entries for your month's submission you will need to submit a new claim for the additional entries.

• If you want to save your claim as you may have more entries to enter before you submit it to your manager – Tick Holding and click Save



#### New - Once all details have been completed tick Requested button and then click save

You will receive a message to confirm that your entry has been added successfully and an email will be sent to your inbox, confirming that your claim has been forwarded to your manager for approval.

You will receive a further email advising whether your claim has been approved or rejected or declined

To find out why your claim has been rejected you must contact your manager. If your claim requires to be amended please amend claim, and resubmit for approval by ticking Requested button and save. **Do not submit a new claim**.

If your claim has been declined by your manager it will be deleted from your view. Please discuss with your manager their reason for declining the claim.

Your manager must approve your claim within the 7 day escalation period (7 day period begins from the date you have submitted your claim and includes Saturday and Sunday) after this time claim will escalate to his/her manager for approval. Any claim approved after the payroll deadline date will be carried forward to the next pay period. (Payroll deadline dates can be found on My Toolkit and in HR21 under the Options tab)

#### Entering journeys manually

If the journey you are claiming for cannot be found in the Business Miles Code, you can enter details manually. E.g. currently the journeys for schools are not available on this list so all school journeys will have to be manually entered.

#### Journey To – From details and number of miles will have to be keyed manually

#### 4.4a Submitting a Claim for Expenses (Non Mileage)

#### **Arrangements for Paying Expenses**

Claims for expenses must be made in accordance with the council's Business Travel and Subsistence Policy which can be found at: http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1665&p=0

All claims are submitted and paid a month in arrears and claims will be processed up to the Payroll deadline date for that month.

If an expense payment does not show in your salary as you expect you should check the status of your claim by selecting Expenses Claim from the Payroll drop down menu. If the status of your claim is "Approved" but you have not received the payment this means that it was approved by your manager after the submission deadline and you will receive the payment the following month. Expense claims which have been processed by Payroll will be visible in Expense History.

#### Submitting a Claim for Expenses (Non Mileage)

Select the **Expenses Claim** option from the **Payroll** drop down menu and a blank form will appear.

#### Do not use this option to make a mileage claim



Ciick **Add** to start a new claim

- **Month Ended Date** enter the last day of the month for which you are claiming expense for e.g. for a submission of expense incurred in August the Month Ending Date would be period end date would be 31/08/2018.
- **Date of Claim** input the date(s) you are claiming expenses for. The system will not allow a duplicate claim to be made i.e. if you already have a claim "Holding" or "Requested" with the same dates then you will not be able to submit a further claim.
- Claim Reason This must include a detailed account of the purpose of the expense.
- Journey From/Journey To This must include full details of journey undertaken.
- Receipt -tick receipt box (all receipts should be retained by yourself for a period of 6 years +1 HMRC)
- Expense Type select expense type from the drop down list

- If you have more than 6 entries for your month's submission you will need to submit a new claim.
- If you want to save your claim as you may have more entries to enter before you submit it to your manager Tick Holding and click Save

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Payroll Leave	HR Options	s Exit					
Staff Member Title Mrs Sun	name & Initials <b>Test T</b>	T First Name Tester	Date Joined 31/97	1989 Positio	Section Leader	MC	
Previously Visited Pages							
Payroll > Mileage & Exps > Expen	se Claim - Non Mile	age					
Expense Claim - Non Mileage	2						
DATA LABEL: OFFICIAL-Sensitive DO NOT USE FOR MILEAGE This form is used to enter business t request. VAT should only be ticked if Before making a claim refer to the <u>B</u> You must keep all receipts for 6 com	DATA LABEL: OFFICIAL-Sensitive DO NOT USE FOR MILEAGE This form is used to enter business travel expenses. You must enter detail of the expenses including from and to destinations. Your manager will approve or decline your request. VAT should only be ticked if your receipt has vat included or cortains a VAT registration number. Leave blank if in doubt. Before making a claim refer to the <u>Business Travel &amp; Subsistence Polic</u> You must keep all receipts for 6 complete tax years.						
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New - Once all details have been completed tick Requested button and then click Save

You will receive a message to confirm that your entry has been added successfully and an email will be sent to your inbox, confirming that your claim has been forwarded to your manager for approval

You will receive a further email advising whether your claim has been approved or rejected or declined

To find out why your claim has been rejected you must contact your manager. If your claim requires to be amended please **amend claim** and resubmit for approval by ticking Requested button and save. **Do not submit a new claim**.

If your claim has been declined by your manager it will be deleted from your view. Please discuss with your manager their reason for declining the claim.

Your manager must approve your claim within the 7 day escalation period (7 day period begins from the date you have submitted your claim and includes Saturday and Sunday) after this time claim will escalate to his / her manager for approval. Any claim approved after the payroll deadline date will be carried forward to the next pay period. (Payroll deadline dates can be found on My Toolkit and in HR21 under the Options tab)

#### Mileage /Expense History

By selecting the mileage/expense history option from the drop down menu you can view all mileage and expense claims processed and paid to you in previous salaries.

#### 4.6 View and Print a Print Payslip

#### To view and print your payslip

• Under Payroll select Details and then Pay Slip

		Gold recognised by recellence star - 2016	Wes	t Lothian ncil
Payroli Leave	HR Options	Exit		
g Details >	Pay Slip	irst Name Tester Date Joined 31/07/1989 Position	Section Leader	MC
Salary Components	Bank Details			
Timesheets	Tax Code & NI Letter			
Mileage & Exps	xpense Claim - Non Mileage	2		
Employee and Manage Self Service	er <u>Site Map</u>   <u>V</u> HR & Payroll	e <u>rsion</u>   Copyright © 2018 Frontier Software, All rights res Solutions - Software / Services   <u>www.frontiersoftware.co</u>	ierved. Jm	Frontier

- The most recent monthly pay details will appear on the screen. This is not your pay slip.
- Your payslip is generated by clicking on the Payslip button.

Payslip					×				
DATA LABEL: OFFICIAL-Sensitive	DATA LABEL: OFFICIAL-Sensitive								
This is a summary of salary payments made to you each pay period. This is not your payslip									
To view & print your payslip click the Payslip button next to the Net Pay box. "Report submitted to be run" appears click ok. Click on print icon top left hand corner on payslip. Click print To view previous salary payments you can select from the list below or use the Search facility. To use the Search facility enter the year.									
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		Date Paid To	31/07/2018						
Amount		Ho	urs						
Base Pay		2283.73 Bas	e Hours	158.40					
Overtime Amount		0.00 Ove	ertime Hours	0.00					
Allowance Before Tax		0.00							
Allowance After Tax		0.00							
Gross		2283.73							
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Deduction After Tax		222.00							
Staff Pension		134.74							
Company Pension		468.16							
Total NI Gross		2283.73	V						
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4401	28/06/2018	2283.73		2283.73 1505.	16				
4394	31/05/2018	2283.73		2283.73 1505.	16				
4388	26/04/2018	2283.73		2283.73 1655.3	38				



This information box appears

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		ZZZ - HR21				
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Description Salary	Hours/Units/%	Rate	Amount 2,283.73	Description PAYE tax deductions National Insurance A Capital Credit Union Social Club Lothian Pension Fund		Amount 239.00 192.45 70.00 2.00 130.17
Total Payments			2,283.73	Total Deductions		633.62
			[	Net Pay		1,650.11
Employee Number NI Number NI Table Tax Code Pay Date / Tax Period Paid from / Paid to Overtime Paid to Paid by	Pay Details	A S1150L 22/02/2018 (M11) /02/2018 - 28/02/2018 31/01/2018 Bank	Gross Pay Pension AVC's Taxable Pay Tax NI SSP SMP Annual Salan P45 Pay P45 Tax	у	Inits Pay           2,283.73           130.17           0.00           2,153.56           239.00           192.45           0.00           0.00	1,801.36 0.00 1,801.36 0.00 27,404.78

## Payslip appears on screen – To print payslip click on print icon

#### If the council logo does not appear in the print window click on Tools and go to Internet Options

Open the Advanced Tab tick the Print background colours and images – click Apply then click Ok

Internet Options							
General Security Privacy Content Connections Programs Advanced							
Cottines -							
Settings							
Show image download placeholders							
Show pictures							
Reinting							
Print background colors and images							
Search from the Address bar							
Do not search from the Address bar     Just display the results in the main window							
Security							
Allow active content from CDs to run on My Computer*							
Allow active content to run in files on My Computer*							
Allow software to run or install even if the signature is inva							
Check for server certificate revocation*							
*Takes effect after you restart Internet Explorer							
<u>R</u> estore advanced settings							
Reset Internet Explorer settings							
Deletes all temporary files, disables browser Reset							
add-ons, and resets all the changed settings.							
You should only use this if your browser is in an unusable state.							
Some <u>settings</u> are managed by your system administrator.							
OK Cancel <u>A</u> pply							

#### 4.6a View and Print Your P60

Your 2019 P60 can now be viewed and printed in HR21 (no previous P60's are available on HR21)

• Click on the Options Menu then click on Payslip/P60 Print

-	INVESTORS IN PEOPLE	Gold Recogn	EFQM	
	Options	Exit	5 star - 2016	
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or th	e Company Ne	ws page, usu	ally displayed a	

Payslip/P60 Print								×
List of reports that you have run.								
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Description	Pay Run	Run Date	Time	Size	Expiry Date	Status		Action
Payslips	004473	26/06/2019	14:32	6465	27/07/2019	Complete		🔊 🗙
P60 for staff		3/05/2019	12:13	5049	31/12/2159	Complete		<b>x</b>

• To view documents click on the spy glass icon. Do not click on the red X as this deletes the P60 (and/or your payslip).



## **Cannot print Pay Slip or P60**

#### May need to do some housekeeping on computer

- Go to Internet Explorer
- Tools
- Internet Options
- Privacy
- Pop-Up Blocker should be ticked

Internet Options					? <mark>×</mark>	
General Security	Privacy	Content	Connections	Programs	Advanced	
Settings						
Select a setting fo	r the Inte	rnet zone.				
Medium     Blocks third-party cookies that do not have a compact privacy policy     Blocks third-party cookies that save information that can be used to contact you without your explicit consent     Restricts first-party cookies that save information that can be used to contact you without your implicit consent     an be used to contact you without your implicit consent						
<u>Sites</u> <u>Import</u> Ad <u>v</u> anced <u>D</u> efault						
physical location	bsites to n	request yo	ur	<u>C</u> lea	ar Sites	
Pop-up Blocker —						
Turn on Pop-up	9 <u>B</u> locker			Se	ttings	
InPrivate						
☑ Disable toolbars and extensions when InPrivate Browsing starts						
		Ok		Cancel	Apply	

- Click on Settings
- Check in" Allowed Sites" for the HR21 link

/	
Pop-up Blocker Settings	<b>—</b>
Exceptions Pop-ups are currently blocked. You can allow pop-ups f websites by adding the site to the list below. Address of website to allow: Allowed site:	rom specific
*.westothian.gov.uk       hr21.westlothian.gov.uk	<u>R</u> emove R <u>e</u> move all
Notifications and blocking level:	
Play a sound when a pop-up is blocked.	
Show Notification bar when a pop-up is blocked.	
Blocking level:	
Medium: Block most automatic pop-ups	-
Leam more about Pop-up Blocker	Close

- If link not in "Allowed sites" you will need to copy HR21 link <u>https://hr21.westlothian.gov.uk/HR21v3213/Interface/login.aspx</u> into "Address of website to allow"
- > Click Add
- > Close

#### 4.7 View your Payroll Record

The **Payroll** option on the drop down menu is where you will find salary information.



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#### Pay Slip - Can view / print your payslips here

**Bank Details** – allows you to view your current bank details. If you wish to change your bank details then please complete a Bank Details Notification Form which can be accessed by clicking on form in the Bank Details screen print form, sign and send to HR Services. The form must be received in HR by the payroll deadline to allow for payroll to process the change in time for your salary to be paid into your new account.

**Tax Code & NI Letter** – provides information on your current tax code and national insurance number.

#### Salary Components

	Payrol	I I	eave	HR	Options	Exit		
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	HR	Employee a Self Service	nd Manage	Pension	ro	Version   Copyright @ Il Solutions - Softwar	2018 Frontier Software, All rights reserved. / Services   <u>www.frontiersoftware.com</u>	Frontier

**Salary** – provides details on your current grade and rate of pay. You can also view previous salary details. If you have more than one job you will only be able to view details on your main post.

Allowances – provides details of any allowances paid e.g. shift or unsocial hour's payments.

**Deductions** – provides details of any deductions such as Trade Union subscription, Social Club fees etc.

**Pay Adjustments** – provides details of expenses claimed along with any overpayments being deducted or previous underpayments being paid.

**Pension** – provides details of your pension contribution rates (If you are a member of the Teachers' Pension Scheme (SPPA) your information will not be visible here as teachers' pension rates are not fixed and can change each month).

**4.8 View your Leave Record** The leave history screen provides information on any leave you may have had including sickness absence, maternity leave, strike days and any unpaid leave. Any annual leave or flexi leave will not be recorded here.

		EFOM Recognised for excellence 5 star - 2016	Living Wage Envis	West Lothian Council
Payroll Leave HR	Options Exi	t		
Staff Member Title Mrs Surname	& Initials Test T T First Name	Tester Date Joined	31/07/1989 Position Section	Leader MC
Previously Visited Pages				
Leave > Leave History				
Leave History				×
ATA LABEL: OFFICIAL-Sensitive Details of the leave submitted by your ma Annual leave and flexi time are not includ If you have a query relating to the inform The sickness absence policy has changed, for further details log-on to: https://www or contact your line manager	inager on the weekly absence ed. ation held by us, please conta westlothian.gov.uk/hr-service	: return is stored her act your line manage es	re. er in the first instance.	
	<u>Refresh</u> Add Verif	y Save Delete	Notes Attach Print H	telp
Leave Type FAM Care - Ill Dep	endant			
Start Date 4/07/2017				
End Date 4/07/2017			Consolidated Detai	ils
Days Taken 1.0	0		Start Date	
Hours Taken 6.0	0		End Date	
Reason			Haura Takan	0.0000
Leave Reason				0.000
				Search:
U Leave Type	Start Date	End Date	Days Taken Spread Payn	ent for Leave at Half Pay
FAM Care - Ill Dependant	4/07/2017	4/07/2017	1.00	
Sickness Absence	5/01/2015	5/01/2015	1.00	

#### 4.9 View your HR Record

**Position details** – provides information on your current post and previous posts with the council.

	ESTORS OUNG PLE	INVESTORS Gold	Recognised for excellence 5 star - 2016	ng ge	We Co	est Lothian uncil
Payroll L	eave HR	t Options E	kit			
Staff Member	Title <b>Mrs</b> Surnam	e & Initials Test T T First Nam	ne Tester Date Joined 31/07	/1989 Position Section	n Leader	MC
Previously Visited Pages						
HR > Position Details						
Position Details						×
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Your employment histo	ry with the counc	il can be viewed here.				
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		Refresh Add Ver	ify Save Delete <u>No</u>	tes Attach Print	Help	
Start Date	1/04/2018					
End Date						
Position Employment Status	350046	Section Leader				
Employment Status Hours/Week	Full Time Perman	hent				
Papidut/Ameriks/Year	Nominal Position					
Weasles Gl/outped/Year						
FTE Percentage	100.00					
Cost Group	Local Governmen	nt Staff				
Cost Centr	A066	40131 Resources	& Remun			
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0 Start Date	End Date Po	osition	Employment Status	Hours/Week	Paid Weeks/Year	Weeks Worked/Year
1/04/2018	Se	ection Leader	Full Time Permanent	36.00	52.14	52.14
1/04/2012	31/03/2018 Se	action Leader	Part Time Permanent	30.00	52.14	52.14
1/08/2010	31/03/2012 Se	action Leader	Part Time Permanent	30.00	52.14	52.14
1/10/2007	31/07/2010 Se	ection Leader	Part Time Permanent	30.00	52.14	52.14
13/04/2007	30/09/2007 Se	ection Leader	Part Time Permanent	30.00	52.00	52.00

#### 5. HOW TO EXIT HR21

It is important to ensure that you always securely log out of the system by clicking on the EXIT button on the top tool bar

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custoren Executive Executive	INVESTORS IN YOUNG PEOPLE		INVESTORS GO	Recognised for excellence 5 states of 6	Livinge			West Lothian Council
Payroll	Leave	HR	Options	Exit				
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# HR21 Employee & Manager Self Service

## Manager User Guide

HR Services July 2019 – Version 18

Data Label: OFFICIAL

#### Contents

- 1. WHAT IS HR21
- 2. PASSWORD PROTECTION
  - 2.1 Password Rules
  - 2.2 Password Expiry
  - 2.3 Locked Accounts/Password Resets
- 3. GETTING STARTED
- 4. HOW TO VIEW YOUR STAFF
  - 4.1 Staff
  - 4.2 Payroll
  - 4.3 Leave
  - 4.4 HR
- 5. DRIVING LICENCES, INSURANCE AND VEHICLE MAINTENANCE
  - 5.1 NEW USERS (Employees using own car for business journeys)
  - 5.2 Annual Review of Existing Users
- 6. HOW TO ACCESS AN EMPLOYEE REQUEST
- 7. HOW TO PROCESS AN EMPLOYEE REQUEST
  - 7.1 Arrangements for Payment of Overtime /Processing Claims
  - 7.2 Arrangements for Approving Mileage and Expenses/Processing Claims
- 8. Annual Performance Review (ADR)
- 9.. HOW TO EXIT HR21

#### 1.0 WHAT IS HR21

HR21 is a secure online system which allows you to view and update general HR information. The table below provides an overview of access rights. Access rights are determined by the user's profile; Manager or Employee. Managers are only able to access certain parts of an employee's record.

The table below shows the information that can be viewed and/or updated by both employees and managers.

Details	Manager	Employee
Personal details	View	Update
Home address and contact details	View	Update
Contact details for next of kin	View	Update
Current position details	View	View
The grade of your current post	View	View
Allowances paid to you	View	View
Previous payments		View
Bank Account details		View
Your tax code		View
Salary paid to you		View
Deductions from salary		View
Your pension contribution rate		View
Pay adjustments		View
2019 – P60		View/Print
Payslip		View/Print
Sick Leave	View	View
Maternity / Paternity leave	View	View
Leave for family care purposes	View	View
Sickness Trigger Record	View	
Health Surveillance Record	Update	
Equal Opportunities Monitoring		Update
Overtime claims (if applicable)	Authorise	Update
Mileage and expenses	Authorise	Update
Licences & Cert. Details	Update	View
Annual Performance Review (ADR)	Update	

#### 2. PASSWORD PROTECTION

Employee Self Service is designed with security and accessibility in mind.

#### 2.1 Password Rules

All passwords must contain at least 8 characters and a mix of alphabetical letters and must end in a number.

Special characters are no longer required in the password construction

#### E.g. Selfservice99

Users can change their password whenever they wish, however passwords are only valid for 60 days and you are unable to re-use previous passwords.

#### 2.2 Password Expiry

The system will notify you in advance of your password expiring. A message will be displayed when you log in. "Password has expired" – You must repeat the old password in pink box then create a new password. Access has been denied. Your old password is the password sent by HR21Queries.

#### 2.3 Locked Accounts

If an incorrect password is entered a message advising you of this is shown and after three attempts you will be locked out of system.

If your account is locked any requests for unlocks you should email HR21 helpdesk at: <u>Hr21queries@westlothian.gov.uk</u>

## Self Service password resets You can reset your own password in HR21.

Click on HR	
	West Lothian Council
Login	
Login ID Password Enter Contact HE if you have forgotten your password.	

Enter your login ID (Employee number) - click ok

Reset Pa	ssword
Login ID	
ОК	Cancel

#### Message appears



The new password that is sent by email from HR21 Queries is classed as your old password. Copy/Paste this password into the white box.

Login
Login ID
Password
Enter
Contact <u>HR</u> if you have forgotten your password.

#### **3. GETTING STARTED**

You can access HR21 through Council's Intranet or Google Chrome - HR21 or by going to <u>https://hr21.westlothian.gov.uk</u>

Please note that the system can only be accessed from a PC connected to the council network and through Google Chrome.

When you are first set up on the system you will receive an email with one time password to allow you to access the system from HR Services. Your login ID is your employee number and you will be required to create a new password the first time you login to the system

This is the screen which will appear when you have entered the one time password issued by HR, before you create a new password you must re-enter your old password in the pink box (Passwords issued by HR becomes your "old password")

	westlothian.gov.uk West Lothian
	Login
Before you enter new password you must enter your old password in the pink box	Login ID Password Password New Password Enter Contact HR if you have forgotten your password.
Employee and Manager Self Service	Version   Copyright © 2013 Frontier Software, All rights reserved. HR & Payroll Solutions - Software / Services   <u>www.frontiersoftware.com</u>

Do not use the back button, to navigate through screens as this will lock you out of the system. To go back to a previous screen click on *Previously Visited Pages*.

There is an online help function and relevant user information provided on each screen.

When you log in, your own personal details will appear on the tool bar

		INVESTORS IN YOUNG PEOPLE	GOOD PRACTICE AWARD GOLD	INVESTORS OF IN PEOPLE	iold <sub>Recog</sub>	EFOM nised for excellence 5 star - 2016	Weares Living Wage Englished	West Lothian Council
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	🛐 Claims	Must Be In By - 1	10/07/17					
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	Information ( For informati Privacy-Not	bage with links to o on on how we will tice/pdf/2018-03-2	council policies. process all perso 21Contract_of	nal data which y _Employment_P	ou enter o rivacy_Not	n this system p tice.pdf	lease see: https:/	//www.westlothian.gov.uk/media/20843/Contract-of-Employment-

#### 4. HOW TO VIEW YOUR STAFF

#### 4.1 Staff

Clicking on the **Staff** option from the **Staff** drop down menu will bring up a list of all the employees who report to you.

CUSTOMER		INVESTORS IN YOUNG PEOPLE		INVESTORS G	old <sub>Recogn</sub>	EFQM sed for excellence 5 star - 2016	Weare a Living Wage English				/est Lothian ouncil
	Staff	Payroll	Leave	HR	Options	Exit					
5	Requests	663 Title Mrs	Surname & Initia	als Test T P First	Name Tes	ter Date Joine	1/09/200	D6 Position HR	Manager		
	Staff	Must Be In B	By - 10/07/17								
	Claims M	ust Be In By - 10	0/07/17								
D	ATA LABEL:	OFFICIAL-Sensitiv	/e								
Inf For P	ormation pa r information Privacy-Notic	ge with links to co on how we will p e/pdf/2018-03-21	ouncil policies. rocess all perso Contract_of	nal data which y _Employment_Pi	ou enter or ivacy_Noti	this system p ce.pdf	ease see: I	https://www.we	stlothian.g	ov.uk/media/2084	43/Contract-of-Employment-
				Refresh Add	Verify S	ave Delete	Notes	Attach Pri	nt <u>Help</u>		

To access a record click on the employee name and their details will appear in the tool bar.



When you access your staff list and cannot see all your staff or you can see staff who does not report to you – Please email HR21Queries with any discrepancies.

#### 4.2 Payroll

The Payroll drop down menu is where you will find details of salary and any related allowances that are paid to members of your team.

CUSTOMER SERVICE EXCELLENCE		INVESTORS IN YOUNG PEOPLE	GOOD PRACTICE AWARD GOLD	Sand Sand	INVESTORS	iold <sub>Re</sub>	EFQM ecognised for excellence S star - 2016	Living Wage Enter	W Co	est Lothian ouncil
Staff		Payroll	Leave	2	HR	Option	s Exit			
View Self	St			•	Surname & Initials	Test T	T First Name Test	er Date Joined 31/07	/1989 Position Section Leader	
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Previously	lisite			•						
Payroll >	Sala	Mileage &	Exps	•						
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HR	Emp Self	ployee and Manag f Service	jer		Pension		oftware / Services	er Software, All rights r <u>www.frontiersoftware</u>	.com	FIOIItter

As a manager you do not have access to view details of pay deductions, pension contributions or pay adjustments for your employees.

#### 4.3 Leave

Selecting **Leave History** from the **Leave** drop down menu provides information on any periods of absence your employees have had including sickness absence, maternity leave, strike days any other unpaid leave.

Annual leave and any flexi leave taken are not recorded here.

	STORS DUNG PLE	INVESTORS Gold	EFQM Recognised for excellen 5 star - 20	Living Wage		West Lothian Council
Staff Payı	roll Leave	HR Op	tions Exit			
View Self   Staff Memb	er s	Surname & Initials Tes	st T T First Name T	ester Date Joined 31	/07/1989 Positio	n Section Leader
Previously Visited Pages						
Leave > Leave History						
Leave History - M	Irs Test T T					
Details of the leave sub Annual leave and flexi t If you have a query rela The sickness absence p for further details log-oo or contact your line man	mitted by your manage ime are not included. sting to the information olicy has changed; n to: https://www.wes nager	er on the weekly abse n held by us, please co tlothian.gov.uk/hr-ser	nce return is store ontact your line ma rvices	d here. anager in the first inst	ance.	
		Refresh Add V	erify Save De	elete <u>Notes Attac</u>	h Print Help	
Leave Type Start Date End Date Days Taken Hours Taken Reason Leave Reason	FAM Care - III Dependa 4/07/2017 4/07/2017 1.00 6.00	nt		Conso Start I End D Days 1 Hours	Jidated Details Jate ate ate ate ate ate ate ate ate ate	0.0000
						Search:
U Leave Type		Start Date	End Date	Days Taken	Spread Payment	tor Leave at Half Pay
FAM Care - Ill Depend	lant	4/07/2017	4/07/2017	1.00		
Sickness Absence		29/12/2014	5/01/2015	1.00		
Sickness Absence		29/12/2014	4/01/2015	5.00		
Sickness Absence		17/12/2014	20/12/2014	3.00		
Bereavement Losvo		15/12/2014	16/12/2014	3.00		
Bereavement Leave		10/12/2014	14/12/2014	3.00		
Hospital/Clinic Appoin	+	22/05/2014	22/05/2014	0.50		
Ciclinger Abager		24/05/2013	24/05/2012	1.00		

To access a record click on an absence from the list and the reason and duration of the absence will be displayed.

Data Label: OFFICIAL

Selecting **Sickness Trigger Record** from the **Leave** drop down menu will allow you to view the details of any employees within your team who have reached the corporate trigger level and, where this information has been returned to HR, the details of what action has been taken as a result of this.

**Health surveillance screen** – Only to be completed for any employees within your team who have been identified with an occupational hazard

Details of all Health surveillance referrals in relation to identified occupational hazards for your staff will need to be entered here.

Please include details of all staff that have been referred to occupational health for health surveillance purposes only; all other occupational referrals will be made through HR. On receipt of the occupational report, record the outcomes including the review periods.

If employee has more than one referral at the same time you will need to add these separately

Before accessing this screen please choose relevant employee from your staff list

Click Add

Sequence – this should be 1. If you have a referral for the employee and want to add another referral you must change the sequence number e.g. 2

		TORS Gold EF	excellence star - 2016	ng ge	West Lothian Council
Staff Payroll	Leave HR	Options			0
View Self   Staff Member 3	The Mrs Surname	& Initials D First	st Name 🔲 a Dat	te Joined 31/07/	1989 Position Section Leader
Previously Visited Pages	$\langle \rangle$				
Leave > Health Surveillance	$\langle \rangle$				
Realth Surveillance - M	м				
DATA LABEL: OFFICIAL-Sensiti Details of all health surveillance You will include details of all sta through HR. On receipt of the occupational r these individually and add the s	ive e referrals in relation to i aff who have been referr report, record the outfor sequence number.	identified occupational ha ed to Occupational Health nes including the review	zards for your sta h for health survei periods. If referrir	ff will need to be illance purposes o ng for more than	entered here. only, all other than occupational referrals should be made one surveillance at the same time you will need to add
	Refrech	Add <u>Verify</u> <u>Save</u>	Delete N	iotes Attach	Print Help
Case Date Line Manager Work Location	Sequence				
Assess Type	New/Review	Referral Date	Appointment D	ate OHN/OHP	1.00
Report Rec'd Outcome	Rest	rictions	Review Date	Remind Date	
	×	v			
Fit for Specific Work - Specify					
Comments					
					Search:
0	Case Date	Sequence I	Line Manager		zkhcoment3
		There are no	records to show in t	nis view	
Employee and Manage Self Service	er <u>Site Ma</u> HR & P	<u>ng   Version</u>   Copyright © 2 ayroll Solutions - Software ,	2013 Frontier Softw / Services   <u>www.fr</u>	are, All rights rese	ved. Frontier

#### 4.4 HR

The HR drop down menu provides access to employee information including home address and contact details.

You will also find position information including hours and place of work.

CUSTOMER SHEVICE EXCLUNCE	INVE INVE PEOL	ESTORS DUNG PLE GOLD	0	INVESTORS Gold	Recognised fo	r excellence s star - 2016	Weare a Living Wage Englise				)Wes Cou	st Lothian Incil
Staff	Pay	roll L	eave	HR Op	tions	Exit						
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DATA LA Your empl	BEL: OFFICIA loyment histo	L-Sensitive ry with the co	uncil can be	viewed here.	/erify Save	Delete	Notes	Attach	Print H	elp		
Start Date End Date Position Employme Hours/We Pacidu/Mand Weeks Give FTE Perce Cost Grou Cost Cent	ent Status eek ks/Year wolped/Year intage ip r	1/04/2018 3SU046 Full Time Perr 36.00 Nominal Posit 100.00 Local Governn A066	ion ment Staff	Section Leader	es & Remun							
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	1/04/2018	End Date	Section	der	Eull Time F	ent status		nours/	36.00	Palo Weeks/	2 14	52 14
	1/04/2012	31/03/2018	Section Lea	der	Part Time	Permanent			30.00	5	2.14	52.14
	1/08/2010	31/03/2012	Section Lea	der	Part Time	Permanent			30.00	5	2.14	52.14
	1/10/2007	31/07/2010	Section Lea	der	Part Time	Permanent			30.00	5	2.14	52.14
1	3/04/2007	30/09/2007	Section Lea	der	Part Time	Permanent			30.00	5	2.00	52.00
	1/03/2006	12/04/2007	Section Lea	der	Part Time	Permanent			30.00	5	2.00	0.00
	1/04/2003	28/02/2006	Section Lea	der	Part Time	Permanent			30.00	5	2.00	0.00
	1/09/2000	31/03/2003	Administrat	ive Assistant	Part Time	Permanent			30.00		0.00	0.00
	1/12/1999	31/08/2000	Payroll Assi	stant	Part Time	Permanent			30.00		0.00	0.00
	1/11/1999	30/11/1999	Payroll Assi	stant	Part Time	Permanent			30.00		0.00	0.00
	1/01/1996	31/10/1999	Payroll Assi	stant	Full Time F	ermanent			36.00		0.00	0.00

#### 5. DRIVING LICENCES, INSURANCE AND VEHICLE MAINTENANCE

Managers are required to verify that authorised car users, for whom they are responsible, have the relevant driving licence and a comprehensive motor insurance policy (clearly stating that they are insured to use their vehicles for work purposes) and vehicle MOT certificate.

Thereafter those documents must be reviewed on an **annual** basis. Full details of the policy requirements can be found at:

http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1665&p=0

#### 5.1 NEW USERS (Employees using own car for business journeys)

#### **Own Vehicle Use Authorisation Application Form**

Managers must ensure that **all** new users who are to use their own car on Council business complete an Own Vehicle Use Authorisation form. This form can be found at: <u>http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1670&p=0</u>

The application must be authorised by the Head of Service prior to an employee using their own vehicle on council business. In authorising the application, Heads of Service must confirm that the employee's necessary documentation (Driving Licence, Insurance, and Vehicle Maintenance) is current and valid. Thereafter, those documents must be reviewed on an annual basis by the line manager

## Forms should be retained by relevant service. Employees are not required to complete an annual renewal form

If at any time an employee is no longer eligible to use their own car, expiry dates in this screen should be amended accordingly.

#### Adding New Users

Managers are required to add all document details for new users. Once the documents have been verified you should

- Select the relevant employee from your Staff list
- Select Licences & Cert. Details from the HR drop down menu
- Click on Add
- Select document type
- Enter date document checked in "First Checked"
- Enter Expiry Date should be one year from date documents checked
- If employee's car is **not eligible** for an MOT at this time Date of car registration should be entered in "First Checked" and Expiry Date should be changed to three years from date of car registration
- When adding driving licence also enter expiry date of 10 year photo driving licence card
- Tick "Required for mileage claims" (this must be ticked or employee will not be able to submit a claim)
- Tick Valid Own Vehicle Use Form (Employee has completed form and it has been authorised by their Head of Service)
- Click Save
- Follow same process for each document to be added

#### 5.2 Annual Review of Existing Users

At the annual review period, managers are required to update details of the expiry and review dates for the following:

- Employee Driving Licence and 10 year Photo Card. An annual review is required for driving licences as an employee may not be qualified to drive due to circumstances which occurred during the previous year. Therefore expiry date for driving licences should always be for one year from annual check and not the date the licence expires.
   10 year Photo Card should be checked each year to ensure it has not expired.
- 2. Insurance Policy stating that they are insured to use their vehicle for work purposes.
- 3. MOT Certificate
  - If employee's car is **not eligible** for an MOT at this time Expiry Date should be three years from date of car registration Manually add date of car registration to "First Checked" and three years from this date should be added to "Expiry Date"

Where an employee changes their car during the annual review period the current insurance document and MOT (if applicable) become invalid. Therefore, the employee must present the new insurance and MOT (if applicable) documents to their manager. If new car is not eligible for an MOT the employee must present new car registration document to their manager who is required to check and update **Licence & Certs.Details** screen in HR21 **before approving any claims.** 

You should receive an email reminder when an employee has a change to their car registration.

Heads of Service will review vehicle user classifications annually and in the event of any material change to the duties of a post that could have implications for the nature of vehicle usage.

Please note that the annual review date is one year from the previous review of driving licence, insurance for business use and MOT/car registration certificate, not the date that vehicle documents expire.

The expiry date should be one year from the date you last reviewed the documents.

Details are updated by going to the **HR** drop down menu and selecting **Licences & Cert. Details** 

	INVESTORS IN YOUNG PEOPLE	GOOD PRACIECE KWAID GOLD	INVESTOR	S Gold Recognised	For excellence s star - 2016		West	Lothian Icil
Staff	Payroll	Leave	HR	Options	Exit			
View Self	Staff Member	Title Mrs S	Detail	5	ame Tester Date Jo	ined 31/07/1989	Position Section Leader	
Previously Vis	ited Pages							
			Positio	on Details				
HR > Licene	es & Certs.Details		Licenc	es & Certs.Details				
HR	Employee and Manag Self Service	er	Equal Site Map   M HR & Payro	Opportunities Version   Copyright @ Il Solutions - Softwar	2018 Frontier Softwar e / Services   <u>www.fron</u>	a, All rights reserved. tiersoftware.com		Frontier

- Select the relevant employee from your Staff list
- Select Licences & Cert. Details from the HR drop down menu
- Select document which requires to be updated
- Change Expiry Date only (Do not add a new entry as this will restrict employee making a claim.)
- There should be a tick already in "Required for mileage claims" (this must be ticked or employee will not be able to submit a claim)
- There should be a tick already in "Valid Own Vehicle Use Form"
- Click Save

Eicences & Cert. Details			×
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Records vehicle documents held by staff	members. Manager use only		
To update existing users documents plea To add new users documents please ente	se change expiry date only er the date you checked your	employee's documents in "First Checked" - Expi	ry date will automatically populate.
Tick must be in "Required for mileage cla	ims"		
	<u>Refresh</u> Add Verify	Save Delete <u>Notes</u> <u>Attach</u>	Print Help
Licence/Certificate Driving Licence			
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Driving Licence	1/09/2014	1/09/2015 🗸	
Insurance - Business Use	1/08/2014	1/08/2015	
MOT Certificate	1/09/2013	1/09/2015 🗸	
1			Page 1 of 1 (3 items)

#### 6.0 HOW TO ACCESS AN EMPLOYEE REQUEST

HR21 allows employees to submit claims for overtime, mileage and expenses. Once a claim has been submitted for approval, you will receive an automated email advising you that there is a claim requiring your approval.

If you do not approve the claim within the 7 day period, it will escalate to your line manager for approval.

Requests for overtime, mileage and expenses are accessed by clicking on the Staff button and selecting Requests option.

All claims are submitted and paid a month in arrears and claims will be processed up to the Payroll deadline date for that month.

As the authorising manager, it is your responsibility to review the details of claims that are submitted for approval. In order to ensure that each claim has been through an appropriate checking process, they must be authorised individually and not as a bulk exercise therefore the Select Action Box beside each submission in Requests should be used

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Staff Payroll Leave	HR Options	Exit			
Staff Membertle Mrs Surname & Initia	ls Test T P First Name Tester Da	te Joined 1/09/2006 Pos	ition HR Manager		
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Expense Claim - Non Mileage	Test T T	Requested	24/07/2018	Select Action	
Mileage Claim	Test T T	Requested	24/07/2018	Select Action	
Expense Claim - Non Mileage	Test T T	Requested	31/07/2018	Select Action	
1				Page 1 c	of 1 (7 items)
Employee and Manager Self Service	Site Map   Version   Copyright © 20 HR & Payroll Solutions - Software / !	18 Frontier Software, All righ Services   www.frontiersoftw	nts reserved. are.com	FIC	software



This will bring up a list of all submissions

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#### 7.0 HOW TO PROCESS AN EMPLOYEE REQUEST

#### 7.1 Arrangements for Payment of Overtime

Overtime at enhanced rates will only apply when 36 hours a week have been worked.

Overtime will only be paid for complete 30 minutes of work.

Employees working overtime must take a break after 6 hours, this break will be unpaid.

Employees graded Band I and over are not entitled to overtime payments.

All claims are submitted and paid a month in arrears and will be processed up to the payroll deadline date for that month. Any claims approved after the Payroll deadline date will be carried forward to the next pay period.

(Payroll deadline dates can be found on My Toolkit and in HR21 under the Options tab)

It is your responsibility to ensure claims are correct prior to authorising.

#### New - Processing an Employee Overtime Claim

Select each submission (highlighted in Red) to open the form and view the details. The employee's details will now be on top of the screen.

Once you have checked the details of each submission you can chose to Approve Reject or Decline the employee's request here. Declined requests will be deleted permanently. Tick relevant box and Save – Request will no longer be visible in Requests

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Select Requests again to view remaining requests – click on **View Self** and the remaining requests can be accessed

#### 7.2 Arrangements for Approving Mileage and Expenses

Claims for mileage and expenses must be made in accordance with the council's Business Travel and Subsistence Policy which can be found at: http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1665&p=0

Mileages must correspond with those set out the council's schedule of mileages which can be found at: <u>http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1666&p=0</u>

#### New - Processing an Employee Mileage / Expense Claim

Select each submission (highlighted in Red) to open the form and view the details. The employee's details will now be on top of the screen.

Once you have checked the details of each submission you can chose to Approve Reject or Decline the employee's request here. Declined requests will be deleted permanently.

#### Tick relevant box and Save – Request will no longer be visible in Requests

#### Example Mileage Request

ew Self   Staff Member eviously Visited Pages avroll > Mileage & Exps > Mileage Claim - Mrs Te DATA LABEL: OFFICIAL-Sens	Mileage Claim	ne & Initials Test T T F	First Name <b>Tester</b> Da	ate Joined 31/07/1	89 Position Section Leader	
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yroll > Mileage & Exps > Mileage Claim - Mrs Te	Mileage Claim					
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Claims must be made in accor Claim reason must include ful	dance with the <u>Busines</u> purpose of journeys. (	s Travel & Subsistence Specifying just "Meetin	e Policy and the <u>Sch</u> g" is not enough. In	edule of Mileages. the first instance tl	he Council's schedule of mileages s	hould alway
vhen making a claim.						
ou must keep all receipts for	6 complete tax years.					
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17/07/2018 FIX2407		DSD	DSD	1.0	·	
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					×	
Total Business Mileage	6.0					
ost Centr						
elect your car from the list. I	t your car is not on the	IIst-email <u>hr21querie</u>	s@westlothian.gov.u	<u>ik</u>		
ith Reg, Make, Model, Fuel T	ype & Eng CC. You will	receive a confirmation	n email when your c	ar has been added.		
egistration number SL66	IKV			_		
		VA	T Receipt	$\checkmark$		
O     O     O     O     O     O     O	essed					
y Requesting this Claim, you	confirm to having the	following: and have re	ead & understood the	e council's Travel &	Subsistence Policy.	
Valid Driving Licence	<ul> <li>Image: A set of the set of the</li></ul>					
MOT (if applicable)						
INS - Business Use	✓					
Valid Own Vehicle Use Form	<b>v</b>					
Medically Fit to Drive	<b>~</b>					
Pieurcally Fill to Drive	-					
Claimed in Accordance with	Council's Travel & Subs	sistence Policy 🗹				

Select Requests again to view remaining requests – click on **View Self** and the remaining requests can be accessed

#### Example Expense Request

.

	INVESTORS IN YOUNG PEOPLE		S Gold E Recognised f	FOM 5 star - 2016	ig ge		West Lothiar Council	
Staff	Payroll	Leave HR	Options	Exit				
View Self   Staff	Member 3	Mrs Surname & In	itials Test T T First	Name Tester Date .	Joined 3	31/07/1989 Position Se	ction Leader	
Previously Visited	Pages							
Payroll > Mileage	a & Exps > Expension	se Claim - Non Mileag	<u>e</u>					
Expense C	aim - Non Mileage	e - Mrs Test T T						
DATA LABEL: O DO NOT USE FO This form is used request. VAT sho Before making a You must keep a	DATA LABEL: OFFICIAL-Sensitive DO NOT USE FOR MILEAGE This form is used to enter business travel expenses. You must enter details of the expenses including from and to destinations. Your manager will approve or decline your request. VAT should only be ticked if your receipt has vat included or contains a VAT registration number. Leave blank if in doubt. Before making a claim refer to the <u>Business Travel &amp; Subsistence Policy</u> You must keep all receipts for 6 complete tax years.							
Ending D			Add <u>Venny</u> Save			acti <u>Print Heip</u>		
Date of Claim	Claim Reason	Journey Jo From T	ce 2 ourney	Amount	Expen	se Type		
25/07/2018	System meeting ret	cc v	rv 🛛	1.00	Train	~		
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	1					-		
Cost Centr			i otal		7	1.00		
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Approve Decline F	leject Failed Processed	a						
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0	Ending Date	Sequence	e Cost Centr		Total	Status	HR21 Entry Type	
	31/07/2018		2		1.00	Requested	E	
	24/07/2018		1		22.00	Requested	E	
	24/07/2018		3		1.00	Approved	E	
	,,		-					
	24/07/2018		4		1.00	Approved	E	

Select Requests again to view remaining requests – click on **View Self** and the remaining requests can be accessed

#### 8.0 Annual Performance Review (ADR)

The Council is committed to ensuring all employees have an opportunity for an annual performance review through the Appraisal and Development Review (ADR) process.

Please record the date the last review meeting was held and the category of employee in the fields below.

This information will be used to ensure compliance.

#### Click Add

Enter date of review meeting Choose category of employee from the drop down list

	NVESTORS Gold Recogness to control State of the control of the con
Staff         Payroll         Leave           View Self           Staff Member         Title Virs           Previously Visited Pages	HR     Options       Surname & Initials     M       First Name     Date Joined 31/07/1989
ADR - I DATA LABEL: OFFICIAL-Sensitive The council is committed to ensuring all empl Please record the date the last review meetin	Ioyees have an opportunity for an annual performance review through the Appraisal and Development Review (ADR) process.         Ing was held and the steggory of employee in the fields below. This information will be used to ensure compliance.         Refresh       Id         Verify       Save         Delete       Notes         Attach       Print         Help
Date Completed	re Search:
Ø Manger & Team Leade Employee	r5 Date Completed Category
	There are no records to show in this view
Employee and Manager Self Service	Site Map   Version   Copyright © 2013 Frontier Software, All rights reserved. HR & Payroll Solutions - Software / Services   <u>www.frontiersoftware.com</u>

#### 9. HOW TO EXIT HR21

It is important to ensure that you always securely log out of the system by clicking on the Exit icon on top tool bar

NVESTORS SUBJECT CE	West Lothian Council					
Staff Payroll Leave HR Options Exit						
Staff Member Surname & Initials Test T P First Name Tester Date Joined 1/09/2006 Position HR Manager						
Options > Claims Must Be In By - 10/07/17						
Claims Must Be In By - 10/07/17						
DATA LABEL: OFFICIAL-Sensitive						
Information page with links to council policies. For information on how we will process all personal data which you enter on this system please see: https://www.westlothian. Privacy-Notice/pdf/2018-03-21Contract_of_Employment_Privacy_Notice.pdf	gov.uk/media/20843/Contract-of-Employment-					



## HR21 Employee & Manager Self Service

## **Troubleshooting Guide**

**HR Services** 

July 2019 – Version13

Data Label: OFFICIAL

## Contents

- 1. New Users Logging in first time
- 2. Where to find link
- 3. Passwords
- 4. Cannot access the system
- 5. System keep logging you out
  - 5.1 Cannot print payslip or P60
- 6.Cannot see Menus
- 7.Cannot find car registration
- 8. Claims submitted not paid salary
- 9.Cannot submit expenses

## 1. New Users - Logging in first time

When you are eligible to access HR21 you will receive an email from HR.

#### Example of email:

The link is: <a href="https://hr21.westlothian.gov.uk/">https://hr21.westlothian.gov.uk/</a>

You log in with your 7 digit employee number .Your password is - will be advised in email (exact format must be used)

This password will expire immediately and will now be your old password which should be repeated in the "Pink Box. You must change your password before you can access the system.

Passwords must contain at least 8 characters made up of upper and lower case letters and must end in a number.

Please read User guide which is available on the Intranet before accessing the system <u>http://intranet.westlothian.gov.uk/article/6909/HR21</u>

Any queries or requests for unlocks should be emailed to <u>hr21queries@westlothian.gov.uk</u> quoting your employee number.

#### The most common issues employees experience on first login is

- Cannot access the system not following password process correctly please refer to the Employee User guide "GETTING STARTED "for further guidance.
- > New password not ending in a number.

### You can access the system via Internet Explorer or Google Chrome

### 2. Where to find the link

The link can be found on Council's Intranet



Click to access HR21

🗮 Staf <sup>ę</sup> Intranet	Home   Inside News   Council Website   Staff Log In   CCESSIBILITY
	SERVICE AREAS   HR MYTOOLKIT   STAFF DIRECTORY   NOTICEBOARD   HR21   IT SELF SERVICE PORTAL
You are here: IntranetHome Pa	age / Quick Links / HR21
Intranet Home Page  Quick Links Staff Directory Service Areas HR21 HR Services - MyToolkit HR Service Portal Sickness Absence Noticeboard Room & Pool Car Bookings Document Search Mitrefinch TMS	HR21 Access to HR21 and current User Guides. lease Note: This link can only be accessed via the council network. Click to access HR21 Guides Manager User Guide Troubleshooting Guide

• Link can also be found on emails sent by <u>hr21queries@westlothian.gov.uk</u>

### 3. Passwords

When creating a new password please refer to the User guide for Password rules.

These are some of the password error messages that you may experience when accessing HR21

- Error message BRE015: The password is incorrect
- Error message BRE017: Password expired You must repeat the old password in the pink box then create a new password
- Error message BRE103: Access has been denied

Email: <u>hr21queries@westlothian.gov.uk</u> for password reset

### **IMPORTANT**

Remember to enter your old password in the pink box before you enter new Password.

#### You can reset your own password in HR21.

#### Click on $HR_{\chi}$

	West Lothian Council
Login	
Login ID Password Contact <u>HS</u> if you have forgotten y	bur password.

### Enter your login ID (Employee number) – click ok

Reset Password
Login ID
OK Cancel

Message appears



The new password that is sent by email from HR21 Queries is classed as your old password. Copy/Paste this password into the white box.

	INVESTORS Gold Recogned for excelence s star - 2016	Wing Wage Dealer	Council
	Login		
	Login ID Password		

### 4. Cannot access the system – possible reasons why

- The system will lock you out after three failed attempts
   Error message BRE012 Your account is now locked please email <u>hr21queries@westlothian.gov.uk</u>
- Your account access has ended (This usually applies to employees who are on temporary contracts)

Error message BRE013 – Your access has expired please email <u>hr21queries@westlothian.gov.uk</u>

• When an system update is due HR will lock out all HR21 users to allow update to be done

Error message BRE341 – HR21 users are currently not allowed to access the system

Error message appears when trying to access the system – Reason

 This is an intermittent problem and it is relating to WLC server and is
 currently under investigation

Error - Cannot connect to the BRE – Check the communication for this version

PLEASE TRY LATER

## 5. System keeps logging you out

## 5.1 Cannot print payslip

### Reason: May need to do some housekeeping on computer

• Go to Internet Options

Privacy								
Internet Options								
General Security Privacy Content Connections Programs Advanced								
Home page								
To create home page tabs, type each address on its own line.								
http://intranet.westlothian.gov.uk/								
· · · · · · · · · · · · · · · · · · ·								
Use <u>c</u> urrent Use de <u>f</u> ault <u>U</u> se new tab								
Startup								
Start with tabs from the last session								
Start with home page								
Tabs								
Change how webpages are displayed in tabs.								
Browsing history								
Delete temporary files, history, cookies, saved passwords, and web form information.								
Delete browsing history on exit								
Delete Settings								
Appearance								
Colors Languages Fonts Accessibility								
Some <u>settings</u> are managed by your system administrator.								
OK Cancel Apply								

<ul> <li>Pop-Up Blocker</li> <li>Pop-Up Blocker Settings</li> </ul>
Internet Options
General Security Privacy Content Connections Programs Advanced
Settings
Select a setting for the Internet zone.
Blocks third-party cookies that do not have a compact privacy policy     Blocks third-party cookies that save information that can be used to contact you without your explicit consent     Restricts first-party cookies that save information that can be used to contact you without your implicit consent     Sites Import Advanced Default     Location     Never allow websites to request your     Pop-up Blocker
Turn on Pop-up Blocker Settings
InPrivate
Some <u>settings</u> are managed by your system administrator.
OK Cancel Apply

- Check in" Allowed Sites" for the HR21, link
- If not there copy HR21 link <u>https://hr21.westlothian.gov.uk/HR21y3213/Interface/login.aspx</u> to "Address of website to allow"
- Add
- Close

Pop-up Blocker Setting	×
Exceptions	
Pop-ups are currently blocked. You can allow pop-ups from specific websites by adding the site to the list below.	
Address of website to allow:	
Add	
Allowed sites:	
*.westlothian.gov.uk cc-hr21test-01 hr21 westlothian.gov.uk	
Notifications and blocking level:	
✓ Play a sound when a pop-up is blocked.	
Show Notification bar when a pop-up is blocked.	
Blocking level:	
Medium: Block most automatic pop-ups	•
Learn more about Pop-up Blocker Close	

### 6. Can access system but cannot see menus

### (Blank drop down boxes)

- On desktop right click mouse
- Click on Personalize (If cannot see Personalize Click on Control Panel look for Personalization)
- Click on Windows 7 Basic



## 7. Cannot find Car Registration

• Reason: if you cannot find your car on this list HR & Support Services have not been notified of your car details.

To get your car added to the list - Email <u>hr21queries@westlothian.gov.uk</u> with Registration, Make/Model and Engine CC. You will receive a confirmation email when your car has been added to system.

## 8. Claims submitted not paid in salary

- Reason : Claims have not been approved by your manager (you should receive an email advising you that your claims have been approved) – Contact your manager
- Reason: Claims submitted /approved to late missed payroll deadlines but will be paid in the next available salary.

## 9. Cannot submit expenses

- You cannot have special characters or symbols within an expense claim e.g. @ & () £ " ' : = +
- If you do have a special character or symbol in your claim the following error message will appear when you try to save or request a claim

FTR-No reply from server: chris21live.app.westlothian.gov.uk : pool5. Last Error = "scGet :5506-Srecv failed : Other end closed connection"

- FTR- No more messages available
- 3500-S
- FTR- No reply from server: chris21live.app.westlothian.gov.uk : pool5. Last Error = "scGet : 5506-S recv failed : Other end closed connection"