



# **HR21 Employee & Manager Self Service**

## **Employee User Guide**

**HR Services  
July 2019 – Version 18**

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## 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 <b>(if applicable)</b>	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

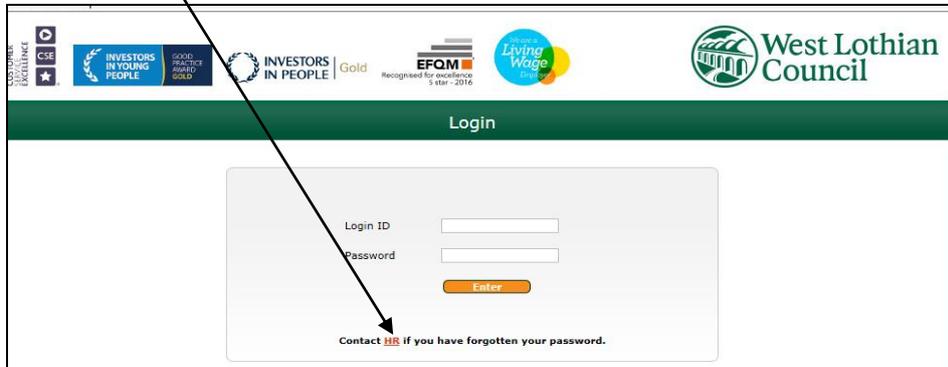
If an incorrect password is entered a message advising you of this is shown and after three attempts you will be locked out of the system.

If your account is locked any requests for unlocks should be emailed to HR21 helpdesk at: [Hr21queries@westlothian.gov.uk](mailto:Hr21queries@westlothian.gov.uk) and your account will be unlocked.

## Self Service password resets

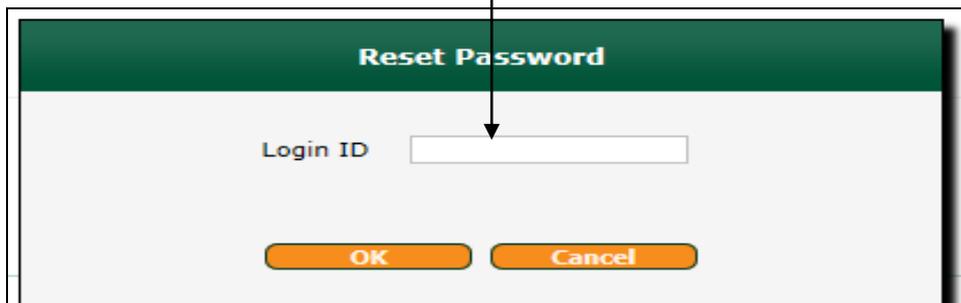
You can reset your own password in HR21.

Click on **HR**



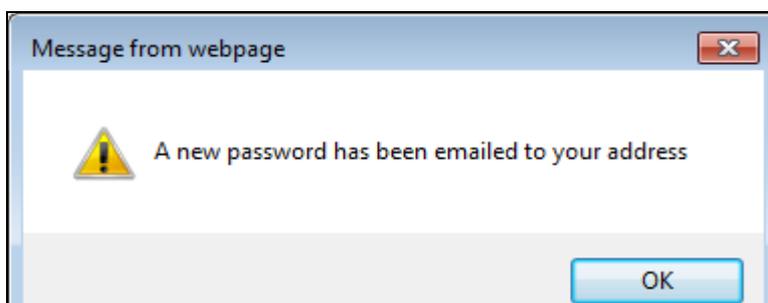
The screenshot shows the HR21 Login page. At the top, there are several logos including 'INVESTORS IN YOUNG PEOPLE', 'GOLD PARTNER GOLD', 'INVESTORS IN PEOPLE Gold', 'EFQM', 'Living Wage', and 'West Lothian Council'. Below the logos is a green header with the word 'Login'. The main content area contains a login form with fields for 'Login ID' and 'Password', and an 'Enter' button. Below the form, there is a link that says 'Contact **HR** if you have forgotten your password.' An arrow points from the text 'Click on HR' to the 'HR' link in this instruction.

Enter your login ID (Employee number) – click ok



The screenshot shows a 'Reset Password' dialog box. It has a green header with the text 'Reset Password'. Below the header is a text label 'Login ID' followed by an empty input field. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'. An arrow points from the text 'Enter your login ID (Employee number) – click ok' to the 'Login ID' input field.

Message appears



The screenshot shows a 'Message from webpage' dialog box. It has a blue header with the text 'Message from webpage' and a close button (X). Below the header is a yellow warning icon (a triangle with an exclamation mark) followed by the text 'A new password has been emailed to your address'. At the bottom right of the dialog is an 'OK' button.

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

Customer Excellence CSE  
Investors in Young People  
Good Practice Award Gold  
Investors in People Gold  
EFQM  
Living Wage  
West Lothian Council

Login

Login ID

Password

Enter

Contact HR if you have forgotten your password.

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Frontier Software

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

Password

New Password

Enter

BRE017: Password expired - You must repeat the old password in the pink box then create a new password  
BRE103: Access has been denied.

Contact HR if you have forgotten your password.

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### 3. GETTING STARTED

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

**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")**

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 [Previously Visited Pages](#).

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:

The screenshot shows the navigation interface of the West Lothian Council HR system. At the top, there are several logos including 'CUSTOMER EXCELLENCE', 'CSE', 'INVESTORS IN YOUNG PEOPLE', 'GOOD PRACTICE AWARD GOLD', 'INVESTORS IN PEOPLE Gold', 'EFQM Recognised for excellence 5 star - 2016', 'Living Wage Employer', and the 'West Lothian Council' logo. Below the logos is a green navigation bar with tabs for 'Payroll', 'Leave', 'HR', 'Options', and 'Exit'. The main content area displays staff information: 'Staff Member [redacted] Title Mrs Surname & Initials Test T M First Name Tester Date Joined 31/07/1989 Position Section Leader' with a 'MC' icon. Below this is a section for 'Previously Visited Pages' showing 'Options > Claims Must Be In By - 10/07/17'. The footer contains the 'HR' logo, 'Employee and Manager Self Service', 'Site Map | Version | Copyright © 2018 Frontier Software. All rights reserved. HR & Payroll Solutions - Software / Services | www.frontiersoftware.com', and the 'Frontier software' logo.

## 4. WHAT YOU CAN SEE AND DO

### 4.1 Changing your name

- Select the Details option under HR on the drop down menu



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

The screenshot shows the 'Details' form for the employee. The form includes the following fields and options:

- Staff Member:** [redacted]
- Title:** Mrs
- Surname & Initials:** Test T M
- First Name:** Tester
- Date Joined:** 31/07/1989
- Position:** Section Leader
- Buttons:** Refresh, Add, Verify, Save, Delete, Notes, Attach, Print, Help
- First Name:** [input field with 'Tester']
- Second Name:** [input field with 'Tester']
- Surname:** [input field with 'Test']
- Preferred Name:** [input field]
- Birth Date:** 24/03/1959
- Joined:** 31/07/1989
- Gender:**  Male  Female
- Email Address:** [input field] @westlothian.gov.uk
- Marital/Civil Status:** Married
- Marital Status Date:** 4/07/2018

Data Label: OFFICIAL

## 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



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

The screenshot shows the 'Addresses' form in the HR system interface. The form is titled 'Addresses' and includes a data label 'OFFICIAL-Sensitive'. It contains a warning message about privacy and a 'Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.' The form has several fields for address information:

- Address Type:** A dropdown menu with options: 'CURRENT HOME ADDRESS', 'PAYROLL USE ONLY', 'CURRENT HOME ADDRESS', and 'EMERGENCY CONTACT INFO'. 'CURRENT HOME ADDRESS' is selected.
- Address Line 1, 2, 3:** Text input fields.
- Suburb / City / Locality:** Text input field.
- State / Province / County:** A dropdown menu.
- Post / Zip Code:** Text input field.
- Country:** A dropdown menu.
- Date of Change:** Text input field.
- Mobile:** Text input field.
- Email:** Text input field.
- Emergency Contact:** A section with fields for Surname, Given Name, and Relationship (dropdown).

At the bottom, there is a table with columns: Address Type, Address Line 1, Address Line 2, Suburb / City / Locality, and Phone. The table contains one row with the following data:

Address Type	Address Line 1	Address Line 2	Suburb / City / Locality	Phone
CURRENT HOME ADDRESS	18 Version Frontier	Upgrade		

Personal mobile numbers and email address can also be added

Data Label: OFFICIAL

## 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

Staff Member:  Title Mrs Surname & Initials Test T T First Name Tester Date Joined 31/07/1989 Position Section Leader MC

Previously Visited Pages  
HR > Addresses

**Addresses**

DATA LABEL: OFFICIAL-Sensitive

You can make a change to your home address here. You can also add or update contact details for your next of kin.  
For information on how we will process your personal data please see: [https://www.westlothian.gov.uk/media/20843/Contract-of-Employment---Privacy-Notice/pdf/2018-03-21\\_-\\_Contract\\_of\\_Employment\\_Privacy\\_Notice.pdf](https://www.westlothian.gov.uk/media/20843/Contract-of-Employment---Privacy-Notice/pdf/2018-03-21_-_Contract_of_Employment_Privacy_Notice.pdf)

Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.

Refresh Add Verify Save Delete Notes Attach Print Help

Address Type:  (dropdown menu open showing: CURRENT HOME ADDRESS, PAYROLL USE ONLY, CURRENT HOME ADDRESS, EMERGENCY CONTACT INFO)

Address Line 1:

Address Line 2:

Address Line 3:

Suburb / City / Locality:

State / Province / County:

Post / Zip Code:

Country:

Date of Change:

Mobile:

Email:

**Emergency Contact**

Surname:

Given Name:

Relationship:

Address Type	Address Line 1	Address Line 2	Suburb / City / Locality	Phone
CURRENT HOME ADDRESS	18 Version Frontier	Upgrade		

Data Label: OFFICIAL

## 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











Payroll
Leave
HR
Options
Exit

Staff Member  Title **Mrs** Surname & Initials **Test T T** First Name **Tester** Date Joined **31/07/1989** Position **Section Leader** MC

[Previously Visited Pages](#)

[HR > Addresses](#)

Addresses
✕

DATA LABEL: OFFICIAL-Sensitive

You can make a change to your home address here. You can also add or update contact details for your next of kin.  
 For information on how we will process your personal data please see: [https://www.westlothian.gov.uk/media/20843/Contract-of-Employment---Privacy-Notice/pdf/2018-03-21\\_-\\_Contract\\_of\\_Employment\\_Privacy\\_Notice.pdf](https://www.westlothian.gov.uk/media/20843/Contract-of-Employment---Privacy-Notice/pdf/2018-03-21_-_Contract_of_Employment_Privacy_Notice.pdf)

Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.

Refresh
Add
Verify
Save
Delete
Notes
Attach
Print
Help

**Address Type** EMERGENCY CONTACT INFO

Address Line 1

Address Line 2

Address Line 3

Suburb / City / Locality

State / Province / County

Post / Zip Code

Country

Date of Change

Mobile

Email

**Emergency Contact**

Surname

Given Name

Relationship

@	Address Type	Address Line 1	Address Line 2	Suburb / City / Locality	Phone
	CURRENT HOME ADDRESS	18 Verson Frontier	Upgrade		

Data Label: OFFICIAL

### 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.

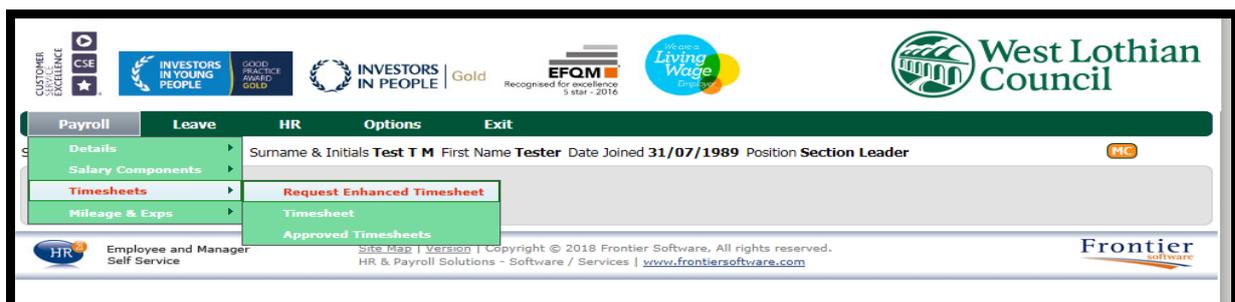
All claims are submitted and paid a month in arrears and will be processed up to the payroll deadline date for that month. Any claims approved after the Payroll deadline date will be carried forward to the next pay period.

(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.



- 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.



**Request Enhanced Timesheet**

DATA LABEL: OFFICIAL-Sensitive  
 Please refer to the HR21v3 User guide for process.  
 Overtime is not payable for breaks. You must take a minimum 30 minute break if working more than 6 hours. If you do work more than 6 hours key 2 separate entries 1. Start to break .2 End of break to Finish. Time From - Time To must be populated or incorrect hrs will be paid.  
 Do not use Notes.

Refresh Add Verify Save Delete Notes Attach Print Help

Period End: 25/07/2018  
 Sequence: 2

Date Worked	Pay Element	Details	Time From	Time To	Hours	Cost Centr
25/07/2018	Overtime at time half	test	6:30 PM	7:30 PM	1.00	A007

Field Picker Level Search [ ] Go [X]

Level	Organisation Code	Organisation Description	Cost Centre
6	A001	10201 Chief Executive	10201
6	A002	00202 Consumer Unit	00202
6	A003	00203 Business Change	00203
6	A004	00204 Corporate Comms	00204
6	A005	10210 Central Hospitality	10210
6	A006	00211 Member Services	00211
6	A007	00250 Reg of Births etc	00250
6	A008	10251 Emergency Planning	10251
6	A009	14280 Head of Finance	14280
6	A010	14281 Finance Typists	14281
6	A011	14282 Financial Mgmt	14282
6	A012	00283 Business Supp Ops	00283
6	A013	14284 Revenues	14284
6	A014	14285 Internal Audit	14285
6	A015	00290 IT Services	00290

Current Only

OT charged to a different cost centre – click on drop down box to view list

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

Period End: 25/07/2018  
 Sequence: 2

Date Worked	Pay Element	Details	Time From	Time To	Hours	Cost Centr
25/07/2018	Overtime at time half	test	6:30 PM	7:30 PM	1.00	A007

Total Hours: 1.00

Holding  Requested

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 Licences & 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



- 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

The screenshot shows the 'Mileage Claim' form. At the top, there is a 'DATA LABEL: OFFICIAL-Sensitive' warning. Below this, there is a disclaimer: 'Claims must be made in accordance with the [Business Travel & Subsistence Policy](#) and the [Schedule of Mileages](#). 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.'

Below the disclaimer, there are buttons for 'Refresh', 'Add', 'Verify', 'Save', 'Delete', 'Notes', 'Attach', 'Print', and 'Help'. The 'Add' button is highlighted.

The form has a 'Month Ending Date' field set to '31/07/2018' and a 'Sequence' field set to '1'. Below this is a table with the following columns: 'Date of Claim', 'Claim Reason', 'Journey From', 'Journey To', 'Business Miles', and 'Business Miles Code'. The first row has the following values: '5/06/2018', 'fx2407', 'dfd', 'fdf', '1.0', and a dropdown menu. The dropdown menu is open, showing a list of 'Business Miles Code' options: '[Adale]-[Bathgate]', '[Adale]-[Blackridge]', '[Adale]-[Linnithgow CB]', '[Adale]-[Livingston]', '[Adale]-[Westfield]', '[Adale]-[Whitburn Cross]', '[Adale]-[Whitehill]', '[Bburn]-[Bellsquarry]', '[Bburn]-[East Whitburn]', '[Bburn]-[Polbath]', '[Bburn]-[Seafield]', '[Bburn]-[West Calder]', '[BPC]-[Aberdeen]', '[BPC]-[Addiewell]', '[BPC]-[Armadale Acad]', and '[BPC]-[Armadale Cross]'. Below the table, there are fields for 'Total Business Mileage' (set to '1.0'), 'Cost Centr', and 'Registration number'. There is also a note: 'Select your car from the list. If your car is not on the list-email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) with Reg, Make, Model, Fuel Type & Eng CC. You will receive a confirmation email when your car has been added.'

- **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. Please 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 [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk)** with registration, make, model, and engine CC. You will receive a confirmation email when your car has been added.

**Mileage Claim**

DATA LABEL: OFFICIAL-Sensitive

Claims must be made in accordance with the [Business Travel & Subsistence Policy](#) and the [Schedule of Mileages](#). 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.

Refresh Add Verify Save Delete Notes Attach Print Help

Month Ending Date: 31/07/2018 Sequence: 1

Date of Claim	Claim Reason	Journey From	Journey To	Business Miles	Business Miles Code
5/06/2018	fix2407	dfd	fdf	1.0	

Total Business Mileage: 1.0  
Cost Centr: ...

Select your car from the list. If your car is not on the list-email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) with Reg, Make, Model, Fuel Type & Eng CC. You will receive a confirmation email when your car has been added.

Registration number: ...

Holding  Requested

By Requesting this Claim, you confirm that:

- Valid Driving Licence
- MOT (if applicable)
- INS - Business Use
- Valid Own Vehicle Use Form
- Medically Fit to Drive

Claimed in Accordance with Council's

Registration Number	Type	Make	Model	Sub-model	Category
AM08 OJZ	C	VAUXHALL	ZAFIRA		E
PJ07 UCV	C	VAUXHALL	ASTRA		E
0012323	C	NISSAN	ALMERA		E
0013034	C	FORD	FIESTA		E
0E51 OZR	C	NISSAN	PRIMERA		E
0U03 YGR	C	FORD	FOCUS		E
1127 NGA	C	FORD	ESCORT		E
123 CAR	C	PEUGEOT	206		E
124 CAR	C	FORD	KA		E
16 SL	C	SAAB	9-5		E
1A06 PUY	C	KIA	SEDONA		E
200 BLJ	C	LEXUS	Z4		E
2141 WE	C	PEUGEOT	306		E
2201S D	C	ALFA ROMEO	220		E
375 EXY	C	VOLKSWAGEN	GOLF		E

Month Endir: 31/07/2018 Sequen: 1 Total Bus: 1.2

ch: ...  
According to Council's

- 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**

Month Ending Date: 31/07/2018 Sequence: 1

Date of Claim	Claim Reason	Journey From	Journey To	Business Miles	Business Miles Code
5/06/2018	fix2407	dfd	fdf	1.0	

Total Business Mileage: 1.0  
 Cost Centre: ...  
 Select your car from the list. If your car is not on the list-email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) with Reg, Make, Model, Fuel Type & Eng CC. You will receive a confirmation email when your car has been added.  
 Registration number: ...  
 VAT Receipt:   
 Holding  Requested

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>

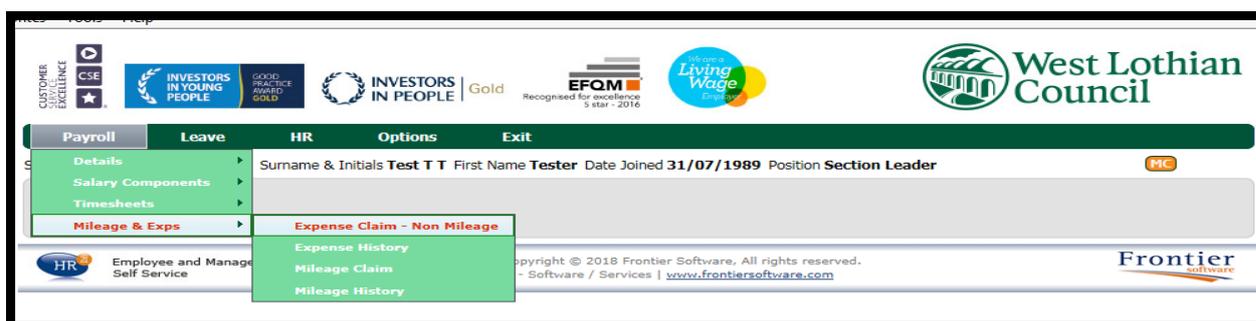
All claims are submitted and paid a month in arrears and claims will be processed up to the Payroll deadline date for that month.

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**



Click **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

**New - Once all details have been completed tick Requested button and then click Save**

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 [Business Travel & Subsistence Policy](#). You must keep all receipts for 6 complete tax years.

Refresh Add Verify Save Delete Notes Attach Print Help

Date of Claim	Claim Reason	Journey From	Journey To	Amount	Expense Type
25/07/2018	System meeting ret	cc	vv	1.00	Train

Cost Centr  ... Total 1.00  
Receipt

Holding  Requested

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)**

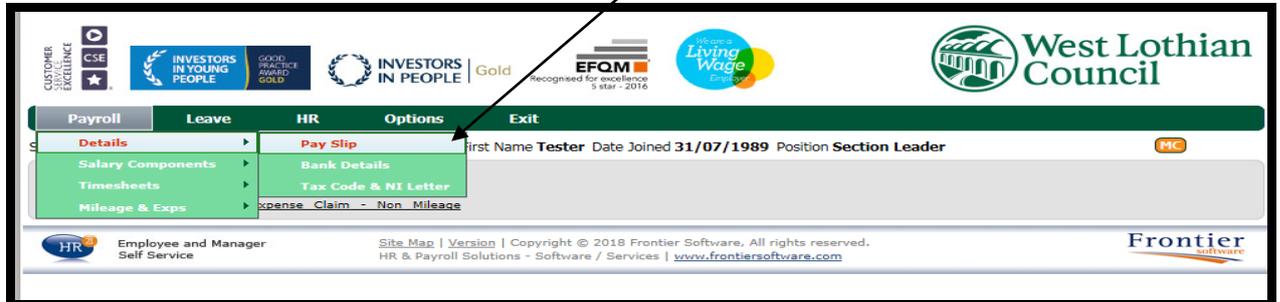
### Mileage /Expense History

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.

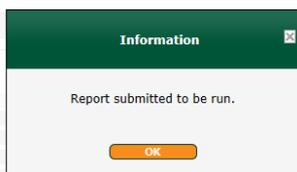
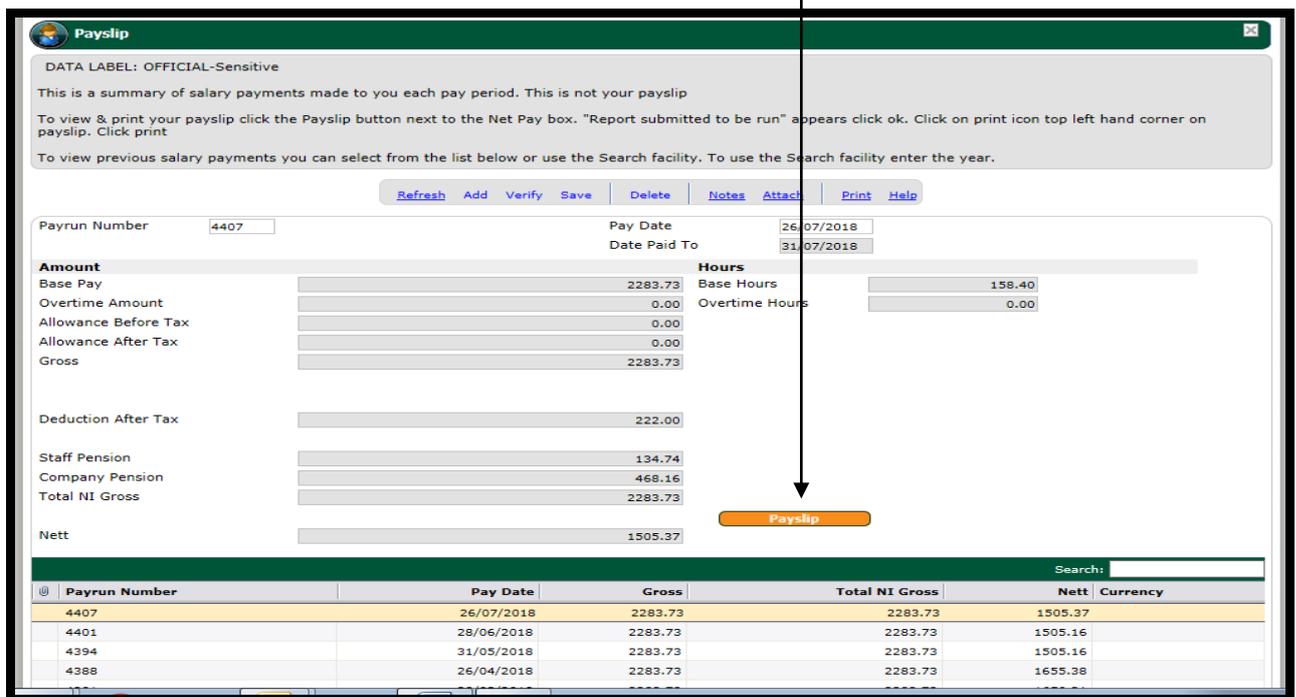
## 4.6 View and Print a Print Payslip

### To view and print your payslip

- Under Payroll select Details and then Pay Slip



- 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.**



This information box appears

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

**West Lothian Council** DATA LABEL: OFFICIAL - Sensitive

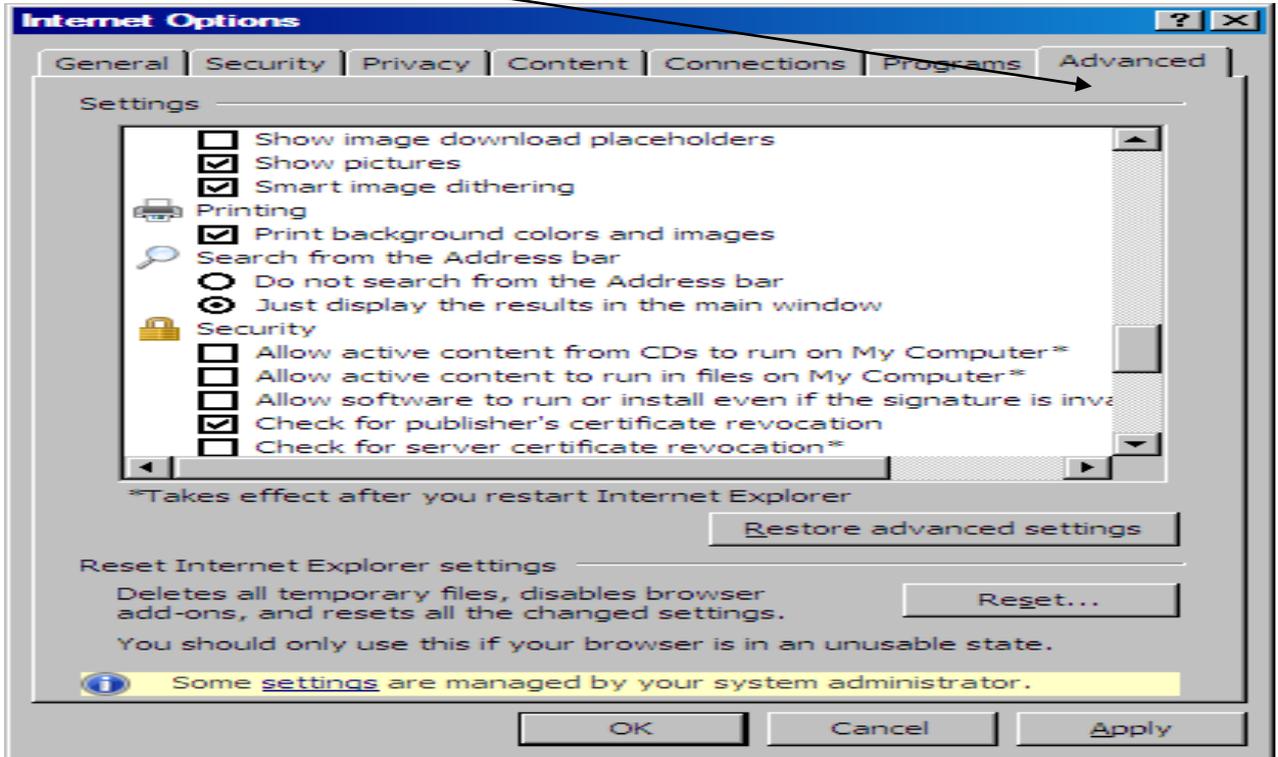
		ZZZ - HR21
--	--	------------

Pay and Allowances				Deductions		
Description	Hours/Units/%	Rate	Amount	Description	Amount	
Salary			2,283.73	PAYE tax deductions	239.00	
				National Insurance A	192.45	
				Capital Credit Union	70.00	
				Social Club	2.00	
				Lothian Pension Fund	130.17	
<b>Total Payments</b>			<b>2,283.73</b>	<b>Total Deductions</b>	<b>633.62</b>	
					<b>Net Pay</b>	<b>1,650.11</b>

Pay Details			This Pay	Year to Date
Employee Number		Gross Pay	2,283.73	22,508.80
NI Number		Pension	130.17	1,282.00
NI Table	A	AVC's	0.00	0.00
Tax Code	S1150L	Taxable Pay	2,153.56	
Pay Date / Tax Period	22/02/2018 (M11)	Tax	239.00	
Paid from / Paid to	01/02/2018 - 28/02/2018	NI	192.45	1,801.36
Overtime Paid to	31/01/2018	SSP	0.00	0.00
Paid by	Bank	SMP	0.00	0.00
		Annual Salary		27,404.78
		P45 Pay		
		P45 Tax		

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



#### 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)

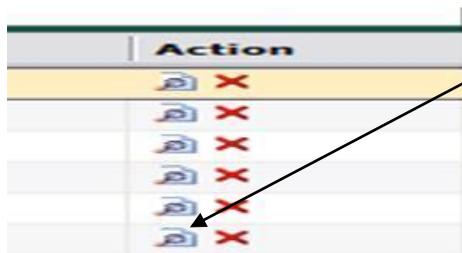
- Click on the Options Menu then click on Payslip/P60 Print



A screenshot of the 'Payslip/P60 Print' interface. The title bar reads 'Payslip/P60 Print'. Below the title bar is a blue bar with the text 'List of reports that you have run.' and a toolbar with buttons for Refresh, Add, Save, Delete, Notes, Attachments, Print, and Help. Below the toolbar is a table with columns: Description, Pay Run, Run Date, Time, Size, Expiry Date, Status, and Action. The table contains two rows of data.

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 <input type="text"/>		3/05/2019	12:13	5049	31/12/2159	Complete	

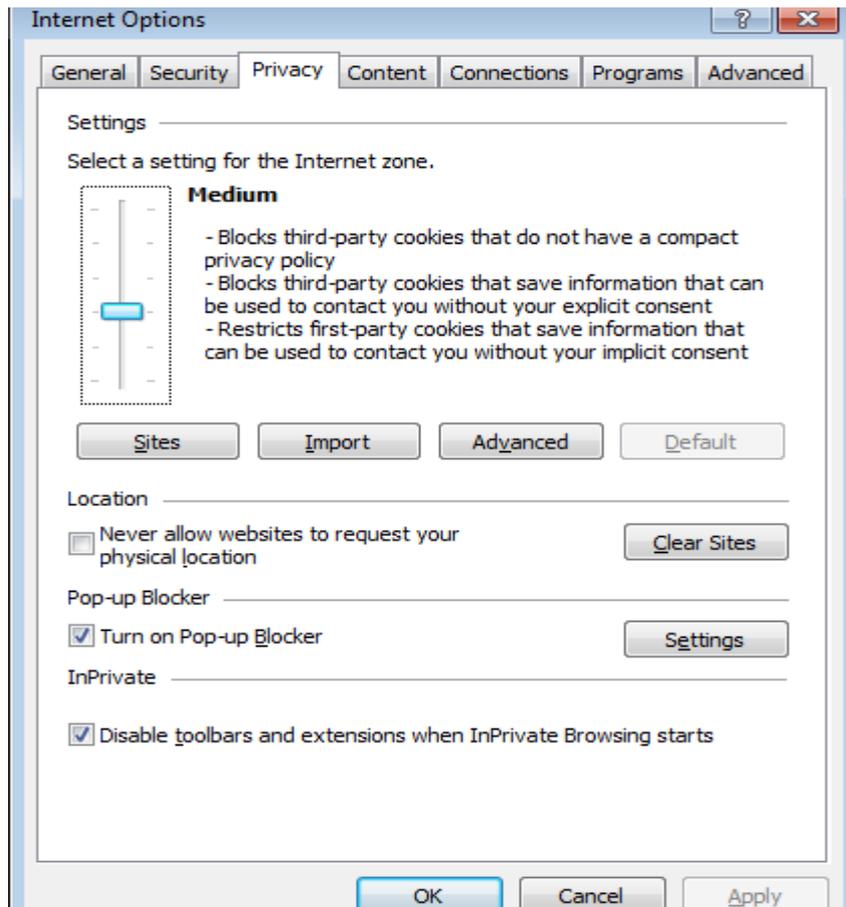
- To view documents click on the spy glass icon. Do not click on the red X as this deletes the P60 (and/or your payslip).



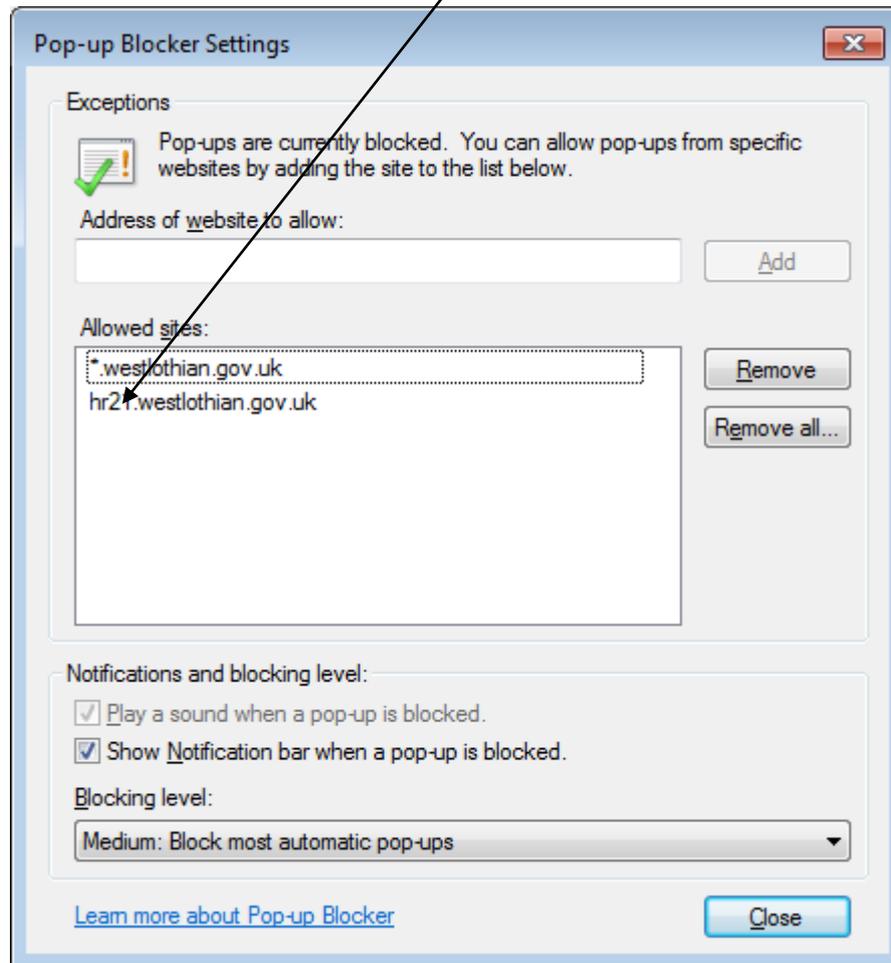
## Cannot print Pay Slip or P60

May need to do some housekeeping on computer

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



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



- If link not in "Allowed sites" you will need to copy HR21 link <https://hr21.westlothian.gov.uk/HR21v3213/Interface/login.aspx> 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.

### Details



**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



**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.

**West Lothian Council**

Payroll | Leave | HR | Options | Exit

Staff Member: [ ] Title **Mrs** Surname & Initials **Test T T** First Name **Tester** Date Joined **31/07/1989** Position **Section Leader** MC

**Leave History**

ATA LABEL: OFFICIAL-Sensitive  
 Details of the leave submitted by your manager on the weekly absence return is stored here.  
 Annual leave and flexi time are not included.

If you have a query relating to the information held by us, please contact your line manager in the first instance.  
 The sickness absence policy has changed;  
 for further details log-on to: <https://www.westlothian.gov.uk/hr-services>  
 or contact your line manager

[Refresh](#) [Add](#) [Verify](#) [Save](#) [Delete](#) [Notes](#) [Attach](#) [Print](#) [Help](#)

Leave Type: FAM Care - Ill Dependant

Start Date: 4/07/2017

End Date: 4/07/2017

Days Taken: 1.00

Hours Taken: 6.00

Reason:

**Consolidated Details**

Start Date: [ ]

End Date: [ ]

Days Taken: 0.0000

Hours Taken: 0.0000

Leave Reason:

Search: [ ]

Leave Type	Start Date	End Date	Days Taken	Spread Payment for Leave at Half Pay
FAM Care - Ill Dependant	4/07/2017	4/07/2017	1.00	<input type="checkbox"/>
Sickness Absence	5/01/2015	5/01/2015	1.00	<input type="checkbox"/>

## 4.9 View your HR Record

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

The screenshot displays the HR system interface for West Lothian Council. At the top, there are several logos including CSE, Investors in Young People, Investors in People Gold, EFQM, and Living Wage. The main navigation bar includes Payroll, Leave, HR, Options, and Exit. The user's current role is identified as Section Leader. Below this, there is a section for 'Position Details' with a data label of 'OFFICIAL-Sensitive'. A table lists the user's employment history with the council, showing start and end dates, positions, and hours worked.

@	Start Date	End Date	Position	Employment Status	Hours/Week	Paid Weeks/Year	Weeks Worked/Year
	1/04/2018		Section Leader	Full Time Permanent	36.00	52.14	52.14
	1/04/2012	31/03/2018	Section Leader	Part Time Permanent	30.00	52.14	52.14
	1/08/2010	31/03/2012	Section Leader	Part Time Permanent	30.00	52.14	52.14
	1/10/2007	31/07/2010	Section Leader	Part Time Permanent	30.00	52.14	52.14
	13/04/2007	30/09/2007	Section 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

This screenshot shows the same HR system interface as above, but with an arrow pointing to the 'EXIT' button in the top navigation bar. The footer of the page includes the text 'Employee and Manager Self Service', 'Site Map | Version | Copyright © 2018 Frontier Software, All rights reserved. HR & Payroll Solutions - Software / Services | www.frontiersoftware.com', and the Frontier Software logo.



# **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.

<b>Details</b>	<b>Manager</b>	<b>Employee</b>
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: [Hr21queries@westlothian.gov.uk](mailto:Hr21queries@westlothian.gov.uk)

## Self Service password resets

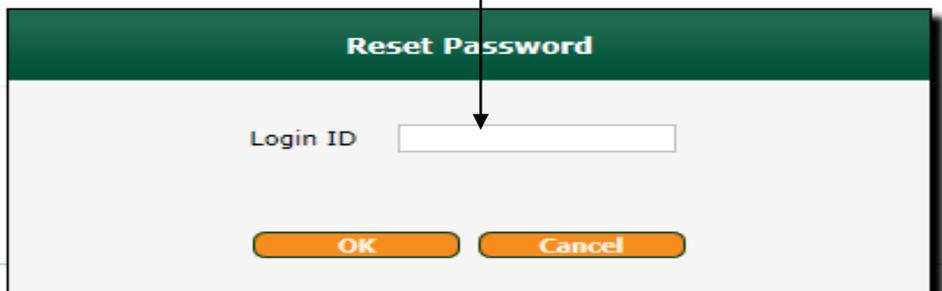
You can reset your own password in HR21.

Click on **HR**



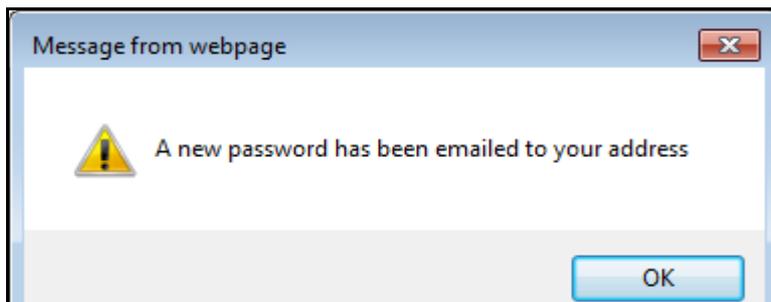
The screenshot shows the HR21 Login page. At the top, there are several logos including CSE, Investors in Young People, Investors in People Gold, EFQM, and Living Wage. The main heading is "Login". Below this, there are two input fields: "Login ID" and "Password", followed by an "Enter" button. At the bottom of the form, there is a link that says "Contact **HR** if you have forgotten your password." An arrow points from the text "Click on HR" to this link.

Enter your login ID (Employee number) – click ok



The screenshot shows a "Reset Password" dialog box. It has a green header with the text "Reset Password". Below the header, there is a "Login ID" label and an empty input field. At the bottom, there are two buttons: "OK" and "Cancel". An arrow points from the text "Enter your login ID (Employee number) – click ok" to the input field.

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.

CLIENTS  
SUPPORT  
FACILITIES

CSE

INVESTORS  
IN YOUNG  
PEOPLE

GOOD  
PRACTICE  
AWARD  
GOLD

INVESTORS  
IN PEOPLE

Gold

EFQM  
Recognised for excellence  
5 star - 2016

Living  
Wage  
Employer

West Lothian  
Council

Login

Login ID

Password

Enter

Contact [HR](#) if you have forgotten your password.

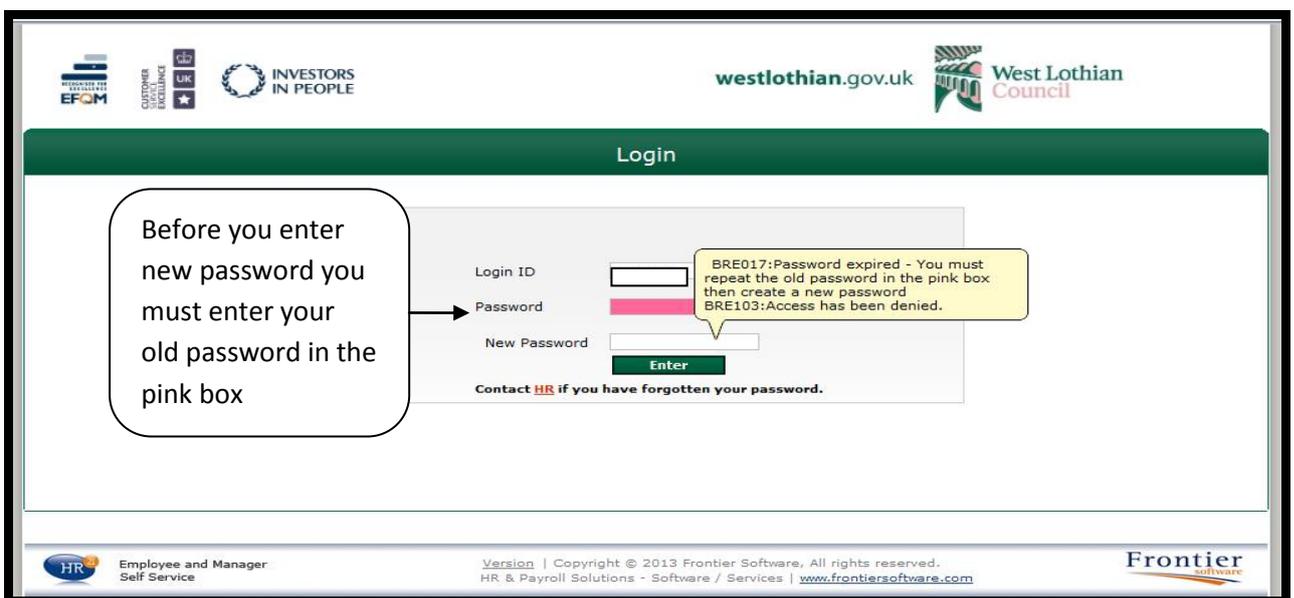
### 3. GETTING STARTED

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

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")



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



## 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.



The screenshot shows the top navigation bar of the West Lothian Council HR system. The 'Staff' menu is open, and a red arrow points to the 'Staff' option. The main content area displays a table with one row of data:

Staff	Payroll	Leave	HR	Options	Exit
663	Title Mrs	Surname & Initials Test T P	First Name Tester	Date Joined 1/09/2006	Position HR Manager

Below the table, there is a 'Claims Must Be In By - 10/07/17' notification and a 'DATA LABEL: OFFICIAL-Sensitive' warning. At the bottom, there are buttons for 'Refresh', 'Add', 'Verify', 'Save', 'Delete', 'Notes', 'Attach', 'Print', and 'Help'.

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



The screenshot shows the 'Staff' page in the HR system. A red arrow points to the 'Staff' option in the top navigation bar. The main content area displays a table with one row of data:

Staff	Payroll	Leave	HR	Options	Exit		
1	Self	Staff Member	Title Mrs	Surname & Initials Test T T	First Name Tester	Date Joined 31/07/1989	Position Section Leader

Below the table, there is a 'Previously Visited Pages' section showing 'Staff > Staff'. A 'Staff' notification is also present. At the bottom, there is a search bar with 'Search For' and 'Go' buttons, a 'Relationship' dropdown menu, and checkboxes for 'Expand All', 'Select All', and 'Rebuild All'. The 'Currently Selected:' field shows 'Test T T'.

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.

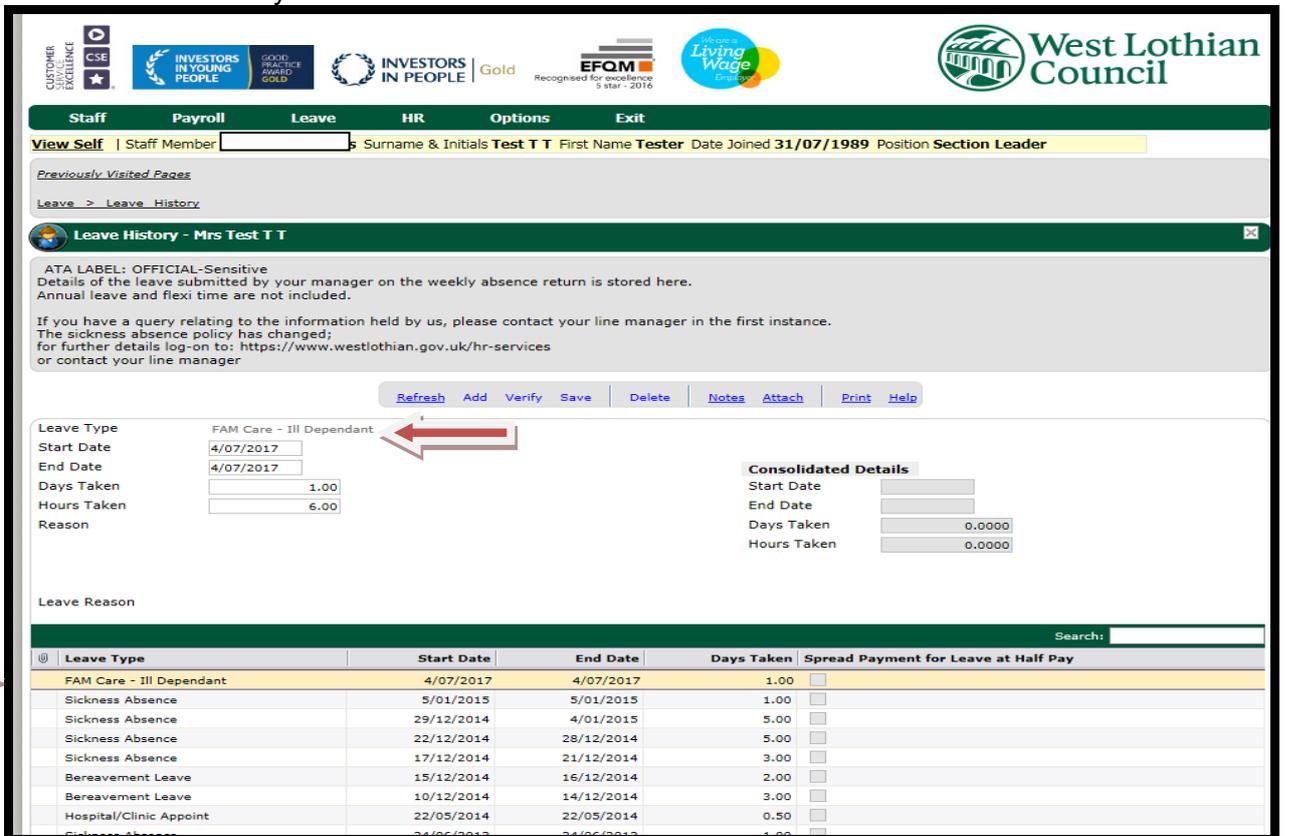


As a manager you do not have access to view details of pay deductions, pension contributions or pay adjustments for your employees.

## 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.



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

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

Data Label: OFFICIAL

## 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.

The screenshot displays the HR system interface for West Lothian Council. At the top, there are logos for 'CUSTOMER SERVICE EXCELLENCE', 'CSE', 'INVESTORS IN YOUNG PEOPLE', 'GOOD PRACTICE AWARDED GOLD', 'INVESTORS IN PEOPLE Gold', 'EFQM', 'Living Wage', and the 'West Lothian Council' logo. The main navigation bar includes 'Staff', 'Payroll', 'Leave', 'HR', 'Options', and 'Exit'. The 'HR' dropdown menu is open, showing options: 'Details', 'Addresses', 'Position Details', 'Licences & Certs-Details', and 'Equal Opportunities'. The current user is identified as 'Mrs S. [redacted]'. Below the navigation, there is a 'Position Details - Mrs Test T T' window. The main content area shows 'DATA LABEL: OFFICIAL-Sensitive' and a message: 'Your employment history with the council can be viewed here.' Below this is a table of employment history with columns for Start Date, End Date, Position, Employment Status, Hours/Week, Paid Weeks/Year, and Weeks Worked/Year. The table contains 13 rows of data, including the current position as Section Leader from 1/04/2018 to 1/04/2018.

Start Date	End Date	Position	Employment Status	Hours/Week	Paid Weeks/Year	Weeks Worked/Year
1/04/2018		Section Leader	Full Time Permanent	36.00	52.14	52.14
1/04/2012	31/03/2018	Section Leader	Part Time Permanent	30.00	52.14	52.14
1/08/2010	31/03/2012	Section Leader	Part Time Permanent	30.00	52.14	52.14
1/10/2007	31/07/2010	Section Leader	Part Time Permanent	30.00	52.14	52.14
13/04/2007	30/09/2007	Section Leader	Part Time Permanent	30.00	52.00	52.00
1/03/2006	12/04/2007	Section Leader	Part Time Permanent	30.00	52.00	0.00
1/04/2003	28/02/2006	Section Leader	Part Time Permanent	30.00	52.00	0.00
1/09/2000	31/03/2003	Administrative Assistant	Part Time Permanent	30.00	0.00	0.00
1/12/1999	31/08/2000	Payroll Assistant	Part Time Permanent	30.00	0.00	0.00
1/11/1999	30/11/1999	Payroll Assistant	Part Time Permanent	30.00	0.00	0.00
1/01/1996	31/10/1999	Payroll Assistant	Full Time Permanent	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: <http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1670&p=0>

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:

1. 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.

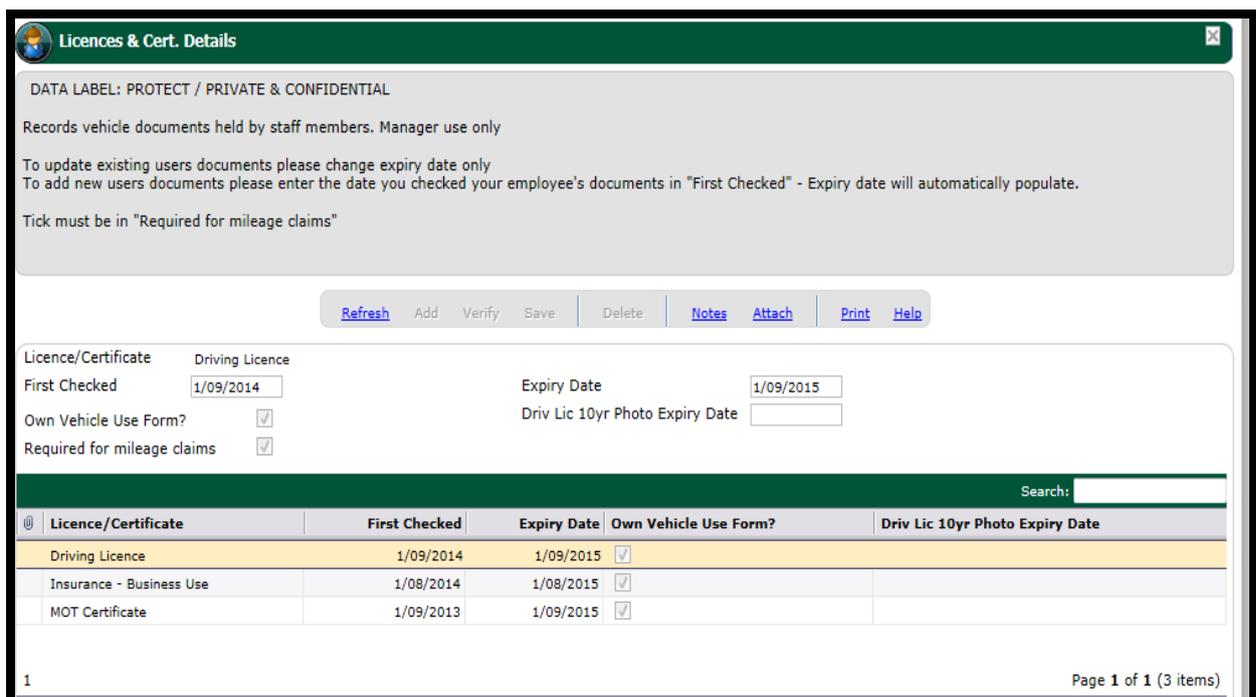
**Please note that the annual review date is one year from the previous review of driving licence, insurance for business use and MOT/car registration certificate, not the date that vehicle documents expire.**

**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**



- 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**



Data Label: OFFICIAL

## 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

The screenshot shows the HR21 interface for a user named Mrs. Test T P, HR Manager. The 'Requests' section displays a table of staff requests:

Type	Staff Name	Description	Date	Select Action
Mileage Claim	Test T T	Requested	31/05/2018	Select Action
Request Enhanced Timesheet	Test T T	Requested	30/06/2018	Select Action
Request Enhanced Timesheet	Test T T	Requested	24/07/2018	Select Action
Expense Claim - Non Mileage	Test T T	Requested	24/07/2018	Select Action
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

A callout box with an arrow pointing to the 'Select Action' dropdown in the table contains the text: "Bulk updates Do not use".

The screenshot shows the HR21 navigation menu. The 'Staff' menu is expanded, and the 'Requests' option is highlighted with a red arrow. The interface also shows the user's name (Mrs. Test T P) and a 'Claims Must Be In By' date of 10/07/17.

This will bring up a list of all submissions

The screenshot displays the HR system interface for West Lothian Council. At the top, there are several accreditation logos including Customer Excellence, Investors in Young People, Investors in People Gold, EFQM, and Living Wage Employer. The main navigation bar includes links for Staff, Payroll, Leave, HR, Options, and Exit. The user is logged in as Staff Member [redacted] with Surname & Initials **Test T P**, First Name **Tester**, Date Joined **1/09/2006**, and Position **HR Manager**.

The page shows a breadcrumb trail: **Staff > Requests**. A green header for the **Requests** section contains a message: "A list of your staff requests that require your response." Below this are action buttons: [Refresh](#), [Add](#), [Verify](#), [Save](#), [Delete](#), [Notes](#), [Attach](#), [Print](#), and [Help](#).

The data is grouped by **Staff Name**. The table below shows 7 items for staff member **Test T T**:

Type	Staff Name	Description	Date	Select Action
<a href="#">Mileage Claim</a>	Test T T	Requested	31/05/2018	Select Action
<a href="#">Request Enhanced Timesheet</a>	Test T T	Requested	30/06/2018	Select Action
<a href="#">Request Enhanced Timesheet</a>	Test T T	Requested	24/07/2018	Select Action
<a href="#">Expense Claim - Non Mileage</a>	Test T T	Requested	24/07/2018	Select Action
<a href="#">Expense Claim - Non Mileage</a>	Test T T	Requested	24/07/2018	Select Action
<a href="#">Mileage Claim</a>	Test T T	Requested	24/07/2018	Select Action
<a href="#">Expense Claim - Non Mileage</a>	Test T T	Requested	31/07/2018	Select Action

Page 1 of 1 (7 items)

Footer information includes: **HR Employee and Manager Self Service**, [Site Map](#) | [Version](#) | Copyright © 2018 Frontier Software, All rights reserved. HR & Payroll Solutions - Software / Services | [www.frontiersoftware.com](http://www.frontiersoftware.com), and the **Frontier software** logo.

Data Label: OFFICIAL



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: <http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1666&p=0>

### 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

Staff Payroll Leave HR Options Exit

**View Self** | Staff Member: [ ] Surname & Initials **Test T T** First Name **Tester** Date Joined **31/07/1989** Position **Section Leader**

Previously Visited Pages

Payroll > Mileage & Exps > Mileage Claim

**Mileage Claim - Mrs Test T T**

DATA LABEL: OFFICIAL-Sensitive

Claims must be made in accordance with the [Business Travel & Subsistence Policy](#) and the [Schedule of Mileages](#).  
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.

Refresh Add Verify Save Delete Notes Attach Print Help

Month Ending Date: 24/07/2018 Sequence: 10

Date of Claim	Claim Reason	Journey From	Journey To	Business Miles	Business Miles Code
24/07/2018	Fix2407	fdf	fdf	5.0	
17/07/2018	FIX2407	DSD	DSD	1.0	

Total Business Mileage: 6.0  
Cost Centr: ...

Select your car from the list. If your car is not on the list-email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) with Reg, Make, Model, Fuel Type & Eng CC. You will receive a confirmation email when your car has been added.  
Registration number: SL66 JKV ...

VAT Receipt

Approve  Decline  Reject  Failed  Processed

By Requesting this Claim, you confirm to having the following: and have read & understood the council's Travel & Subsistence Policy.

Valid Driving Licence   
MOT (if applicable)   
INS - Business Use   
Valid Own Vehicle Use Form   
Medically Fit to Drive   
Claimed in Accordance with Council's Travel & Subsistence Policy

Search: [ ]

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

## Example Expense Request

CUSTOMER SERVICE EXCELLENCE

CSE

INVESTORS IN YOUNG PEOPLE

GOOD PRACTICE AWARDED GOLD

INVESTORS IN PEOPLE | Gold

EFQM

Recognised for excellence 5 star - 2016

Approved Living Wage Employer



West Lothian Council

Staff
Payroll
Leave
HR
Options
Exit

[View Self](#) | Staff Member [redacted] Mrs Surname & Initials **Test T T** First Name **Tester** Date Joined **31/07/1989** Position **Section Leader**

*Previously Visited Pages*

Payroll > Mileage & Exps > Expense Claim - Non Mileage

Expense Claim - Non Mileage - Mrs Test T T

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 [Business Travel & Subsistence Policy](#). You must keep all receipts for 6 complete tax years.

Refresh Add Verify Save Delete Notes Attach Print Help

Ending Date  Sequence

Date of Claim	Claim Reason	Journey From	Journey To	Amount	Expense Type
25/07/2018	System meeting ret	cc	vv	1.00	Train

Cost Centr 
Total

Receipt

Approve
  Decline
  Reject
  Failed
  Processed

Ending Date	Sequence	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	2		1.00	Rejected	E
24/07/2018	3		1.00	Approved	E
24/07/2018	4		1.00	Approved	E
24/07/2018	5		2.00	Approved	F

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

The screenshot displays the HR Self Service interface for the West Lothian Council. At the top, there are navigation tabs for Staff, Payroll, Leave, HR, and Options. The user is logged in as a Staff Member with the title 'Mrs Surname & Initials', first name 'M', and position 'Section Leader', having joined on 31/07/1989. The breadcrumb trail shows 'HR > ADR'. The main content area is titled 'ADR - I' and contains a data label 'OFFICIAL-Sensitive'. Below this, a message states: '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.' A toolbar with buttons for Refresh, Add, Verify, Save, Delete, Notes, Attach, Print, and Help is visible. The form fields include 'Date Completed' with a calendar icon and a 'Category' dropdown menu. The dropdown menu is open, showing options: 'Depute Chief Executive', 'Head of Service', 'Service Manager', 'Manger & Team Leaders', and 'Employee'. A search bar is located to the right of the dropdown. Below the form, a table header shows 'Date Completed' and 'Category', with a note 'There are no records to show in this view'. The footer contains the 'HR Employee and Manager Self Service' logo, site map and version information, copyright notice for Frontier Software (2013), and the Frontier Software logo.

## 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



The screenshot shows the top toolbar of the HR21 system. It features several logos on the left, including 'CUSTOMER EXCELLENCE CSE', 'INVESTORS IN YOUNG PEOPLE', 'GOOD PRACTICE AWARDED GOLD', 'INVESTORS IN PEOPLE Gold', 'EFQM', and 'Living Wage'. On the right is the 'West Lothian Council' logo. Below the logos is a green navigation bar with buttons for 'Staff', 'Payroll', 'Leave', 'HR', 'Options', and 'Exit'. An arrow points from the text above to the 'Exit' button. Below the navigation bar, the user's profile information is displayed: 'Staff Member [redacted] Surname & Initials Test T P First Name Tester Date Joined 1/09/2006 Position HR Manager'. Below this is a grey bar with the text 'Options > Claims Must Be In By - 10/07/17'. A green bar below that contains a globe icon and the text 'Claims Must Be In By - 10/07/17'. At the bottom, a grey bar contains the text 'DATA LABEL: OFFICIAL-Sensitive' and a link to a privacy notice: '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.gov.uk/media/20843/Contract-of-Employment--Privacy-Notice/pdf/2018-03-21\\_-\\_Contract\\_of\\_Employment\\_Privacy\\_Notice.pdf](https://www.westlothian.gov.uk/media/20843/Contract-of-Employment--Privacy-Notice/pdf/2018-03-21_-_Contract_of_Employment_Privacy_Notice.pdf)'.



# **HR21 Employee & Manager Self Service**

## **Troubleshooting Guide**

**HR Services**

**July 2019 – Version13**

Data Label: OFFICIAL

## **Contents**

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**3. Passwords**

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**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: <https://hr21.westlothian.gov.uk/>

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 <http://intranet.westlothian.gov.uk/article/6909/HR21>

Any queries or requests for unlocks should be emailed to [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) quoting your employee number.

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

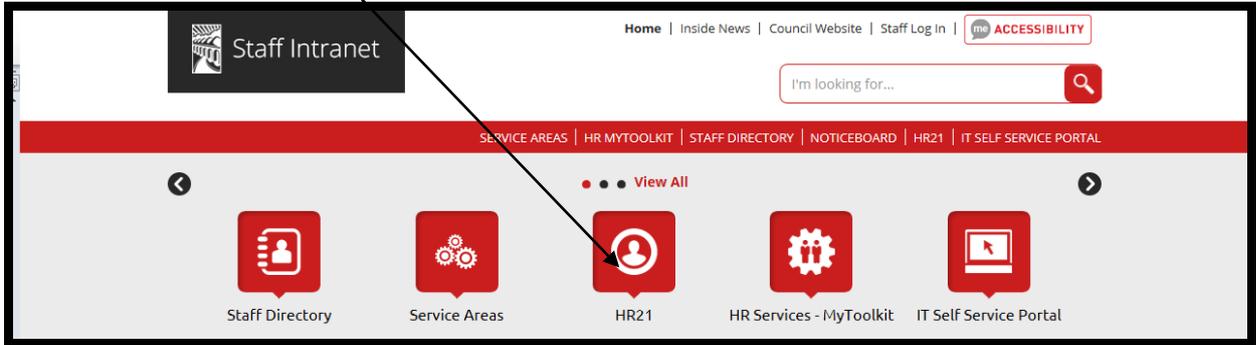
- Cannot access the system – not following password process correctly – please refer to the Employee User guide “GETTING STARTED “for further guidance.
- New password not ending in a number.

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

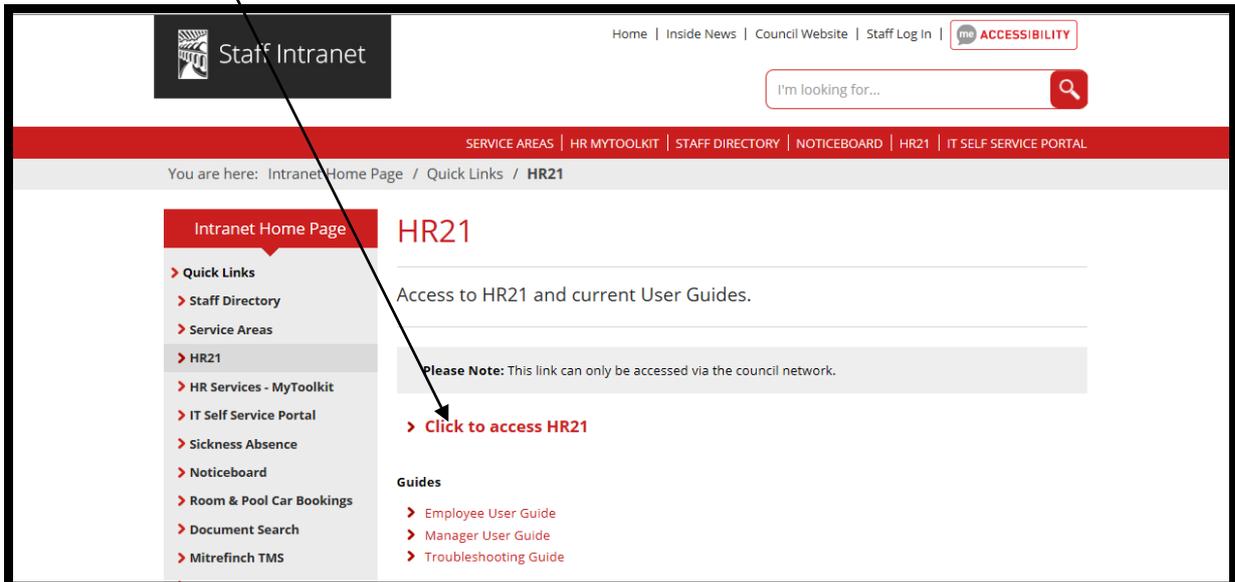
## 2. Where to find the link

The link can be found on Council's Intranet

Click on HR21



- Click to access HR21



- Link can also be found on emails sent by [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk)

### 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: [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) for password reset

### **IMPORTANT**

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

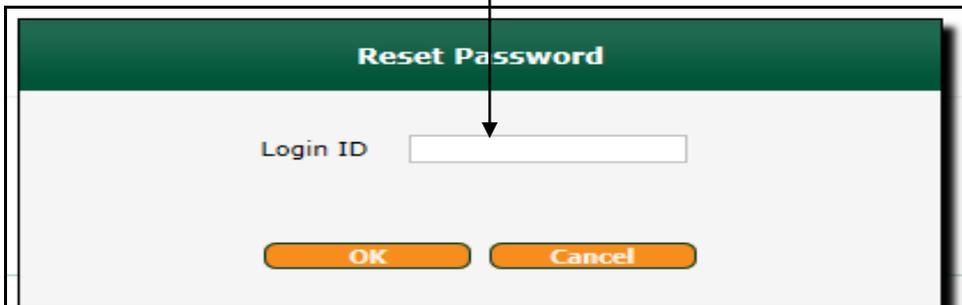
You can reset your own password in HR21.

Click on **HR**



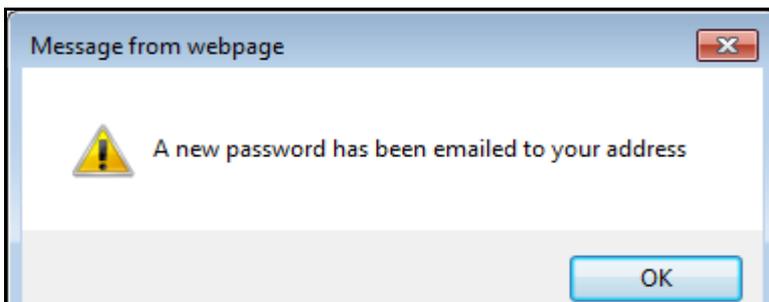
The screenshot shows the HR21 login page. At the top, there are several logos including 'Investors in Young People', 'Good Practice Award Gold', 'Investors in People Gold', 'EFQM', and 'Living Wage'. The 'West Lothian Council' logo is on the right. Below the logos is a green header with the word 'Login'. The main content area contains a login form with fields for 'Login ID' and 'Password', and an 'Enter' button. Below the form, there is a link: 'Contact [HR](#) if you have forgotten your password.' An arrow points from the text 'Click on HR' to the 'HR' link.

Enter your login ID (Employee number) – click ok



The screenshot shows a 'Reset Password' dialog box. It has a green header with the text 'Reset Password'. Below the header is a text label 'Login ID' followed by an empty input field. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'. An arrow points from the text 'Enter your login ID (Employee number) – click ok' to the input field.

Message appears



The screenshot shows a message box titled 'Message from webpage'. It contains a yellow warning icon and the text 'A new password has been emailed to your address'. At the bottom right of the message box is an 'OK' button.

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.

Customer Satisfaction  
CSE  
INVESTORS IN YOUNG PEOPLE  
GOOD PRACTICE AWARD GOLD  
INVESTORS IN PEOPLE Gold  
EFQM Recognised for excellence 5 star - 2016  
Living Wage Employer  
West Lothian Council

Login

Login ID

Password

Enter

Contact [HR](#) if you have forgotten your 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 [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk)
- **Your account access has ended** (This usually applies to employees who are on temporary contracts)  
Error message BRE013 – Your access has expired please email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk)
- **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

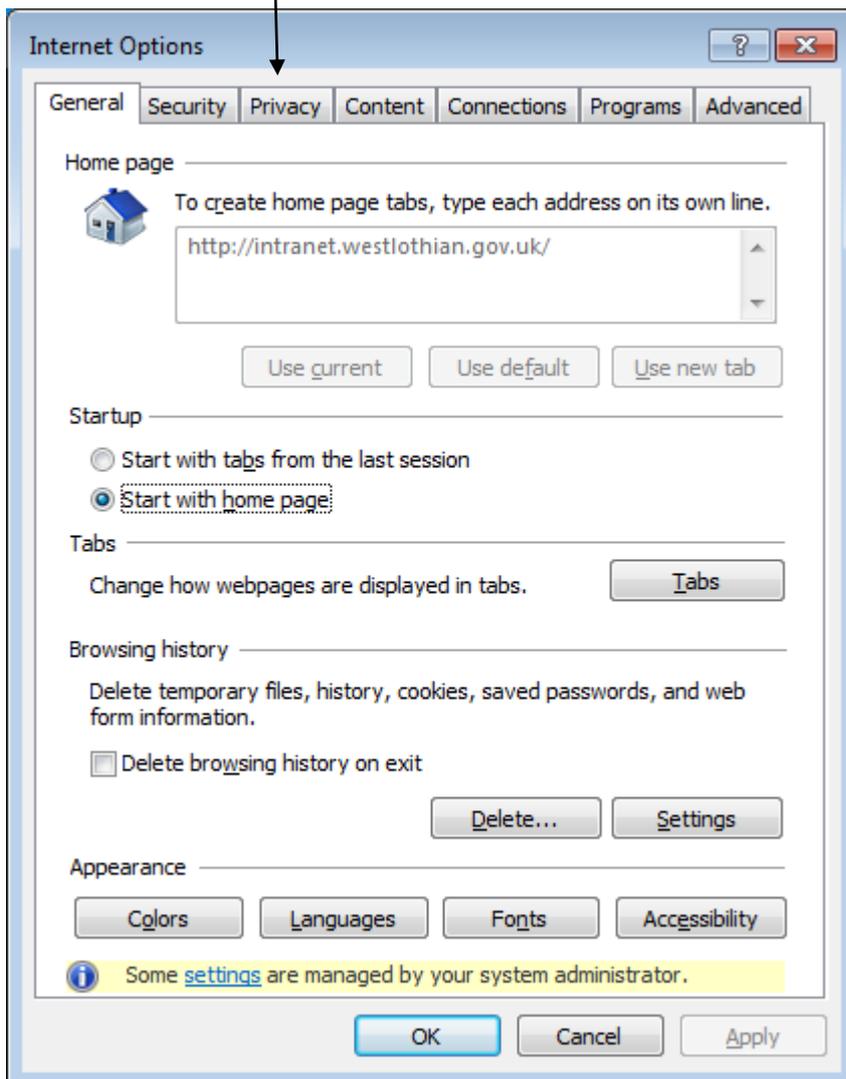
**PLEASE TRY LATER**

## 5. System keeps logging you out

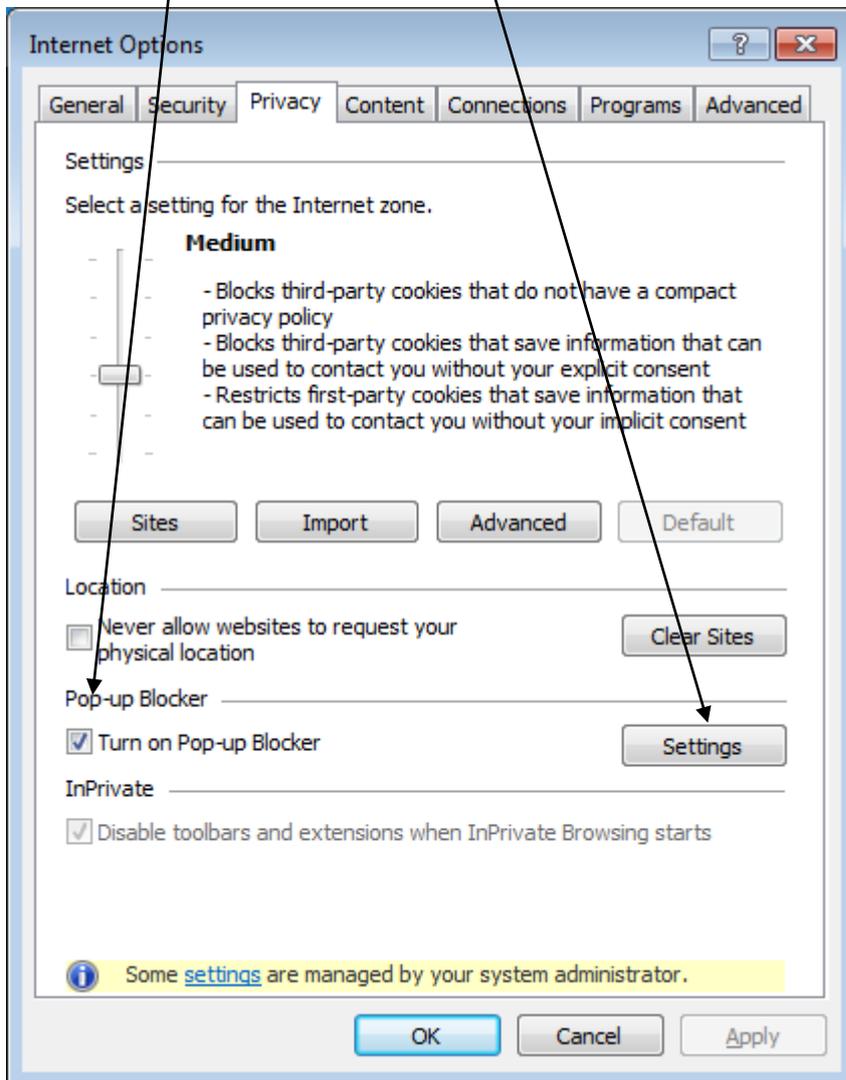
### 5.1 Cannot print payslip

Reason: May need to do some housekeeping on computer

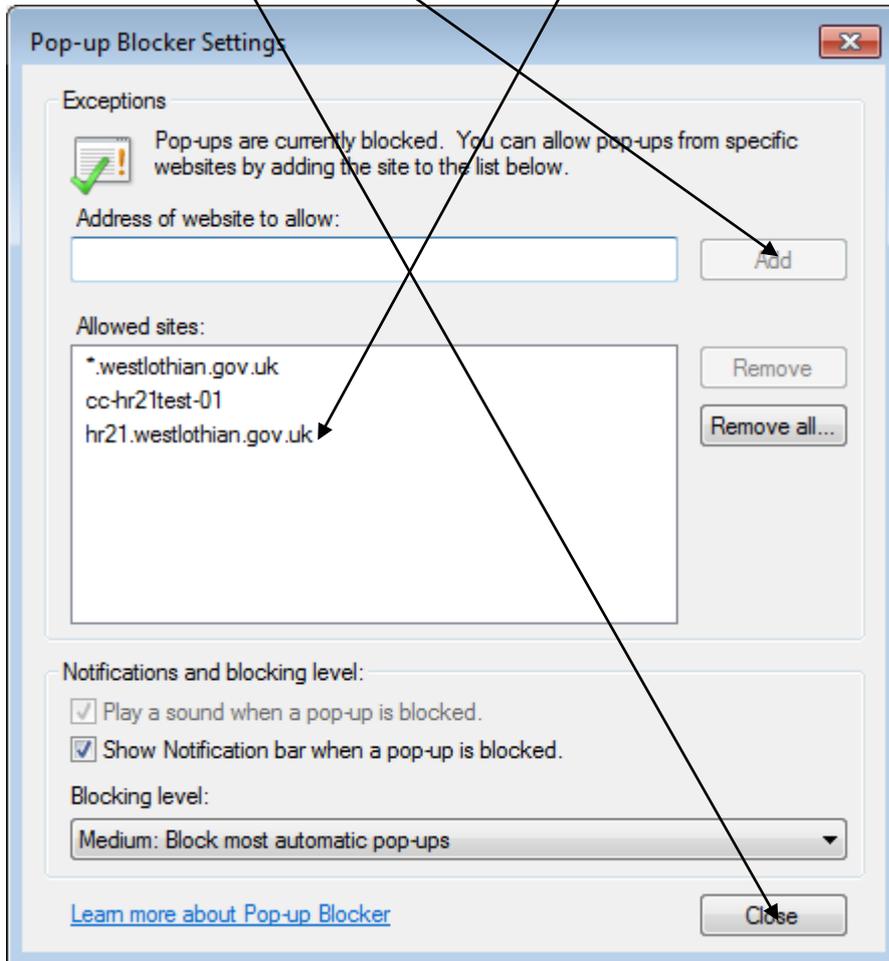
- Go to **Internet Options**
- Privacy



- Pop-Up Blocker
- Pop-Up Blocker Settings



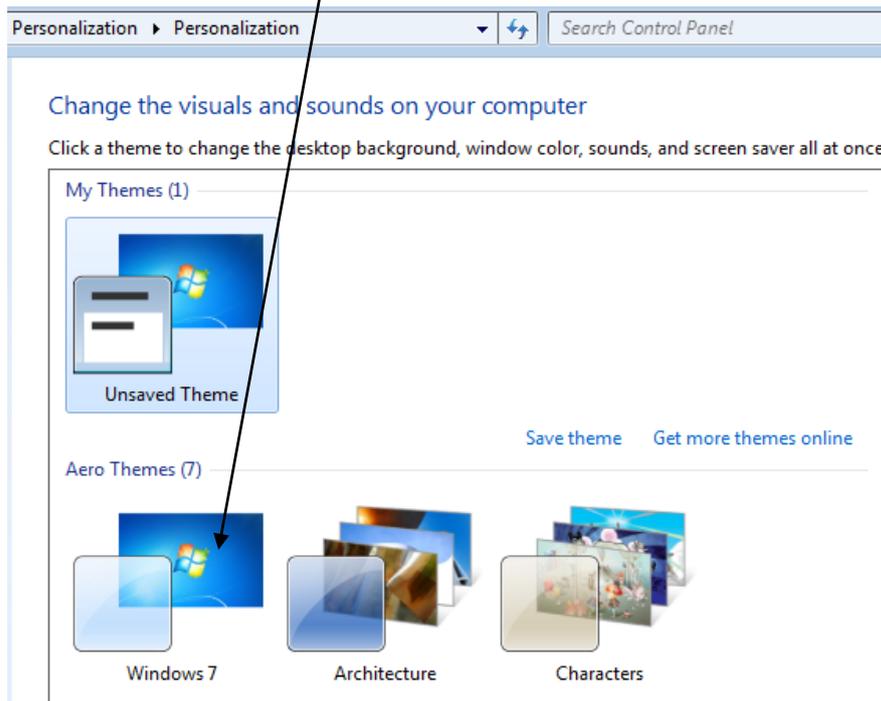
- Check in "Allowed Sites" for the HR21 link
- If not there copy HR21 link <https://hr21.westlothian.gov.uk/HR21v3213/Interface/login.aspx> to "Address of website to allow"
- Add
- Close



## 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 [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) 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- 5506-S No reply from server: chris21live.app.westlothian.gov.uk : pool5. Last Error = "scGet : rcv failed : Other end closed connection"**

**FTR- 3500-S No more messages available**

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