Employee Self Service User Guide

June 2023

Contents

Data Label: Public

Please refer to the relevant user guides for the following processes which can be found on my toolkit Welcome to Human Resources - West Lothian Council

➢ **Annual Leave**
➢ **Learning**

Data Label: Public

1. About This Guide

This guide gives you comprehensive information about how to use employee self-service and acts as a reference point in case you need to know about any particular feature.

➢ **How to use this Guide**

You can use the contents page to find a specific topic or, you can read through the entire guide to help you understand what you can do on myHR. Within the guide we have used screen shots to illustrate the self-service screens and any steps you need to make when making a change or submitting claims.

There are separate guides available for

➢ **Learning**
➢ **Annual Leave**

2. Getting Started with myHR Employee Self Service
➢ What is myHR

myHR is West Lothian Council's employee self-service system that enables you to:

- View and update some of your own personal details.
- View your sickness absence details.
- Submit Special Leave requests and submit Time & Expenses claims.
- View and request Annual leave.
- Book a Learning course.

➢ Security

When you log into myHR, the data you see only be viewed by you. Your Reporting manager will be able to view limited details. It is in your own interest to keep it accurate and up to date.

You can help ensure your myHR data is secure by following these simple rules:

- Never give your username and password to anyone else.
- Never leave personal data on screen for others to see.
- Always log out of myHR when not in use.

Data Protection
The data contained in this system and its usage is subject to general data protection regulations and **West Lothian Council's Information- Governance Policy.**

Data Label: Public

➢ New User Set up

 When first set up on the system you will receive an email advising that your account has been set up and a link to access myHR.

Dear

Please be advised that your 'MyHR' account has been set up.

Your username is as follows:

Your Password is your NI Number and you can access your account via this link:

https://trent.westlothian.gov.uk/trentlve_ess/ess/dist/#/login?page=login

If you are a reporting manager please access your People Manager account via this link

https://trent.westlothian.gov.uk/trentlve_web/wrd/run/etadm001gf.open

Please use the same username and password.

Whichever you access first, myHR or People Manager and you change your password, you are changing the password for both and the new changed password should be used going forward.

Regards
HR Services

(To open link – hold Ctrl on keyboard and click on link)

Capital letters should be used when entering your National Insurance number.

Login page is displayed

- Type your Username: This is your employee number and ==this never changes==.
- Type your Password: Your Initial password will be your National Insurance number (Please use capital letters).
- Please change your password after accessing the system for the first time.
- Click on Login button once to get started
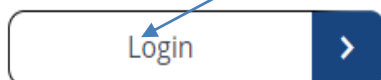
Employee number can be found on your payslip or P60. Your reporting manager will also be able to give you this number.

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Disclaimer notice

The first time you access myHR a Disclaimer notice will display for you to read.

 After you have read the statement please tick box "I agree to the above privacy statement" and click Accept.

You cannot access myHR until this has been done.

Disclaimer

Data Protection

All personal information is held and processed by West Lothian Council in accordance with data protection law.

West Lothian Council have put in place appropriate technical security and organisational measures to prevent personal information being accidentally lost, used or accessed in an unauthorised way, altered or disclosed.

In addition, the council limits access to your personal information to those who have a business need to access such information. Where it is necessary to share information with a third party, they will only process personal information on our instruction and they are subject to a duty of confidentiality.

Further information is available in the council's privacy notices regarding:

Contract of Employment

If you have any questions please contact hrsupport@westlothian.gov.uk

☐ I agree to the above privacy statement.

Accept privacy statement

Data Label: Public

➢ **Logging onto myHR**

To access myHR at any time please click on this link to the login page – it is recommended you save link to your favourites

https://trent.westlothian.gov.uk/trentlve_ess/ess/dist/#/login?page=login

myHR is a web-based system so you can access it using a PC, Laptop, tablet, Android and iPhone smart phones. (Please use Google chrome)

iPhone

Bookmarking (shortcut) to iTrent link for an iPhone

- **Browse to https://trent.westlothian.gov.uk/trentlve_ess/ess/dist/#/login?page=login**
- **At bottom of Safari click on 'send to' icon. This is a square with an arrow pointing upwards.**
- **Scroll down to Add Bookmark & Select.**
- **Name Bookmark (if required).**
- **Ensure LOCATION is set to Bookmarks & Save.**
- **NEVER SAVE YOUR PASSWORD**

View Bookmarks (shortcuts)

- **Open Safari.**
- **At bottom of Safari click on 'book' icon.**
- **Ensure 'book' icon is highlighted, if not select it.**
- **Your bookmark should appear.**

Android phone

Creating a shortcut to myHR on Smartphone Home Screen.

- **Launch "Chrome" app.**
- **Open the website or web page you want to pin to your home screen. For myHR go to**
- **https://trent.westlothian.gov.uk/trentlve_ess/ess/dist/#/login?page=login**
- **Tap the menu icon (3 dots in upper right-hand corner) and tap Add to home screen.**
- **You'll be able to enter a name for the shortcut (MyHR) and then Chrome will add it to your home screen.**
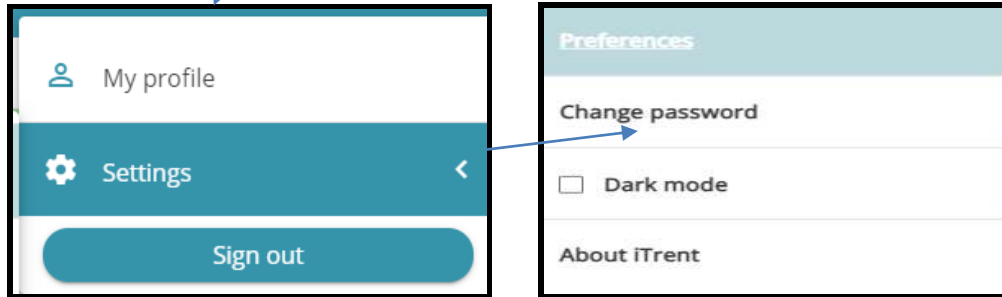- **NEVER SAVE YOUR PASSWORD**

Data Label: Public

Utility menu

Data Label: Public
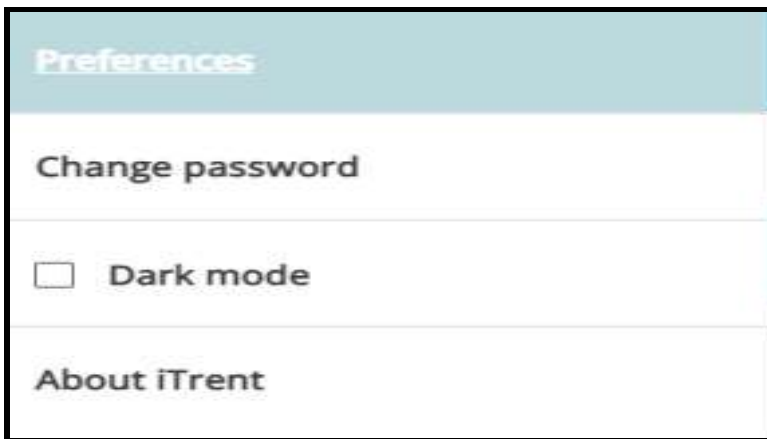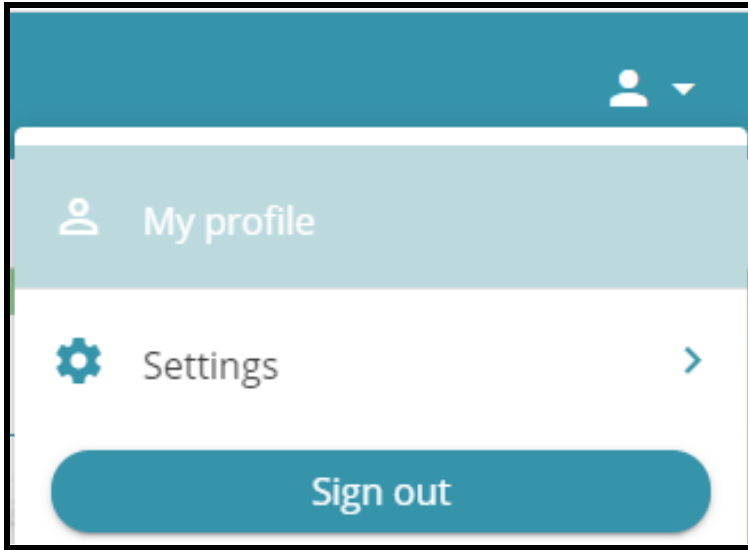
Change password

To change your password after your first log in: **To set this up click on the icon.** **which can be found on the right at the top of the page. When you click the icon, a drop-down menu will appear.**

**Select Change password**

- ❖ **Passwords expire after 90 days**
- ❖ **You cannot use any password you have previously used.**
- ❖ **Password must have at least 8 characters and must contain alpha, numeric and upper- and lower-case letter**
- ❖ **Passwords will deactivate after three unsuccessful attempts (invalid password message will keep appearing) If this happens please use the Forgotten password process**
- ❖ <mark>**NEVER SAVE YOUR PASSWORD**</mark>

People manager users only

Whichever you access first myHR or People Manager and you change your password, you are changing the password for both and the new changed password should be used going forward

Dark mode

If Dark mode is ticked your background view will be dark. This view can help with accessibility issues.
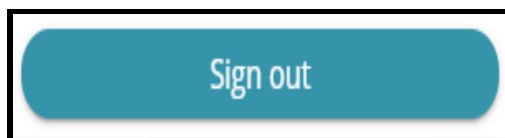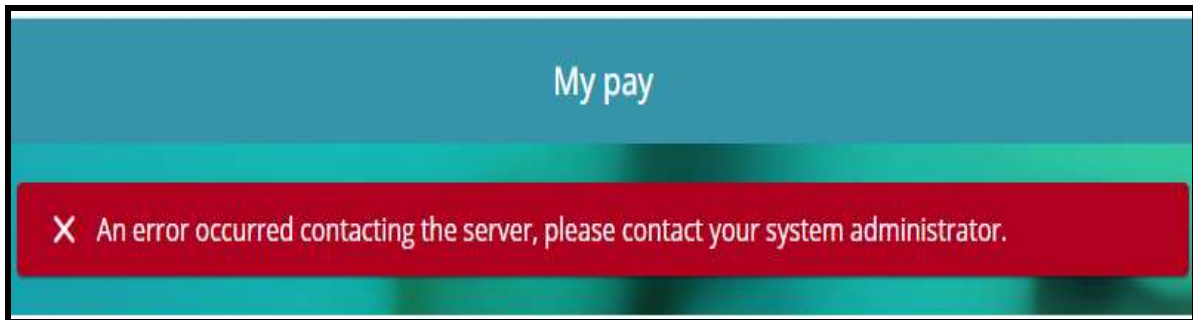
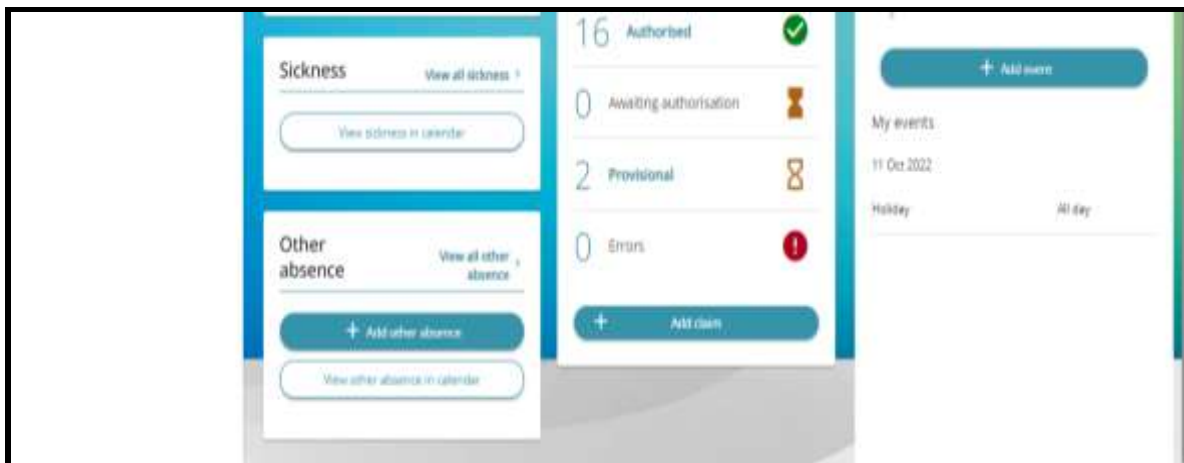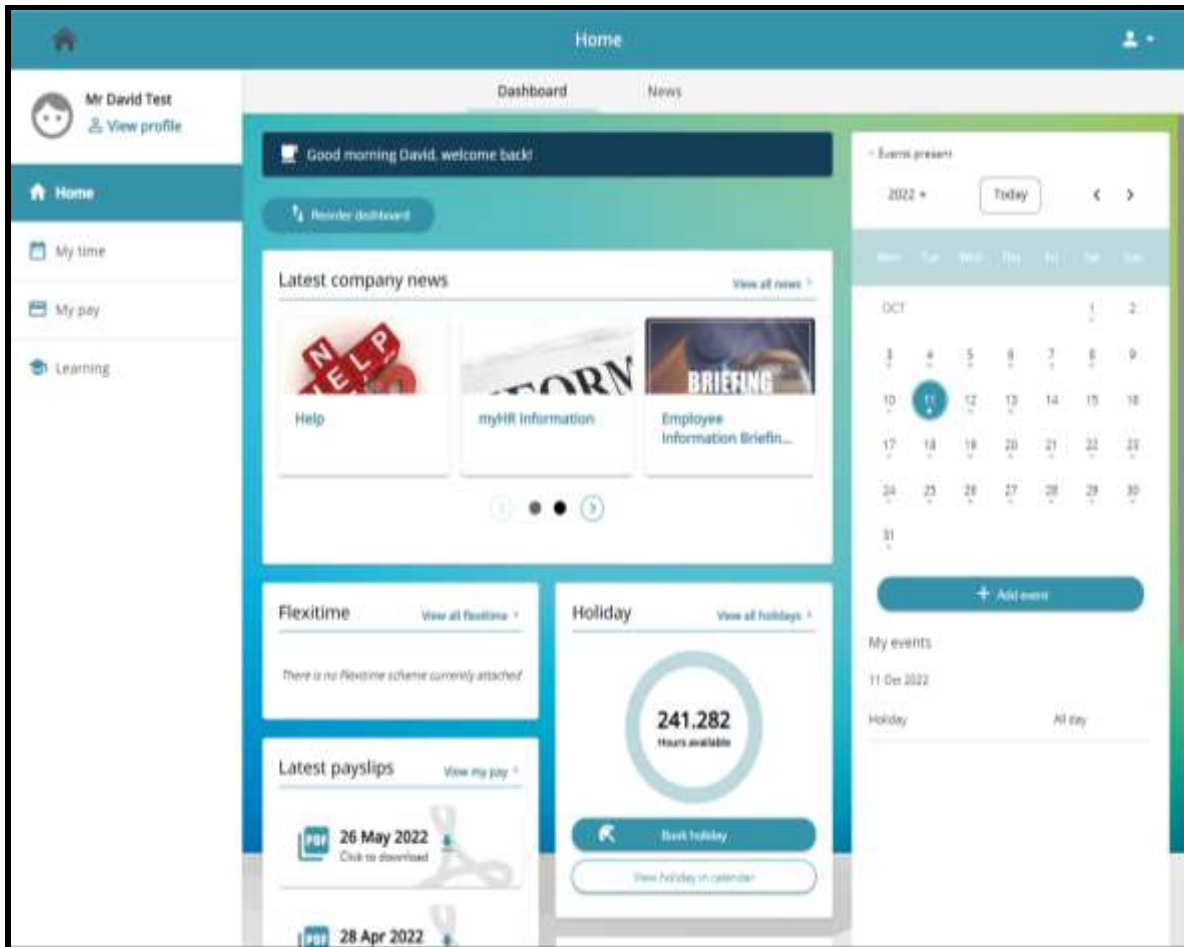**To exit myHR click on Sign out**

Data Label: Public

Home page **this button can be used to return to the home page from any page**

If you have not signed out of myHR after a period of time and access again you will receive this warning message

Log out and log back in again to access myHR again.

Data Label: Public

Home page

Data Label: Public

Dashboard

Displays the latest company news which you can view by clicking on the arrows under the cards displayed.

You can also view your

- ❖ **Sickness absences**
- ❖ **Latest payslips (download also if required)**
- ❖ **Add and view Other absence**
- ❖ **Book and view all your holidays**
- ❖ **Add and view all your Time & Expenses claims**

News

Can view all news items by clicking on cards displayed

Data Label: Public
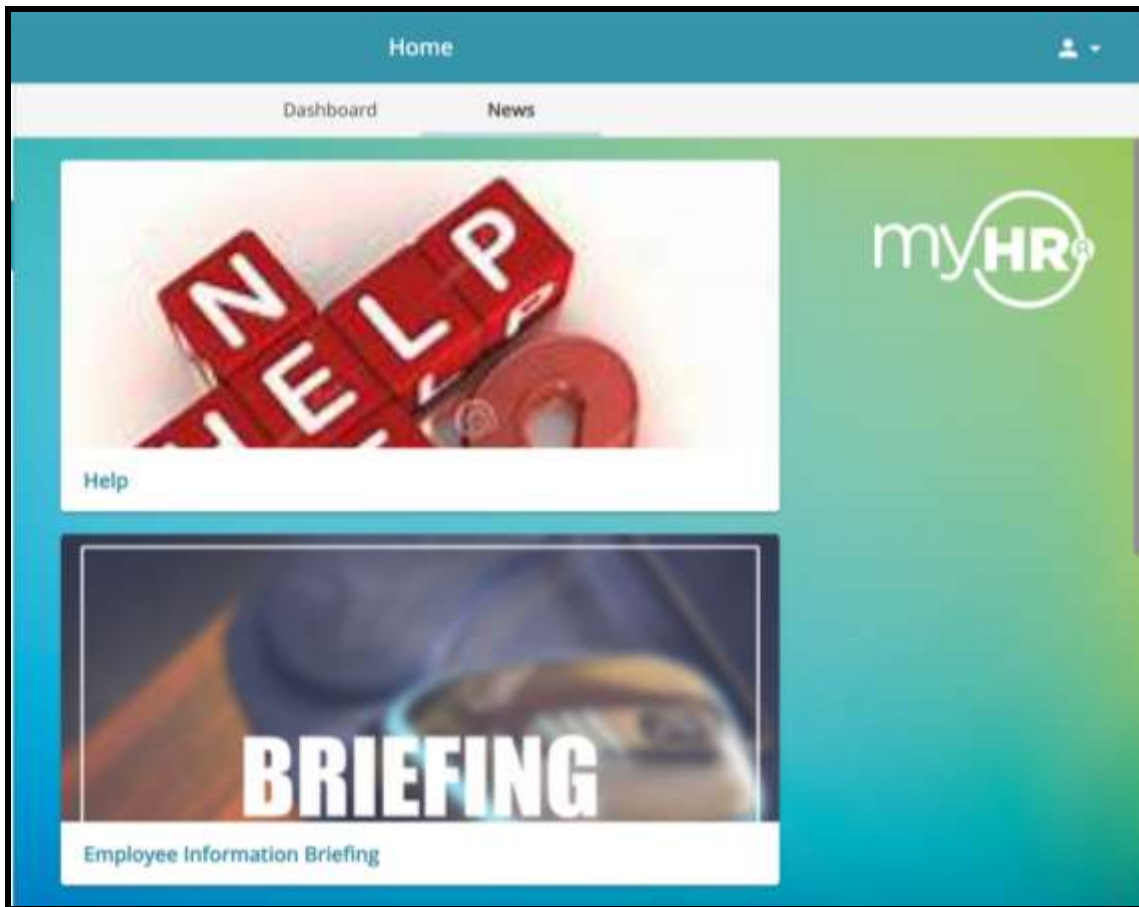
Example:

Click on Help card – information displayed

Help

Information relating to MyHR's (employee self service) can be found at the link below. Here you will find

- Employee User Guide
- Quick links to access pages within the guide
- A list of Digital Champions for each service area

https://www.westlothian.gov.uk/my-hr

Paydates and Payscale information can be found here https://www.westlothian.gov.uk/article/33247/Payroll

Click on myHR information – information displayed

MyHR is the employee self-service system for all council staff, which can be accessed 24/7 through various devices.

Access the system using the button below:

Log in to MyHR >

You will be able to view your data, including:

- Personal information
- Absence information (including sickness and special leave requests)
- Payslips (current and payslips from April 2020)
- P60s (2020/21 onwards)
- Current job position (including hours and continuous service date)

As an employee you can:

- update your personal information at any time (including equalities information)
- change your bank account details
- request Special Leave (e.g. bereavement leave) and annual leave*
- make overtime and expenses claims *

Data Label: Public

There is an events calendar displayed on the right-hand side of the screen
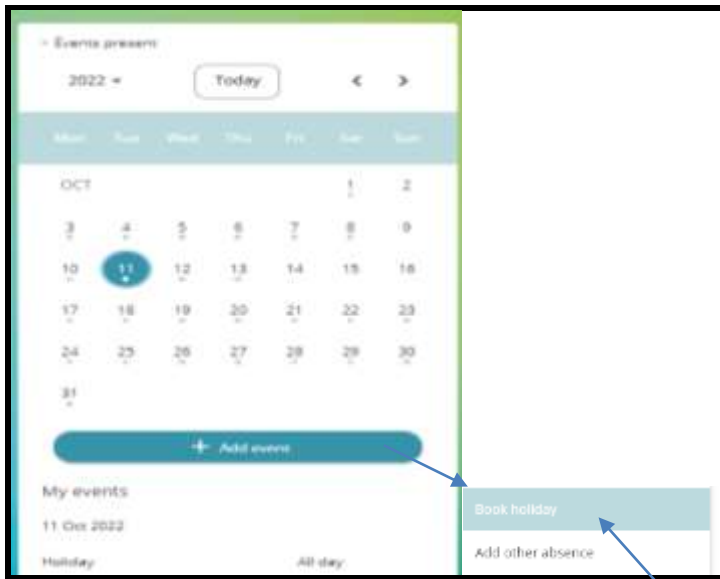
**Any holidays/Other absences that you have booked will be displayed under My events**

In Add event you can book a holiday and add a Other absence here.

Data Label: Public

➢ **What to do if you forget your username?**

Your username is your employee number and this <mark>never changes.</mark>

If you forget your username you can find it on your payslip or P60 and you can also ask your reporting manager.

<mark>**Do not use the Forgotten username link on the login page**</mark>

Data Label: Public
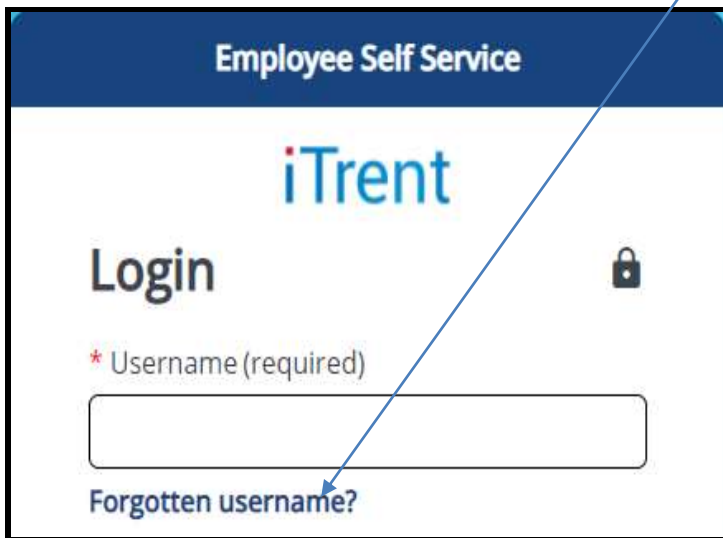
➢ What to do if you forget your password?

Passwords will deactivate after three unsuccessful attempts (invalid details message will keep appearing)

If this happens please use the Forgotten password process.

If you forget your password click the "Forgotten password?" link
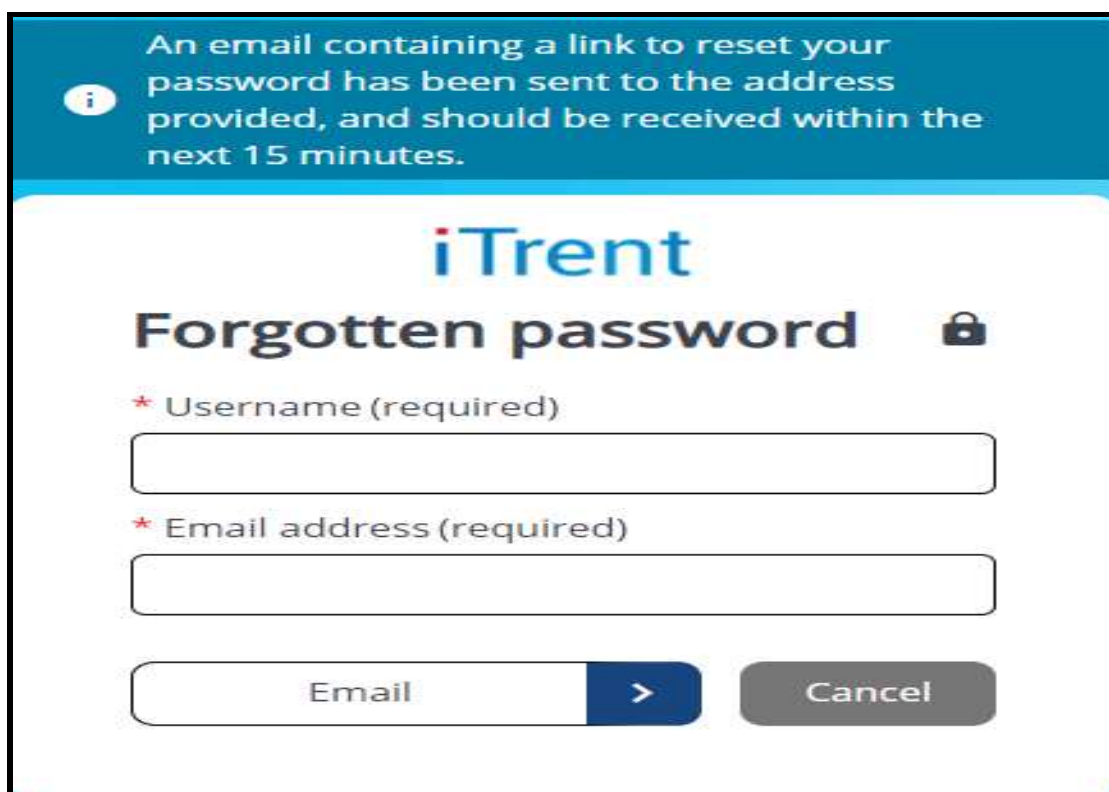
- **Enter your username – employee number**
- **Enter your myHR email address in Email address (required)**
- **Click the 'Email' button**

Data Label: Public

After clicking 'Email' you will see the following message.

Email addresses

Please ensure you use the correct email address, this depends on the email address you advised that you wish to be assigned to your myHR account.

Email addresses can be your

- ❖ **Work email address (if you have one)**
- ❖ **Personal email address**

Employees cannot change their myHR email address

Email addresses can be changed as follows:

- **myHR Correspondence: Change yourself via myHR**
- **myHR email: Request via HRSupport@westlothian.gov.uk**
- **e-payslip: Request via payroll@westlothian.gov.uk**

<mark>**Education staff only**</mark>

Please do not try to use glow email addresses you will not be able to access your account.

Glow email addresses where not assigned to any myHR accounts.

Your work email address is .org account e.g. David.Test@westlothian.org.uk

Data Label: Public

Email is received in your mailbox (example below) – Click on Reset password button and you will be asked to enter a new password.

If the password you enter is the same as your old password you will be informed.

- **Passwords expire after 90 days.**
- **Passwords will deactivate after three unsucessful attempts (invalid login will keep appearing) If this happens please use the Forgotten password process.**
- **You cannot use any password you have previously used.**
- **Password must have at least 8 characters and must contain alpha, numeric and upper- and lower-case letter.**

Hi Anita Marie,

You recently requested to reset your password for your MyHR / People Manager account. Use the button below to reset it.

This password reset is only valid for the next 6 hours.

==Please DO NOT save your password on your device==

Reset your password

If you did not request a password reset, please ignore this email or contact myhr@westlothian.gov.uk if you have questions.

Thank you
HR Services

If you do not receive this email in your inbox within the specified timeframe, please check your Junk mail before contacting HR as a potential problem.

You can only use the Reset your password link once if you try more than once you receive a warning message.
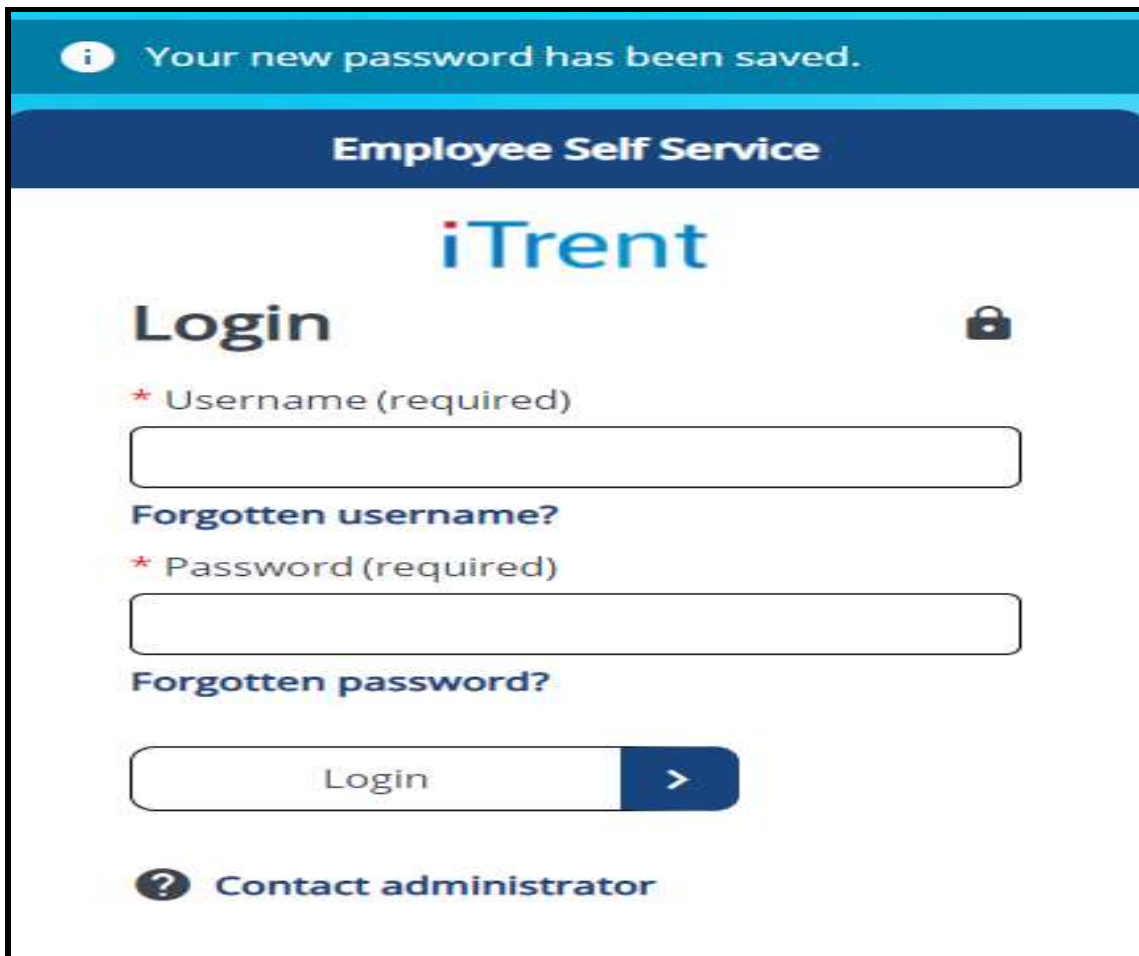

Detected a potential security violation. No further action will be allowed.

Data Label: Public

If you do not reset your password within the 6-hour time limit you will receive the following warning message. You will have to start the Forgotten password reset process again.

Data Label: Public

When you successfully change your password, this screen is displayed

Saved Passwords

You should never save your password to any device as this can stop you accessing the system.

You will need to delete any saved passwords from your devices and then use the Forgotten password process to create a new password.

MyHR system teams cannot delete your saved passwords.

View profile

You will see your name in the left-hand corner of the screen with a View profile icon.

When you click on View profile all your personal details are displayed.

Data Label: Public

My personal details

- ❖ **Confidential information – includes Special requirements /Sensitive information**
- ❖ **Contact information**
- ❖ **Friends and family**
- ❖ **Bank details**
- ❖ **Private vehicles**

My personal details
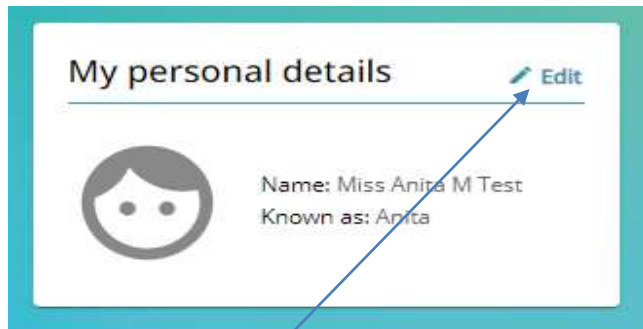
My personal details section, you can view, add and change certain information held about you in the Council's HR/Payroll system.

You can change your surname /title/pronouns/preferred names/marital status in this section by clicking Edit – you are unable to amend any of the grey boxes

You are unable to change your date of birth. In the event it is incorrect and it requires changing, please email hrsupport@westlothian.gov.uk

My personal details

Profile image selection

[↑ Upload image] [🗑 Delete image]

No profile image is currently in use

* Surname (required)

Test

* Forename (required)

Anita

Forename 2

Maria

Forename 3

* Title (required)

Miss   × ▼

Pronouns

Please choose   ▼

Preferred surname

Test

Make the change – Save

When you make a change, an email notification will be sent to you.

Click on Back to Personal to bring you back to Personal page.

Confidential information

Confidential information

Select the links below to view or amend your information
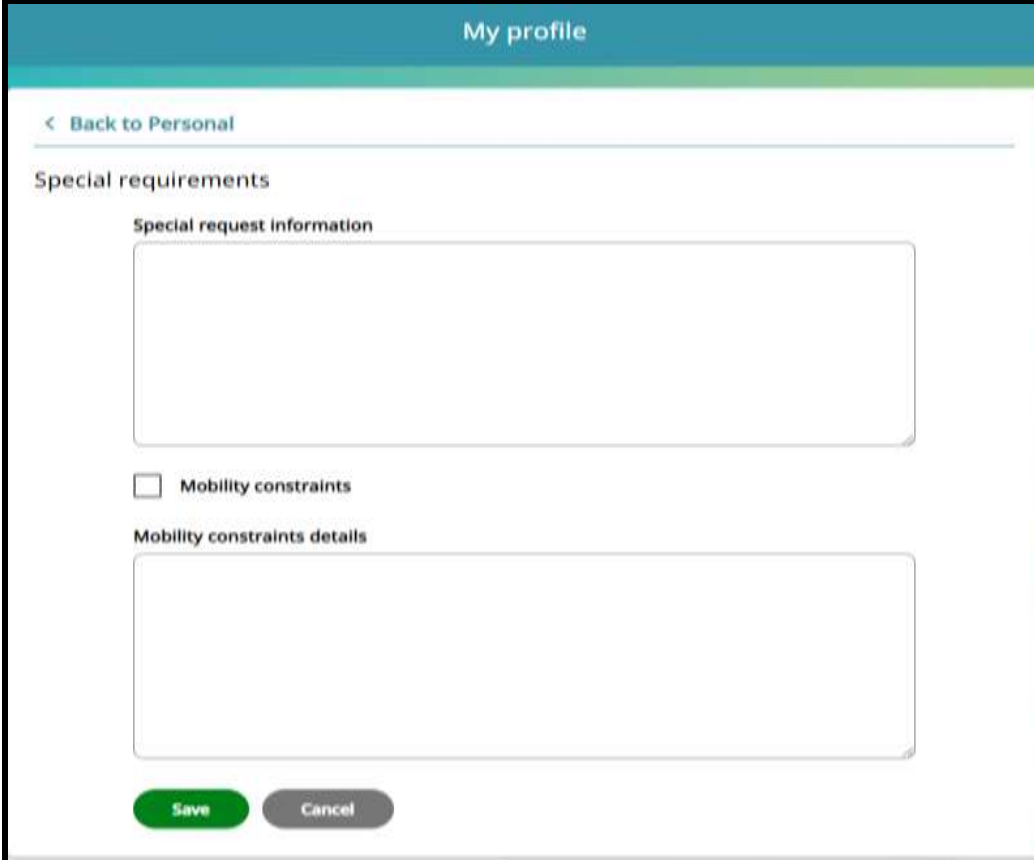
Special requirements >

Sensitive information >

Confidential information section, you can view, add and change certain information held about you in the Council's HR/Payroll system.

Data Label: Public

Special requirements

If you have any special requirements e.g. Mobility issues, you can record your information here.

Data Label: Public

Sensitive information

This screen contains information that the Council has about you with regards to sensitive information such as Religion, Ethnic origin, Sexual orientation and disability.

On your first visit to the system, please enter your information in this area. This is to enable the council to make their legal obligations with regards to equality legislation.

Please note you are not required to complete any of these fields on this screen and you have an option to select prefer not to say.

Sensitive information

ℹ️ The personal data that you enter into this form is voluntary, if you do provide the information requested, we will only use this in an aggregated and anonymised form.

Marital status

Married   × ▾

Religion

Prefer not to say   × ▾

Ethnic origin

Prefer Not to Say   × ▾

Place of birth

Nationality

Italian   × ▾

Sex identifier

Prefer not to say   × ▾

Gender reassignment

When you make a change, an email notification will be sent to you.

Data Label: Public

You can also update /amend any changes that may occur with your Carer responsibilities

e.g. Your children are no longer under 18 years old

- **In "Do you have caring responsibilities" – choose None**
- **In "Area of caring responsibility" – Choose No longer applicable**
- **Save**

Additional fields

Do you have caring responsibilities

Yes ▼

Area of caring responsibility

Children under 18 ▼

Save   Cancel

Contact Information

In Contact information section, you can view, add and change your contact details, view amend and add your address.

Contact information

Home - Mailing Address: 61 Castle Kevin Drive, West Calder, WEST LOTHIAN, EH32 8TH, United Kingdom

My HR Correspondence Email:

My HR Email Address:

Work Telephone: 01506 112156

+ Add Address   **+ Add Contact Details**

Email addresses

❖ **myHR Correspondence Email**
- **myHR Correspondence Email address can be changed by you. Click on link and make change.**
- **This email address is where all your correspondence from HR / Payroll will be emailed to.**

❖ **myHR Email Address**
- **myHR Email Address cannot be changed by you – this is used to send notifications to you when an action is carried out on the system.**
- **Employees who have a council email address this will be their "myHR email address"**

myHR email address for employees who do not have a Council's email address will be their personal email address.

Please contact hrsupport@westlothian.gov.uk if you wish to change this.

Data Label: Public

To amend contact information

Click on relevant link

Contact information

Home - Mailing Address: 61 Castle Kevin Drive, West Calder, WEST LOTHIAN, EH32 8TH, United Kingdom

My HR Correspondence Email: [redacted]

My HR Email Address: [redacted]

Work Telephone: 01506 112156

+ Add Address   **+ Add Contact Details**

Example: Home – Mailing Address

Address details

ⓘ This form allows you to correct your current address information. If your address has changed please use the add address details option.

* Address type (required)

Home

☑ Mailing address

Postcode

EH66 KYT

Premises

Happy Street

* Building number/street (required)

62

Neighbourhood

Calders

Post town

LIVINGSTON

County

WEST LOTHIAN

Country

United Kingdom

You can amend your address here by over keying information already there.

Save

Data Label: Public
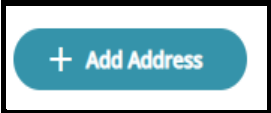
If your address has changed – Click on Add Address button **B**

- **A blank screen is displayed**
- **Enter your new address**
- **Save**
- **Message is displayed – Address has been set as a new mailing address**

When you make a change or add a new address, an email notification will be sent to you.

Data Label: Public

Contact details

Click on Add Contact Details **and choose which contact type you want to add from drop down list.**

Add in information you want added

Save

If you have more than one contact detail to add click on Add Contact details button again.

Data Label: Public

Friends and family

In this screen you can maintain your emergency contact details. Emergency contacts are used when the Council needs to get in touch with your nominated contact (friend or family member) in the event of an emergency.

Friends and family

Type	Contact name	Relationship	Contact number	Primary contact
Emergency contact	asfsfjhsfsdf	Husband	dsdsadsa	Yes
Emergency contact	Test Tester	Not Specified	01607 851747 / 07402365154 /0141205163 (HMW)	No
Emergency contact	Test Tester 2	Son		No

+ Add Emergency Contact

Click on Add Emergency Contact button

Emergency contact

* Contact name (required)

Relationship to me

Please choose

Contact at

Contact email

☐ Primary contact

☐ Use as next of kin

Enter details - Save

If the contact you are adding is to be the primary contact please tick the box (you can only have one primary contact).

Bank details

This page shows the bank details that are used to pay you.

Bank details

Account name	Bank name	Sort code
A Testeing	Royal Bank of Scotland	831605

You can only <u>amend your bank details</u> by clicking on the information already there.

Please be aware of the warning message at top of screen

Bank details

ⓘ These details are used to pay your salary and any changes will take immediate effect. Please check the details carefully before saving.

* Sort code (required)

831605

Bank name

Royal Bank of Scotland

Roll number

* Account number (required)

12345678

* Account name (required)

A Testeing

[Save] [Cancel]

Data Label: Public

PLEASE NOTE: If you have changed your bank account within 8 days of pay day, your pay will have already been processed to the bank. We therefore recommend that your <u>old account</u> is left open until you have been paid.

Please be mindful when changing bank details that the correct details are entered to ensure your salary is not paid into an incorrect bank account.

- **Overtype with new details**
- **When you change the bank sort code, the bank name will change on the screen**
- **Roll number field is only used for those accounts that are from certain Building Societies**
- **If your sort code is not recognised a message will appear saying invalid sort code. If this happens contact Payroll at <u>payroll@westlothian.gov.uk</u> ask them to check your sort code on your behalf**
- **If payroll has already been processed, this change will take effect from the next payroll run**
- **Save**

When you change your bank information, an email notification will be sent to you.

Private vehicles

This screen should only be completed if you are authorised to use your own car for business journeys.
Before you can claim business mileage your vehicle must be added here.

- **Start Date – The system will only allow mileage to be claimed from this date – if you add a claim prior to this date you will receive an error message on claim** **"Error You have no default vehicle"**
- **Default vehicle for expenses must be ticked if this is the vehicle you wish to claim mileage for.**
- **You will not be able to claim mileage unless this box is ticked. An error message will display when you try to claim your business mileage in Time and Expenses if this is not ticked.**
- **End Date – ==Please do not enter an end date when adding a vehicle.==**
- **End dates should only be entered when the car will no longer be used to claim mileage.**
- **If you are no longer using your car for council business please enter an end date.**

You will receive an email notification when you add or amend a vehicle.

Your reporting manager will be advised that you have added a vehicle and they are required to check your documents each time a vehicle is added and update in People Manager.

You should not claim mileage until these checks have been made – please refer to the council's [Policy on Business Travel and Subsistence](#)

Managers are required to verify that authorised car users, for whom they are responsible, have the following checked:

- **Driving licence,**
- **a comprehensive business use motor insurance policy**
- **Valid MOT certificate**
- **Driver Declaration and Authorisation form.**

Where an employee has agreed to use their own car for undertaking business mileage, payment of all allowances will only be made where Services have completed the relevant documentation.

Driving at Work Policy

West Lothian council is committed to protecting, so far as is reasonably practicable, the health and safety of all its employees and others who could be affected by the hazards associated with work related driving.

This policy applies to all employees who drive at work on council business whether this is a key responsibility of their job or a means of travelling between council locations for work purposes.

To refer to this policy please click on this link [Driving at Work Policy](#)

Relevant employees are required to complete a Driving Authorisation and Declaration form when requested annually and resubmit a form if there are any subsequent changes to their details.
This form should be completed and passed to your reporting manager.
They are required to verify that relevant employees have completed this form on an annual basis and update checks in People Manager.

Please click on link to access form   [Driving Declaration and Authorisation form](#)

 (This form now includes the Own Vehicle Authorisation form)

Business use mileage cannot be claimed until this form has been completed.

Motorcycle

If you are adding a motorcycle, fuel type should be Not-applicable.

Employees who drive at work but do not use their own vehicle for council business

All employees who drive whilst at work both in council and private vehicles, must on an annual basis have their drivers licence checked and complete a Drivers Declaration Authorisation form (which includes a medical declaration) annually and be authorised to drive by their reporting manager.

Please click on link to access form   **Driving Declaration and Authorisation form**

When these checks are completed your reporting manager will record the checks in employee's record in People Manager.

Employee and Reporting manager will receive an email reminder 90/60/30 days before these checks are due to be renewed.

For further information please refer to the Driving at Work Policy.

Click on this link **Driving at Work Policy**

Employment

To view details of your employment with the council click on information displayed.

Data Label: Public

- ❖ **Your current position details are read only.**
- ❖ **If you believe the details to be incorrect please contact your reporting manager.**
- ❖ **If your reporting manager is incorrect in Manager field please ask your current reporting manager to email myHR@westlothian.gov.uk**
- ❖ **Please email hrsupport@westlothian.gov.uk if you require more information about your post.**
- ❖ **If you believe your work pattern is incorrect please contact your reporting manager**

Please note: The start date is the date you started working for the organisation not the date you started in this post.

Any future posts you may have will display the date you started in the post.
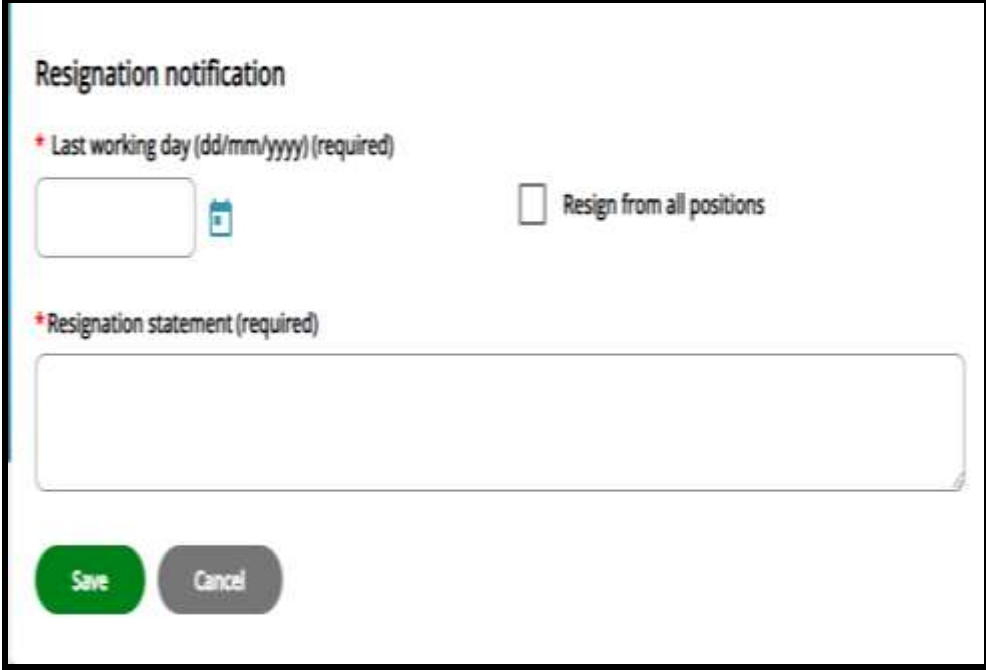
Employees who more than one post will see all post displayed in this screen.

Click on a post and information about that post is displayed.

My employment

Period of employment	Position	Department
25 Feb 2013 - present	Cleaner	Civic Centre
25 Feb 2013 - present	Domestic	Deans House
25 Feb 2013 - present	Supply/Casual	Supply (Social Policy)
25 Feb 2013 - 30 Jun 2020	Cleaner	Supply (Cleaning)

Data Label: Public

Resignation notification

When you resign from your post in myHR the following details should be entered in this screen.

Resignation notification

* Last working day (dd/mm/yyyy) (required)

[   ] 📅   ☐ Resign from all positions

* Resignation statement (required)

[   ]

[Save]   [Cancel]

- **Enter your Last working day – Please be mindful that you are still required to work your notice period. This date should be after all annual leave due to you has been taken**
- **You must complete a resignation statement.**
- **If you have more than one post and only want to resign from one – click on relevant post in Current Job details and continue to complete resignation.**
- **If you have more than one post and wish to resign from them, all please tick Resign from all positions**
- **Save**

Your reporting manager and you will receive an email notification confirming your resignation entry – if you have more than one post you will receive an email notification for each post.

Your reporting manager will complete a Leavers form and send to HR Support to be processed.

You cannot delete a resignation entry.

 Please discuss with your manager if there has been an error in the date.

Off – Boarding: When you leave you will still have access to myHR for a period of 60 days to allow you to access any Payslips/P60'S you may require, you can also download your P45.
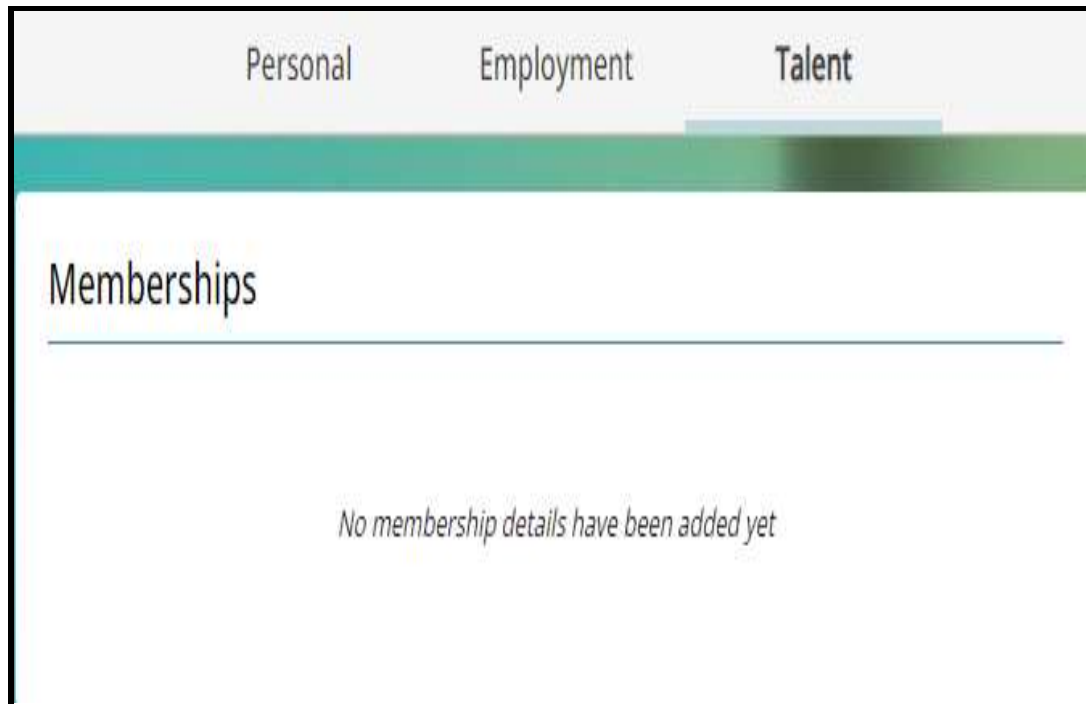
 Also, to allow any late payments to be processed for you by payroll.

Data Label: Public

Talent

Memberships

Teachers can view their GTC membership number here.

Currently you cannot add any memberships details to this screen.

Personal	Employment	**Talent**

Memberships

No membership details have been added yet

My time

In My time you can

- ❖ **Book a holiday**
- ❖ **View your sickness absences**
- ❖ **Add a Other absence**

Please refer to the myHR annual leave user guide on how to book a holiday.

Overview

Sickness

Click on view all sickness   View all sickness >

 ❖ **Enter start date and end date if you want to view your sickness for a specific period of time.**
 ❖ **Searching with neither Start date nor End date will return all absences.**

Example - Sickness absence entry

< Back to Absence records

Sickness details

* **Absence type (required)**

Sickness   ▾

* **Absence reason (required)**

Accidents, Incidents & Poisoning - Chemical burns   ▾

☐ Hide absence reason

* **Sickness period (required)**

More than one day   ▾

* **Start date (dd/mm/yyyy) (required)**

24/03/2022

* **Full or part day (required)**

Full day   ▾

* **End date (dd/mm/yyyy) (required)**

* **Full or part day (required)**

Data Label: Public

Sickness absence process

❖ **When you contact your reporting manager to advise of your sickness absence, they will update the system with the start date and the expected end date of your absence. An email notification will be sent to you.**
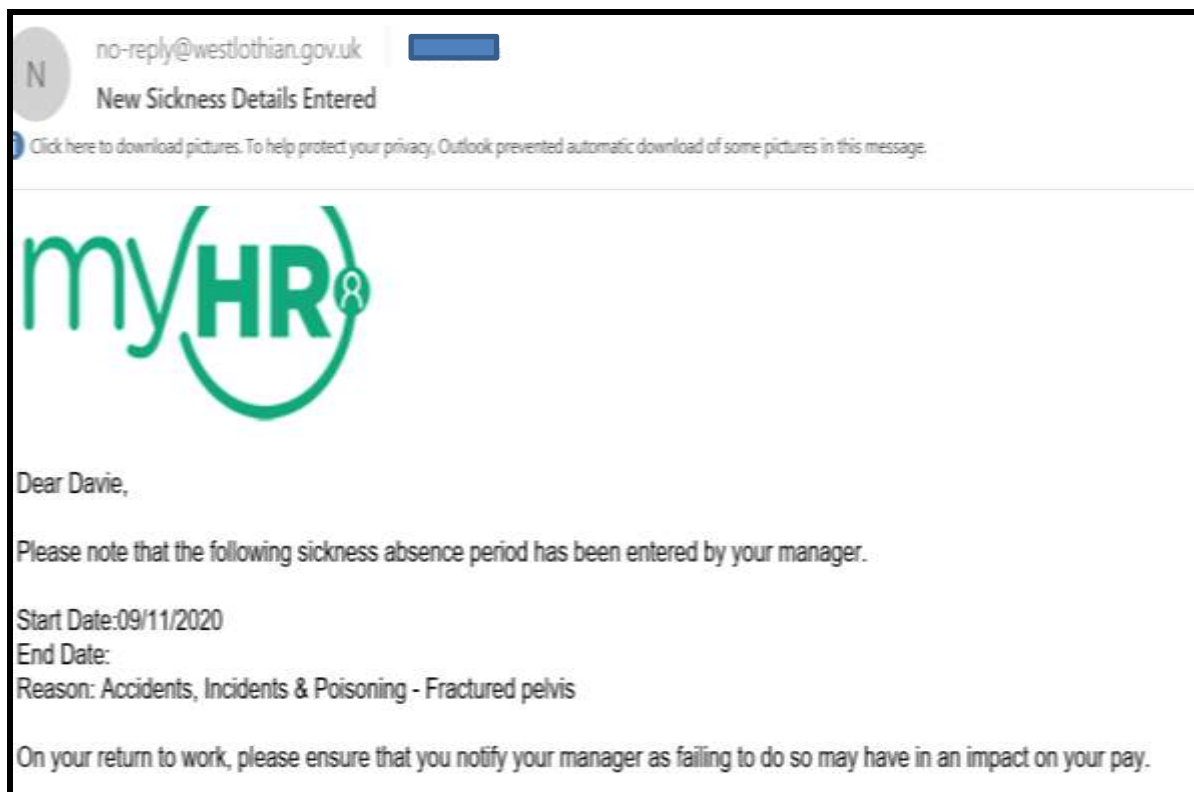
Return to work

- **On your return to work you must advise your reporting manager, they will then enter last day of your absence in the system, if this end date is not entered, this can affect your salary as you will be recorded as still been absent.**
- **The sickness end date is day before you come back to work, not the last day you would have worked i.e. If you are absent from work Monday to Friday and do not work Saturday and Sunday, your sickness end date would be Sunday.**
- **You will receive an email notification to advise that an end date has been entered for you by your reporting manager.**
- **When you do return to work and have advised your reporting manager please review in myHR to check your end date has been entered by your reporting manager.**
- **On your return you are required to complete a self-certificate and your reporting manager will arrange a return to work interview.**

Please contact your reporting manager if end date has not been entered and if any of the details are not correct

Data Label: Public

Email you will receive when an end date has been entered by your reporting manager.

my**HR**

Dear David,

Your sickness absence has been updated, the records note you being absent between: 05/10/2022-07/10/2022.

Regards
HR Services

Data Label: Public

Other absence

Click on view all other absence   View all other absence >

- ❖ **Enter start date and end date if you want to view your Other absences for a specific period of time.**
- ❖ **Searching with neither Start date nor End date will return all Other absences.**

Example – Other absence entry

Data Label: Public

To request a Other absence

Employees can request other leave or time off work in certain circumstances. This must adhere to the Council's Family Care and Other Special Leave policy.

Click on Add other absence

- **Choose absence type from drop down list**
- **Choose absence reason from drop down**
- **Choose absence period e.g. Full day etc**
- **Start date for Part day or Full day**
- **Start date and End date for More than one day**
- **Save**

Data Label: Public

If you select Part day a new field appears and you will then have to select Morning / Afternoon or Specify time.

If you choose Specify time you are required to enter the Start time and End time e.g. 08:00 – 11:00 and number of hours absent e.g. 03:00.
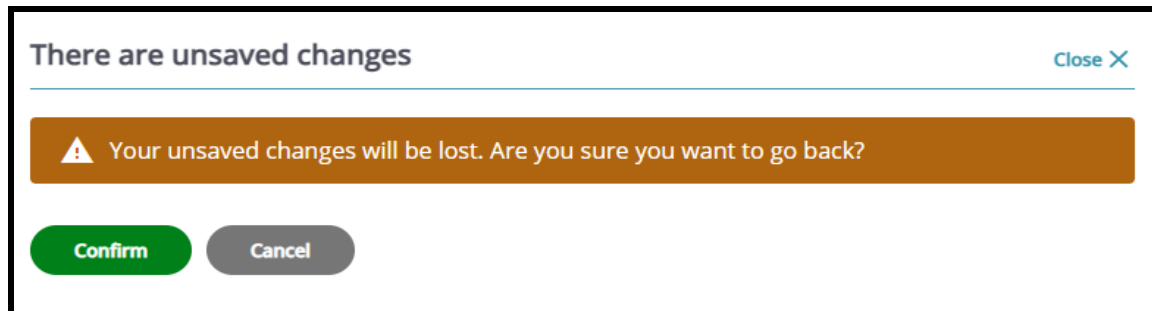
Data Label: Public

if you do not click "Save" after entering details and you then click "Back to Overview" (top of the page) the following warning message is displayed.

A system generated email will be sent to your reporting manager for them to review and either authorise or not authorise your request. When your reporting manager processes your request, you will receive an email notifying you of the outcome.

Amend an Other absence request

You can amend a future dated authorised Other absence request

- ❖ **You <u>cannot amend a future Other absence request that has not been authorised</u> by your reporting manager**
- ❖ **You <u>cannot amend a retrospective Other absence request</u>, you will need to contact your reporting manager requesting that this is to be done**

To amend a future dated authorised request

- **Open request**
- **Make changes**
- **Save**

You will receive an email when this is done and so does your reporting manager.
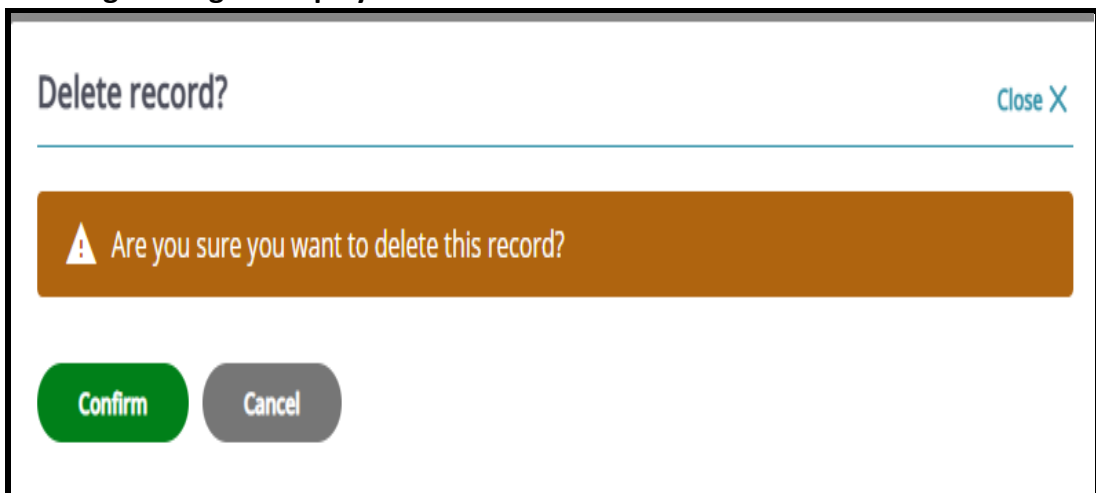
Delete a Other absence request

You can delete a future dated authorised Other absence request

- ❖ **You cannot delete a future Other absence request that has not been authorised by your reporting manager**
- ❖ **You cannot delete a retrospective Other absence request, you will need to contact your reporting manager requesting that this is to be done**
- ❖ **If you wish for an unauthorised entry to be deleted you will need to contact your reporting manager requesting that this is to be done**

To delete a future dated authorised request

- • **Open request**
- • **Click Delete button**
- • **Warning message is displayed**

Delete record?   Close X

⚠ Are you sure you want to delete this record?

[Confirm]   [Cancel]

- • **Click Confirm**

You will receive an email when this is done and so does your reporting manager.

Data Label: Public

Warning messages

Sickness absence

If you request a Other absence and it overlaps with a sickness absence entry, a warning message is displayed. You will not be able to save the Other absence entry.

Other absence details

✕ This absence overlaps with the following existing absence(s):
07/03/2022 - 08/03/2022 (Sickness)

- ❖ **This indicates that your reporting manager has not ended your sickness absence. In this instance you will need to contact your reporting manager as it will not allow you to save the Other absence request.**
- ❖ **When the end date has been entered by your reporting manager will be then able to request the Other absence.**

If you have previously submitted a future dated Other Absence request but was on sickness absence leave on the dates you had requested, your reporting manager should delete your Other Absence request.

 Holiday absence

If you request a Other absence and it is the same day you have booked a holiday for, a warning message is displayed. You will not be able to save the Other absence entry.

Other absence details

✕ This absence overlaps with the following existing absence(s):
01/03/2022 - 01/03/2022 (Personal Holiday)

- ❖ **This indicates that you have already booked a holiday for this date.**
- ❖ **The booked holiday will have to be deleted if you want to request the Other absence for this date.**
- ❖ **If it is a future dated holiday booking and it has been authorised by your reporting manager you will be able to delete it in myHR. A notification email will be sent to your reporting manager advising that you have deleted this booking.**
- ❖ **If the booked holiday date is retrospective you will have to ask your reporting manager to delete the booking for you.**
- ❖ **You will then be able to request the Other absence.**

Data Label: Public

Multi Posts

If you want to apply for leave in all your posts you will need to do a <u>Other absence request for each post</u> <mark>except any supply posts you may have</mark>

- **Choose first post from drop down**
- **Save**

Then do same again for each remaining post <mark>– never do a request for a supply post.</mark>

A system generated email will be sent to your reporting manager for each post and for them to review and either authorise or not authorise your request. When your reporting manager processes your request, you will receive an email notifying you of the outcome.

Data Label: Public

If you only want to apply for leave in one post only

- **Choose relevant post from drop down list - email requesting authorisation will be sent to reporting manager for this post only**
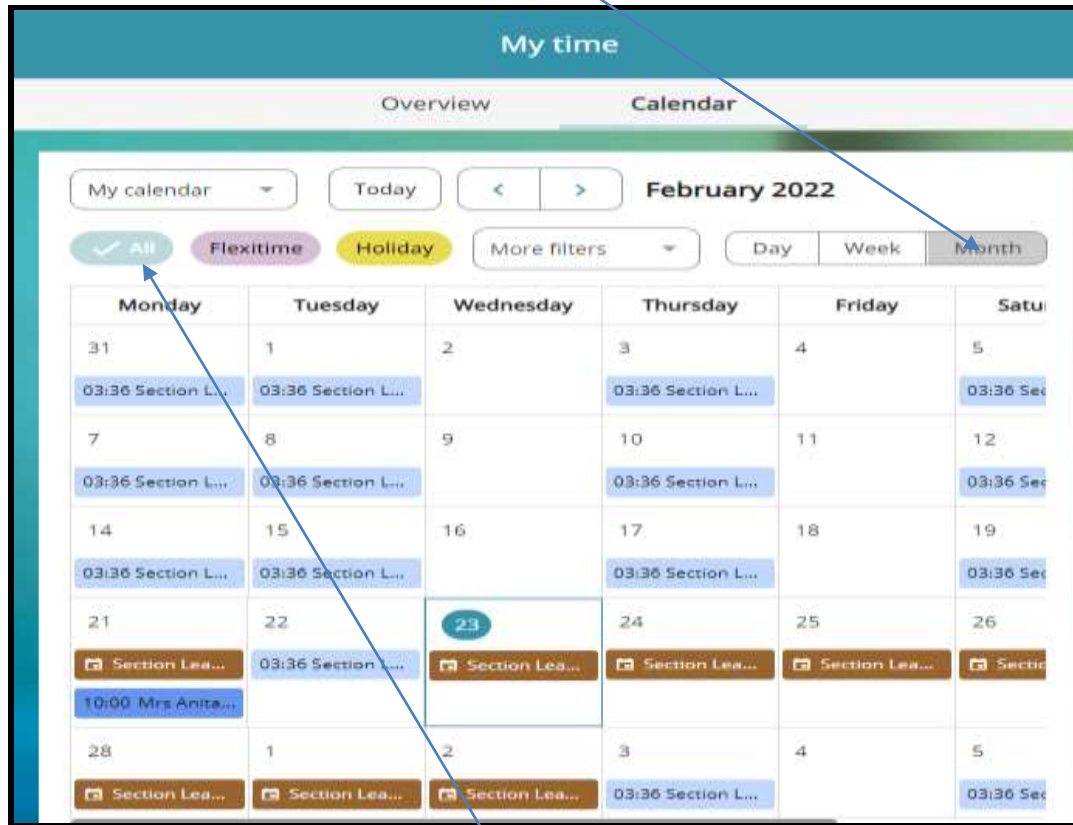
<All Jobs>

Cleaner (Mrs Anita M TESTER2, Civic Centre, ⬛⬛⬛⬛, J0009818) (Current)

Domestic (Ms ⬛⬛⬛⬛⬛ s House, ⬛⬛⬛⬛ J0012096) (Current)

Supply/Casual (, Supply (Social Policy), ⬛⬛⬛⬛, J0013099) (Current)

==DO NOT APPLY FOR LEAVE FOR ANY SUPPLY POSTS==

Data Label: Public

Calendar

Click on Calendar

In calendar you can view by day/week/month

In this screenshot which is a month view All is ticked so everything that can be ticked in more filters is displayed in calendar

More filters list

Adoption leave

Bank holidays

Company holidays

Maternity/Paternity leave

Other absences

Working patterns

Sickness absences

Learning activities

Example

If you just want to see your working pattern for a month – tick Working pattern

My pay

In My pay you can

- ❖ **View your payslips**
- ❖ **Download your payslips**
- ❖ **View your P60**
- ❖ **Download your P60**
- ❖ **Make an overtime claim**
- ❖ **Make a sleep-in claim**
- ❖ **Make a mileage claim**
- ❖ **Make an expense claim**

My pay

Payslips / P60

This section looks at how to view and download your payslips and P60's.

To view a payslip

- **Click on a relevant pay date**
- **Payslip is displayed**

Data Label: Public

Please note this payslip will not have a West Lothian Council logo on it

Payslip details: 28 Nov 2019   ⬇ Download

Employee Name	Anita TESTER2	
Reference No.	▬▬▬	

Tax Period	8
Tax Code	S1255L Cumulative
NI Number	▬▬▬
NI Category	A

Payments

Payment	U/T	Rate	Cash
Mileage NT / West Lothian Council - Mileage			0.00
Salary		17.04	1,138.44
Holiday Overtime	77.28	0.083	6.41
Holiday Overtime NP	318.6	0.083	26.44
Nursery Staff Allowance SS			85.42
Overtime SCET Plain (Back Pay)			-0.52
Overtime Plain	5	15.56	77.80
Overtime Time & Half	10	31.86	318.60
Shift Allowance	0.1	1138.4424	113.84
Contractual Overtime 1.5	5	25.56	127.80
Contractual Overtime Double	1	34.08	34.08
Contractual Overtime Percent	0.1	1138.4424	113.84
Cycle to Work	125		-25.00
Cycleplus	40		-20.00
Other			128.83

Deductions

Deduction	Rate	Cash
Tax		192.26
NI - A		168.84
Credit Union		220.00
Social Club		2.00
GMB		13.70
LGPS (WLC)	6	105.78

This Period

Description	Value
Taxable Payments	2,020.20
Pensionable Pay	3,656.03
Employer's NI - A	194.16
Employer's Pension Paid TP	767.77

Year-to-date

Description	Value
Tax Paid	1,910.35
NI Paid - A	1,581.35
Taxable Pay	17,930.62
Niable Pay	16,881.94

Total Payments	2,125.98	Total Deductions	702.58	NET PAY	1,423.40

To download a payslip

- **Click on Download button** **which can be found on right hand corner on payslip**

- **When downloaded a tab will appear at the bottom of your screen**
- **Click on tab to open payslip**
- **Payslip is displayed with West Lothian Council logo on it**

To print payslip

- **Click on printer icon on screen** **top right-hand corner**

To save to your PC
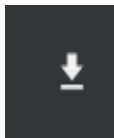
- **Click on downward arrow**

Data Label: Public

Online payslip (E-payslip)

Your payslip is emailed to you each month by Payroll, if you do not receive this email please contact Payroll who can check that the email address they have for you is correct.

To access this payslip please enter your National Insurance number using capital letters.

Download your payslip from your iPhone you may need to enable pop up blockers on your phone

Enable Pop Up Blocker for iPhones

- Go to > Settings > Scroll down to Safari > Disable Block-Ups

View your P60

You can view and download your P60 – 2020/2021

Please note the P60s for 2019/20 were sent to employee's home addresses.

Leavers - P45

You can view and download your P45

P45

Generated date

06 Jul 2022
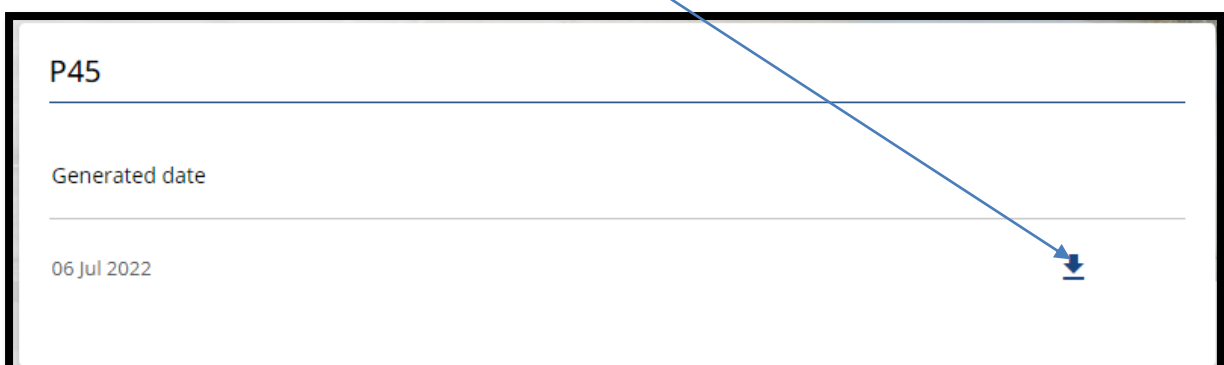
Time & Expenses

 This section looks at how

- ❖ **To view**
- ❖ **Add**
- ❖ **Submit**
- ❖ **Amend your time and expense claims**

On this page you can view which claims are in Progress ![In progress] or Authorised

![Authorised] by clicking on the relevant tabs and entering the start date and end date of the period you wish to view.

Data Label: Public

In progress claims can be:

- ❖ **A claim Awaiting authorisation by the reporting manager**
- ❖ **A claim with Errors – indicates that there is an error on the claim and needs to be rectified by you before it can be submitted**
- ❖ **A claim Provisional – not submitted yet**
- ❖ **A rejected claim – manager has not authorised this claim, employee required to amend if necessary and resubmit or delete the claim**
- ❖ **Click on relevant status and the claim will be displayed**

Error reasons

Overtime

- ❖ **Element left blank**
- ❖ **Details left blank**
- ❖ **Hours from and to left blank**

Mileage

- ❖ **Date of claim left blank**
- ❖ **Miles left blank**
- ❖ **Journey from and to left blank**
- ❖ **Reason for journey left blank**

Expenses

- ❖ **Element left blank**
- ❖ **Claim reason left blank**
- ❖ **Amount left blank**

Cost Centre

- ❖ **Invalid cost centre entered**
- ❖ **Nothing should be entered in this field if claim is for your substantive post**
- ❖ **If your expenses are to be charged to a different cost centre than your own – enter here.**

To return to the Time & Expenses page click on Back to Time & Expenses on top of page

Authorised claims are:

❖ **Claims that have been authorised by your reporting manager and have been paid to you in your salary or will be paid in the next available salary pay date**

To search for Authorised claims

- **In status choose "Authorised" from drop down**
- **Start date – if you want claims that have been paid previously – choose a start date that is before the date's overtime/expenses have been claimed for**
- **End date - todays date**
- **Click on Summary- details of claim are displayed**

Data Label: Public

Time & expenses claim summary: West Lothian Council - Overtime Claims

Start date
01/02/2023

Name
Dr David Testing

Roads Operative (E) Position

Payroll
Staff

Element	Type	Time/ Units/ Miles	Cash amount	
Sleep In Hours	Time		1	9.78
Total				**9.78**

These values are provisional. The final values will be shown on the payslip.

Print

To check which authorised claims have been paid to you in your salary go to My pay to view your monthly payslips.

To return to the Time & Expenses page click on Back to Time & Expenses on top of page.

Before submitting an overtime claim please read the following:

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.

If your overtime is to be paid at a different rate i.e. If your Acting post is paid as an allowance amount and overtime worked is to be paid at the acting rate. Please email payroll to advise of this as your overtime rate will need to be amended by payroll   payroll@westlothian.gov.uk

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

The payroll cut-off date is the date by which the reporting manager must have authorised the claim, otherwise the claim will carry over to the following month – so please submit your claims promptly at the end of each month to allow your reporting manager sufficient time to action the claims.

Employees

If you do work more than 6 hours enter 2 separate entries as follows:

1. **Start to break**
2. **End of break to finish**

What cannot be claimed in myHR

You cannot claim Supply Hours in myHR. Teachers cannot claim additional hours in myHR.

The following payments can be claimed in myHR

Add a claim

Click on + Add claim button

Time & Expenses claim entry: New screen is displayed

Data Label: Public

> **It is recommended you read the following information before making a claim**

- ❖ **Start date should be the 1ˢᵗ date of the month you have worked the overtime in e.g. you worked overtime in February so the start date should be 01/02/ 2022**
- ❖ **Claim forms should cover one calendar month e.g. All overtime claims for February (and only February) on one claim**
- ❖ **A new claim form should be started for each new month, and claims should not be accrued to redeem several month's claims in one go**

Claims this far in the future are not allowed

- ❖ **System will not allow a Start Date in the future**

To add an overtime claim

Time & Expenses claim entry: New

Start date

Job title
Section Leader - 300413500

Claim template
Please choose

> Please choose
> West Lothian Council - Mileage & Expenses
> West Lothian Council - Overtime Claims

New

- • **Start date – enter 1ˢᵗ date in month e.g. 01/02/2022**
- • **Job title - If you only have one post this will be populated but if you have more than one post you will need to choose the post you wish to claim overtime for**
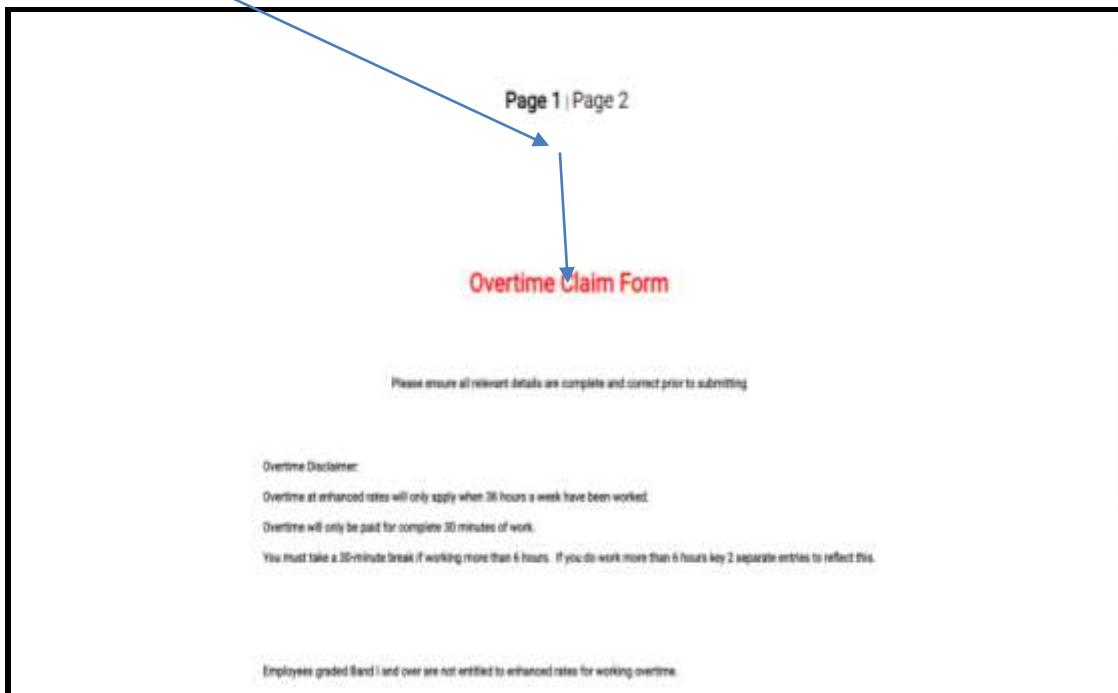
Job title
Please choose
Cleaner -
Domestic -

from the drop down list e.g.
- • **Claim template – Choose which ever applies to your claim i.e. if it is Overtime choose Overtime Claims**
- • **New**

Click on Page 1

Page 1 | Page 2

Overtime Claim Form

Please ensure all relevant details are complete and correct prior to submitting.
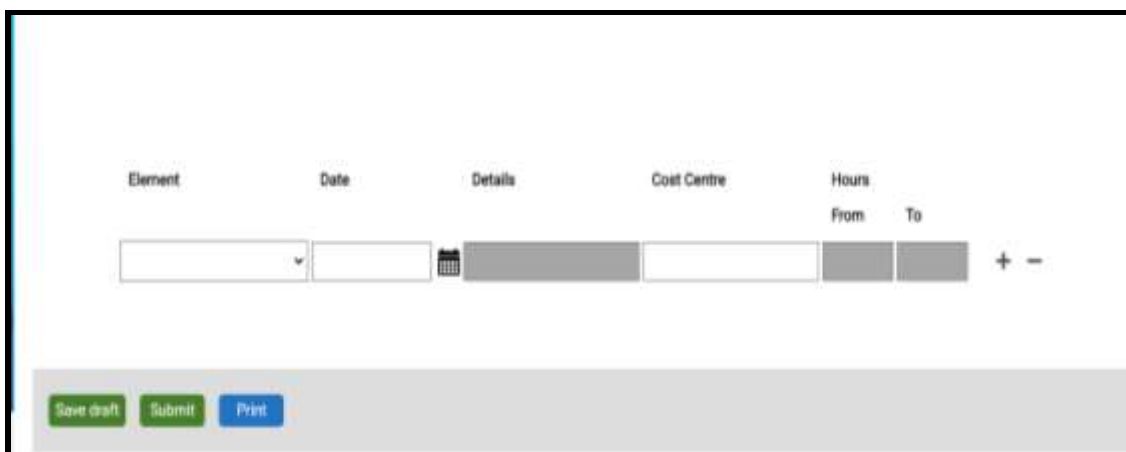
Overtime Disclaimer:

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.

You must take a 30-minute break if working more than 6 hours. If you do work more than 6 hours key 2 separate entries to reflect this.

Employees graded Band I and over are not entitled to enhanced rates for working overtime.

Element	Date	Details	Cost Centre	Hours From	To	

Save draft   Submit   Print

Overtime Double
Overtime Plain
Overtime Time & Half
Public Holiday Double
Public Holiday Double NP
Public Holiday Plain

Only the following elements can be claimed in myHR

- ❖ **Overtime Double**
- ❖ **Overtime Plain**
- ❖ **Overtime Time & Half**
- ❖ **Public Holiday Double**
- ❖ **Public Holiday Double NP**
- ❖ **Public Holiday Plain**

All other payments should continue to be claimed re the current process

e.g. Standby / Unsocial hours

Data Label: Public

When and how to claim Public Holiday payments

Public Holiday Plain

- ❖ **You can claim Public Holiday Plain hours when you work a public holiday during your normal working week and will receive another day as a holiday.**

Public Holiday Double

- ❖ **You can claim Public Holiday Double when you work a Public Holiday during your normal working week and will <mark>not</mark> receive another day as a holiday.**

Public Holiday Double NP (non-pensionable)

Scenario 1

- ❖ **You can claim Public Holiday Double NP if you were not rostered to work on the public holiday e.g. Your working week is Tuesday to Saturday but Public Holiday is a Monday a non-working for you but are required to work.**

Scenario 2

- ❖ **Public holiday is a Monday and your normal working day is 7 hours – you work 9 hours on the Public Holiday**
  - **Claim 7 hours at Public Holiday Plain time**
  - **Claim 2 hours at Public Holiday Double NP**

If you are unsure on what you can claim please discuss with your reporting manager in the first instance.

Data Label: Public

How to make an Overtime claim
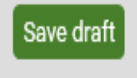
- **In Element choose from drop down list what you are claiming for e.g. overtime plain**
- **Enter date – The date you enter is the date you worked the overtime hours**
- **Details – Input the reason for the overtime working**
- **Cost Centre – <mark>Please leave Cost Centre field blank</mark> - only time you should enter anything here is if it is to be costed to a different cost centre from your own cost centre**
    - **If it is to be costed to a different cost centre you will need to ask your reporting manager what the cost centre should be (can only be 5 digits)**
- **Hours From - To - Key in times of overtime working**

    Please note when you enter From and To, it must be entered in a 24-hour clock format (20:00 is 8pm).

- **To add another line, click on +**
- **To remove a line, click on –**
- **If you are unable to complete your claim at any point and wish to return to it later, click on Save draft button** [Save draft] **at the bottom of the claim.**
- **Any claims that are saved as draft are provisional claims and have not been submitted to your reporting manager for authorisation**

- **When you are ready to submit your claim click the Submit button** [Submit]

Completed overtime claim

Element	Date	Details	Cost Centre	Hours	
				From	To
Overtime Plain	15/02/2022	test claim		18:00	19:00	+ −

Save draft | Delete | Submit | Print

<mark>**Please do not copy/paste information from word to this claim form**</mark>

Data Label: Public

How to submit an overtime claim

When you click Submit this page is displayed

- **By submitting your claim, it confirms you have read the disclaimer and agree to its contents**
- **DO NOT enter anything in Authorising group or Authorising role**
- **Enter your myHR password – this is the same password you used to log into myHR**
- **Submit**

- ❖ **After your claim is submitted the status changes from Provisional to Awaiting Authorisation and will now say Awaiting Authorisation on the Time & expenses front page**

- ❖ **Please be aware of any warning messages that will appear at the top of the screen when you submit a claim e.g. duplicate claim warning**

   Always review your claim and amend before submitting

- ❖ **When claim is submitted you will receive an email confirming that your claim has been forwarded to your reporting manager to Authorise/Reject and another email is sent when your reporting manager has actioned request.**

- ❖ **If your claim is rejected you should contact your reporting manager in the first instance to discuss this.**

- ❖ **You can amend the rejected claim (Status changes back to Provisional when original claim is rejected) and resubmit to your reporting manager if applicable.**

Sleep ins – Page 2

Time & Expenses claim entry: Test WLC - Overtime Claim Form

Job title: Section Leader

Employee: Mrs Anita M TESTER2

Payroll: Staff

Page 1 | **Page 2**

Overtime Claim Form

Please ensure all relevant details are complete and correct prior to submitting

Overtime Disclaimer:

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 graded Band I and over are not entitled to enhanced rates for working overtime.

Element	Date		Cost Centre	Rate	No. of hours			
					From	To	Total	
Sleep In Hours		📅		01 ⌄			0.00	+ −

Save draft   Delete   Submit   Print

Page **73** of **93**

Data Label: Public

How to claim Sleep ins

- **Enter date** – The date you enter is the date you are claiming a Sleep in for
- **Cost Centre** – <mark>Please leave Cost Centre field blank</mark> - only time you should enter anything here is if it is to be costed to a different cost centre from your own cost centre

  If it is to be costed to a different cost centre you will need to ask your reporting manager what the cost centre should be (can only be 5 digits)
- **No. of hours** – Enter start time to end time e.g. 10.00 to 13.00

  Please note when you enter From and To, it must be entered in a 24-hour clock format (20:00 is 8pm).

- **Total automatically populates e.g. 3.00 when claim is saved**
- **To add another line, click on +**
- **To remove a line, click on –**
- **If you are unable to complete your claim at any point and wish to return to it later, click on Save draft button** **at the bottom of the claim.**
- **Any claims that are saved as draft are provisional claims and have not been submitted to your reporting manager for authorisation**

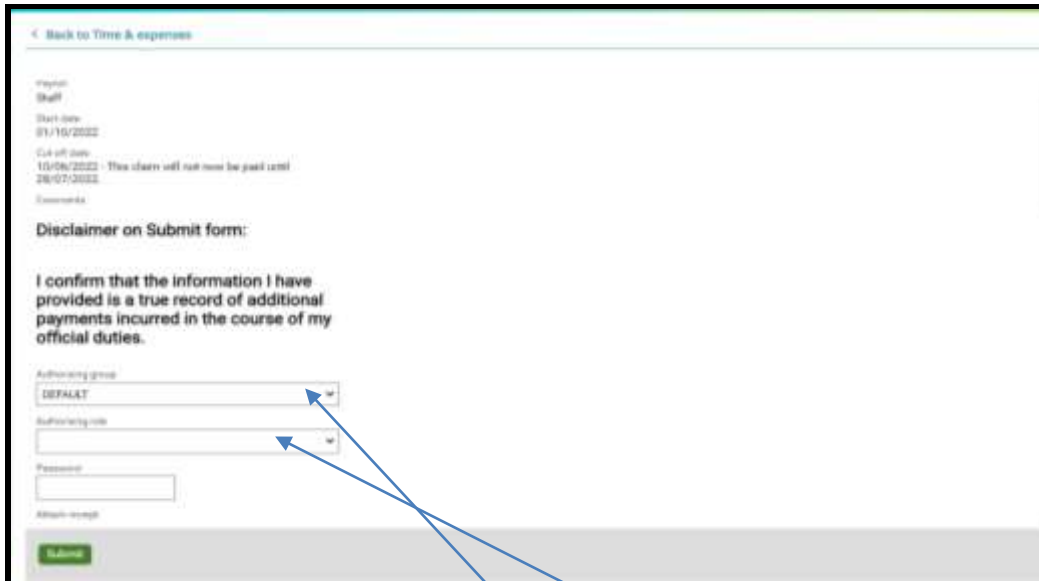- **When you are ready to submit your claim click the Submit button**

Completed Sleep in claim

Data Label: Public

How to submit a Sleep-in claim

When you click Submit this page is displayed

Disclaimer on Submit form:

I confirm that the information I have provided is a true record of additional payments incurred in the course of my official duties.

- **By submitting your claim, it confirms you have read the disclaimer and agree to its contents**
- **DO NOT enter anything in Authorising group or Authorising role**
- **Enter your myHR password – this is the same password you used to log into myHR**
- **Submit**

- ❖ **After your claim is submitted the status changes from Provisional to Awaiting Authorisation and will now say Awaiting Authorisation on the Time & expenses front page**

- ❖ **Please be aware of any warning messages that will appear at the top of the screen when you submit a claim e.g. duplicate claim warning**

> Changes have been saved.
> 1 row for 15/02/2022 is identical to 1 row on a different claim with claim start date 01/02/2022.

Always review your claim and amend before submitting

- ❖ **When claim is submitted you will receive an email confirming that your claim has been forwarded to your reporting manager to Authorise/Reject and another email is sent when your reporting manager has actioned request.**

- ❖ **If your claim is rejected you should contact your reporting manager in the first instance to discuss this.**

- ❖ **You can amend the rejected claim (Status changes back to Provisional when original claim is rejected) and resubmit to your reporting manager if applicable.**

Before submitting mileage claims please read the following:

Mileage

Before submitting a claim for mileage, you must ensure you are authorised to use your own car for business journeys. Please refer to the council's **Policy on Business Travel and Subsistence**

You must have a valid Driving Licence / Insurance (which covers Business use) Mot if applicable: if your car is not eligible for a MOT your Car registration document must be produced. You must have completed a Driver Declaration and Authorisation Form which now includes the Own Vehicle Authorisation form.

Your reporting manager is required to check and record these documents on an annual basis and you will receive an email notification to advise you when your checks are due.

Each time you add a new vehicle your reporting manager is required to check the documents for your new vehicle.

Mileage should not be claimed until all these documents have been checked by your reporting manager

Claims for mileage must be made in accordance with the council's Business Travel and Subsistence policy

Council's schedule of mileage should always be used in the first instance

- **Business Travel and Subsistence Policy**
- **Schedule of mileages**

A valid vat receipt for fuel is required for each mileage claim that is made and should be retained by yourself for a period of 6 years (HMRC)

Driving at Work Policy

West Lothian council is committed to protecting, so far as is reasonably practicable, the health and safety of all its employees and others who could be affected by the hazards associated with work related driving.

This policy applies to all employees who drive at work on council business whether this is a key responsibility of their job or a means of travelling between council locations for work purposes.

To refer to this policy please click on this link **Driving at Work Policy**

Relevant employees are required to complete a Driving Authorisation and Declaration form when requested annually and resubmit a form if there are any subsequent changes to their details.
This form should be completed and passed to your reporting manager.

Please click on link to access form   **Driving Declaration and Authorisation form**

Business use mileage cannot be claimed until this form has been completed.

It is recommended you read the following information before making a mileage claim

---

- ❖ **Start date should be the 1ˢᵗ date of the month you are claiming mileage for e.g. you used your car for business in February so the start date should be 01/02/ 2022**
- ❖ **Claim forms should cover one calendar month e.g. All mileage claims for February (and only February) on one claim form**
- ❖ **A new mileage claim form should be started for each new month, and mileage claims should not be accrued to redeem several month's claims in one go**

- ❖ **System will not allow a Start Date in the future** | Claims this far in the future are not allowed |

To add a Mileage claim

- **Start date – enter 1ˢᵗ date in month e.g. 01/02/2022**
- **Job title - If you only have one post this will be populated but if you have more than one post you will need to choose the post you wish to claim overtime for**

  from the drop down list e.g.
- **Claim template – Choose which ever applies to your claim i.e. if it is Mileage choose Mileage & Expenses from drop down list**
- **New**

Mileage claim form – page 1

Job title: Section Leader
Employee: Mrs Anita M TESTER2

Page 1 | Page 2

Page 1 - Mileage | Page - 2 Expenses

Claims must be made in accordance with the Business Travel and Subsistence Policy. Please ensure you have read this policy before making a claim.

Travel and Subsistence|Schedule of Mileages

Claim reason must include full purpose of journeys, specifying meeting is not enough. When making a claim, the shortest route must be taken.
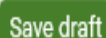
Vehicle	Scheme	Cost Centre
DD28 5AD	West Lothian Council - Mileage ⌄	

Date of Claim	Miles claimed	Journey From	Journey To	Reason for Journey	
📅					⊗ + −

Save draft   Submit   Print

How to make a Mileage claim

- **If you are claiming mileage for a motor cycle – choose in Scheme – West Lothian Council Motorcycle**
- **Do not have to change scheme for claiming mileage for a car**
- **Date of Claim – The date you enter is the date you want to claim mileage for**
- **Miles claimed – How many miles you wish to claim for that date**
- **Journey To – Journey From – Start of journey to end of journey**
- **Reason for journey**
- **Cost Centre – <mark>Please leave Cost Centre field blank</mark> - only time you should enter anything here is if it is to be costed to a different cost centre from your own cost centre If it is to be costed to a different cost centre you will need to ask your reporting manager what the cost centre should be (can only be 5 digits)**
- **To add another line, click on +**
- **To remove a line, click on –**
- **If you are unable to complete your claim at any point and wish to return to it later, click on**

  Save draft button [Save draft] **at the bottom of the claim**
- **Any claims that are saved as draft are provisional claims and have not been submitted to your reporting manager for authorisation**

  [Submit]
- **When you are ready to submit your claim click the Submit button**
- **Please refer to page 69 on how to submit a claim**

Completed mileage claim form

Data Label: Public

Default vehicle

❖ **Your default vehicle is displayed on claim form** **if this is not the vehicle you want to claim mileage for – this can be changed by you in View profile – Private vehicle**

❖ **If you have not added your vehicle in Private Vehicles this error message will appear and you will not be able to make a claim for mileage**

❖ **Please note that you will only be able to claim mileage from the** <mark>start date</mark> **you have entered for your car in Private vehicle – if you try to claim mileage prior to this date error message will say "** <mark>Error - you have no default vehicle"</mark>**.**

If you want to claim mileage for a motorcycle not a car (must be added in Private Vehicles as your default vehicle)

• **Choose Motorcycle from drop down list in Scheme**

How to submit a Mileage claim

When you click Submit this page is displayed

- **By submitting your claim, it confirms you have read the disclaimer and agree to its contents**
- **Enter your myHR password – <u>this is the same password you used to log into myHR</u>**
- **Submit**

Please do not attach receipts – Fuel receipts should be retained by yourself for a period of six years.

- ❖ **After your claim is submitted the status changes from Provisional to Awaiting Authorisation and will now say Awaiting Authorisation on the Time & expenses front page**

- ❖ **Please be aware of any warning messages that will appear at the top of the screen when you submit a claim e.g. duplicate claim warning**

<u>Always review your claim and amend before submitting</u>

Data Label: Public

❖ **When claim is submitted you will receive an email confirming that your claim has been forwarded to your reporting manager to Authorise/Reject and another email is sent when your reporting manager has actioned request.**

❖ **If your claim is rejected you should contact your reporting manager in the first instance to discuss this.**

❖ **You can amend the rejected claim (Status changes back to Provisional when original claim is rejected) and resubmit to your reporting manager if applicable.**

Data Label: Public

Expenses

❖ **Claims for expenses must be made in accordance with the council's <u>Business Travel and Subsistence policy</u>**

❖ **Employees must only claim for their own individual expenditure and all claims must be supported by relevant receipts and retained by yourself for a period of six years (HMRC)**

To add an Expense claim

- **Start date – enter 1st date in month e.g. 01/02/2022**
- **Job title - If you only have one post this will be populated but if you have more than one post you will need to choose the post you wish to claim overtime for**

from the drop down list e.g.
- **Claim template – Choose which ever applies to your claim i.e. if it is Expenses choose Mileage & Expenses from drop down list**
- **New**

Data Label: Public

Expense claim form – Page 2

Time & Expenses claim entry: (New)

Job title: Section Leader

Employee: Mrs Anita M TESTER2

Page 1 | Page 2
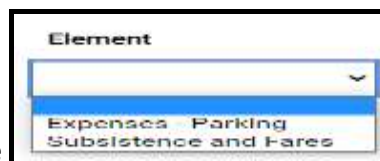
Expenses Claim Form

Claims must be made in accordance with the Business Travel and Subsistence Policy. Please ensure you have read this policy before making a claim.

Element	Date	Claim Reason	Mode of Transport	Cost Centre	Amount	Total
⌄	📅					0.00

Save draft   Submit   Print

How to make an Expense claim

- **Element – choose from dropdown type of expense**
- **Date - The date you enter is the date you want to claim expenses for**
- **Mode of Transport – Car /Bus/Taxi etc**
- **Cost Centre – <mark>Please leave Cost Centre field blank</mark> - only time you should enter anything here is if it is to be costed to a different cost centre from your own cost centre If it is to be costed to a different cost centre you will need to ask your reporting manager what the cost centre should be (can only be 5 digits)**
- **Amount of expense you are claiming for**
- **To add another line, click on +**
- **To remove a line, click on –**
- **If you are unable to complete your claim at any point and wish to return to it later, click on Save draft button at the bottom of the claim**
- **Any claims that are saved as draft are provisional claims and have not been submitted to your reporting manager for authorisation**

- **When you are ready to submit your claim click the Submit button**
- **Please refer to page 69 for how to submit a claim**

Completed expense claim form

- ❖ **When claim is submitted you will receive an email confirming that your claim has been forwarded to your reporting manager to Authorise/Reject and another email is sent when your reporting manager has actioned request.**

- ❖ **If your claim is rejected you should contact your reporting manager in the first instance to discuss this.**

- ❖ **You can amend the rejected claim (Status changes back to Provisional when original claim is rejected) and resubmit to your reporting manager if applicable.**

Data Label: Public

How to submit an Expense claim

When you click Submit this page is displayed

- **By submitting your claim, it confirms you have read the disclaimer and agree to its contents**
- **Enter password – this is the same password you used to log into myHR**
- **Submit**

Please do not attach receipts – Fuel receipts should be retained by yourself for a period of six years.

- ❖ **After your claim is submitted the status changes from Provisional to Awaiting Authorisation and will now say Awaiting Authorisation on the Time & expenses front page**

- ❖ **Please be aware of any warning messages that will appear at the top of the screen when you submit a claim e.g. duplicate claim warning**

Always review your claim and amend before submitting

Data Label: Public

Amend status of claim

When a claim has been submitted it can only be amended when status is "Provisional".

Employees cannot amend a claim if status is Awaiting Authorisation – if your submitted claim requires amending

- **Contact your reporting manager and ask them to reject the claim**
- **Employee amends rejected claim in myHR and resubmits**
- **Reporting manager will have a new task to process**

Delete a claim in myHR

You can only delete a claim if its status is Provisional

- **Go back to view claim**
- **Click Delete button and claim will be removed**

To view claims that have been processed

- **In status choose "Authorised" from drop down**
- **Start date – if you want claims that have been paid previously – choose a start date that is before the date's overtime/expenses have been claimed for**
- **End date - todays date**
- **Click on Summary- details of claim are displayed**

Time & expenses

Status
Authorised

Start date (dd/mm/yyyy)
09/12/2022

End date (dd/mm/yyyy)
09/03/2023

Search   Clear search

Claim name	Start date	Reference	Cut off date	Status	Summary
West Lothian Council - Overtime Claims	01 Feb 2023		03 Feb 2023	Authorised	Summary
West Lothian Council - Mileage & Expenses	01 Feb 2023		03 Feb 2023	Authorised	Summary
West Lothian Council - Overtime Claims	01 Feb 2023		03 Feb 2023	Authorised	Summary
West Lothian Council - Mileage & Expenses	01 Feb 2023		03 Feb 2023	Authorised	Summary

+ Add claim

< Back to Time & expenses

Time & expenses claim summary: West Lothian Council - Overtime Claims

Start date
01/02/2023

Name
Dr David Testing

Roads Operative (E) Position

Payroll
Staff

Element	Type	Time/ Units/ Miles	Cash amount	
Sleep In Hours	Time	1		9.78
Total				**9.78**

These values are provisional. The final values will be shown on the payslip.

Print

Data Label: Public

Claims not paid in salary

Claims will not be paid to you in your salary until your reporting manager has authorised the claim and you should have received an email confirming this.

If your expected claim payments are not in your salary the following reasons may apply

- ❖ **Your reporting manager has not authorised payment – Please contact your reporting manager**
- ❖ **It has been authorised by your reporting manager but missed the payroll cut off period your payment will be in the next available pay date.**

- ❖ **You can check the status of your claim in My pay – Time & Expenses**

In Progress
- ▪ **Provisional – you have not submitted your claim to your reporting manager**
- ▪ **Awaiting Authorisation – Your reporting manager has not authorised your claim**
- ▪ **Error – claim cannot be submitted until errors in claim are corrected**

Authorised

- • **All authorised claims can be viewed**

Learning
Please refer to the myHR Learning user guide

Help & Support

- **If you still have difficulty logging on the system after you have followed instructions found in this guide please email MyHR@westlothian.gov.uk**
- **Contract query: HRSupport@westlothian.gov.uk**
- **Payroll query: payroll@westlothian.gov.uk**
- **Sickness absence query: [sickness absence@westlothian.gov.uk](mailto:sicknessabsence@westlothian.gov.uk)**
- **Learning & Development: learn2develop@westlothian.gov.uk**
- **Policy & Advice query: Hrpolicy@westlothian.gov.uk**
- **Annual Leave queries please contact your reporting manager**
- **Reporting manager queries please contact your reporting manager**

Intranet

Click on this tab to access

- **MyHR user guides**
- **Index list to guides**
- **Annual leave FAQs**
- **Assistance accessing myHR**