West Lothian Council

People Manager

Self Service User Guide

April 2025

Data Label: Public

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- Temporary change to employees work pattern

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- How to process tasks from your "To do List"
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Please refer to relevant user guides for the following processes

- Case Management
- Learning
- Annual Leave

1. About This Guide

This guide gives you comprehensive information about how to use People manager 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 in People manager. Within the guide we have used screen shots to illustrate relevant screens and any actions you are required to make to complete a task.

There are separate guides available for

- **Case Management**
- **Learning**
- **Annual Leave**

These guides can be found on [my toolkit]

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2. Getting Started with People manager

- **What is People manager**

People manager is West Lothian Council's managers self-service system. It enables you to carry out a range of functions for your employees including

- **Extending Fixed term contracts**
- **Completing Leavers process when employee resigns via myHR**
- **Record Sickness absences**
- **Create/amend a Case management record**
- **Process requests for Special Leave**
- **Authorise Time & Expenses claims**
- **View/amend /adjust Annual Leave entitlements**
- **Book onto Learning courses and add to waiting list**

You will receive notification emails when renewal dates are due e.g. contract end dates.

How to access a People manager account

If you have reportees who report to you, access to People Manager will be required and your reporting manager should request this for you.

Your reporting manager will be sent an access form to complete which should be returned to myHR mailbox.

When your account is set up you will receive an email which will have a link to enable you to access People Manager.

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

Your username (employee number) and your password will be the same as your myHR username and password.

- **Security - Please refer to myHR guide for security information and guidance**

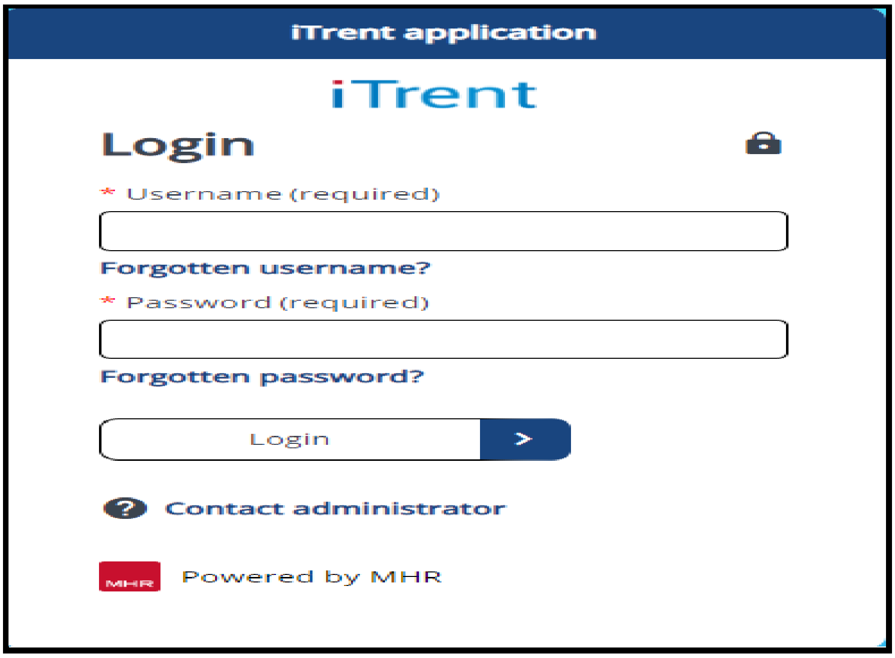
Logging in to People Manager

To access People Manager at any time please click on this link to the login page

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

(Link will also be available on my tool kit)

Login page is displayed



Type your Username: This is your employee number and this never changes

Type your Password:

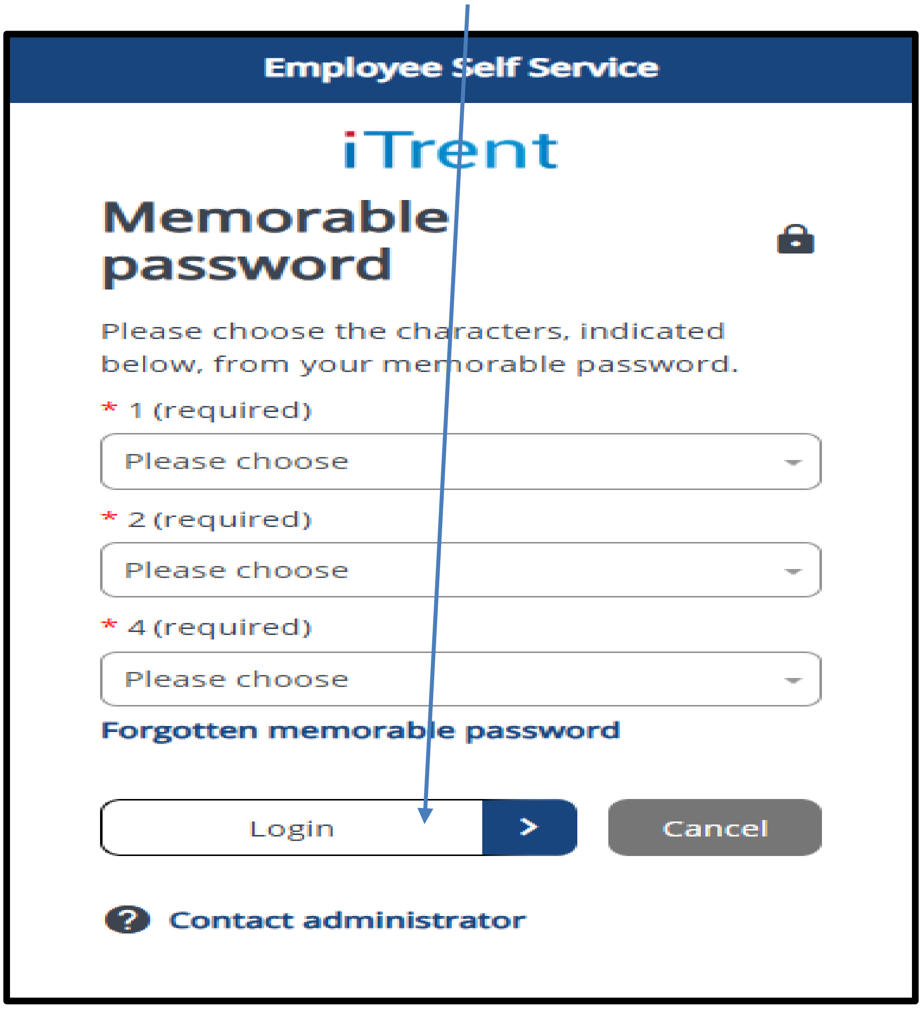
If you have already accessed myHR, then it is your myHR password that you should use to access People Manager for the first time.

It is the same main password and username for both systems.

Same process applies if you have accessed People manager before myHR.

Click on Login button once to get started

You are then required to input 3 random characters from your memorable password. You can either type them using your keyboard or select them from the provided drop-down menu (case sensitive). Please double check your answers before submitting.

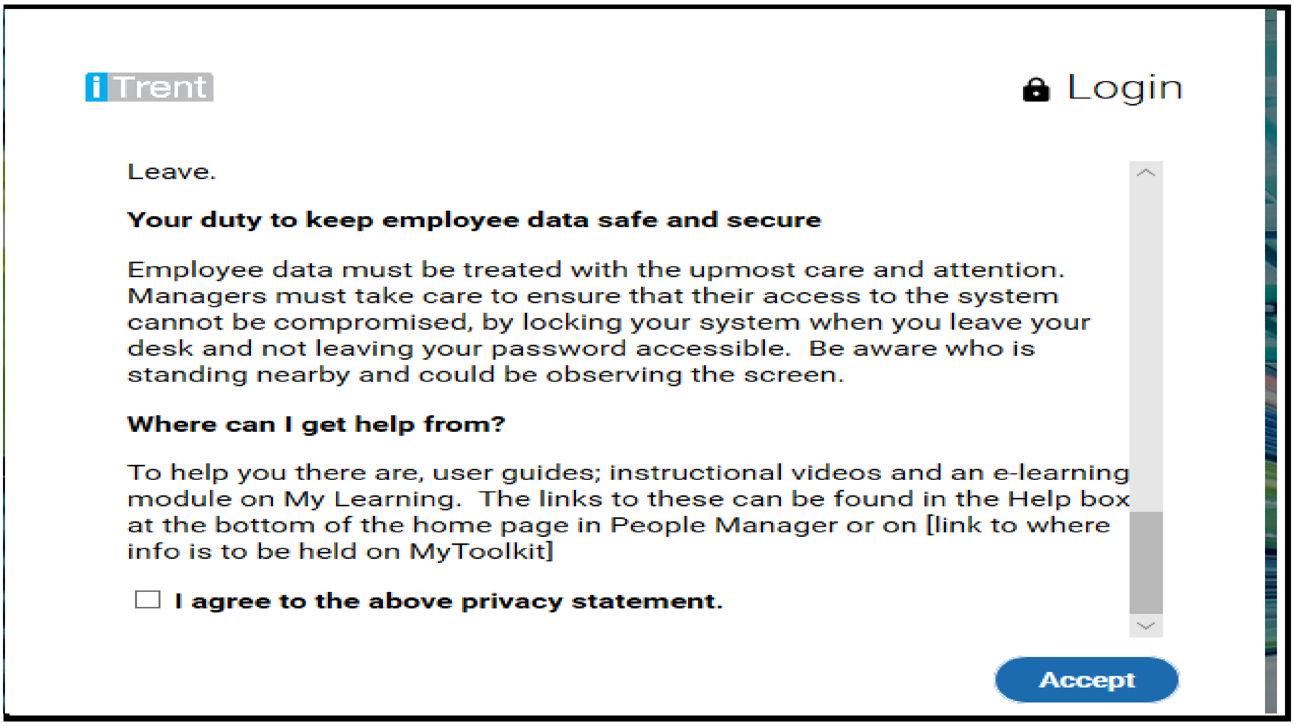


If you have already accessed myHR, then it is your myHR memorable password that you should use to access People Manager for the first time.

It is the same memorable password and recovery code for both systems.

Same process applies if you have accessed People manager before myHR.

New user - when you first log in to People Manager a welcome statement is displayed, please read statement, tick box and click on Accept.

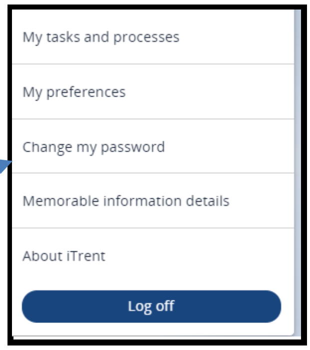


Passwords

If you wish to change your password at any time you can do so

- **By clicking on the profile 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 my password

- **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 expire after 90 days**
- **If this bar ever appears on a page please click "Not for this site" – <u>PASSWORDS SHOULD NEVER BE SAVED IN SYSTEM</u>**

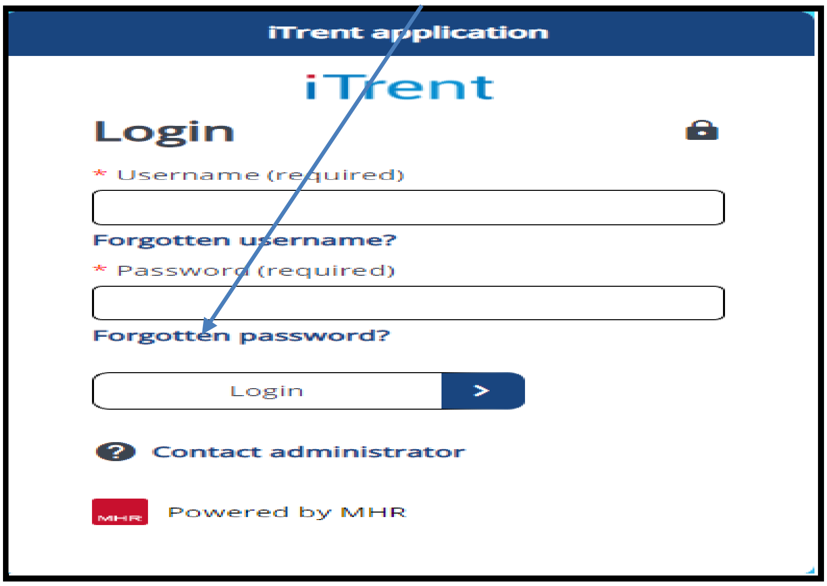
Remember this new password will now be your myHR password also.

What to do if you forget your password

Scenario 1 – Main password

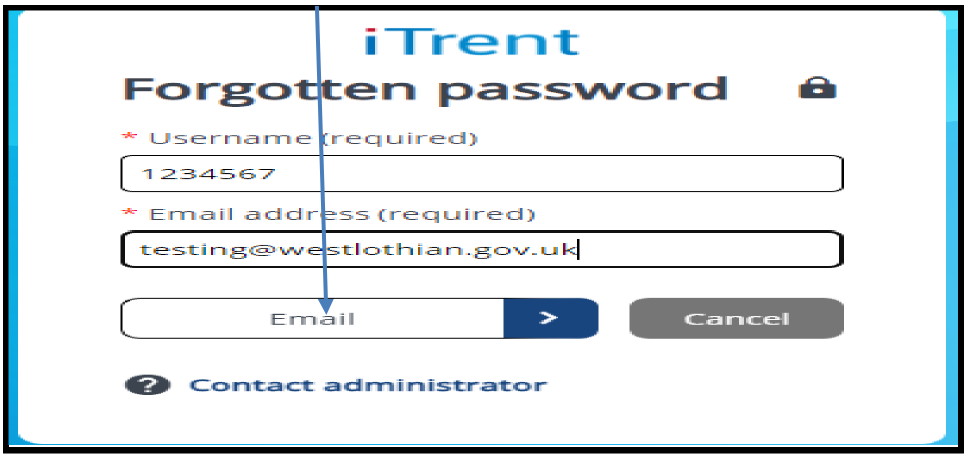
Passwords will deactivate after three unsuccessful attempts (invalid details) will keep appearing) If this happens please use the Forgotten password process

If you forget your password click the "Forgotten password?" link



A page will appear asking your username and email address. Enter your username (Employee number) in the box. Enter your email address (this is your myHR email address which is normally your work email address).

Click Email (at bottom of page)



This message is displayed

An email containing a link to reset your password has been sent to the address provided, and should be received within the next 15 minutes.

Email received in your mail box – Click on Reset password button and you will be asked to enter a new password.

Hi Anita,

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.

Reset your password

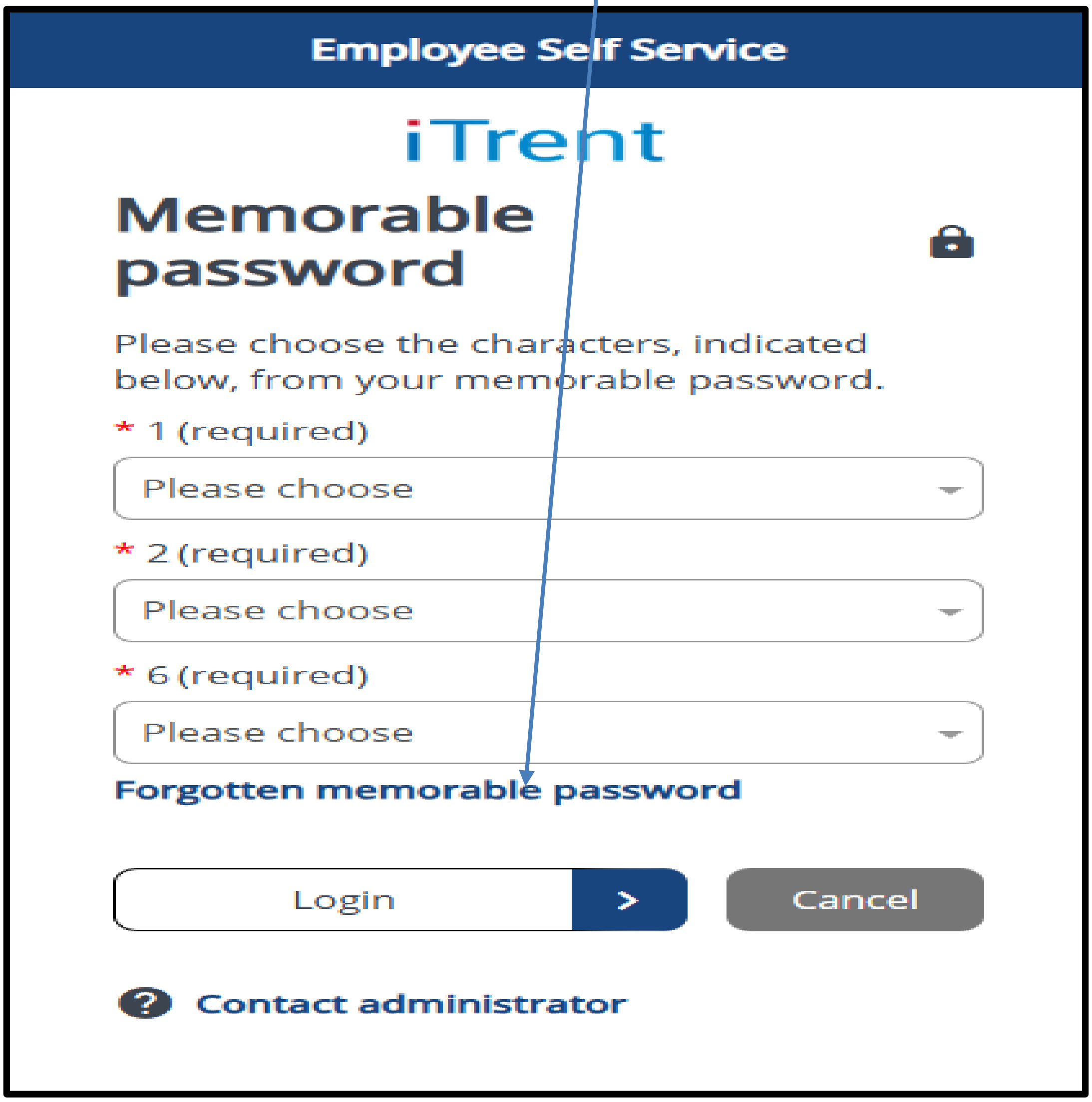
If you did not request a password reset, please ignore this email or contact your administrator if you have questions.

Thank you
HR Services

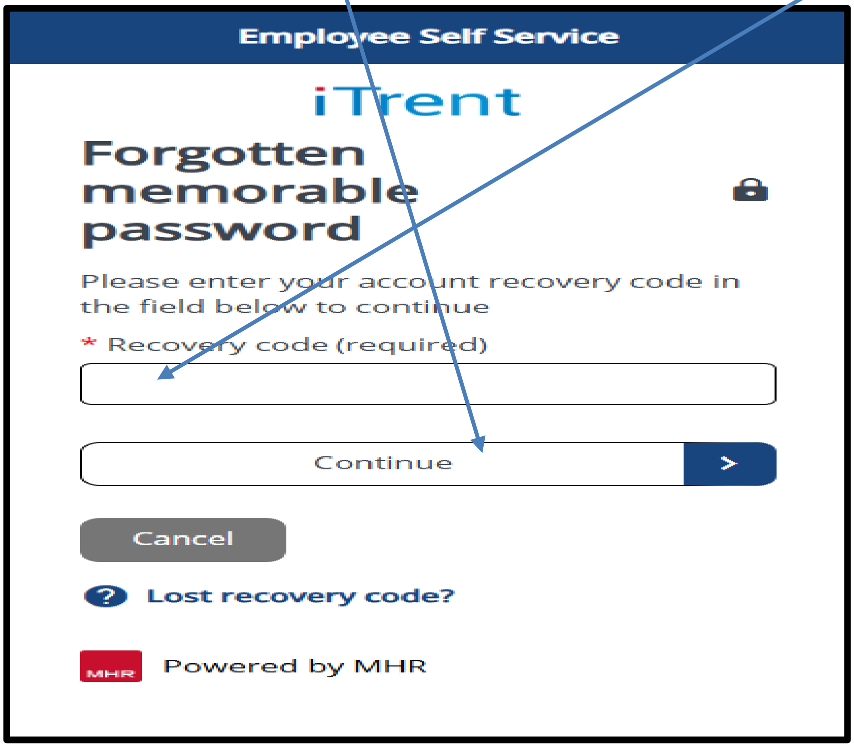
Please follow the password criteria on page 9

Scenario 2 – Forgotten Memorable password

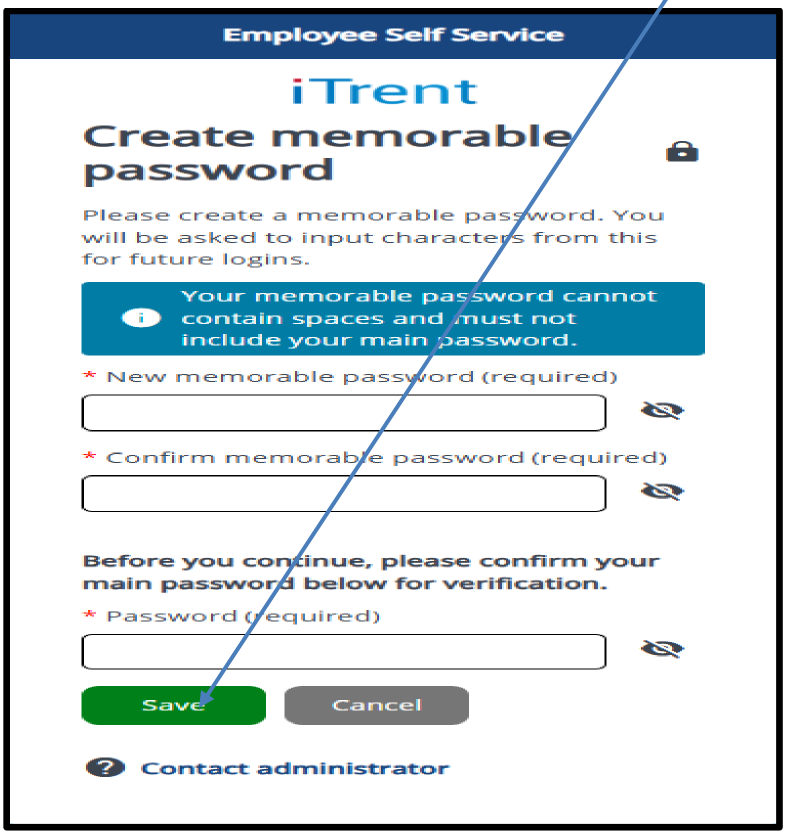
After logging in, you will be directed to the memorable password page. If you forget your memorable password, click the "Forgotten memorable password" link.



You will then need to enter your recovery code, which you should have saved earlier during the initial setup. This is your 16-digit code in the following format: 'XXXX-XXXX-XXXX-XXXX.' Once entered, please click "Continue".



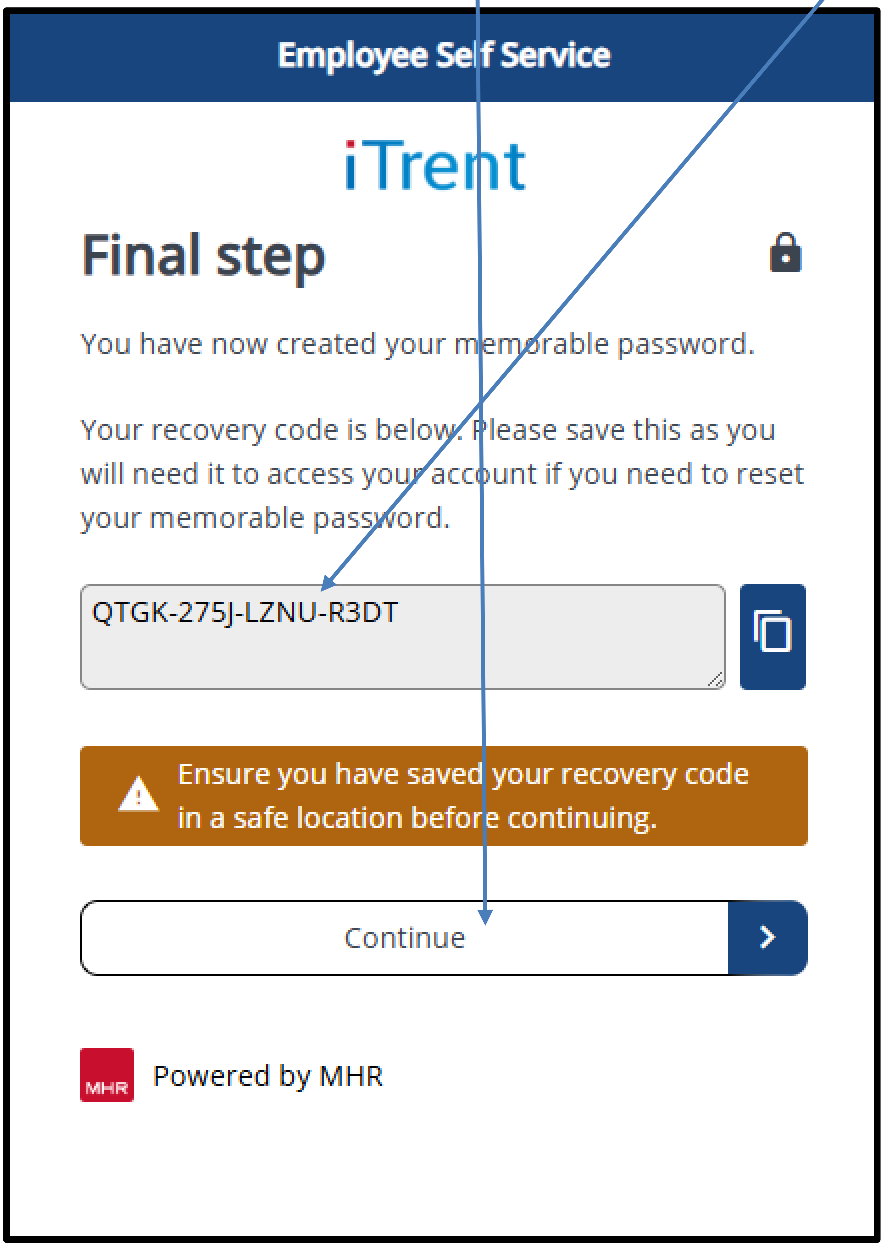
If the recovery code is accepted, you will then be prompted to choose a new memorable password (see below for details). Once chosen, click "Save".



- Your memorable password must be at least 8 characters long.
- Your memorable password cannot contain any spaces.
- Your memorable password must not include your main password.

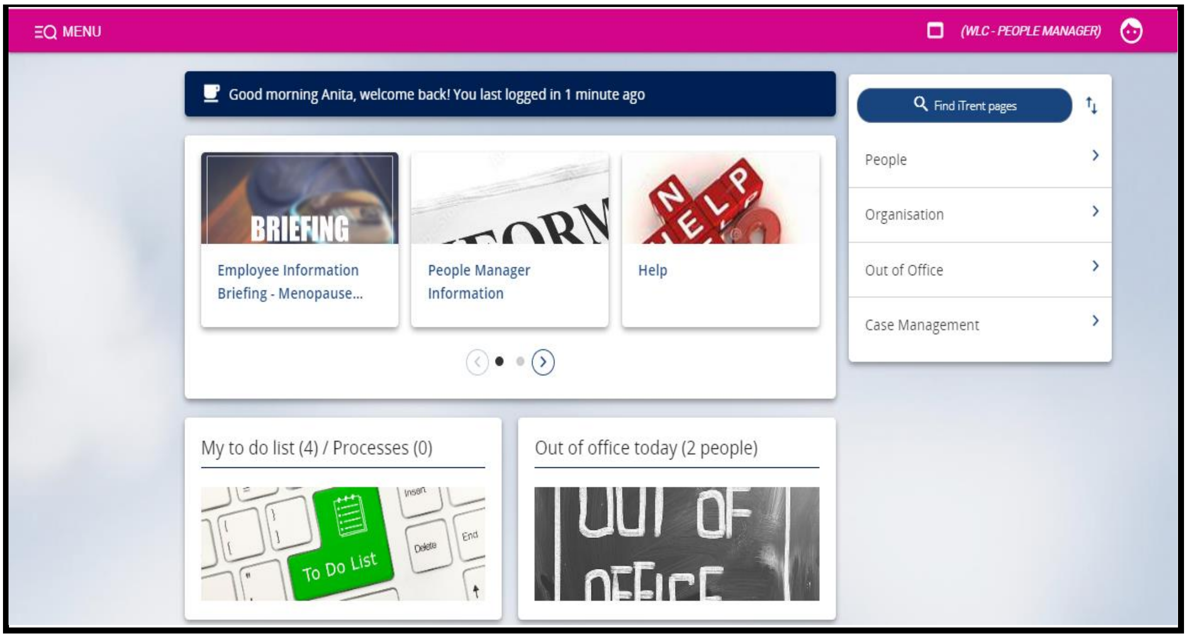
Once your memorable password has been created, make sure to note down your NEW recovery code. When you're ready, click "Continue".

NOTE THAT ANY PREVIOUS RECOVERY CODES WILL NOW BE INACTIVE. PLEASE USE THIS NEWLY CREATED CODE FOR ANY FUTURE RESETS.



If you have misplaced or forgotten your recovery code, please email myhr@westlothian.gov.uk

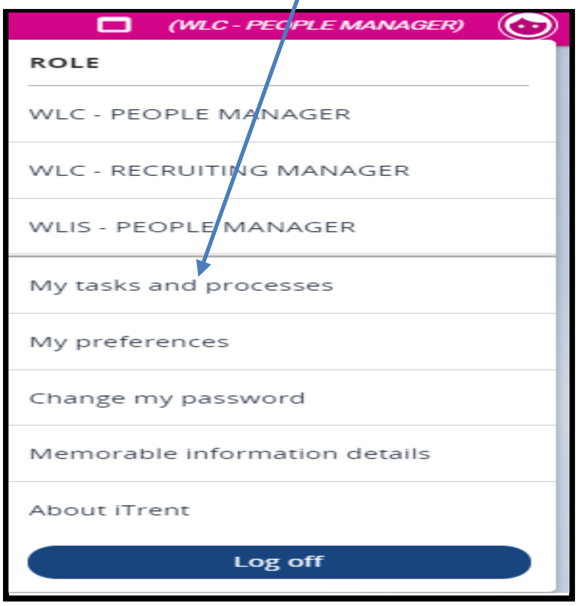
Once you have successfully logged into People Manager, you will be presented with the Homepage.



You can view current briefings, information on People manager and a help page.

<u>My to do list</u> – Contains tasks that require your attention (to Authorise or Not Authorise employee requests) and it is good practice to check this each time you log into People Manager.

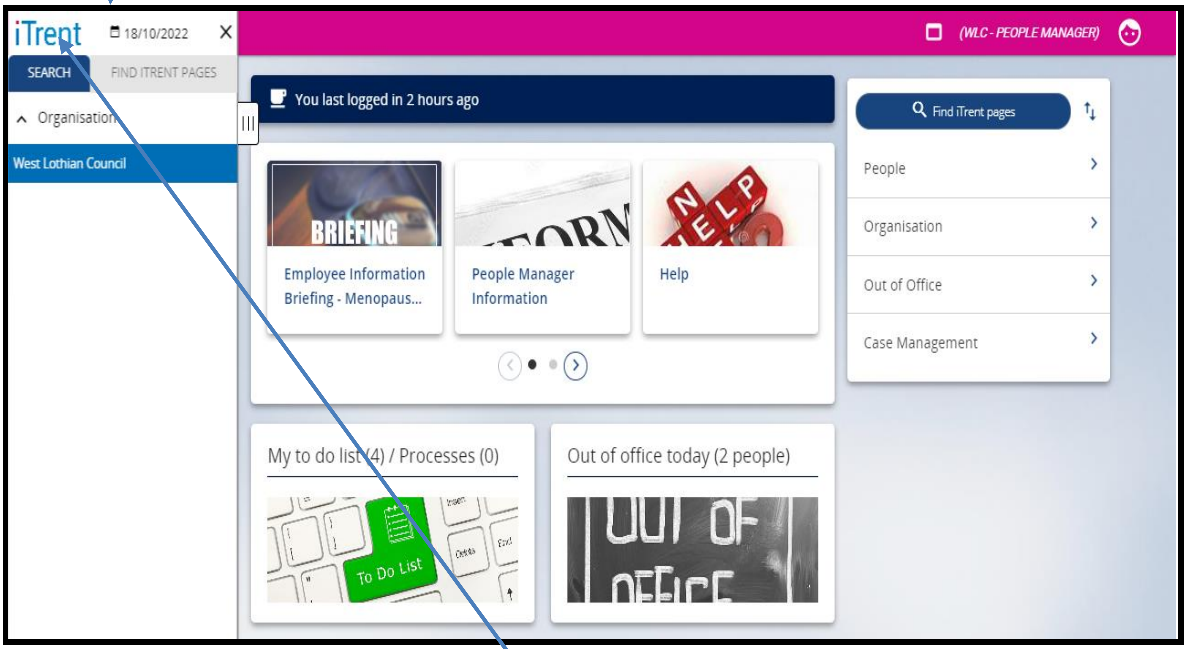
You can also review your tasks by clicking on the profile icon which can be found on the right at the top of the page. When you click the icon, a drop-down menu will appear.



Out of Office

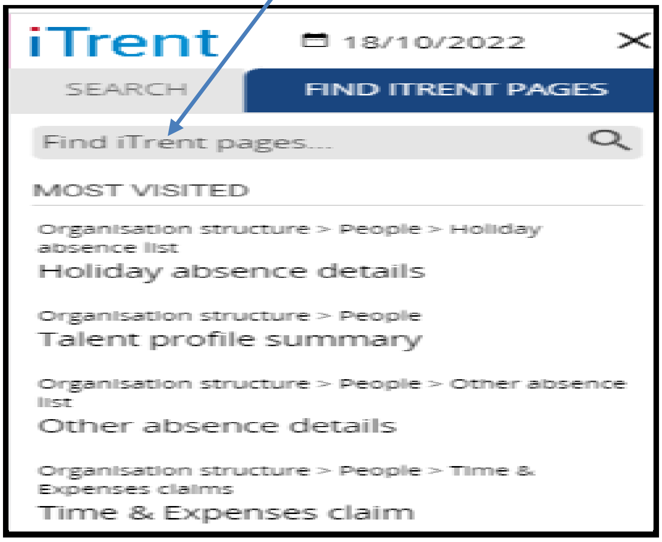
Displays which members of your team are out of office on a particular day. Further information on this facility can be found in the People Manager Annual Leave user guide.

Click on Menu and a side panel will be displayed



While using People Manager, if you navigate away from the homepage, you can always get back to the home page by clicking on the iTrent button in the top left hand side of the screen.

You can also use Find iTrent Pages to search for a specific screen and most visited pages are displayed here.



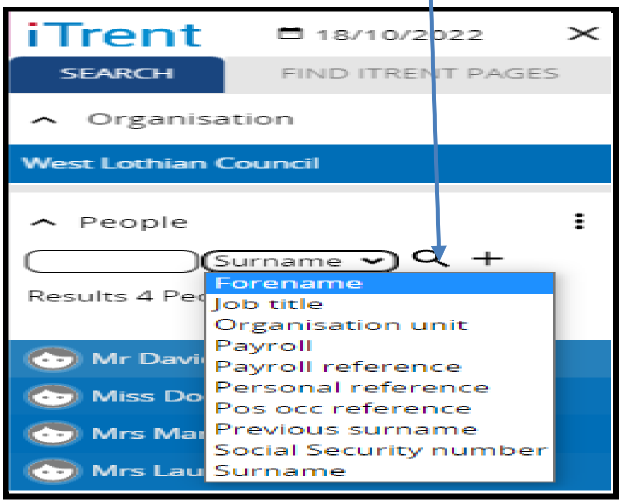
3. People

How to access your employee information

Click on People 

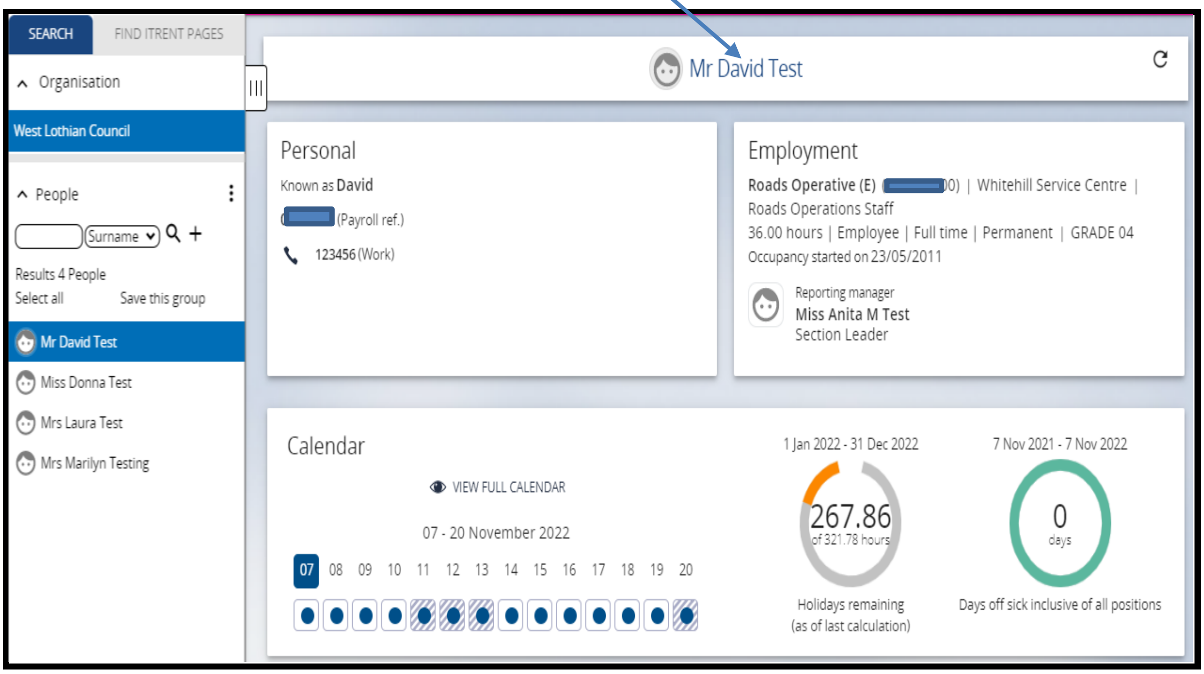
all employees that report to you will appear down the left-hand side of the screen with a search option at the top of the list.

Example: To search for a specific employee enter the employee's surname into the search field and choose Surname – click search icon



When you choose an employee, the tabs are displayed for you to view the employee's information.

To return to this page at any time click on employee's name at top of the screen

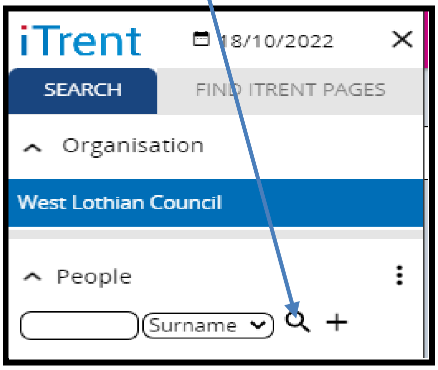


Senior managers can view employees who report to their managers

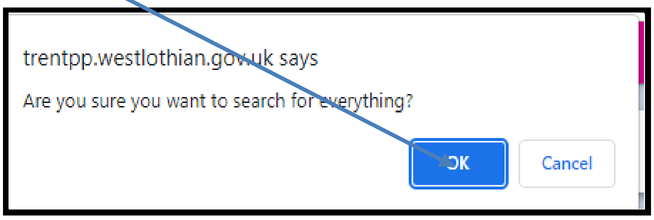
How to view employees who are not direct reports to you but you are authorised to view

Reporting managers direct reportees will appear in side panel only - but senior managers will be able to view employees who are not their direct employees and are direct reportees to their managers.

Click on search icon (beside surname) and search



Click ok



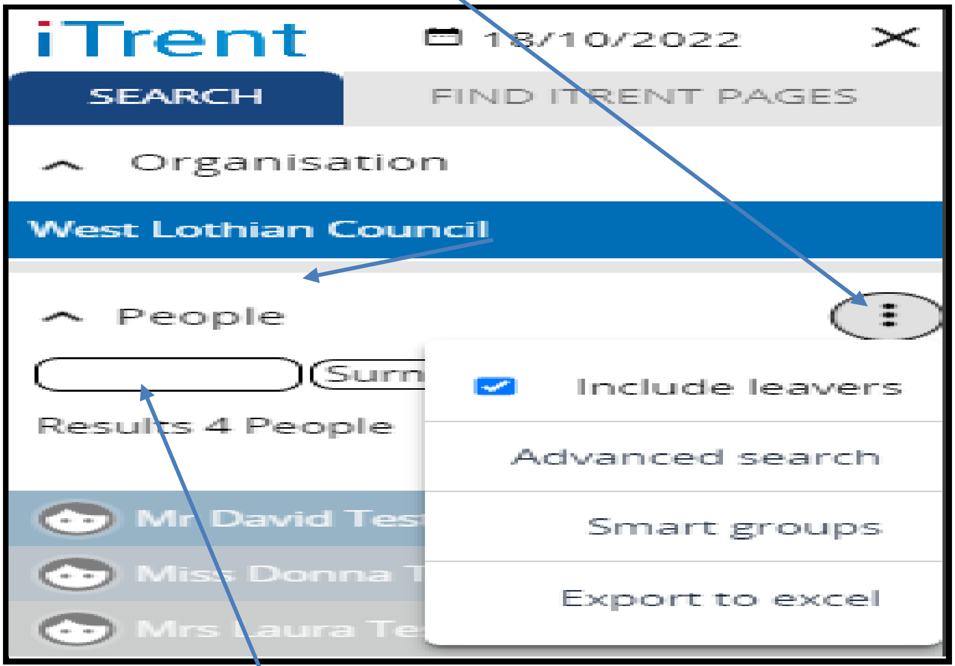
All employees who report to you and your managers will be dispalyed

System is date driven and you will be required to enter the date you want to view or edit information from each time you click on a tab.

How to view leavers

You may be required to enter e.g. absences for an employee who has left but you will not be able to find employee by the normal search function.

To search for a leaver, click on three dots and <u>tick "Include leavers" box</u>



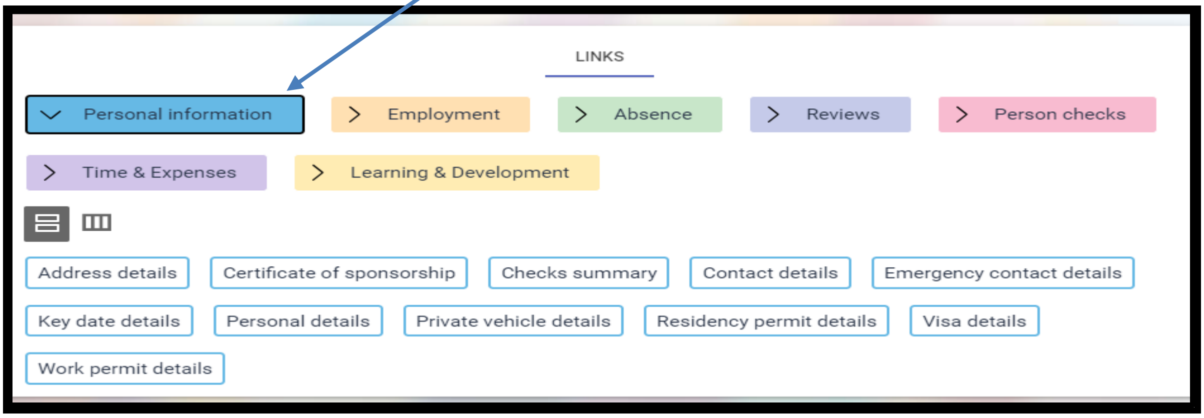
Enter employees surname in box and search

What you can see and do in each of the tabs

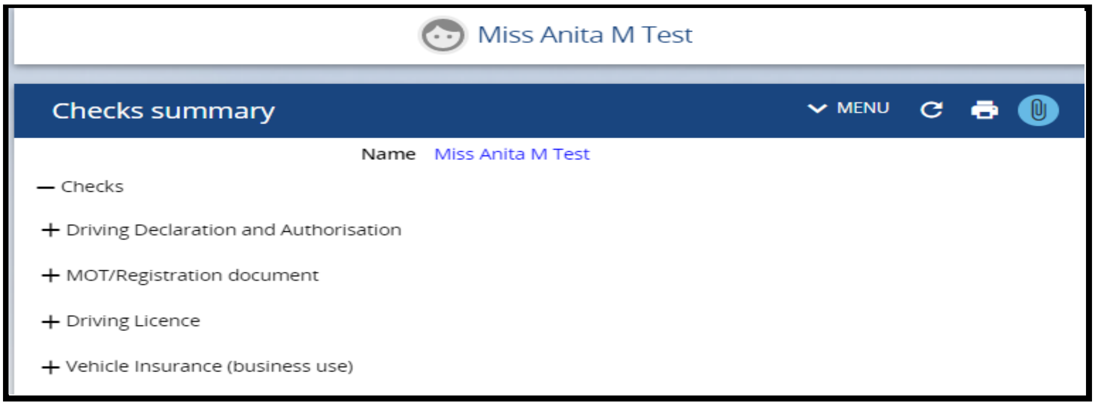
When you have searched for the employee you wish to view/update information for click on relevant tab.

Personal Information 

Click on relevant tab to find information required

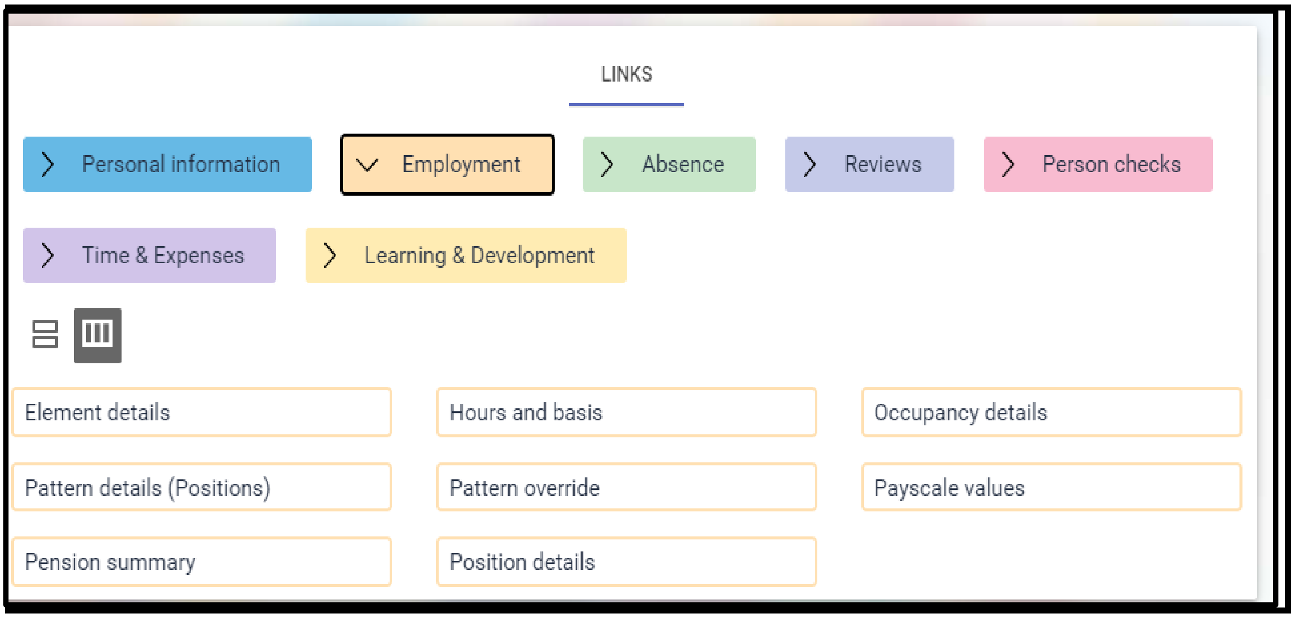


- **Address details – view employees home address**
- **Certificate of sponsorship – view details of employee's sponsorship – HR Support will notify you when you are required to take the necessary action**
- **Checks summary – view all checks that have been updated for employees**



- **Contact details – view employees contact details – myHR email address / personal mobile number**
- **Emergency contact details – view employees emergency contacts**
- **Key date details – view employees start date of employment / Length of service and date of birth**
- **Personal details – view employees personal ref no (employee number)**
- **Private vehicle details – if employee is authorised to use their own car – details can be found here**

Employment 



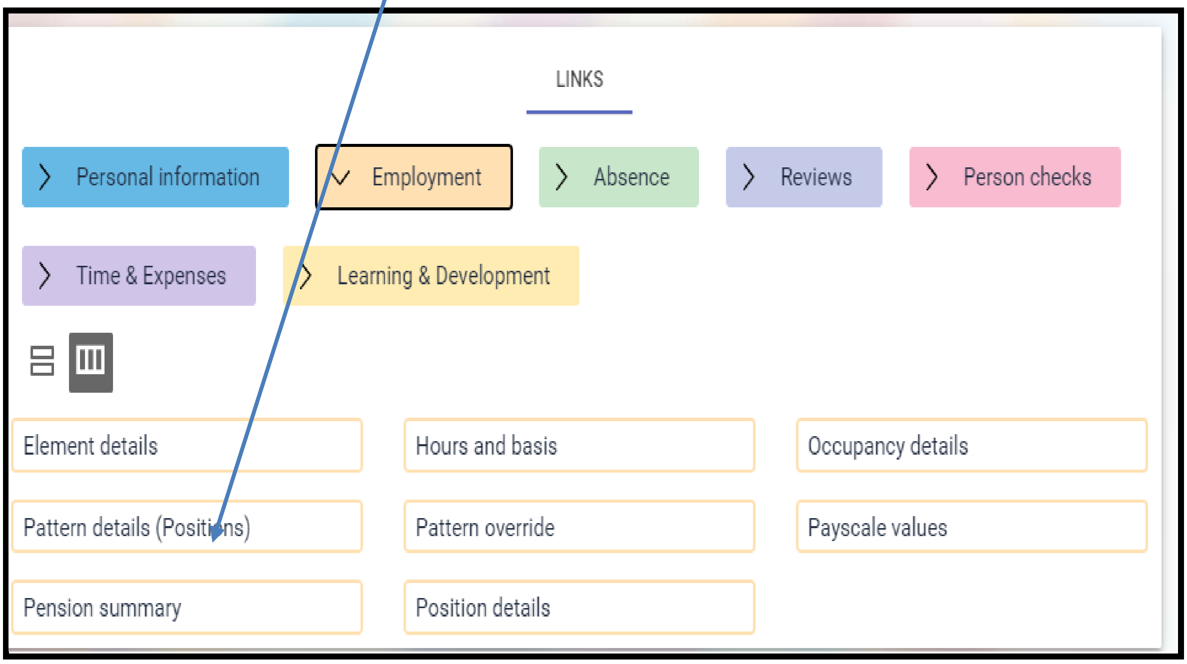
- **Element details – view any allowances that an employee receives e.g. shift allowance**
- **Hours and basis – view employees contracted hours and weeks worked and contract type**
- **Occupancy details – can extend employees Fixed Term contracts (only)**
- **Pattern details (Positions) – view Working pattern**
- **Pattern override – can override a work pattern if a temporary change to employees work pattern is required**
- **Pay scale values – view employees salary scale**
- **Pension summary – view details of the pension scheme the employee is a member of**
- **Position details – view details of employee's position – start date shown is the date the position was created not the date employee started in position**

Work Patterns

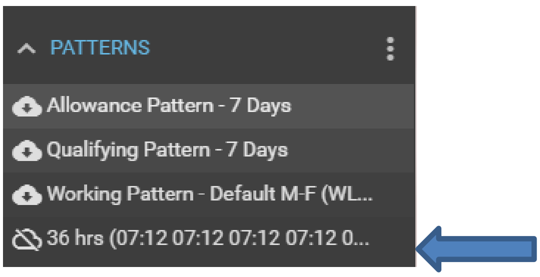
How to view employees work pattern details

To view an employee work pattern, click on

- **Employment tab**
- **Pattern details (Positions)**

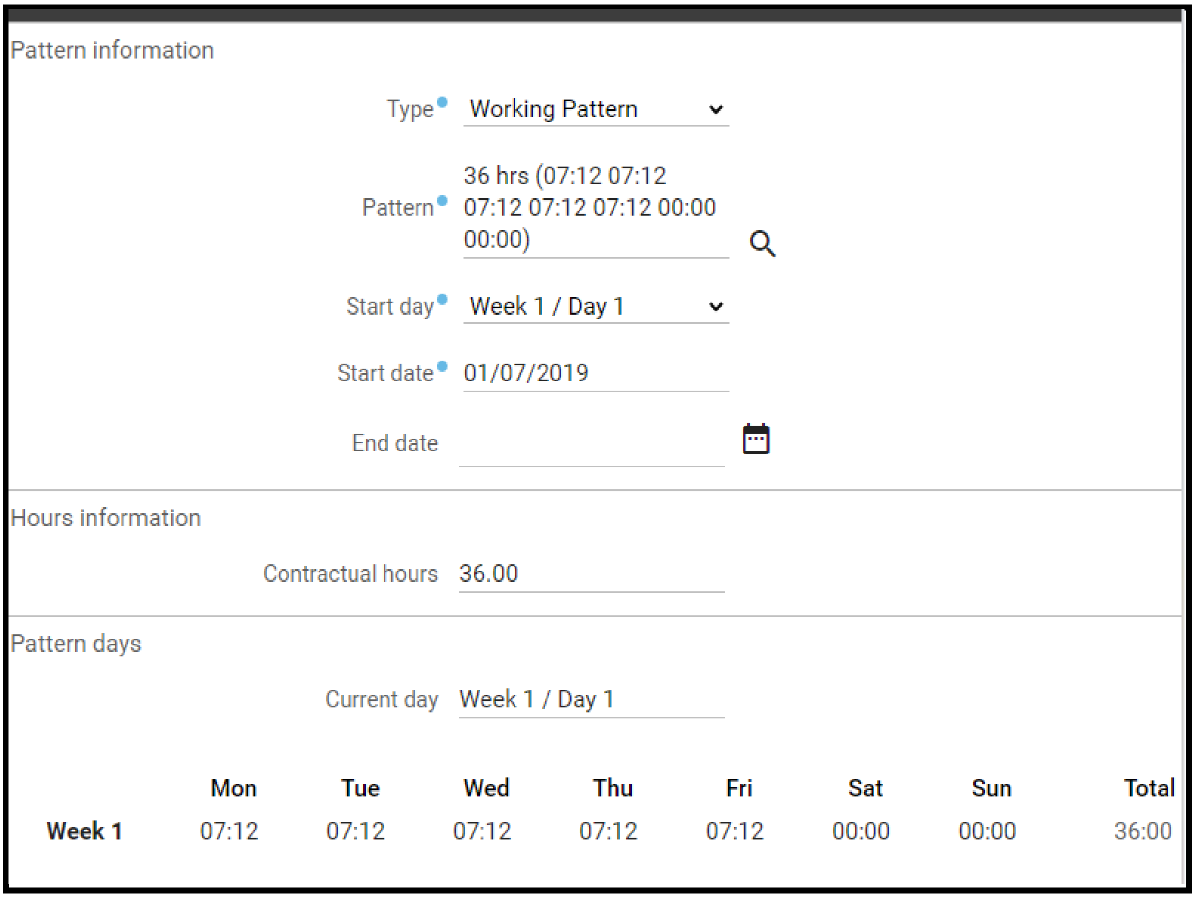


If employee has a work pattern it will be displayed in side panel



Click on working pattern 36 hrs (07.12 07.12 07.12) and details are displayed (There may be more than one working pattern displayed so check if there is an end date, if so that will not be the current working pattern for employee).

Example: A new working pattern for employee (the previous one has an end date).


Pattern information

Type: Working Pattern

Pattern: 36 hrs (07:12 07:12 07:12 07:12 07:12 00:00 00:00)

Start day: Week 1 / Day 1

Start date: 01/07/2019

End date:

Hours information

Contractual hours: 36.00

Pattern days

Current day: Week 1 / Day 1

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	07:12	07:12	07:12	07:12	07:12	00:00	00:00	36:00

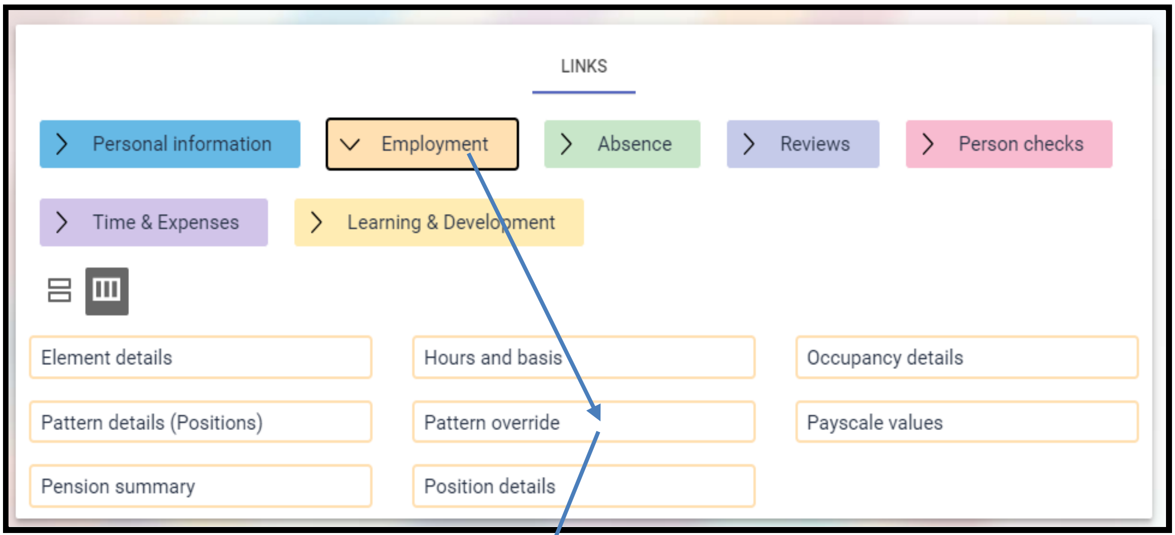
Reporting managers can only view working patterns you cannot make permanent changes to employees working patterns.

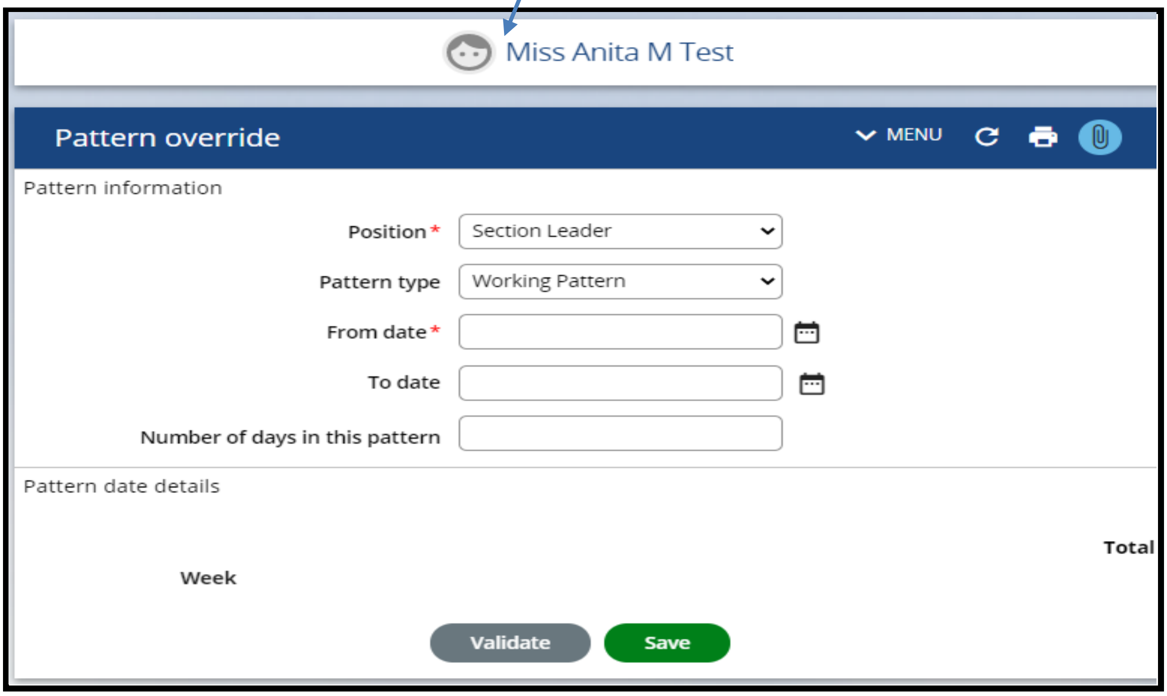
- **If an employee working pattern is incorrect a [working pattern change form] should be completed and sent to [hrchanges@westlothian.gov.uk]**
  Note - This form is only for changes to working patterns.
- **Please be aware that some employees have more than one week working pattern.**
- **Work patterns are only applicable to certain groups of reportees**

It is very important that employees working patterns are correct as this affects any unpaid leave deductions and their annual leave entitlement calculation.

Pattern Override (Temporary changes only)

If an employee has a temporary change to their work pattern the reporting manager is required to make the change in People Manager this is called a pattern override (in the Employment Tab).

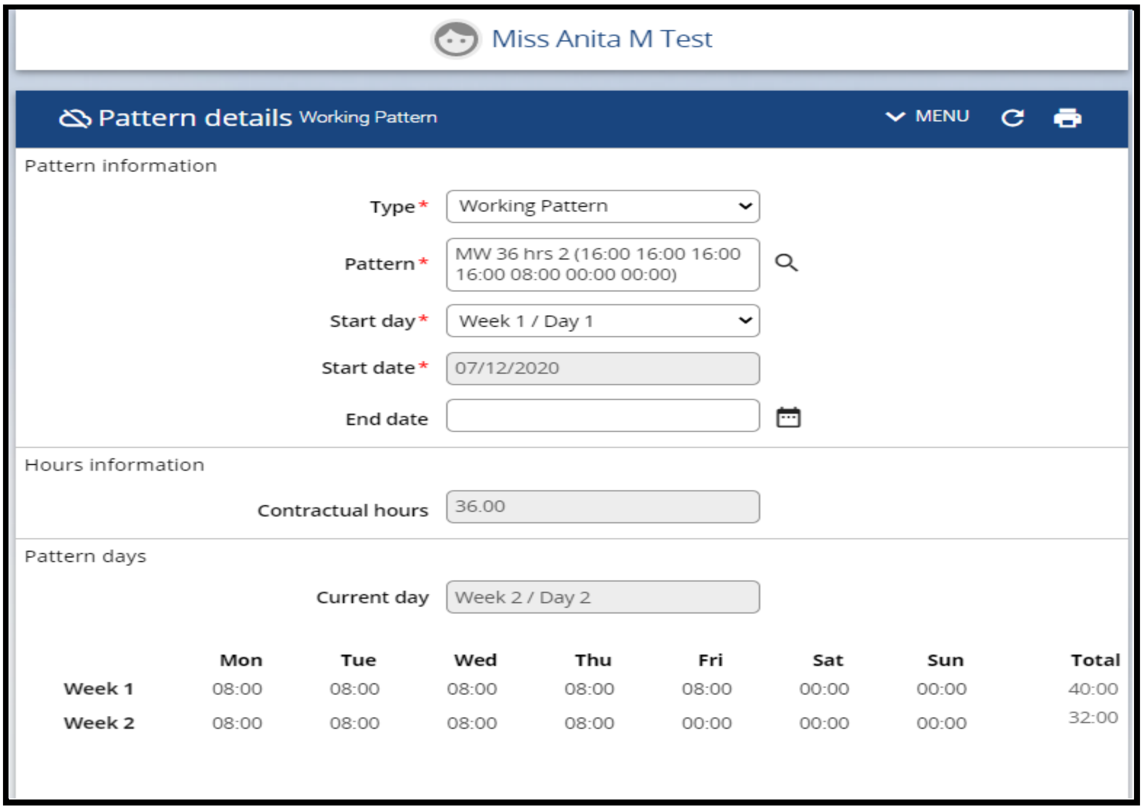




When you log into this screen the employee's position and pattern type will already be populated.

View employees current work pattern in Pattern details (Positions)

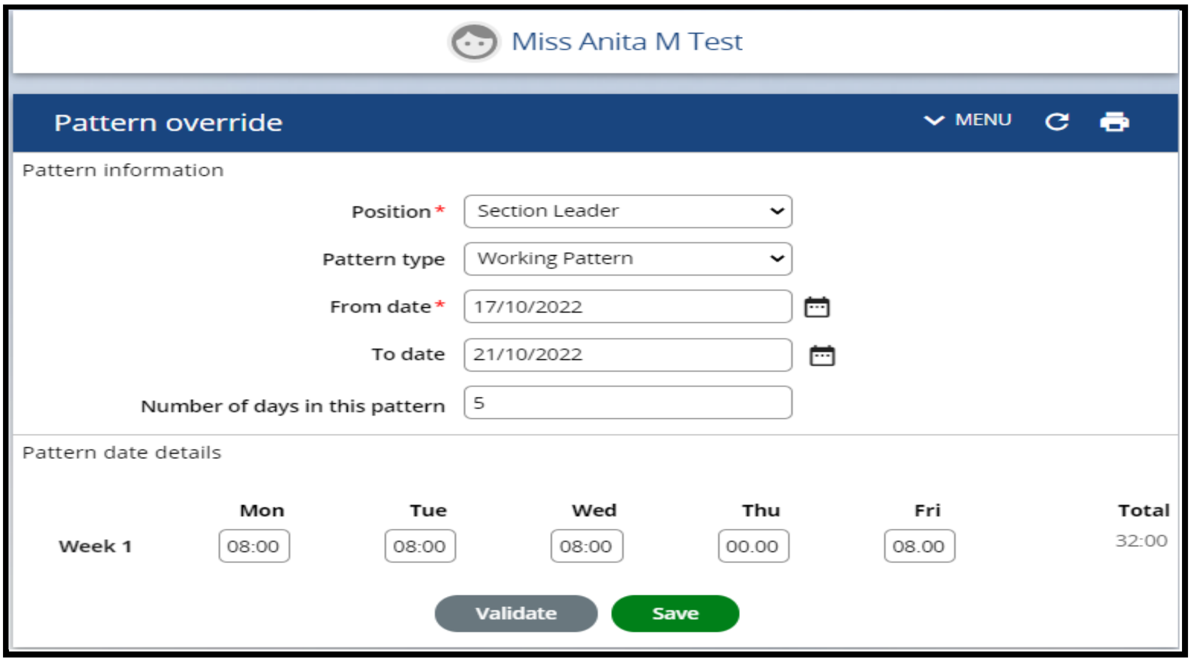
Week 2 – Want to swap Friday non-working day to a working day and Thursday to a non-working day for one week only.



Example: Employee changes their non-working day (Friday to Thursday)

- **From date (of change) 17/10/2022**
- **To date (End date of pattern change) 21/10/2022**
- **Number of days in this pattern 5 (automatically populates when dates are entered)**
- **Pattern date details appear at bottom of screen**

Example of change made: Friday will now be a working day and Thursday a non-working day for this period.

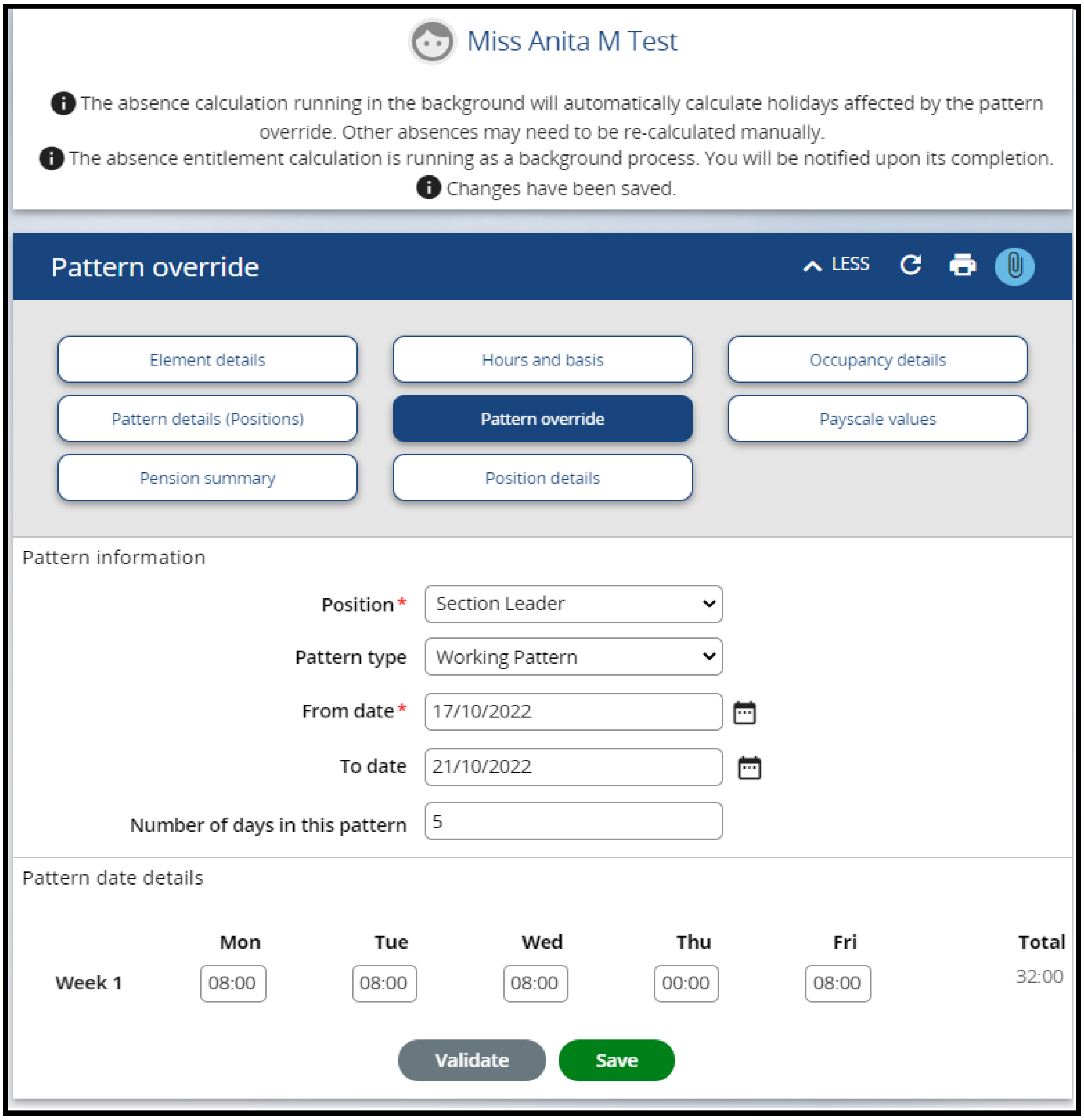


- **Click Validate (This ensures changes made do not go over normal weekly hours worked)**
- **Save**

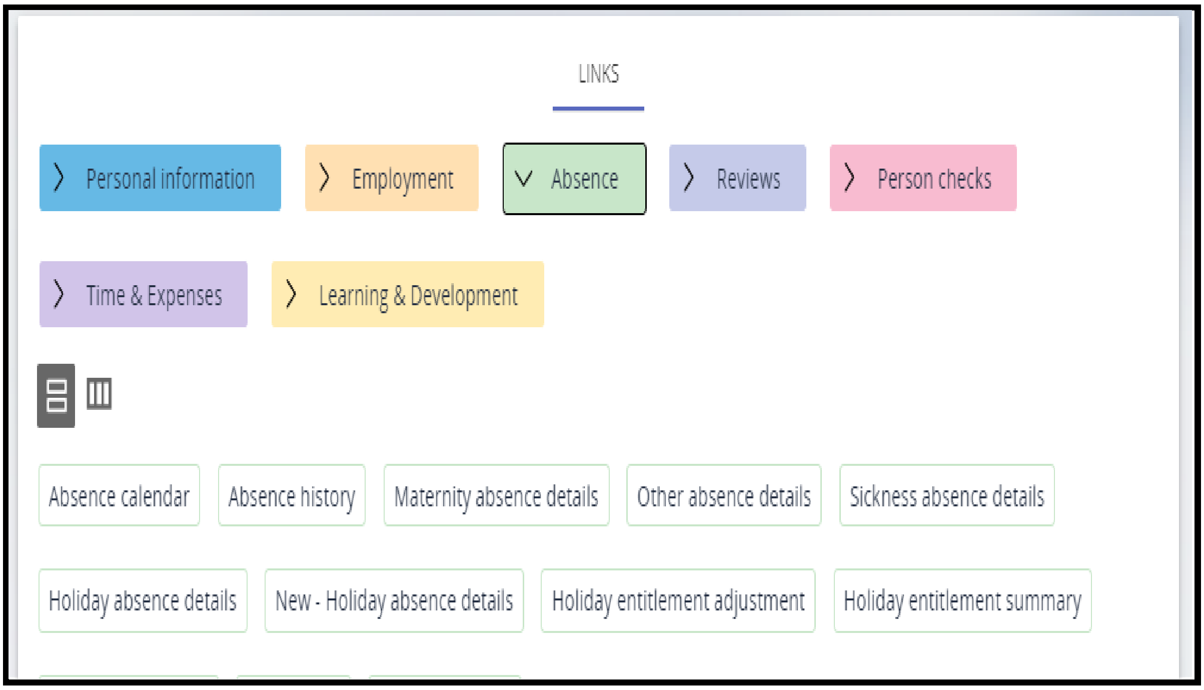
Employee's normal work pattern will resume from 24/10/2022

An information message appears at top of screen advising that employee's holiday balance will be recalculated to reflect temporary change to pattern

Other absences may need to be recalculated manually e.g. unpaid leave – Please email payroll if this applies. payroll@westlothian.gov.uk

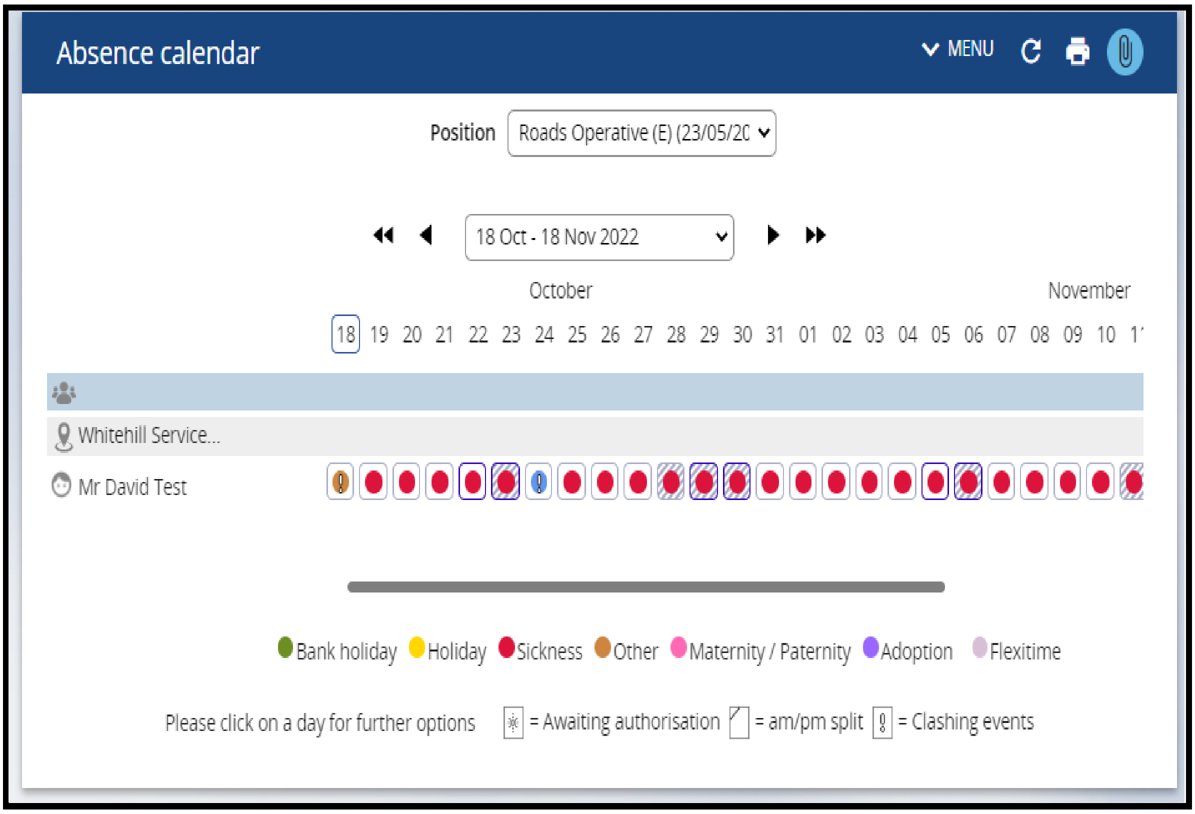


Absence 



Absence calendar

Employee absences are identified by relevant colours

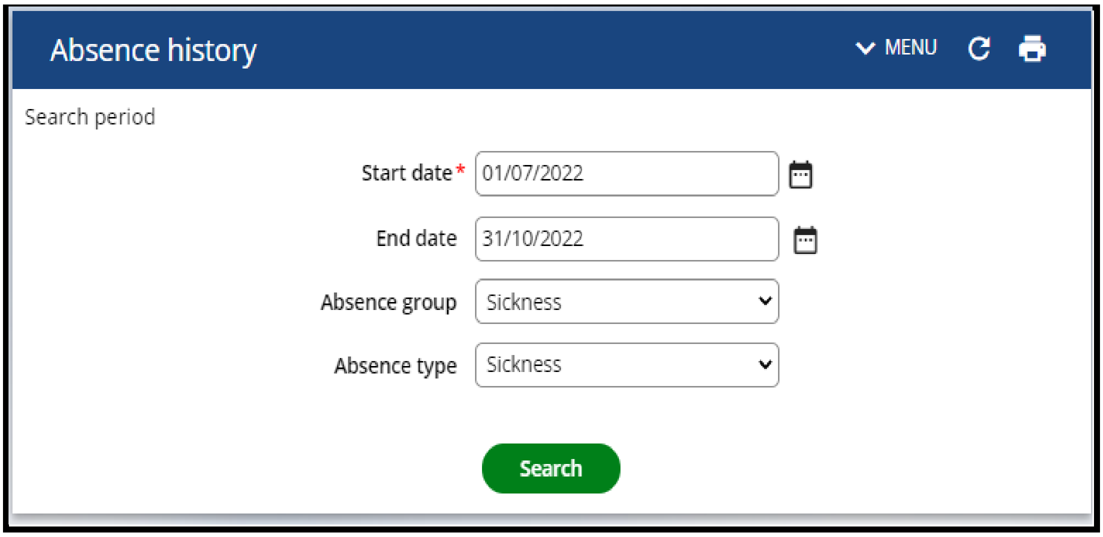


Absence history

This report can be run to view employee's (all) absence dates and reasons

Example – Sickness

- **Enter start date – End date**
- **Absence type – Sickness**
- **Search**



Report generated

Absence history

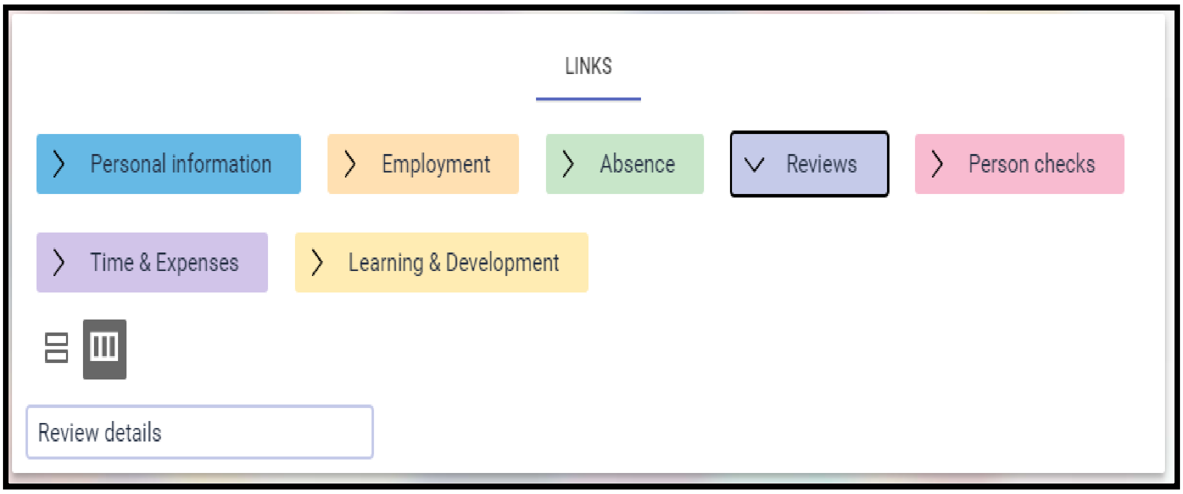
∨ MENU

Personal ref.	Payroll no.	Person	Start date	End date	Type	Reason	Auth status	Unit	Job title	Working days lost
[redacted]		Mr David Test	22/09/2022	03/10/2022	Sickness	Accidents, Incidents & Poisoning - Cut	Not applicable	Roads Operations Staff	Roads Operative (E)	0
[redacted]		Mr David Test	04/10/2022 PM		Sickness	Accidents, Incidents & Poisoning - Electric shock	Not applicable	Roads Operations Staff	Roads Operative (E)	0

- **Maternity absence details - view employee's Maternity dates**
- **Other absence details – view employee's Other absence (Special Leave) entries**
- **Sickness absence details - view and enter employees sickness absence**

Reviews – 

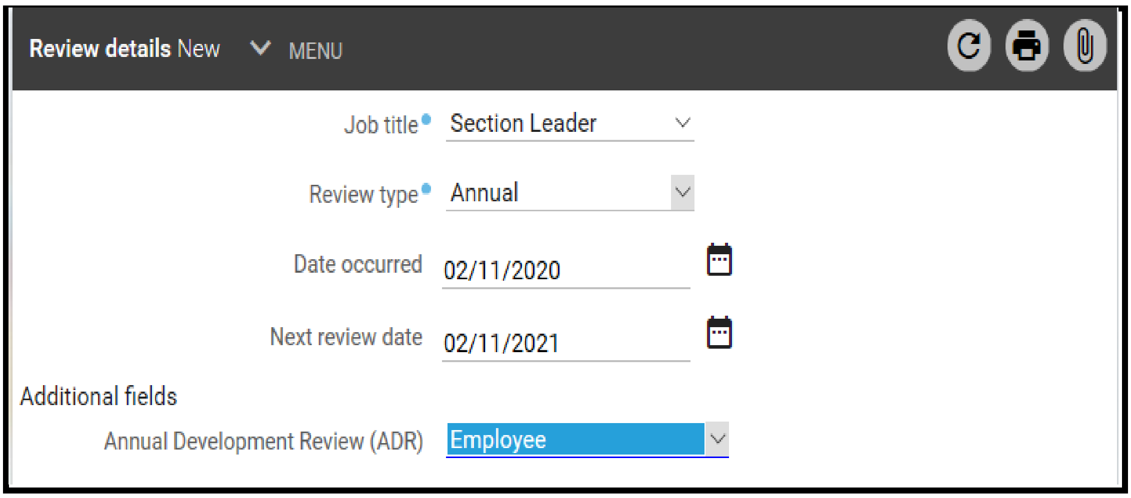
Employee's ADR dates can be recorded in this screen



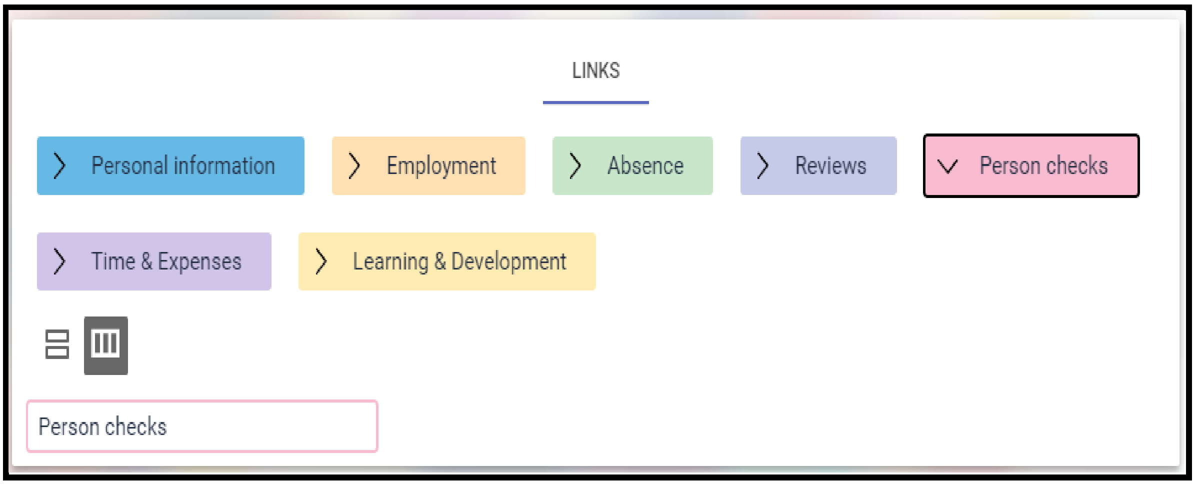
Review details

- **Job title (automatically populates)**
- **Review type – Annual**
- **Date occurred**
- **Next review date**
- **ADR type**

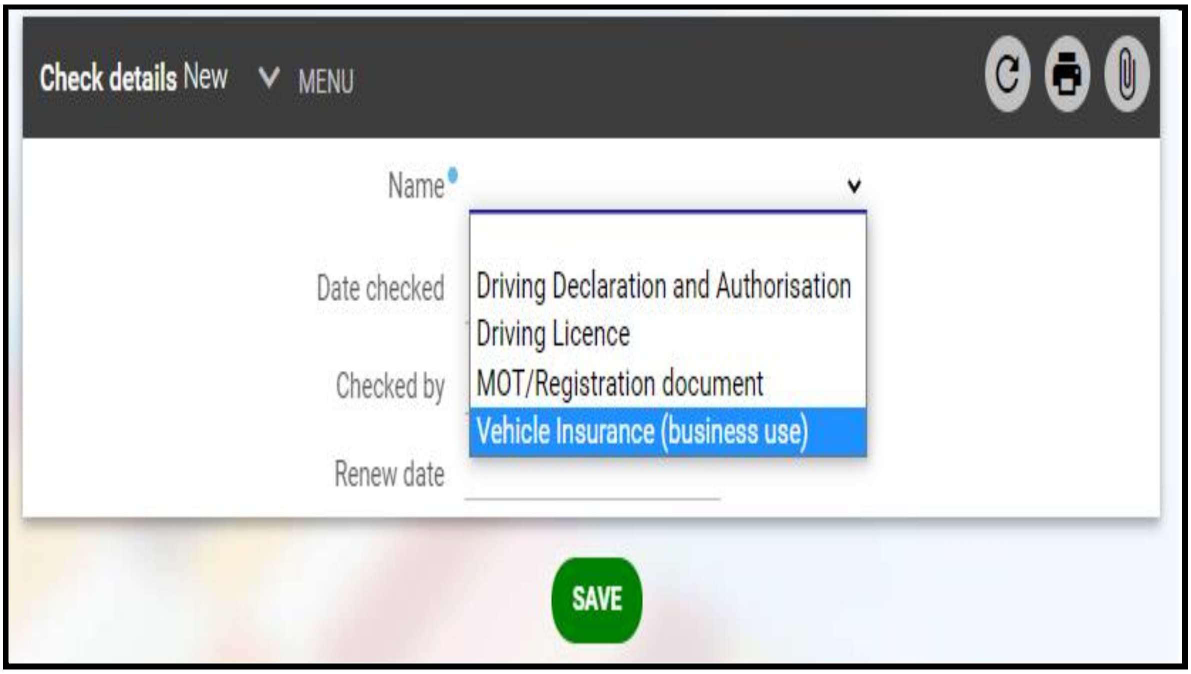
Example of completed screen



Person checks 



Person checks – Check details



If any of your employees are authorised to use their own vehicle on council business you are required to carry out an annual check to review their relevant documents.

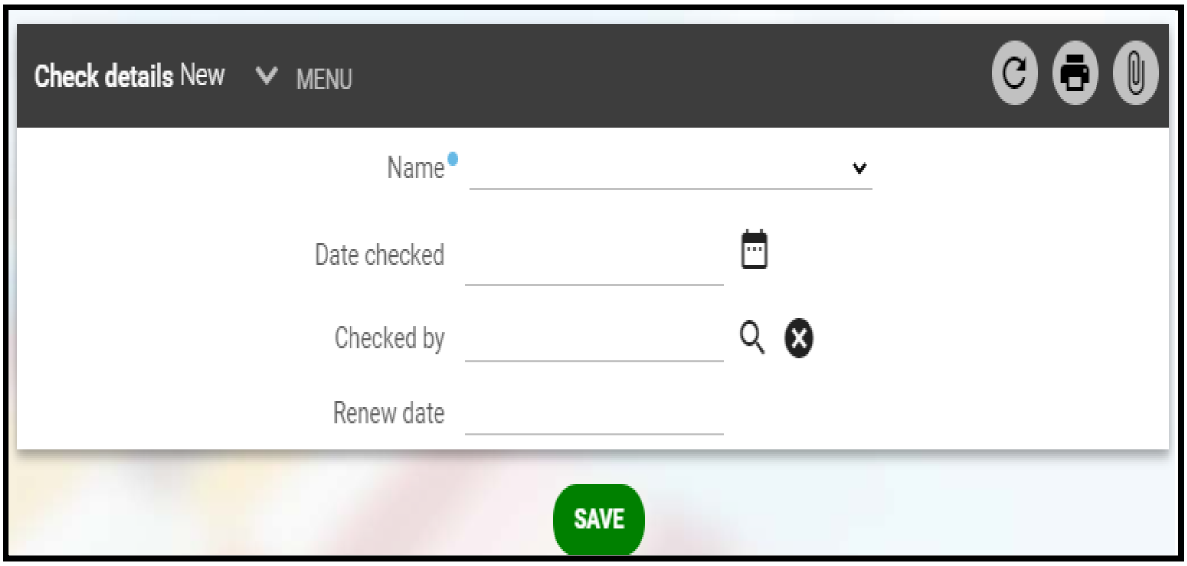
- **Driving Declaration and Authorisation form**
- **Driving Licence**
- **MOT/Registration document**
- **Vehicle Insurance (business use)**

Employees should not be permitted to drive on council business until these documents have been checked and their record in People manager updated.

Vehicle Checks (4)

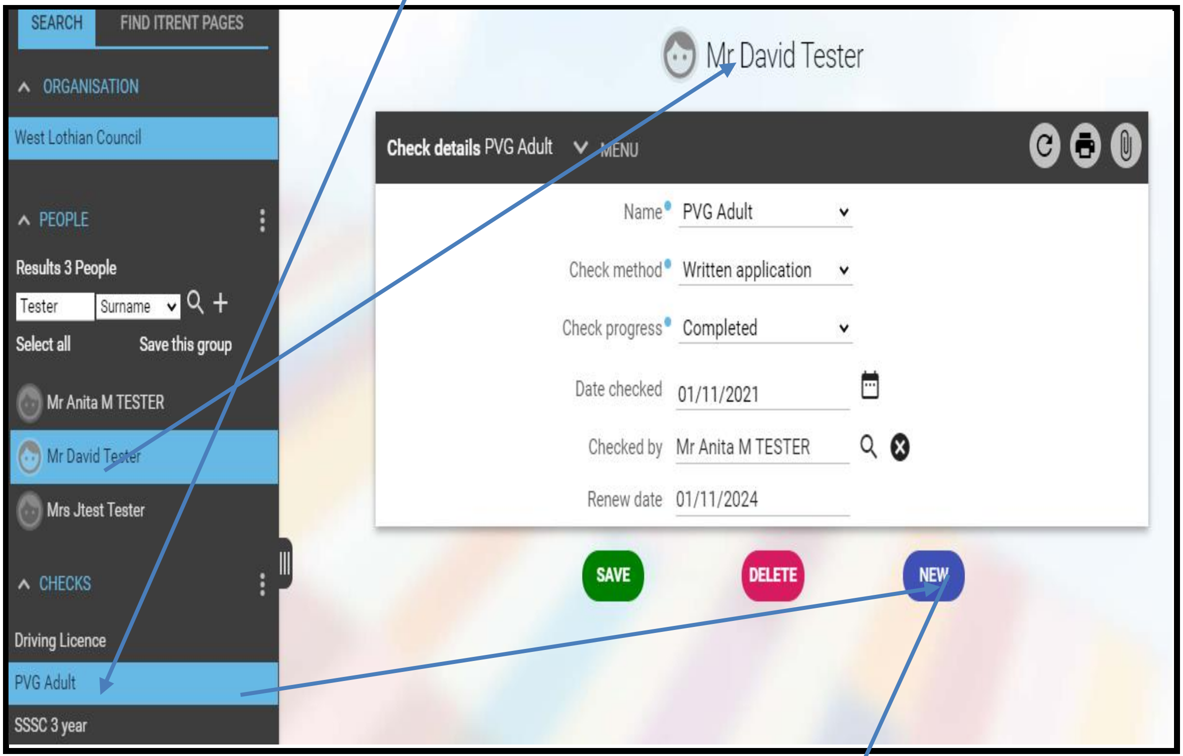
- Driving Declaration and Authorisation form - Link to policy [Driving at Work Policy]
- Driving Licence
- MOT/Registration document
- Vehicle Insurance (Business use)

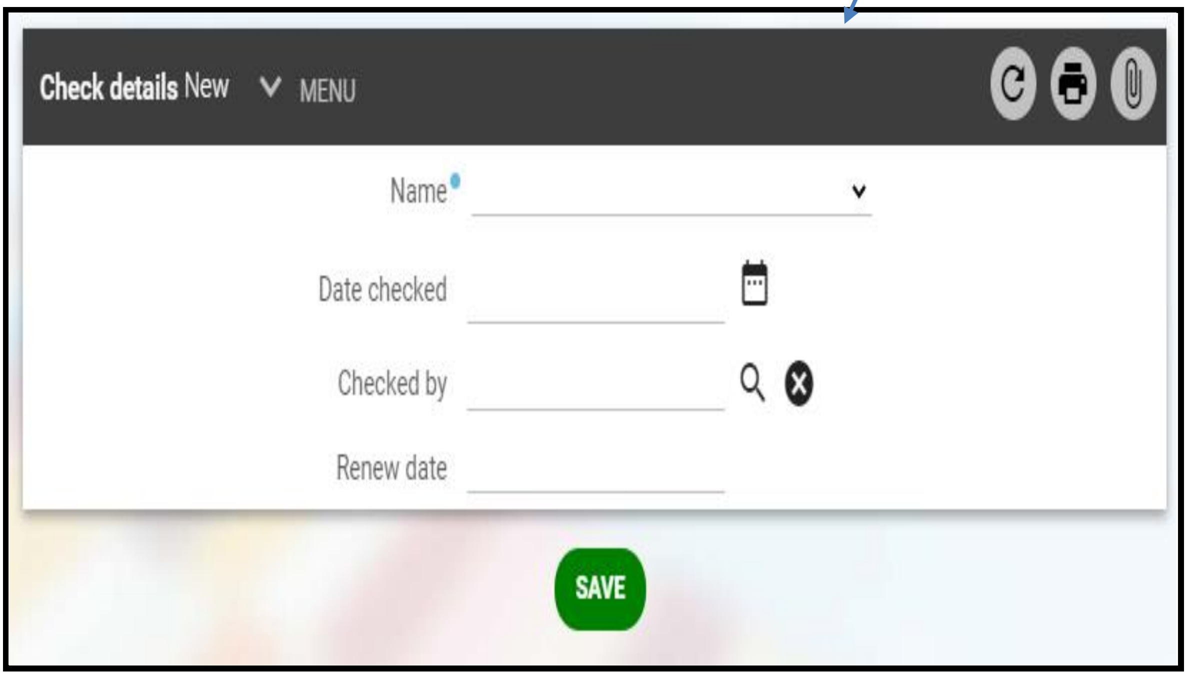
For new users please update this screen as follows:



- Name – choose from drop down list (four documents that must be checked annually)
  - ✓ Driving Declaration and Authorisation form
  - ✓ Driving Licence
  - ✓ MOT if vehicle is 3 years + or Registration document if vehicle is under 3 years old
  - ✓ Vehicle Insurance (business use)
- Date checked
- Checked by
- Renew date automatically updates
- Save

If the employee has a check e.g. PGV / SSSC already recorded in this screen you will not see a New screen - click on the check in the side panel to access a New screen





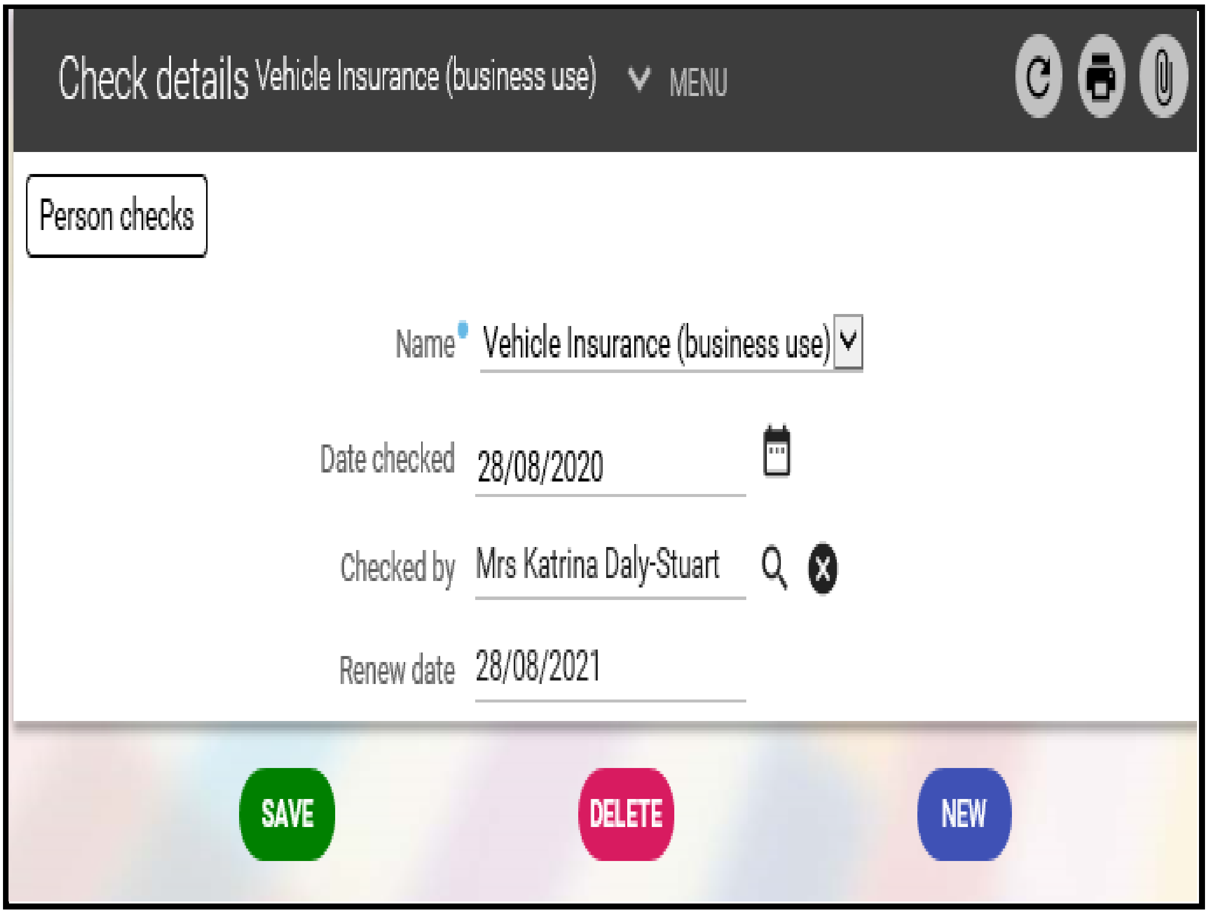
Annual Check

Employee and yourself will receive a notification email 90/60/30 days prior to the renewal date and one day after renewal date has expired.

When you have checked the form and the documents, over key Date checked with new date and Renew date is automatically updated.

Driving Declaration and Authorisation form must be completed annually

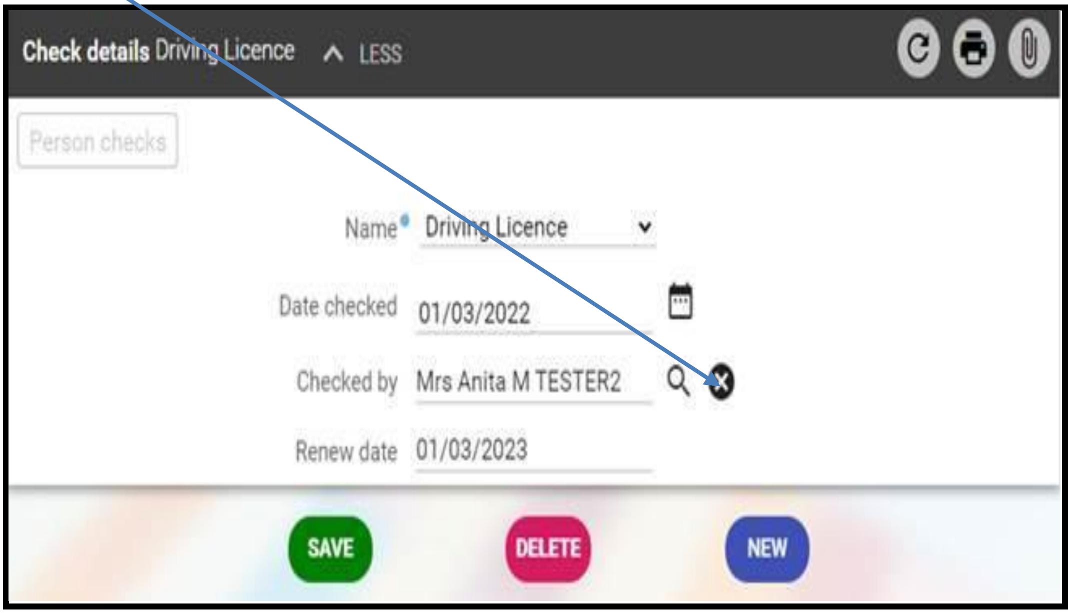
Completed forms should be saved in employees objective file by the reporting manager



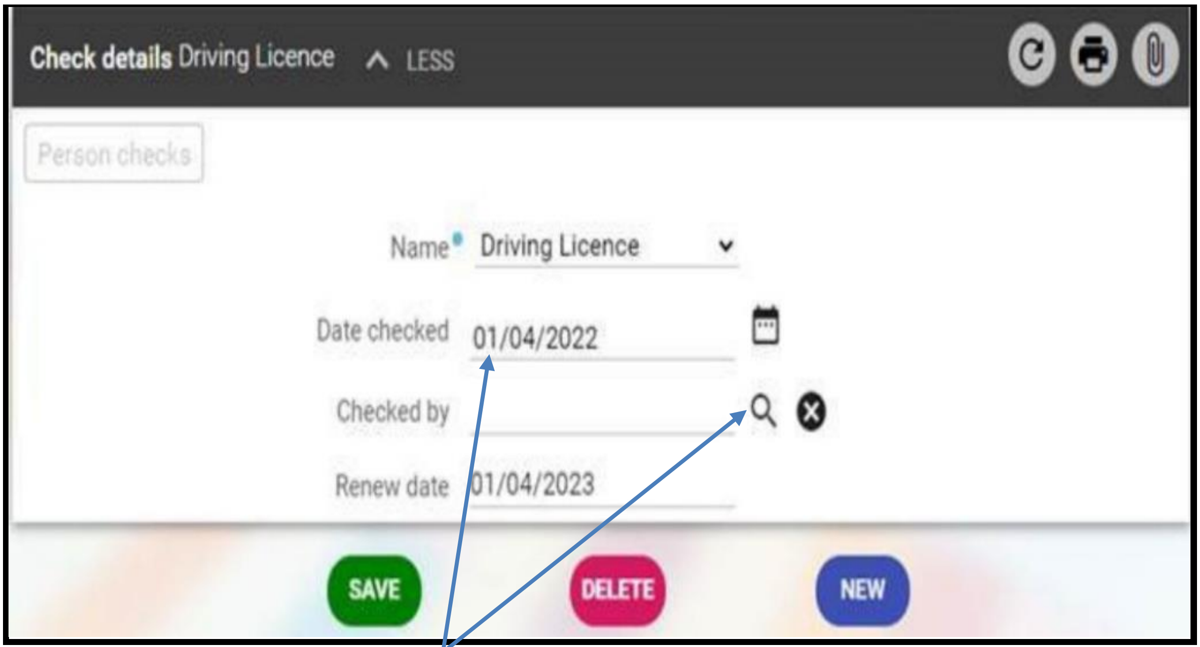
New reporting manager (since last checks done)

If you are the employees new reporting manager you will need to change the Checked by name to your own.

Click x and Save

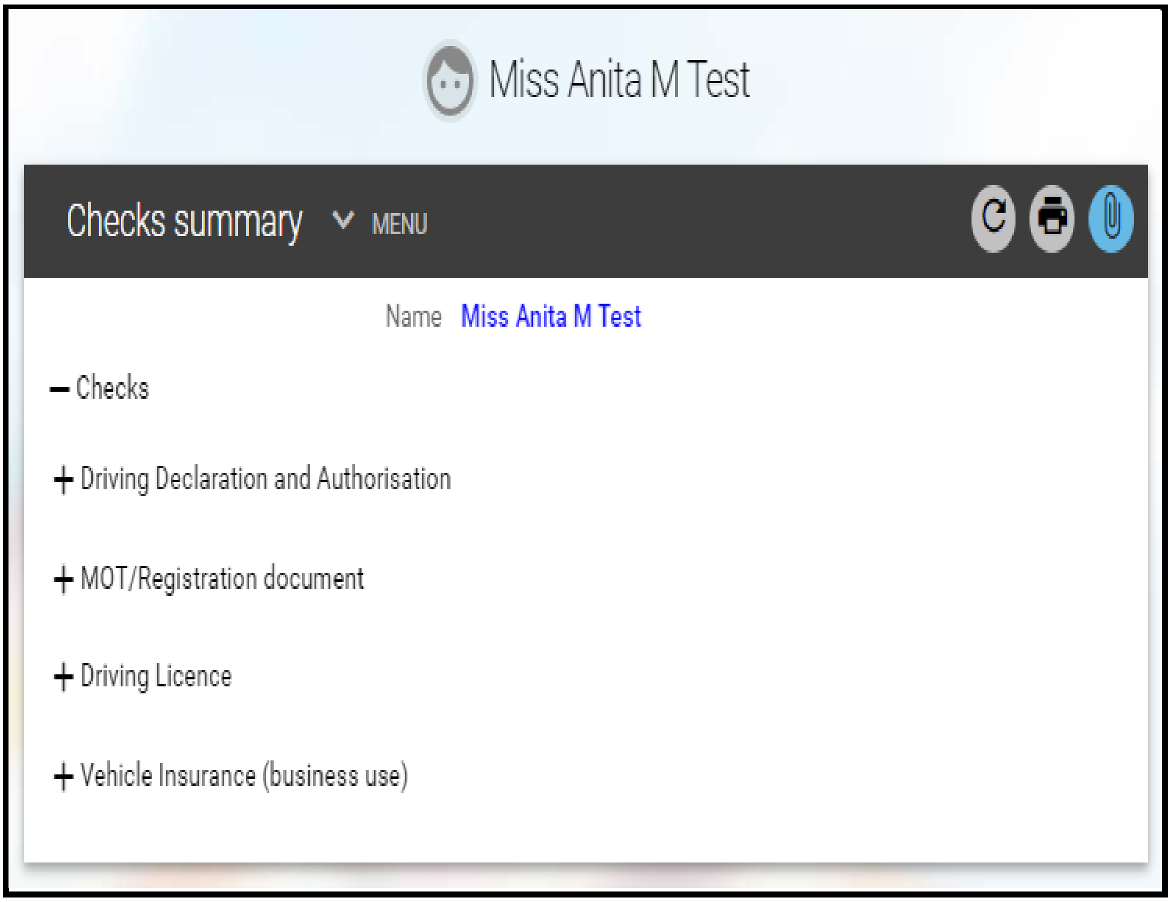


Checked by now will be blank



- **Change Date Checked to new date**
- **Search for your name**
- **Save**
- **Your name should now be in the Checked by field**

In Personal Information you can find "Checks summary" were you can view all checks that an employee has attached to their HR record.



SSSC/PVG/NMC/Basic Disclosure/Enhanced Disclosure

You will receive an email notification for these checks at 90 /60 / 30 days prior to expiry dates.

Please take the necessary action (Employee also receives a notification email).

Note: These checks cannot be updated in myHR or People manager

Employee no longer using their car for business journeys

- **Employee adds end date to their Private vehicle entry in myHR**

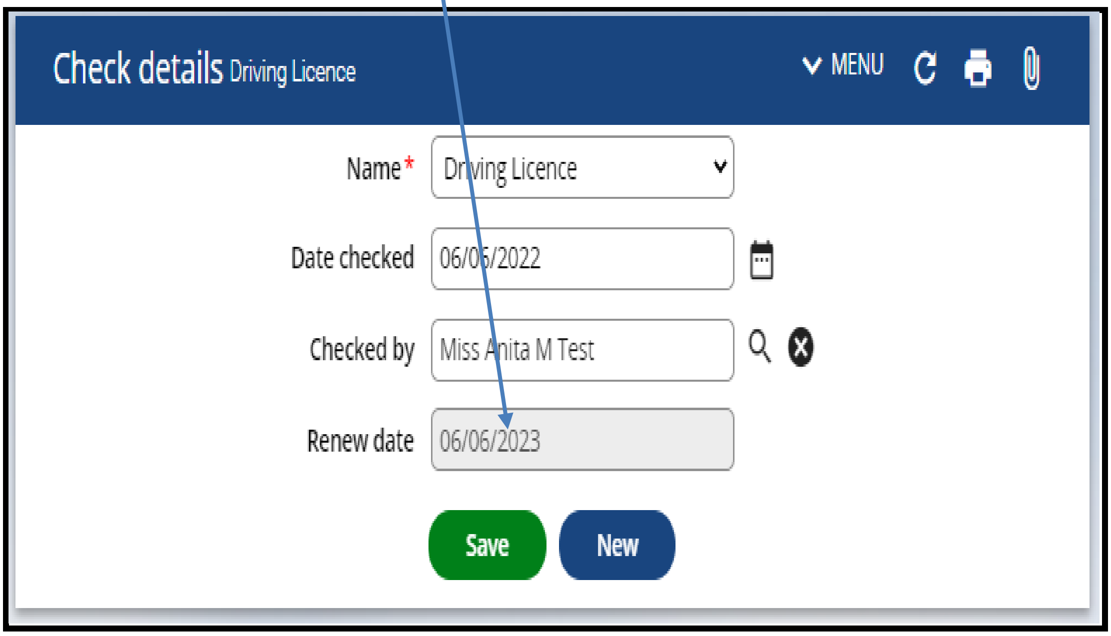
- **Reminder emails will continue to be sent to reporting manager until 1 day after the renewal date in Check Details screen in People manager**

- **This date cannot be amended to same date employee has ended their car in myHR as system is set up to automatically populate one year from date checked date**

- **Reminders are sent 90/60/30 days before renewal date and 1 day after**

Example

Last reminder will be sent on 07/06/2023



Previous checks in system for employee

If an employee had stopped using their car or was no longer required to drive as part of their post e.g. Secondment and the renewal check dates were not updated.

But at a later date the employee is required to drive as part of their duties again, the following process should be followed.

Employee is required to complete another Drivers Declaration form

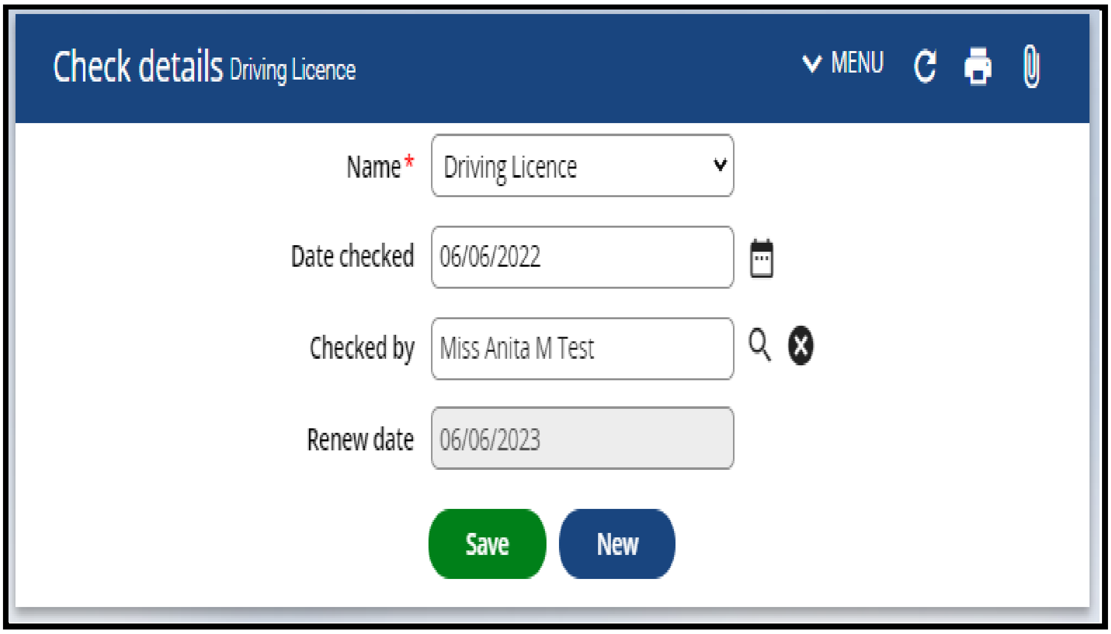
To access form please click on link
Driving Declaration and Authorisation Form

Reporting managers are required to check the current documents and update the Check details screen

Access the employee's previous checks

- **Change the Date Checked to the date you have checked the documents**
- **Save**

The renew date will change and the reminders will resume at 90/60/30 prior to this new renewal date and 1 day after this date



<u>Employees who drive but do not use their own vehicle for council business</u>

(Please refer to process for employees using their own car on pages 30 – 33 of this guide)

All employees who drive whilst at work, both in council and private vehicles, must have their driving licence checked, complete a Drivers Declaration and 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 documents are checked and completed initially, a record of this should be recorded in the Person's Checks for the employee in People Manager by the reporting manager.

Going forward these checks must be done on an annual basis – Driver Declaration and Authorisation form must be completed annually.

<u>Completed forms should be saved in employees objective file by the reporting manager</u>

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.

The 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.

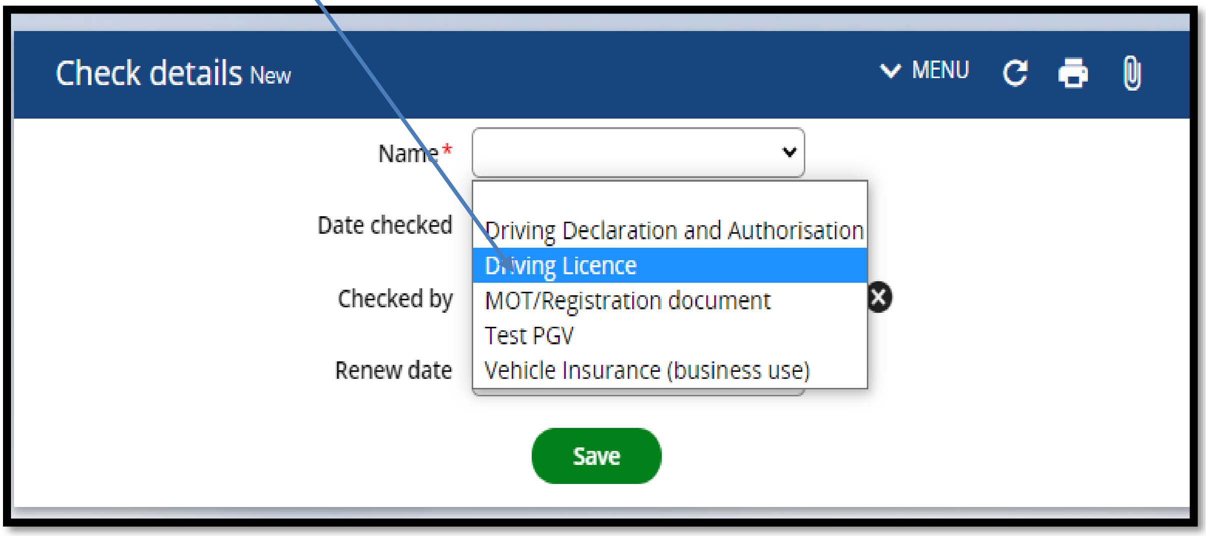
All reporting managers are responsible for ensuring the health and safety of their employees and must ensure that the regulations set out in the policy are met.

Employees who undertake work related driving activities are responsible for ensuring that they comply with the requirements of the policy.

Link to policy [Driving at Work Policy]

__Driving Licence Check__

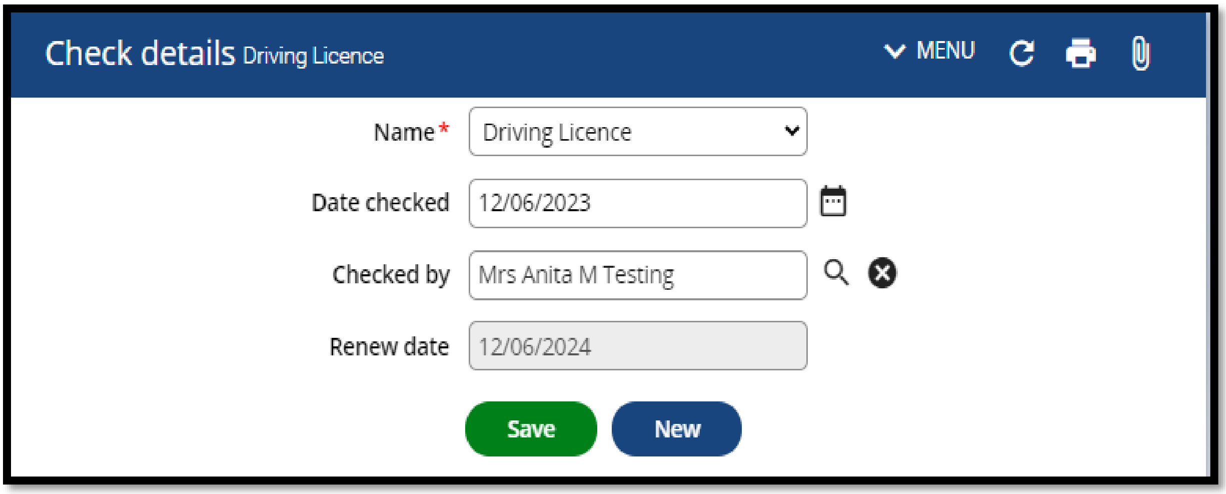
Choose from drop down



When click Save – dates will populate

Date checked

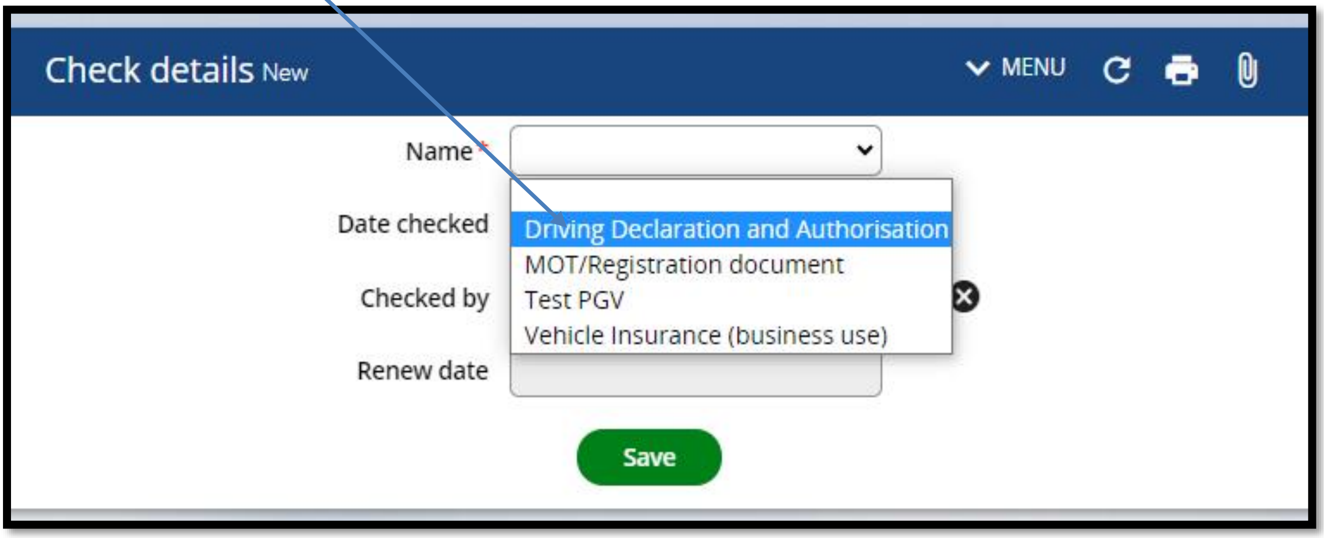
Renew date (Annually) – Reporting manager will receive a reminder email 90/60/30 days prior to renew date (Employee will also receive a reminder email)



When doing the annual check – over key __Date checked__ with new date and Renew date is automatically updated.

Drivers Declaration and Authorisation Form (completed annually)

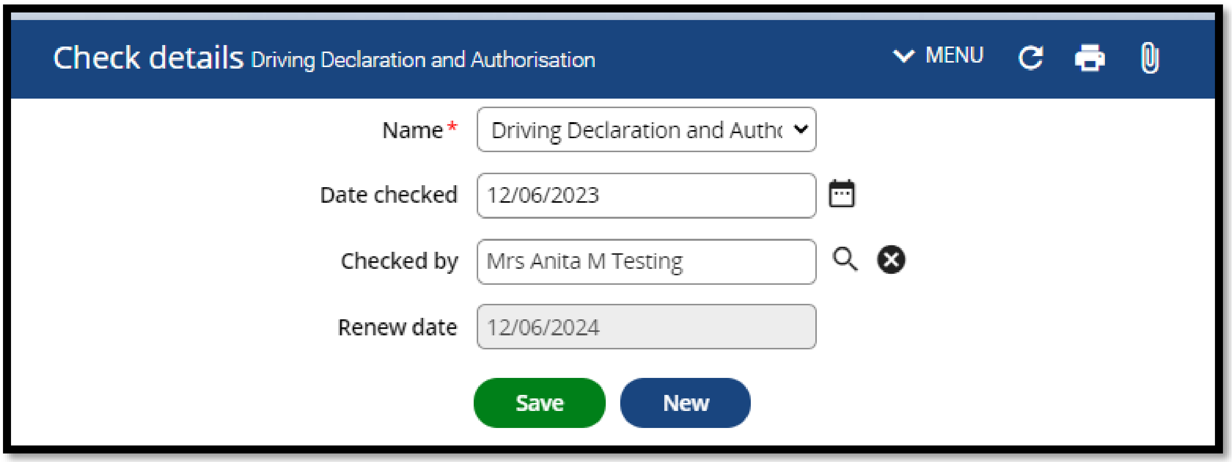
Choose from drop down



When click Save – dates will populate

Date checked

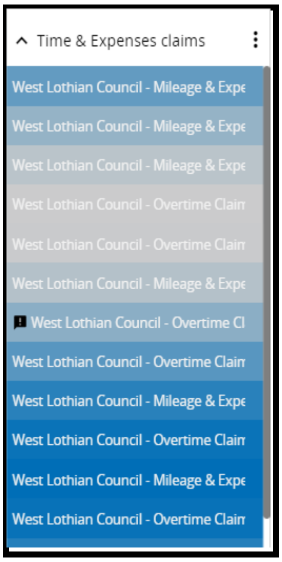
Renew date (Annually) – Reporting manager will receive a reminder email 90/60/30 days prior to renew date



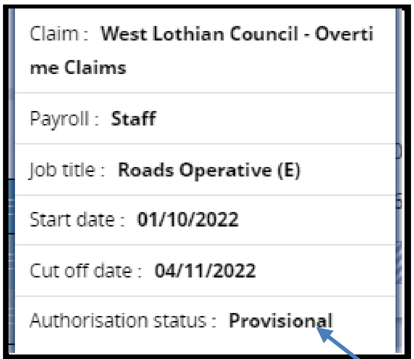
When doing the annual check — over key Date checked with new date and Renew date is automatically updated.

Time & Expenses

Time & Expenses Claim



You can view employees claims – available in side panel (Hover over each claim in side panel and details of claim is displayed)

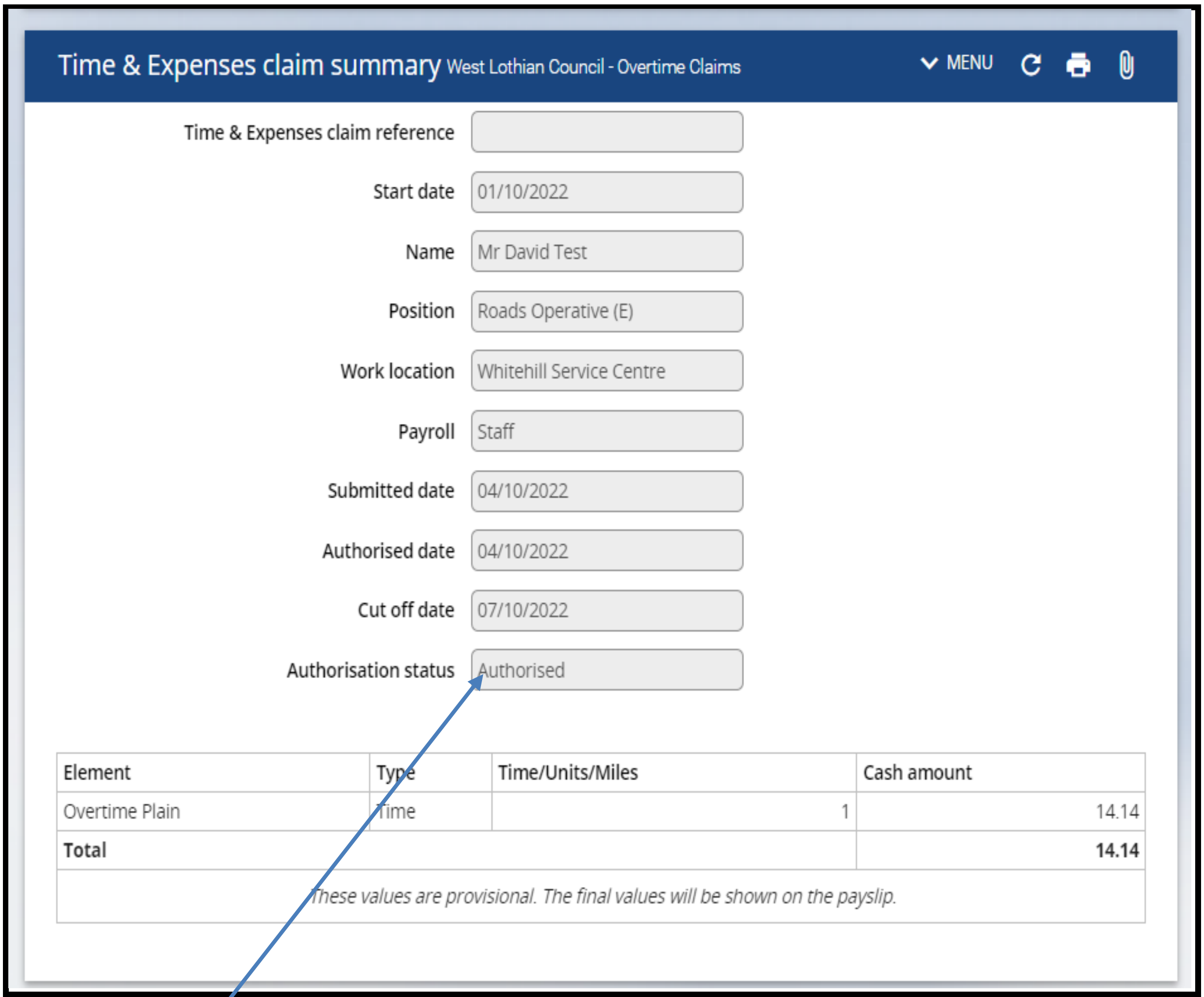


You can check the status of the claim

To view full details of a claim, click on relevant claim – claim is displayed.

Time & Expenses claim summary

Click on relevant claim in side panel and a summary of claim will be displayed.



Time & Expenses claim summary West Lothian Council - Overtime Claims

MENU

Time & Expenses claim reference:

Start date: 01/10/2022

Name: Mr David Test

Position: Roads Operative (E)

Work location: Whitehill Service Centre

Payroll: Staff

Submitted date: 04/10/2022

Authorised date: 04/10/2022

Cut off date: 07/10/2022

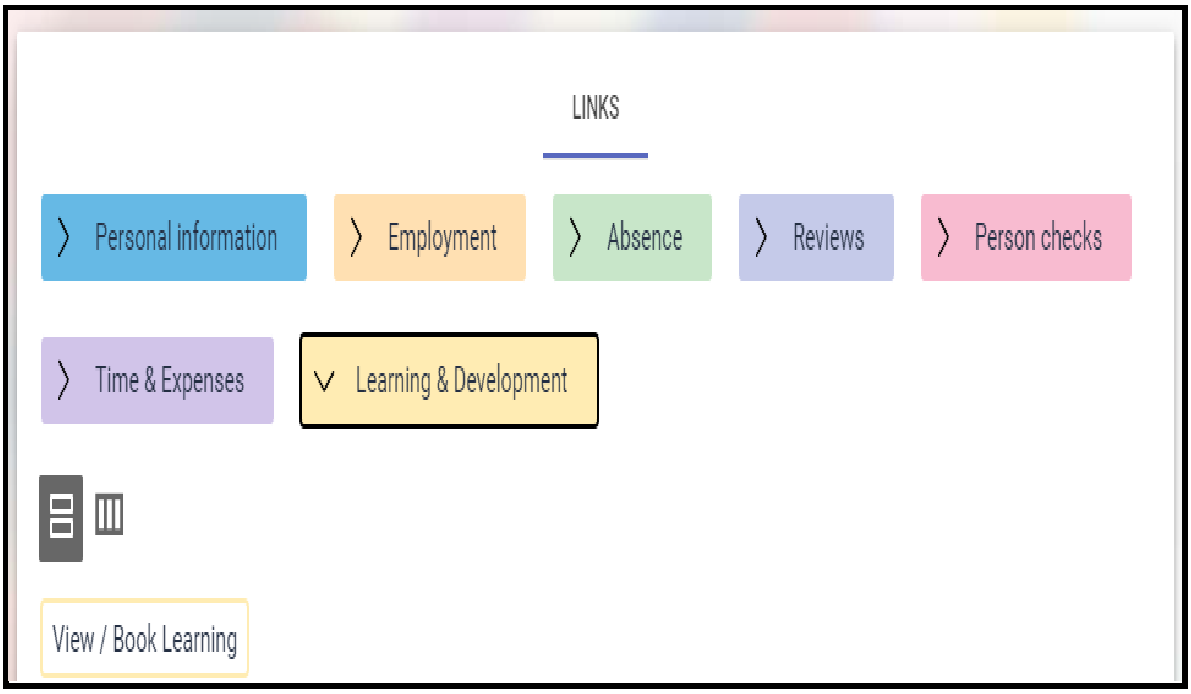
Authorisation status: Authorised

Element	Type	Time/Units/Miles	Cash amount
Overtime Plain	Time	1	14.14
Total			**14.14**

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

You <u>cannot authorise</u> or reject claims from here – This can only be done from your <u>My to do list</u>.

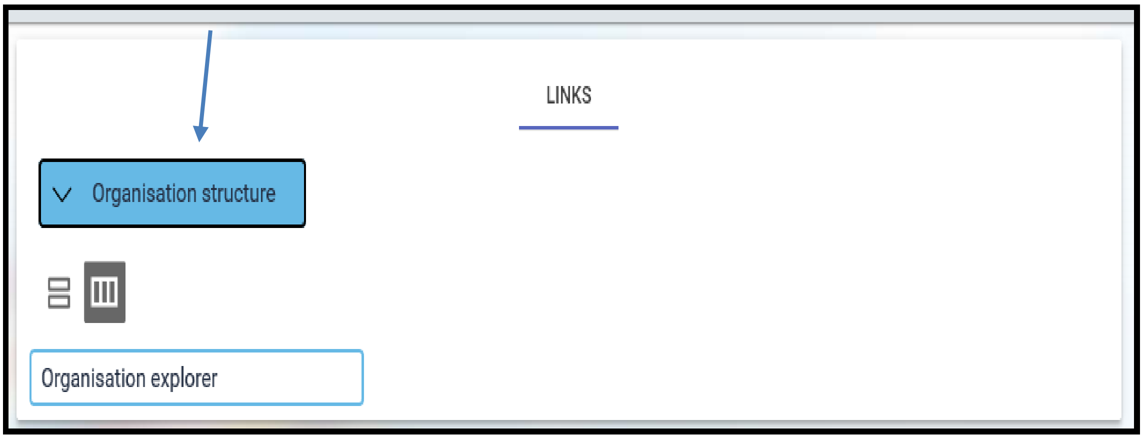
Learning & Development



Please refer to the People Manager Learning & Development user guide.

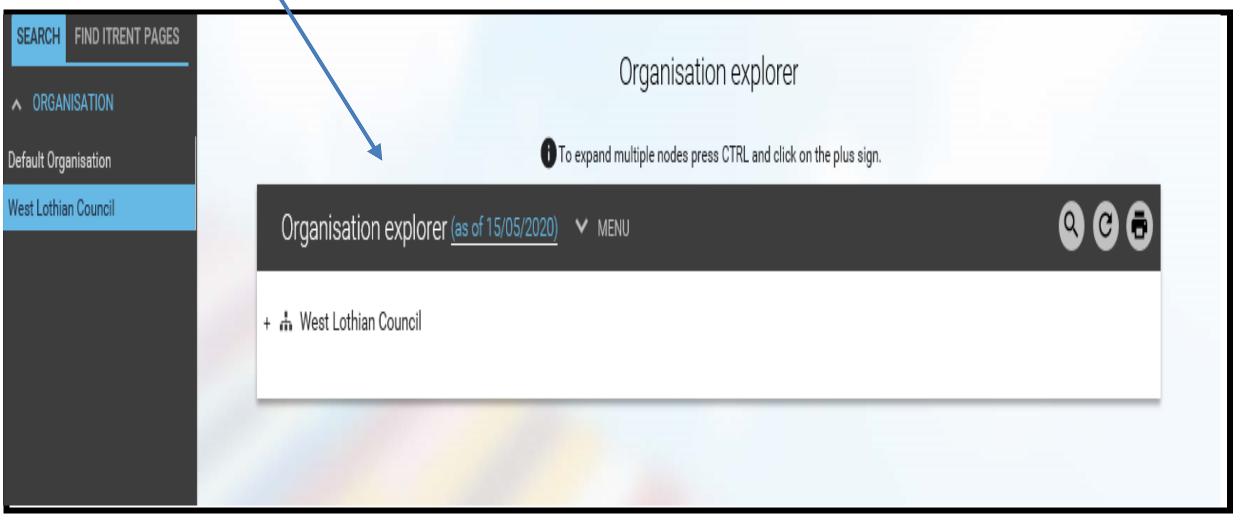
4. Organisation

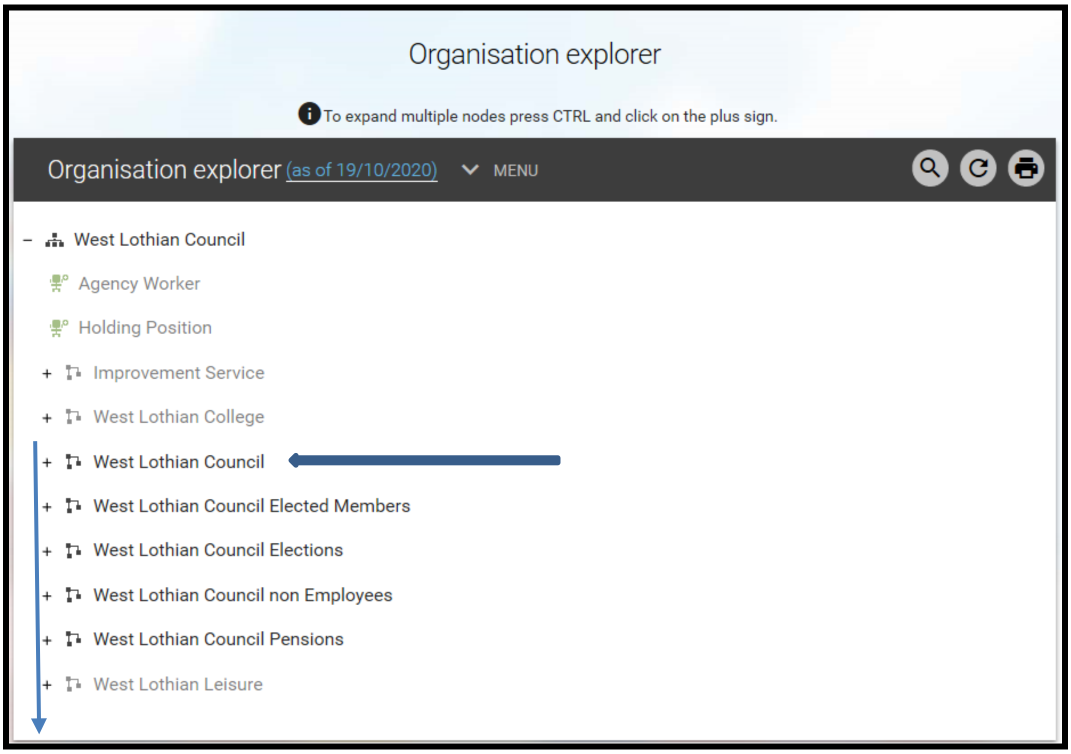
(to access Organisation Structure – Organisation explorer)



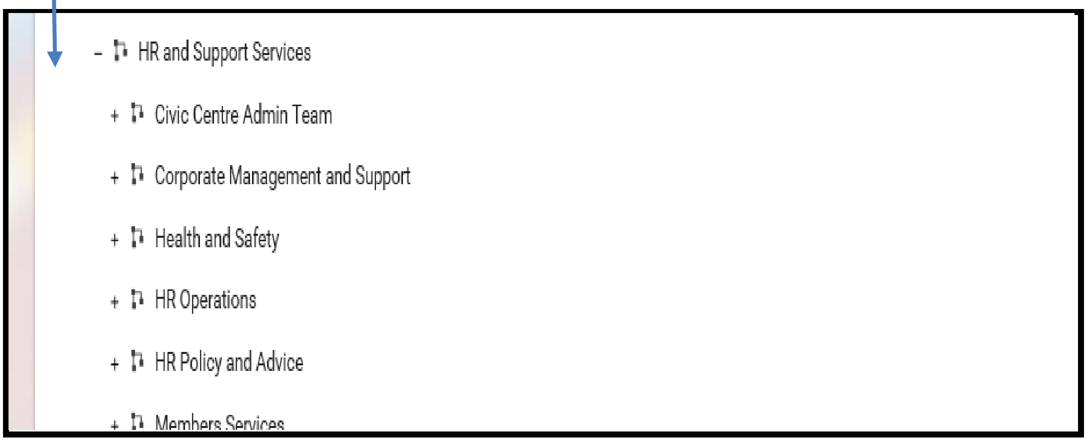
You will be asked for the date you want to view the structure at (The effective date will <u>always</u> default at today's date)

Click on + icon and each Unit will appear




Organisation explorer
To expand multiple nodes press CTRL and click on the plus sign.
Organisation explorer (as of 19/10/2020)
MENU
West Lothian Council
Agency Worker
Holding Position
Improvement Service
West Lothian College
West Lothian Council
West Lothian Council Elected Members
West Lothian Council Elections
West Lothian Council non Employees
West Lothian Council Pensions
West Lothian Leisure


Corporate Services
Corporate Communications
HR and Support Services
IT Services
Legal Services
Performance and Improvement Service
Procurement


HR and Support Services
Civic Centre Admin Team
Corporate Management and Support
Health and Safety
HR Operations
HR Policy and Advice
Members Services

Click on + icon at HR and Support Services - HR Policy and Advice Team and all posts in this unit appear. A post in iTrent is identified by a Table icon – Click on a table and it will show the name of the person who is in this post.

Positions are identified by chairs

- **Blue chairs are occupied positions**
- **Green chairs are vacant positions**
- **Red chair will represent a post that is in the recruitment process – which will be a future development**

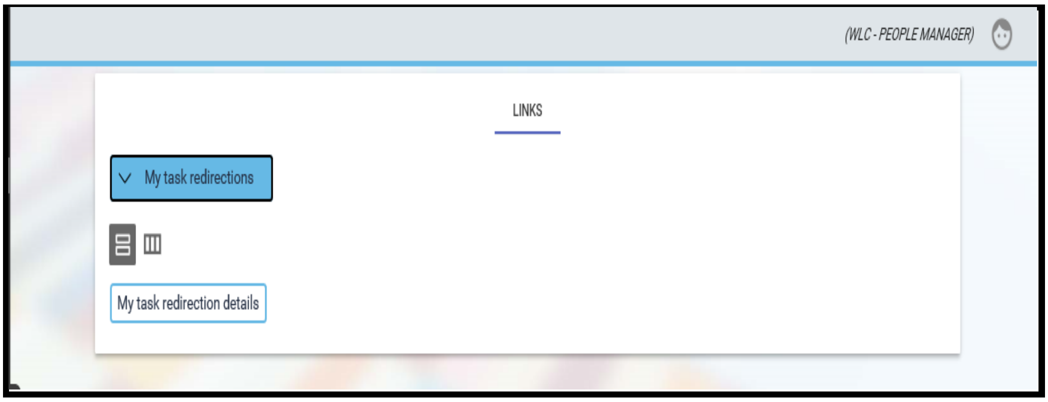
5. Out of Office

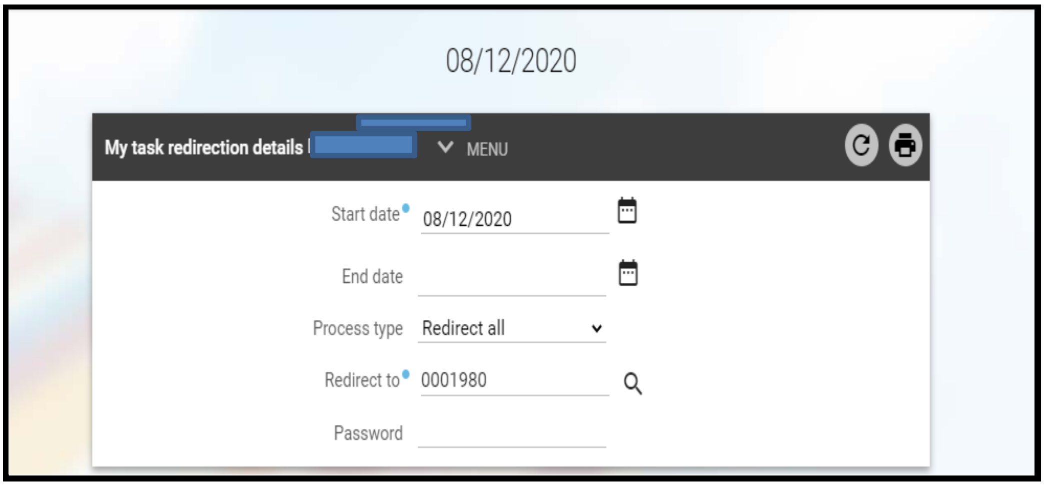
My task redirection (tasks that can be redirected are - Time & Expenses claims /Other Absence requests and Annual Leave requests)

If you are unable to action any tasks due to your absence e.g. Annual Leave, there is a facility to redirect any future tasks to another reporting manager.

If you are absent for any reason and will be unable to authorise your tasks you are required to log on to People Manager and put your out of office – "task redirection" on so that your tasks can be forwarded to another reporting manager to action during your absence.

You can access People manager from home.





- **Enter Start date (First date of your absence) this has to be today's date or a future date (date cannot be retrospective)**
- **Leave End Date blank – You must enter end date on your return – *if this is not done it can have an impact on employees' future claims***
- **Process type - Redirect all**
- **Redirect to - Click on Search icon to find reporting manager - <u>Please be aware when choosing who you are redirecting your authority to, as there are some people with the same name in the council.</u>**
- **Password is your log on password**

Redirected Manager

- **The person that you choose to redirect your tasks to should be:**
  - **Equivalent level of manager or level above – this must be adhered to, it is an audit requirement, otherwise your direct reportee will be able to authorise their own requests**
  - **The person that is chosen to redirect tasks to must have People Manager access**
  - **Only tasks that are submitted for authorisation after the start date of redirection will be redirected**
  - **Setting up a redirection will not transfer any pre-existing tasks to your chosen person**
  - **Any pre-existing tasks in your To do list should be authorised before your absence, if you cannot do this you can redirect them in your To do list to the redirected manager.**
  - **You will need to advise the redirected manager that you have allocated your tasks to them from the start date entered and ensure that there is no overlap with dates**
    This can occur when the reporting manager you redirect your tasks to is also going to be absent during your period of absence and redirects their tasks to you.

The reporting manager you have redirected your tasks to will not be able to see your reportees in People Manager so will not be able to key in sickness absence or extend Occupancy end dates if applicable for any of your reportees

<u>Your reporting manager</u> is required to add sickness absences /extend occupancy end dates for your reportees during your absence.

<u>When you are the redirected reporting manager:</u>

Please ensure you action all tasks in your "To do list" that have been redirected to you before end date of redirection. If this is not done they will remain in your "To do list" but you will not be able to authorise the task.

You will need to redirect them to the reporting manager who has ended the redirection and can authorise the tasks.

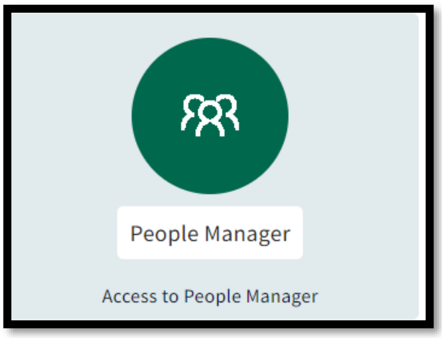
Entering Sickness absence details for employees cannot be redirected – as this is not a task – only <u>your</u> reporting manager can key in sickness absences when you are absent.

6. Help & Support

MyHR email address should only be used for system related issues

If your query is not related to People Manager system issues please send an email to the correct mailbox:

- Contract / Annual Leave queries: HRSupport@westlothian.gov.uk
- Payroll query: payroll@westlothian.gov.uk
- Sickness absence /Case management query: sicknessabsence@westlothian.gov.uk
- Learning query: learn2develop@westlothian.gov.uk
- Policy & Advice query: Hrpolicy@westlothian.gov.uk
- Recruitment query: Recruitment@westlothian.gov.uk



There is further help available on my toolkit under

People Manager – Managers self service

- **User guides**
- **Index link pages to help you find the section you require in the user guides**
- **People Manager FAQs**

Frequently Asked Questions

Email Example	Reply
Can you please re-set my password for People Manager.	You must use the forgotten password link on the log in page to reset your password. Please note that this will also change your myHR password. The link to people manager is: https://trent.westlothian.gov.uk/trentlve_web/wrd/run/etadm001gf.open
I tried to log in using my employee number as username and password and get an invalid login message	The error message "invalid details" means your account is locked, you must use the forgotten password link on the log in page to reset your password (you must use your myHR email address which is normally your work email address if you have one, if not then use your personal email). The link to people manager is: https://trent.westlothian.gov.uk/trentlve_web/wrd/run/etadm001gf.open
I get message "account violation" when trying to log in	The error message "account violation" means you have clicked on something in error or clicked too many times, you must try the accessing the system again allowing the pages to open properly before clicking again.
My email address is wrong	Your 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
I cannot authorise a request in People manager	Please refer to pages 58 - 65 in this user guide
Employees sickness record is wrong	Reporting managers can amend employee's sickness record on People Manager.
I am a manager and need to delete a sickness absence for an employee.	Only Payroll can delete sickness absence please forward your email to payroll@westlothian.gov.uk

Driving at Work Policy & Business Use Mileage Rules

7. 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.

The 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.

All reporting managers are responsible for ensuring the health and safety of their employees and must ensure that the regulations set out in the policy are met.

Employees who undertake work related driving activities are responsible for ensuring that they comply with the requirements of the policy.

Link to policy [Driving at Work Policy]

Reporting managers are required to ensure that employees have completed a Driving Declaration and Authorisation form and a new form is required to be completed each year.

The completed forms should be saved in the employees objective file by the service.

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

Or form can be found in [Travel and Subsistence] on my toolkit.

Driving Declaration and Authorisation check is an annual review which reporting managers are required to review and update on an annual basis in Persons Checks

in People manager.

8. Business Use Mileage

If it has been agreed between reporting manager and employee that for particular type of journeys it would be appropriate and more efficient for the journey to undertaken in the employee's own vehicle, the employee must complete the Own Vehicle Use Authorisation Request which is part of the Driver Declaration and Authorisation form.

Please click on link to access this form [Driver Declaration and Authorisation Form]

The completed forms should be saved in the employees objective file by the service.

The application must be authorised by the Service manager prior to an employee using their own vehicle. In authorising the application, Service Manager's 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 reporting manager.

This form is required to be completed annually and reporting manager signature is required to confirm appropriate documentation checks have been carried out and updated in People Manager.

Reporting manager and employee receive a notification email 90/60/30 days prior to the renewal date and one day after renewal date has expired

<u>Payment of mileage</u>

Employees should not claim business use mileage until this form has been completed and authorised. Relevant checks have been reviewed and recorded in People Manager by the reporting manager.

Reporting managers should not authorise claims until all these documents have been checked and are valid.

<u>New Vehicle</u>

Each time an employee adds a new vehicle the employee's reporting manager is required to check the documents for the new vehicle and update details in People Manager.

When vehicle documents are checked they should be updated in Persons Checks

in People 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.

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

PROCESSES

Occupancy details

Fixed term contracts

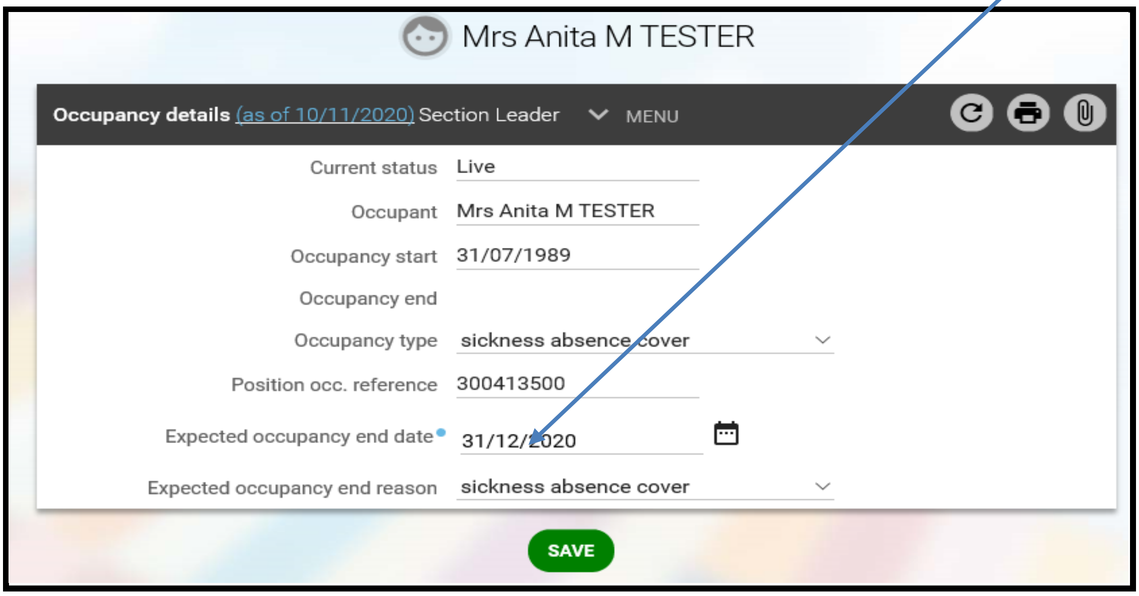
(How to extend or end employees Fixed term contracts)

Employment – Occupancy details - Fixed Term Contracts only

You will receive a notification email at 90 /60 / 30 / 18 days before employees' contract is due to end (if acted upon no further emails will be sent).

To extend contract

- **Choose todays date**
- **If contract is to be extended please change Expected occupancy end date to new expected end date**
- **Save**



- ➢ **You will receive an email advising that the date has been changed**
- ➢ **Employee will also receive an email advising that the contract has been extended as soon as the end date is entered by yourself**

If you are not the budget holder then you must ensure that you have the budget holder's approval in writing (email must come from the budget holders account not from a personal account).

<u>Reporting managers should not make any other changes to this screen</u>

Fixed Term Contracts:

If the expected occupancy end reason changes please complete and submit a contractual change form to HRchanges@westlothian.gov.uk

Where a fixed term contract is coming to an end you should ensure that you follow the necessary steps set out within the Managers Guide on the use of Fixed Term Contracts.

Or speak to your HR Adviser for further advice.

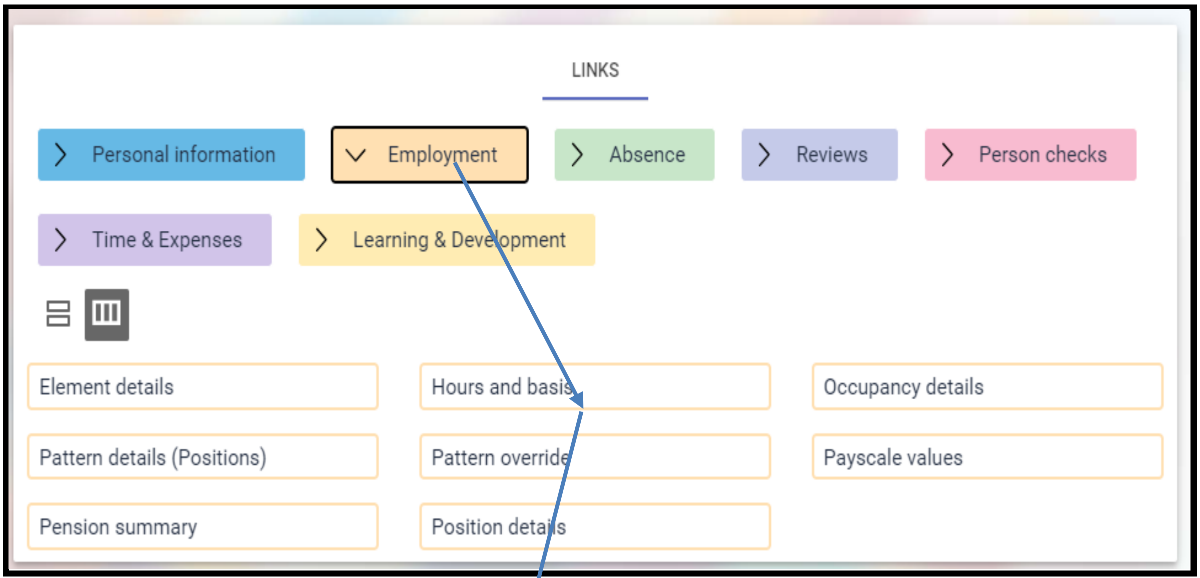
If the fixed term contract is to end please complete a termination form and email form to HRChanges@westlothian.gov.uk

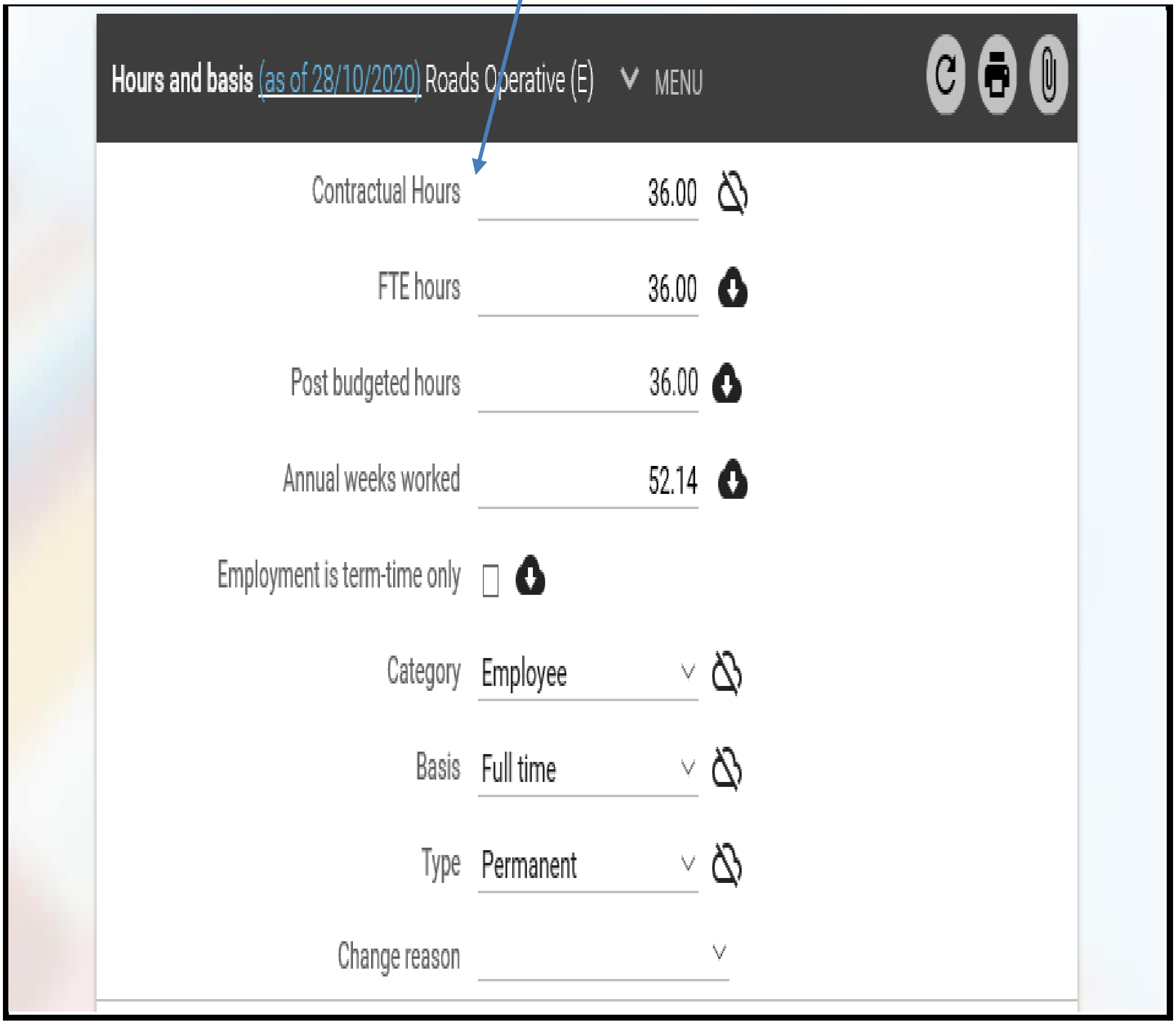
For all other temporary change's occupancy type will be standard, reporting managers will continue to receive monthly spread sheets for other temporary changes which should be returned to HRChanges@westlothian.gov.uk for processing.

Failure to do so may result in an over or underpayment to the employee.

Employees contract type can be viewed in Hours & Basis

Employment – Hours and basis



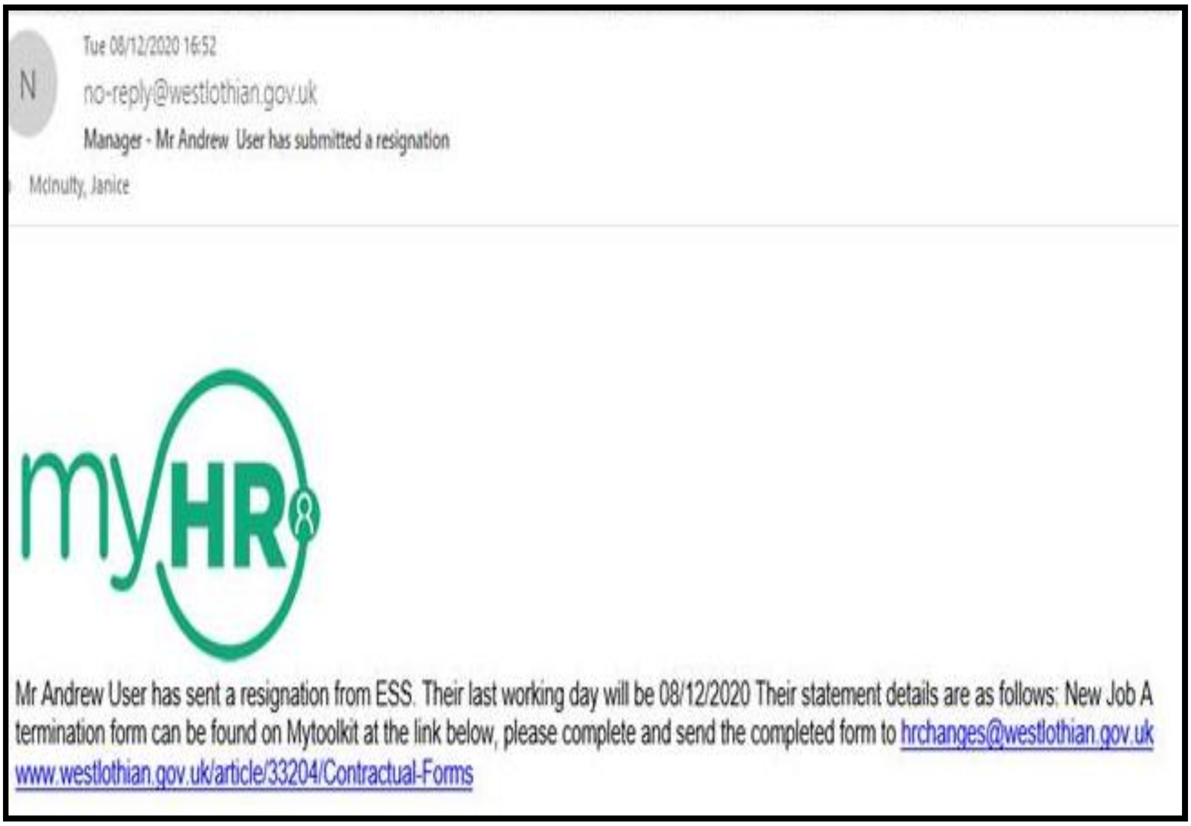


Employee Resigns via myHR

Employees will be expected to resign from their post(s) in myHR. They are required to enter the following:

- **Last working day**
- **Complete a resignation statement**
- **If they have more than one post they can resign from one or both posts.**

Reporting managers receive a notification email



Tue 08/12/2020 16:52

no-reply@westlothian.gov.uk

Manager - Mr Andrew User has submitted a resignation

Mcnulty, Janice

Mr Andrew User has sent a resignation from ESS. Their last working day will be 08/12/2020 Their statement details are as follows: New Job A termination form can be found on Mytoolkit at the link below, please complete and send the completed form to hrchanges@westlothian.gov.uk www.westlothian.gov.uk/article/33204/Contractual-Forms

- **Please review the date the employee has entered for the last working day,**
  - **Is this date the last day of working after they have worked their relevant notice period?**
  - **Is this date the last day of working after all annual leave due to them has been taken?**

- **If the resignation date is incorrect please email myHR@westlothian.gov.uk asking for it to be deleted**
- **When deleted advise employee to enter correct resignation date in myHR**
- **When last working day has been confirmed as correct the reporting manager is required to complete a termination form**
- **Completed Leavers form should be saved to your own PC and then emailed to hrchanges@westlothian.gov.uk**

Off – Boarding

Employees will have access to myHR for a period of 60 days after leaving to allow them access to any payslips they may require or a copy of their P60/P45, but cannot add any overtime claims or expenses still outstanding.

HOW TO PROCESS TASKS – IN MY TO DO LIST

(Requests from employees)

The following requests will be directed to you as a reporting manager after one of your reportees make the request in myHR, and you are required to Authorise or Not Authorise each request.

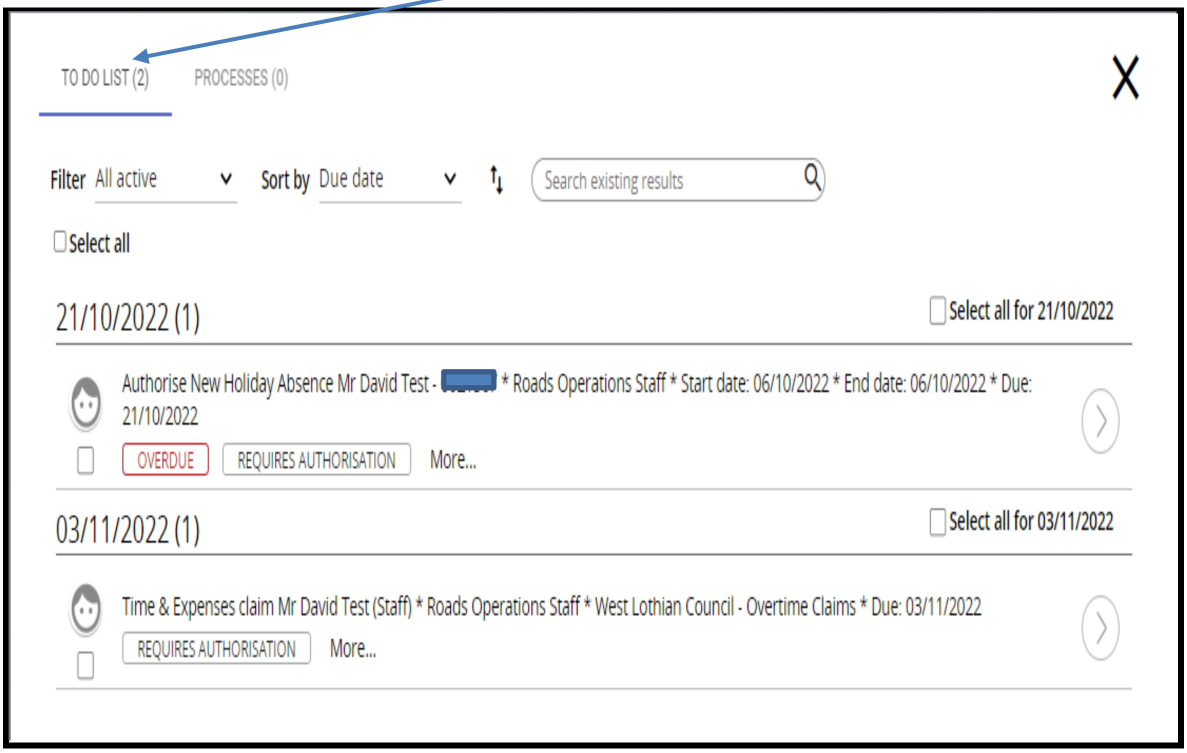
- **Overtime claims**
- **Mileage / Expense claims**
- **Other Absence (Special Leave etc)**
- **Annual Leave**
- **Learning request (Course)**

When reportee makes a request – reporting manager receives an email

Access requests

Click on My to do list (Front page)

To do list is displayed and in this example, there are 2 tasks in the managers To do list

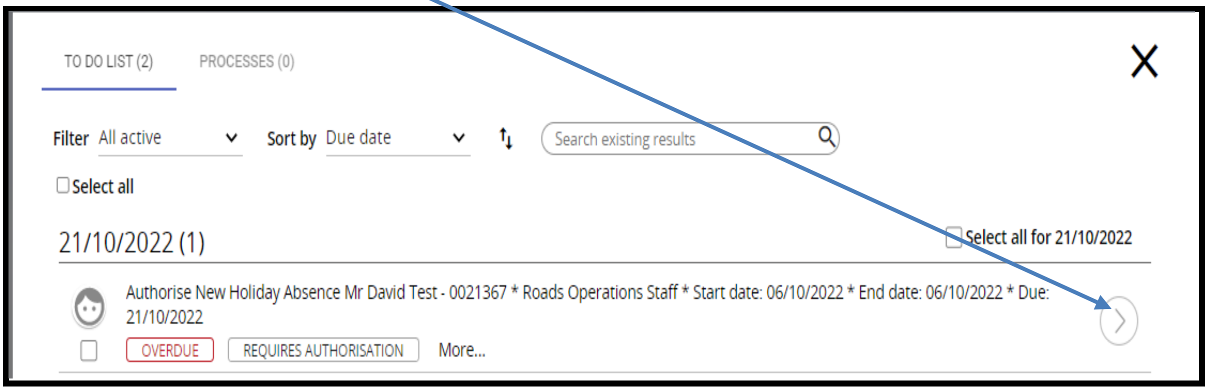


Authorise/Not Authorise requests

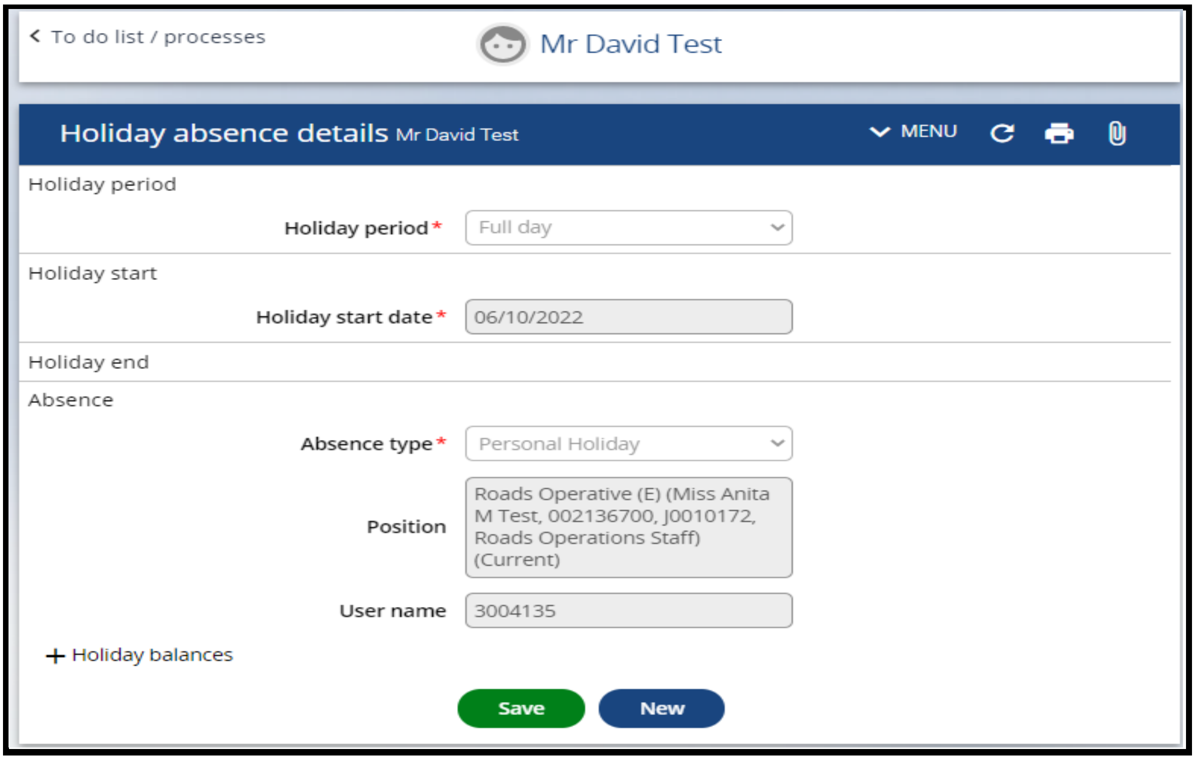
<u>You can only Authorise /Not Authorise a request from your To do list</u>

Before authorising a request please open the request and review content – Please refer to page 63 for more information on checks required when authorising Time & Expenses claims.

To view a task, click on arrow



Task is displayed



Please note you cannot authorise/not authorise in request, you must return to your To do list to carry out this action

To return to your To do list

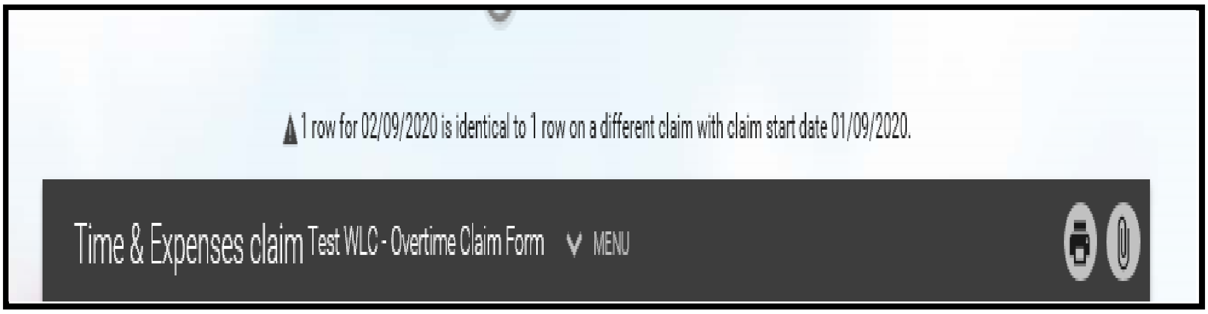
Click on To do list (this can be found on left hand corner at top of screen on each viewed request) this returns you to your task list where you can action employees' requests.

Important checks prior to authorisation

Overtime / Mileage / Expenses – duplicate claims

Before authorising any overtime/mileage/expense requests please review request and be aware of any warning messages that may be on top of screen e.g. this warning message relates to a duplicate entry that has been submitted by employee.

In this instance the claim should be Not Authorised and employee should resubmit a corrected claim.



You are accountable as the reporting manager to ensure all claim information is accurate before authorisation.

Overtime - 24-hour clock

Prior to authorising any overtime claims please check the hours are keyed in 24-hour clock times.

Failure to do this results in overpayments. Please reject any incorrect submission and explain to the employee how to add Hours from and to correctly e.g. 10am to 2pm should be keyed as 10.00 -14.00 which is 4 hours if keyed as 10.00 -02.00 system will pay 16 hours.

You are accountable as the reporting manager to check this prior to authorisation.

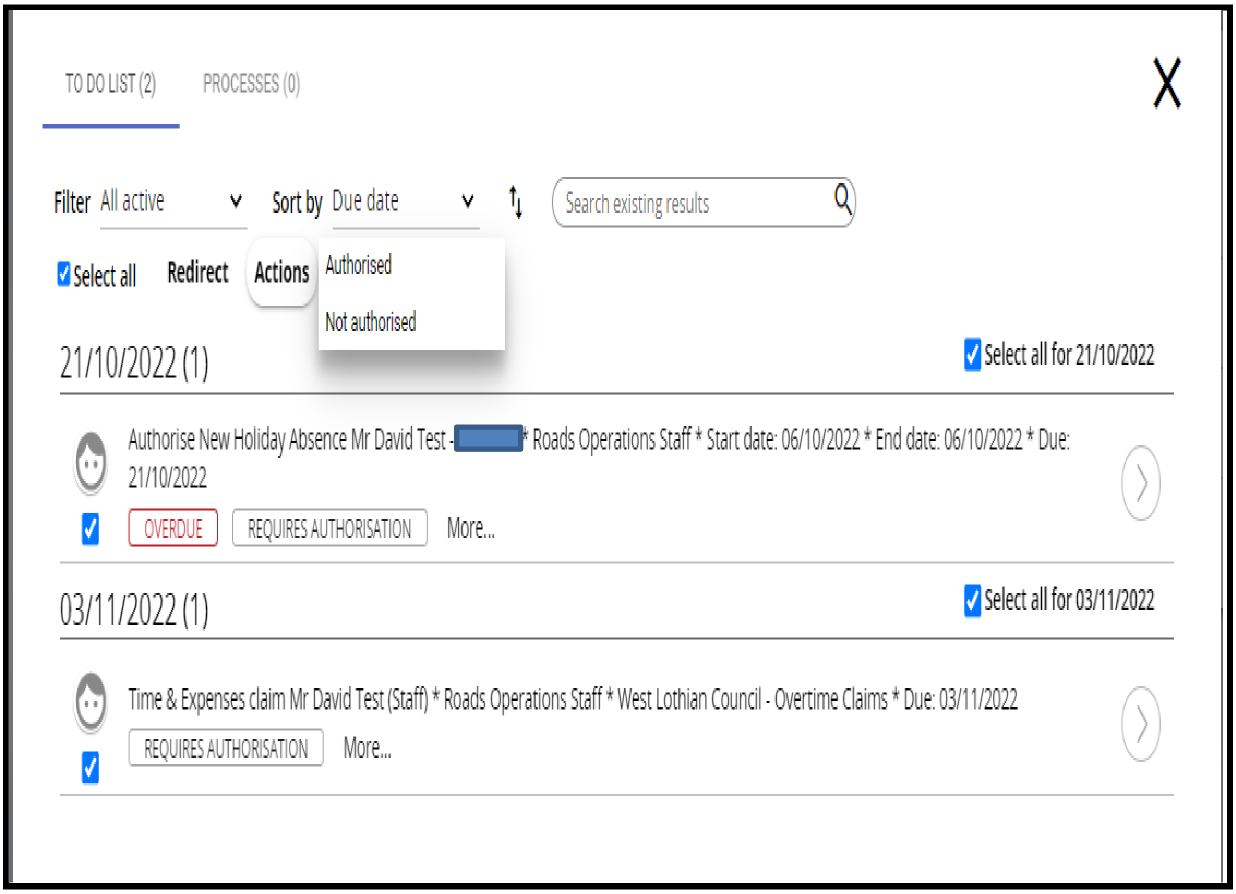
Payment of claims

Claims will be processed for payment up to the Payroll cut-off date each month. All claims authorised up to this date will be paid in this month's salary, otherwise the claim will carry over to the following month – so encourage your reportees to submit their claims promptly at the end of each month to allow you sufficient time to action the claims.

Payroll cut-off dates are pre-set in the system each year and they cannot be changed.

Authorise/Not authorise

- Tick the box beside each task you wish to Authorise/Not authorise
- Click on Actions
- Two options are displayed - Authorised or Not authorised
- When you click on either one the task will be removed from your task list
- Email is sent to employee advising if request has been authorised or not



Authorised claims that are incorrect

If you have authorised a claim that is incorrect, please email payroll@westlothian.gov.uk with the claim details and they can delete the claim if it is prior to payroll completion.

If the claim has already been paid to the employee, payroll will be required to do an overpayment.

A task is in your To do list that is not one of your reportees

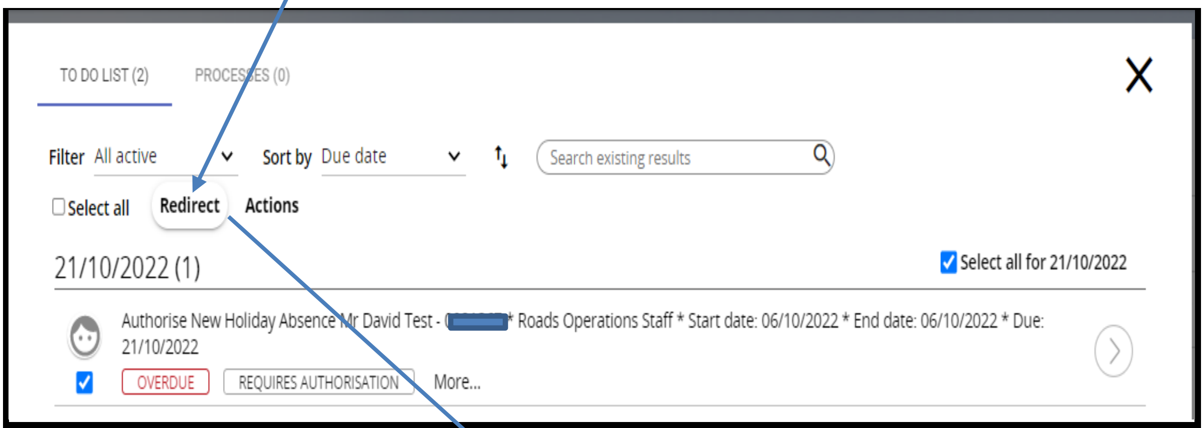
Tasks may be in your to do list for an employee that no longer reports to you, this is because the employee is claiming for dates when you were still their reporting manager.

- **You will need to redirect the request to their current reporting manager so that they can process the requests**
- **Please be aware when choosing who you are redirecting the request to, as there are some employees with the same name in the council**
- **The reporting manager that you are redirecting the task to will not receive an email notification, you will need to advise them that you have redirected a task to them for processing**

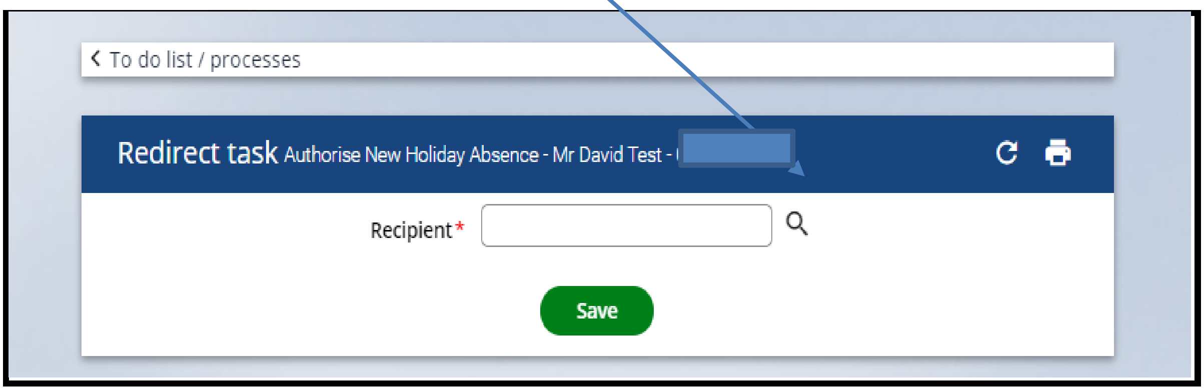
Tasks may be in your to do list if you have had a redirection assigned to you by another manager in their absence and they have not ended the redirection on their return to work.

To redirect a task in your To do list

- **Tick the box beside the task you wish to redirect**
- **Click on Redirect**



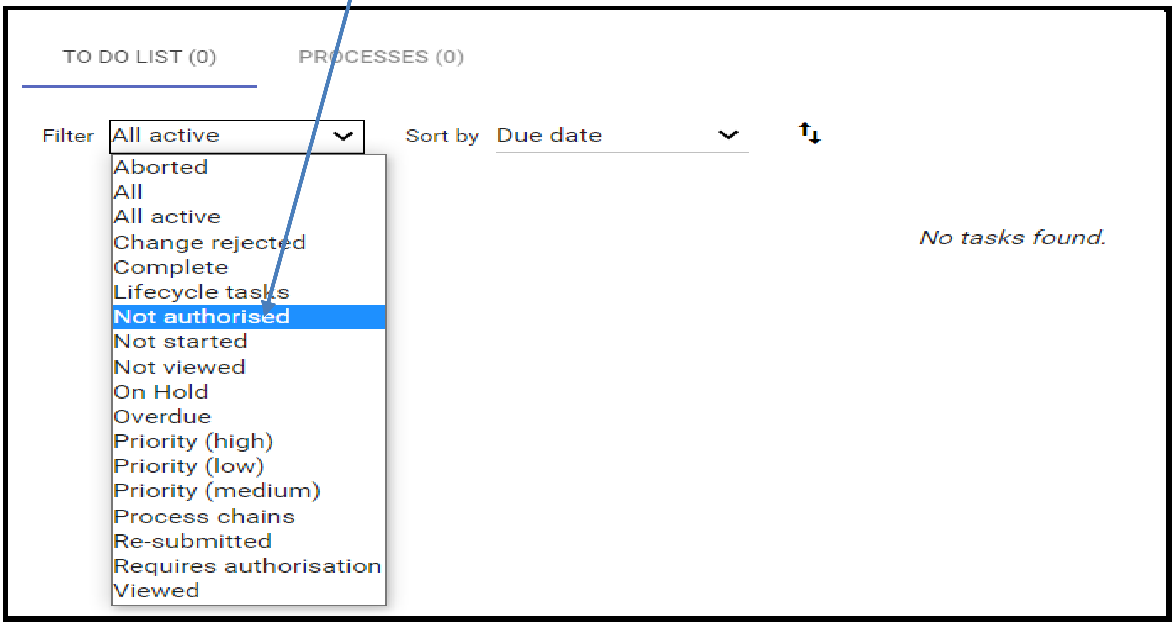
- **Search for person you wish to redirect task to (must have People Manager access)**
- **Save**



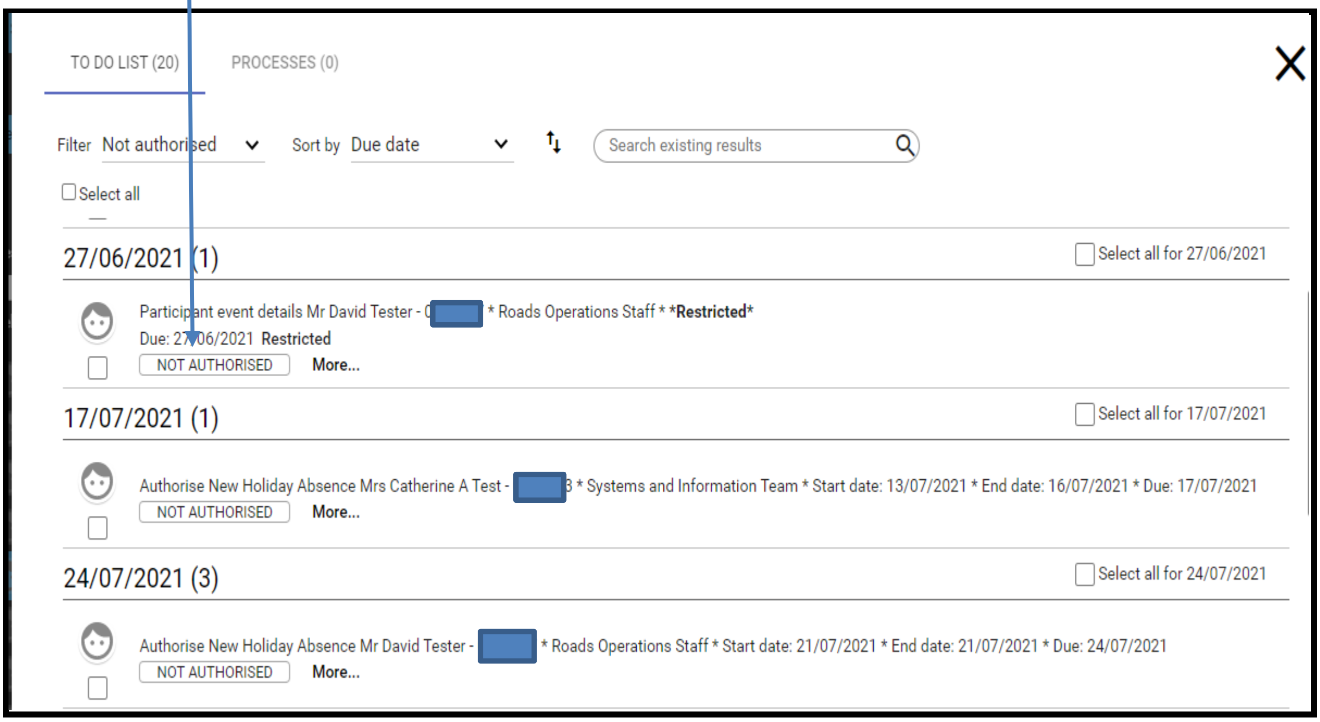
Task will be removed from your To do list.

In your To do list you have the facility to view status of tasks e.g. if you want to view all tasks that you have Not authorised (Rejected)

- **Click on Filter – All active**
- **Choose Not authorised from dropdown**



All not authorised claims appear



Absence Processes

Sickness absence

- **Sickness triggers**

Other absence

Maternity Absence

Sickness absence process

- **Employee will contact their reporting manager to advise of sickness absence**
- **As their reporting manager you are required to enter their sickness absence dates in People Manager (More than one day / Full day and Part days) and an expected end date of absence**
- **You can amend the expected end date at any time (example: employee contacts you to say they will not be returning on original expected return date)**
- **When employee contacts you to advise they have returned to work, you must enter the Absence end date in their sickness absence record**
- **On their return to work please ensure employee completes a self-certificate form and you undertake a return to work interview in line with the** Policy and Procedure on Supporting Attendance at Work**.**
- **Employee can view their absence in myHR**
- **Until an employee has returned to work reporting managers should note the date of expected last day of absence in the Expected end date, and only complete the Absence End Date field when the employee has actually returned to work**

If this is completed prior to this date, it may have pay implications for the employee.

Please note when keying end date of absence

End date is day before they return to work

Example 1 - Employee normal working week Monday – Friday their last day of absence is Sunday – this is the date that should be entered in record

Example 2 – Employee normal working week Monday – Thursday – their last day of absence is Sunday

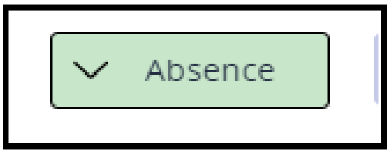
Example 3 – Employee normal working week Tuesday – Saturday – their last day of absence is Monday

The last day of sickness should always be the last day before physically back at work.

If you are unsure of what day should be the end date please contact Payroll@westlothian.gov.uk

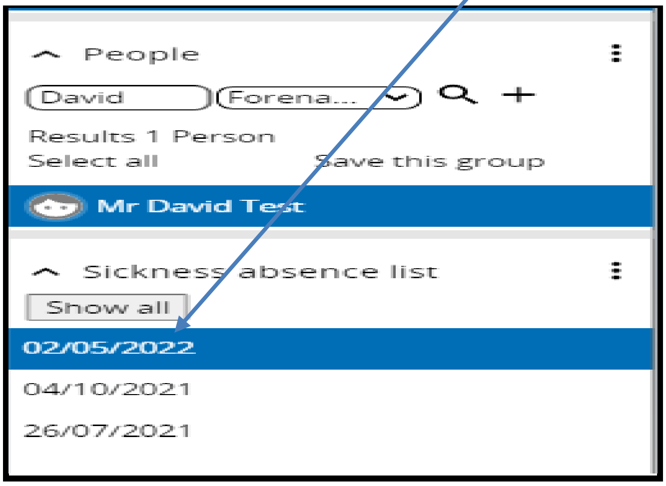
COVID RELATED ABSENCES

The national agreement relating to the introduction of temporary arrangements that provided a period of special leave for COVID-19 absences was withdrawn from 1 July 2022. Thereafter, if staff have any absences due to illness, infection or self-isolation as a result of COVID-19, they will be recorded and managed under the Council's existing Supporting Attendance at Work Policy and Procedures.

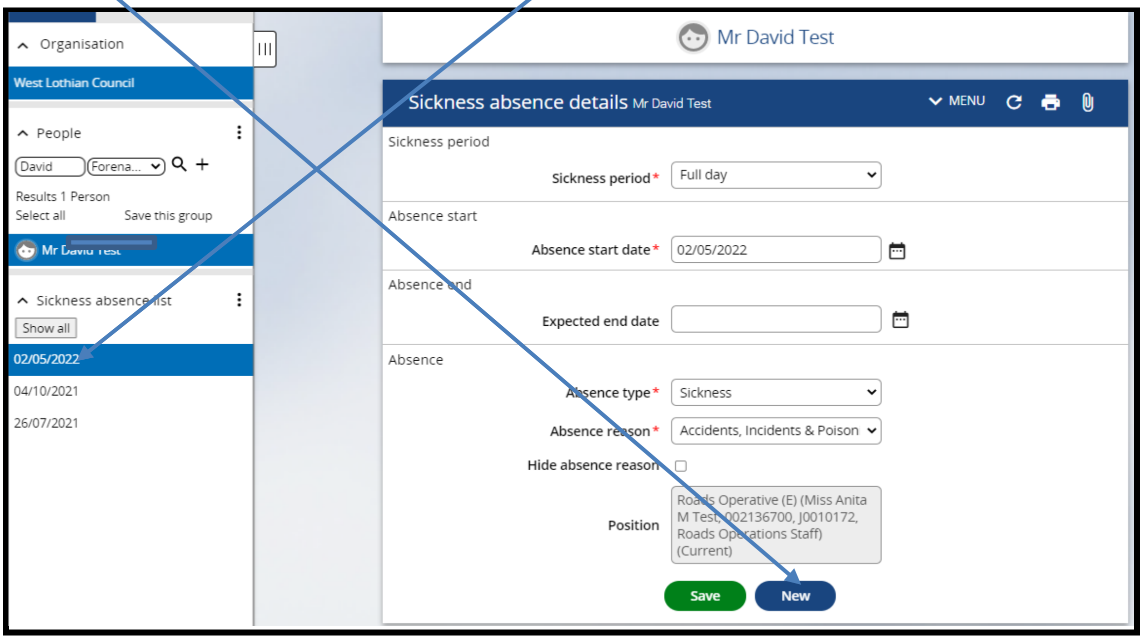


To key in sickness absence, click on Sickness absence details

All employee's sickness absences display on side panel



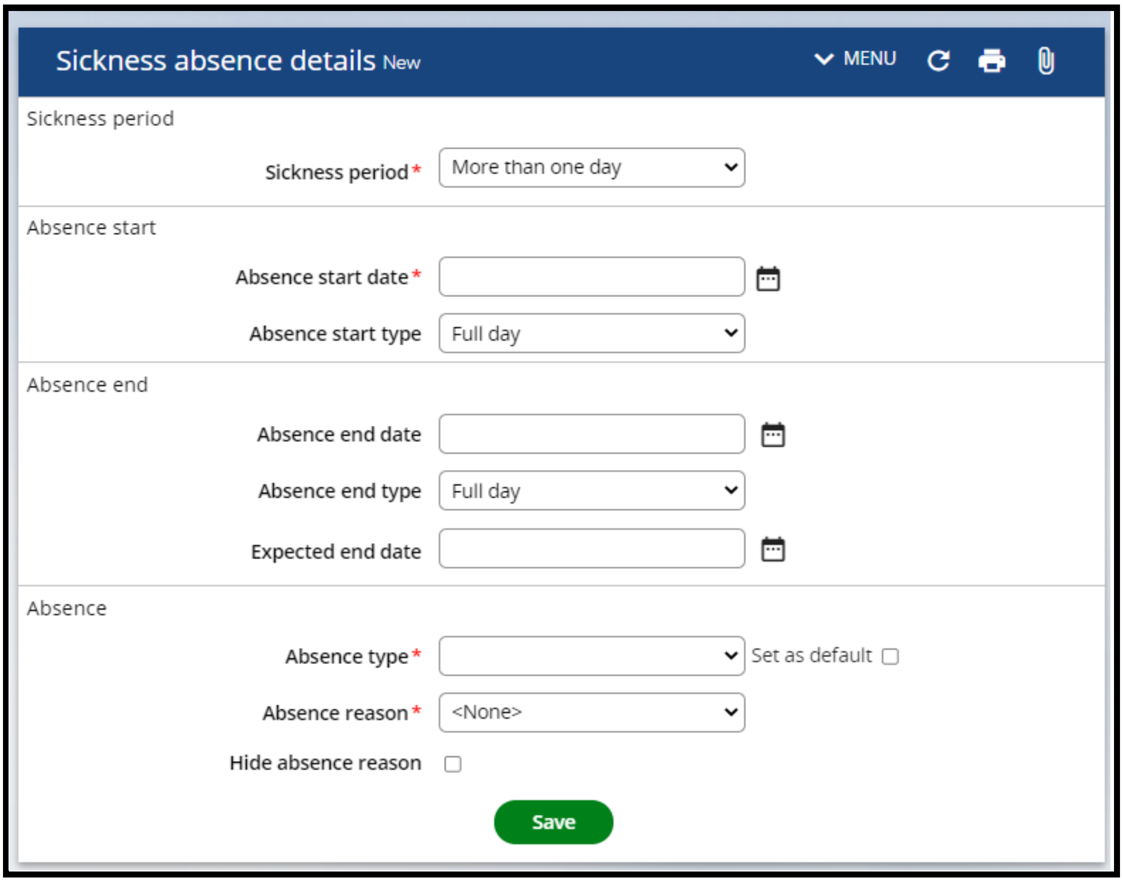
To enter a new absence - Click on last entry and this entry will appear – To enter new absence click on New



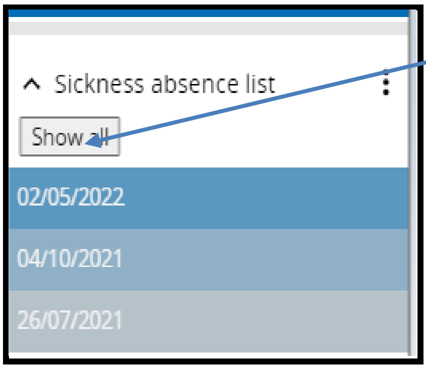
PLEASE DO NOT OVER KEY AN ENTRY ALREADY THERE – THIS WILL DELETE THIS ABSENCE – ALWAYS CLICK NEW BUTTON.

New screen – ready for you to enter their latest absence.

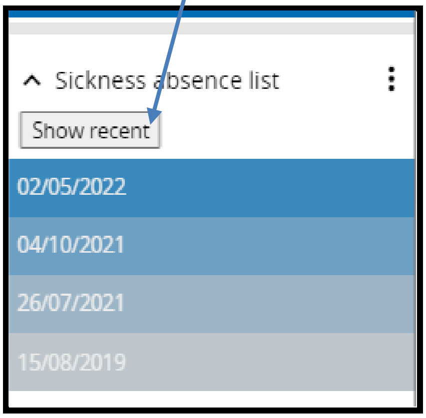
(If employee does not have any previous sickness absences this screen will also appear when you click on Sickness tab Sickness absence details **)**



If you want to view <u>all employee's sickness absence</u> history click on "Show all"



Double click on Show all to access Show recent



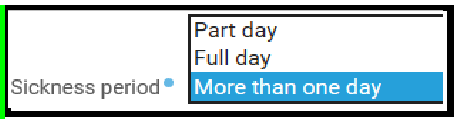
"Show recent" displays all sickness absences from 2018

Example 1: More than one day absence

Employee contacts reporting manager and advises they will not be coming into work today due to sickness.

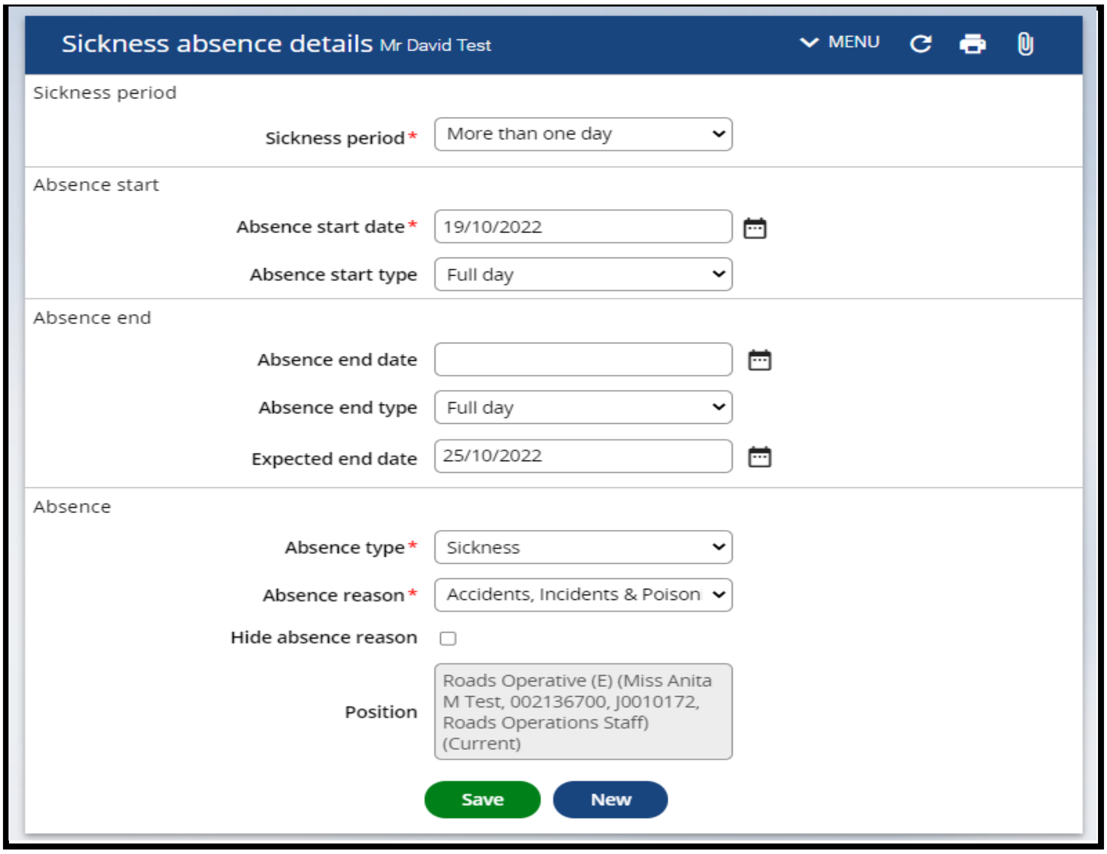
Reporting manager asks employee of their expected end date of absence.

In Absence – Sickness Absence details screen in People Manager the following information should be entered



- **Sickness period is More than one day**
- **Absence start date**
- **Expected end date**
- **Absence type – choose from drop down list – Sickness or Industrial injury**
- **Absence reason – choose from drop down list**
- **Save**

Absence – Sickness absence details screen

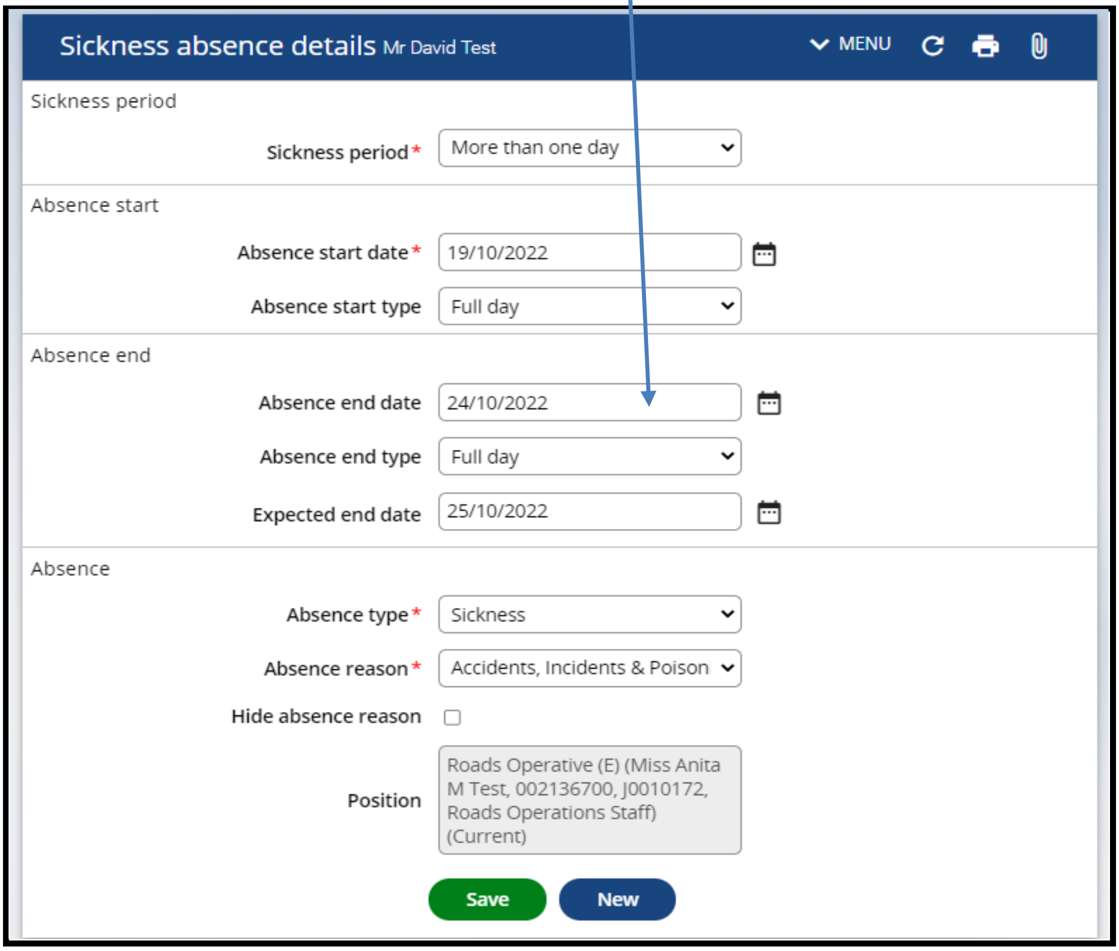


Employee and yourself will receive a notification email when a sickness absence is keyed by you

Absence end date

When employee returns to work, enter the end date of sickness absence in the sickness absence entry.

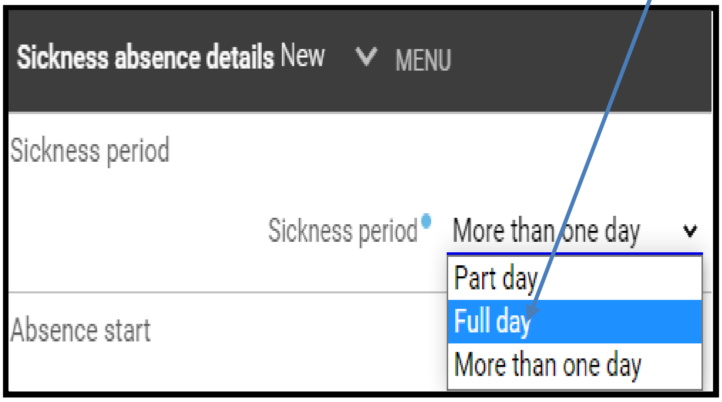
__Only__ complete the Absence End Date when the employee has __actually__ returned to work.



Please note Absence end date has been keyed as the 24/10/22 not the 22/10/22 as Sunday is the last day employee was not at work.

Employee and yourself will receive a notification email when a sickness absence end date is keyed by you

Example 2: Full day absence – DO NOT USE Full Day absence from dropdown



Employee contacts you and advises that they will be absent today due to sickness but will be back tomorrow – entry should be keyed as follows:

- **Sickness period is More than one day (as it cannot be guaranteed employee will return the next day)**
- **Absence start date**
- **Expected End date**
- **Absence type Sickness or industrial injury**
- **Absence reason – Choose from drop down list**
- **Save**

If employee does not return the next day you can change the Expected End date to date the employee has indicated will be their last day of absence.

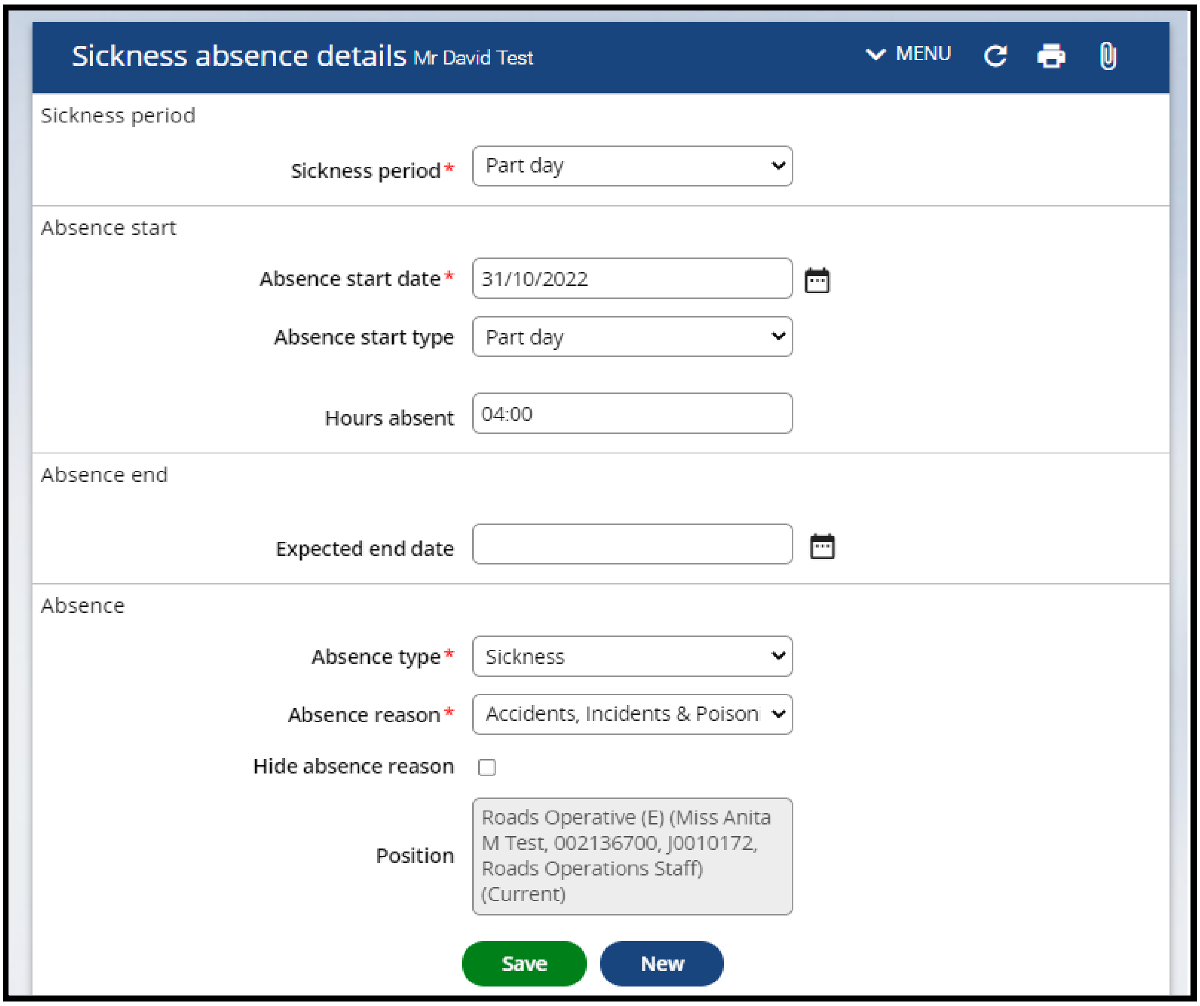
Only complete the Absence End Date when the employee has actually returned to work.

Example 3: Part day absence - AM

Employee contacts you and advises that they are off sick for the morning only and will return to work in the afternoon – entry should be keyed as follows: only if employee has returned to work in the afternoon

- Sickness period is Part day
- Absence start date
- Absence start type - Half Day AM
- Key Hours absent
- Choose Absence type
- Choose Absence reason
- Save

You do not have to enter an Absence end date as employee sickness absence is ending on the same day.


Sickness absence details Mr David Test

MENU

Sickness period

Sickness period* Part day

Absence start

Absence start date* 31/10/2022

Absence start type Part day

Hours absent 04:00

Absence end

Expected end date

Absence

Absence type* Sickness

Absence reason* Accidents, Incidents & Poison

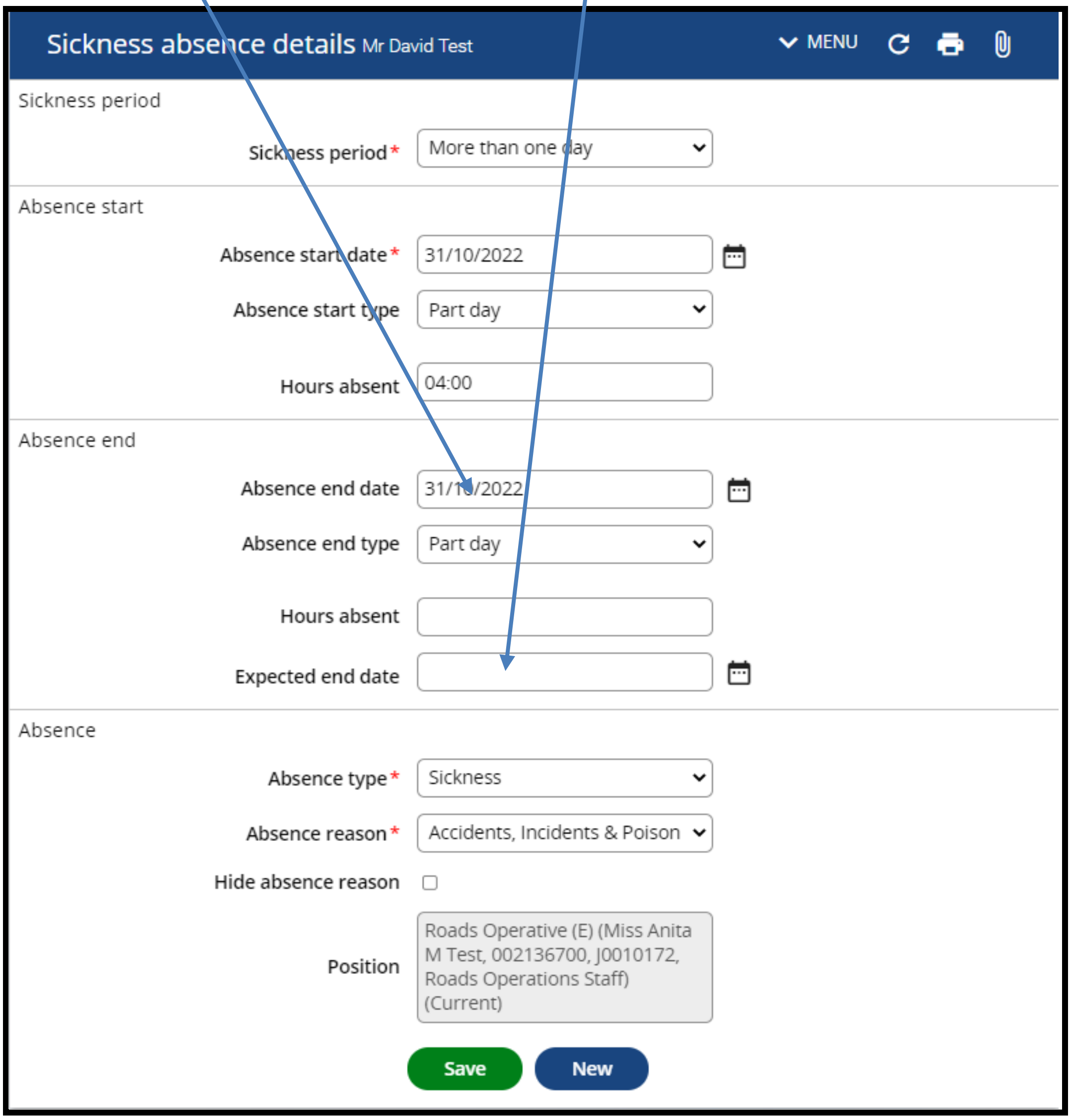
Hide absence reason

Position Roads Operative (E) (Miss Anita M Test, 002136700, J0010172, Roads Operations Staff) (Current)

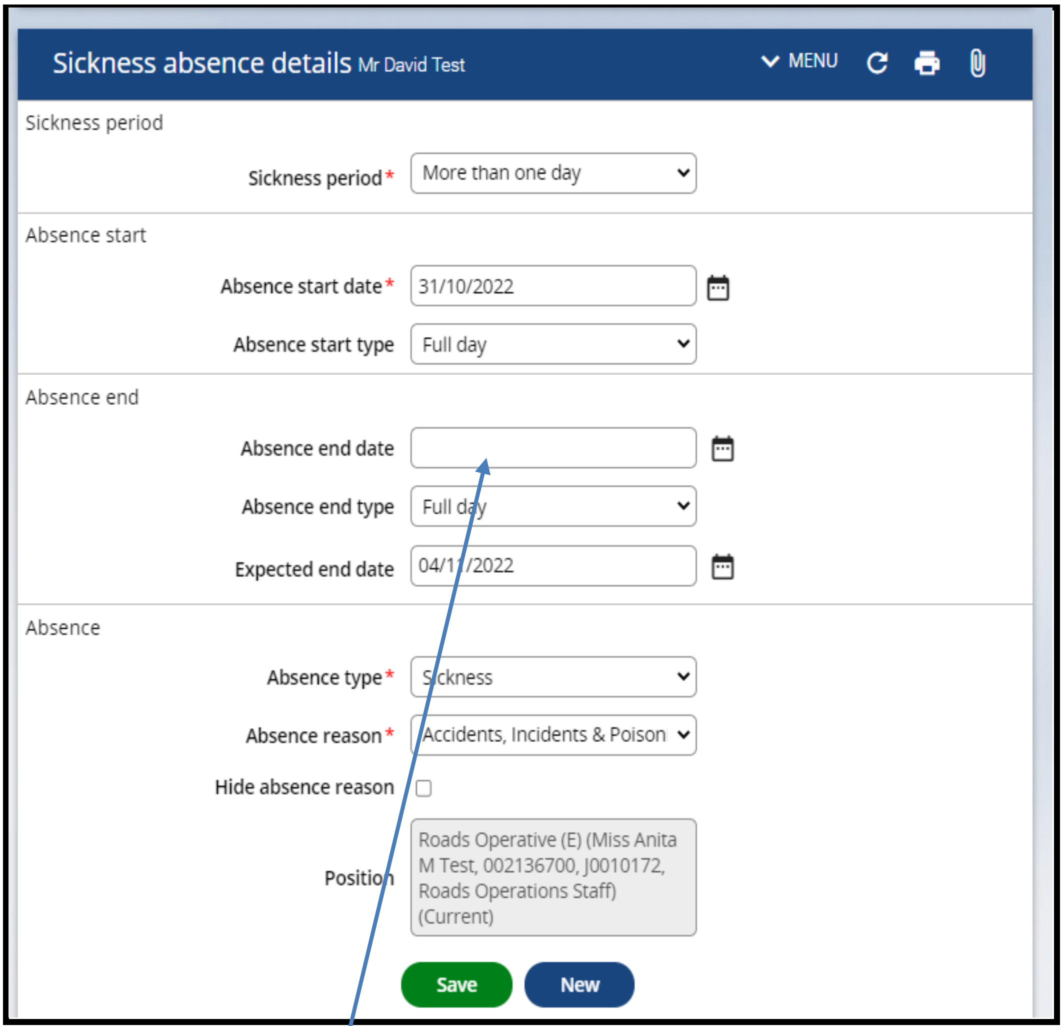
Save New

If employee <u>does not return to work</u> in the afternoon (it is not a Part Day absence now)

- In entry change Sickness Period to **More than one day**
- Change Absence start type to **Full day**
- Change Absence end type to **Full day**
- When you change to More than one day an Absence end date is displayed
- **Remove** this end date and key in Expected end date of absence
- Save



This is how the entry displays after changes made.



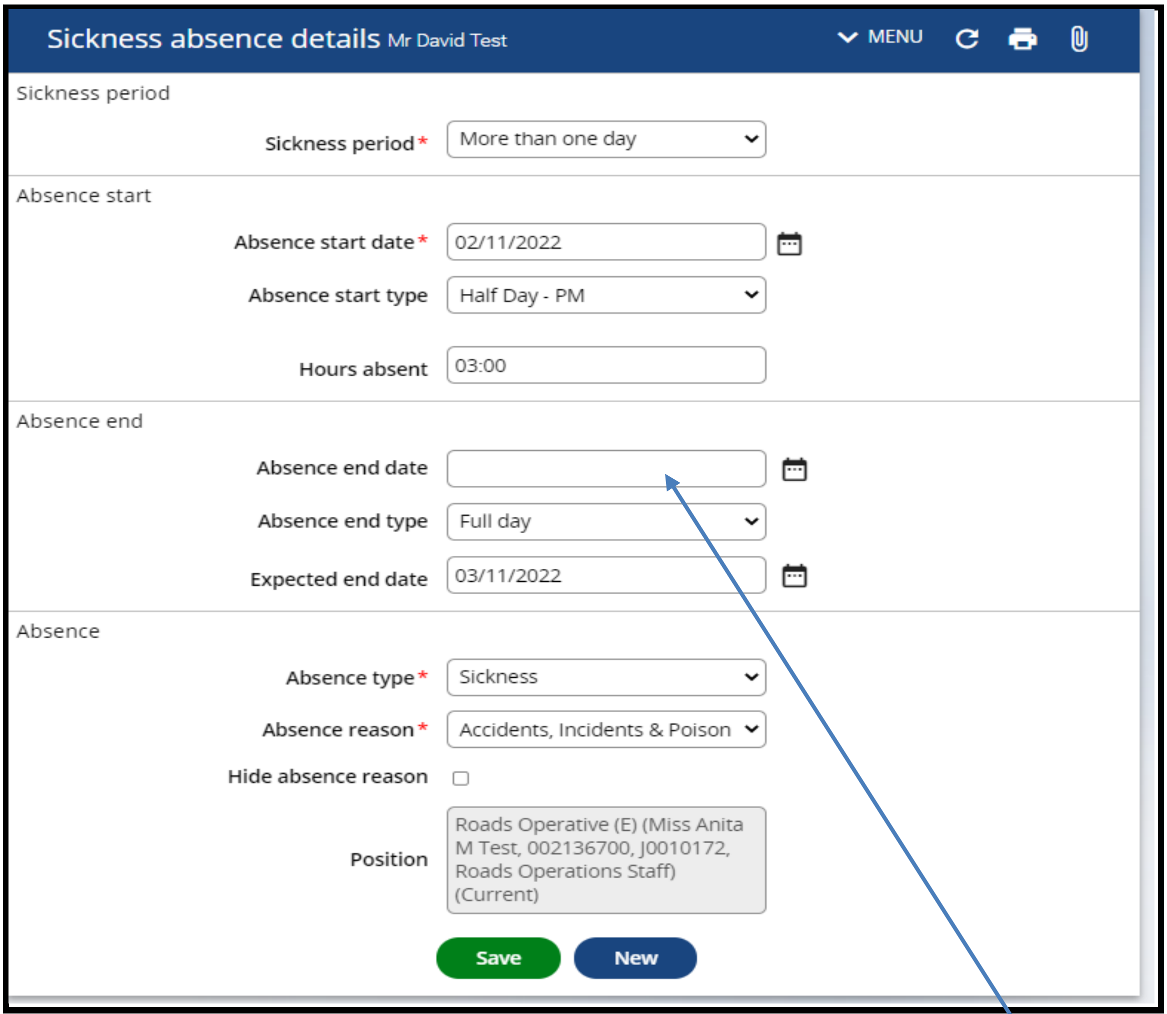
<u>Only</u> complete the Absence End Date when the employee has <u>actually</u> returned to work

Example 4: Part day Absence – PM

Employee contacts you and advises they have to go home due to illness – entry should be keyed in as follows:

More than one day is the Sickness period as you cannot be sure employee will return the next day

- Sickness period is More than one day
- Absence start date
- Absence start type - Half day PM
- Key in Hours absent
- Expected End date
- Absence type Sickness or industrial injury
- Absence reason – Choose from drop down list
- Save



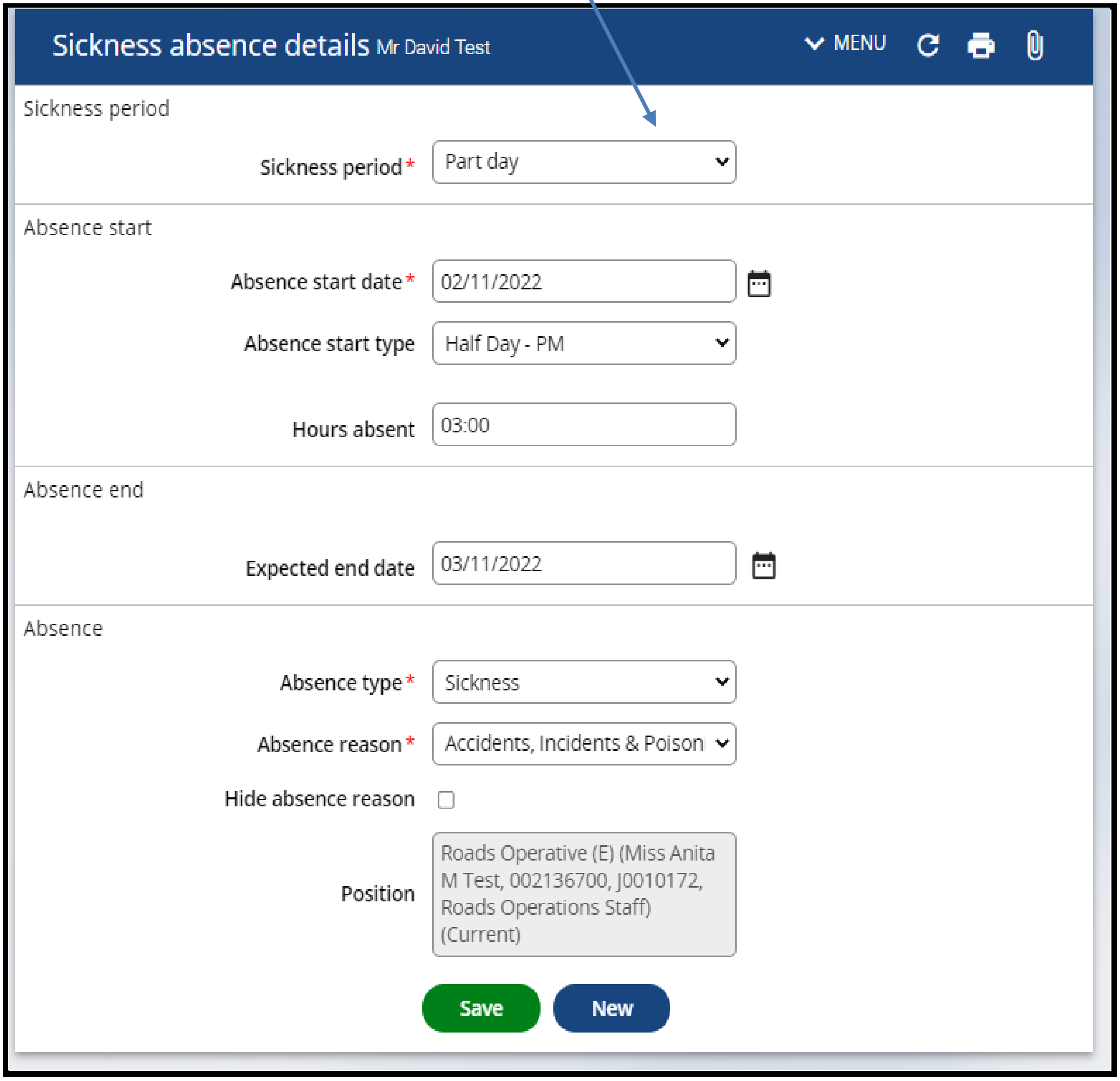
Employee does not return to work next day – key in Absence end date when they do return.

But employee does return to work the next day so was only a Part day PM absence

Go back into entry (above)

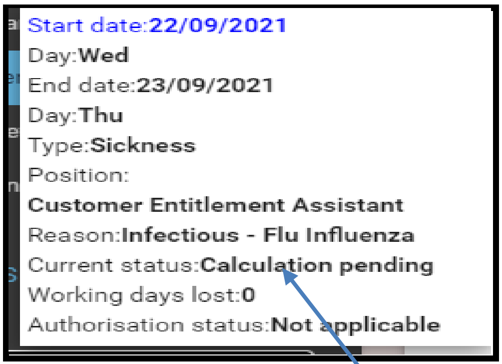
- **Change Sickness period to Part Day**
- **Save**

You do not have to enter an Absence end date as employee sickness absence is ending on the same day



Calculation pending

When you hold the mouse over the keyed absence in the side panel a white box is displayed



Current status – "Calculation pending "

This is a Payroll function that is run each month prior to payroll completion.

When this is run it updates employee's absence entitlement -working days lost will display 0 until this process is complete.

Working days lost

Working days lost is not the number of days employee has been absent – it is the number of absence days left until sick pay entitlement expires.

The number of days will change each time a calculation is run (Payroll run a calculation each month)

Current status on card changes to "Processing complete" when updated by Payroll.

Total number of sickness Absence days per employee for a rolling year

When calculation run is complete the sickness circle will update with number of days employee has been off sick within a rolling year.

Retrospective absence

You should not key in a sickness absence with an end date (emails do not trigger)

If it is not possible to key in absence when employee contacts you, and you can only key in absence when they return from absence please do as follows:

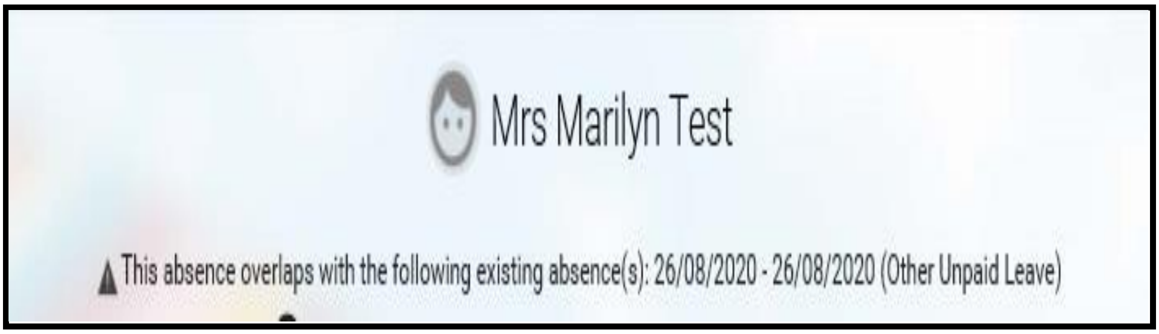
- **Enter Absence as above**
- **Save**
- **Go back into absence entry and key end date**
- **Save**

Warning messages

Warning messages may appear at top of sickness absence entries.

An example of a warning message you may receive is that the absence overlaps with another absence (in this example it is for unpaid leave for 26/08/20) as there is not an absence end date in the sickness absence entry yet, the system is presuming employee is still off sick at this date.

If employee sickness is going to continue for these dates, the entries for Other Absences should be deleted by you in People Manager.

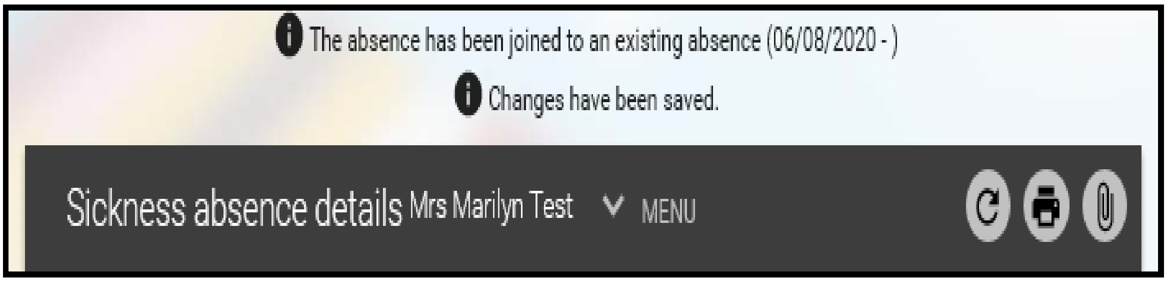


Employees with more than one post

If you enter an absence for one of your employees who has another post with a different service you may receive a warning message when you enter the absence.

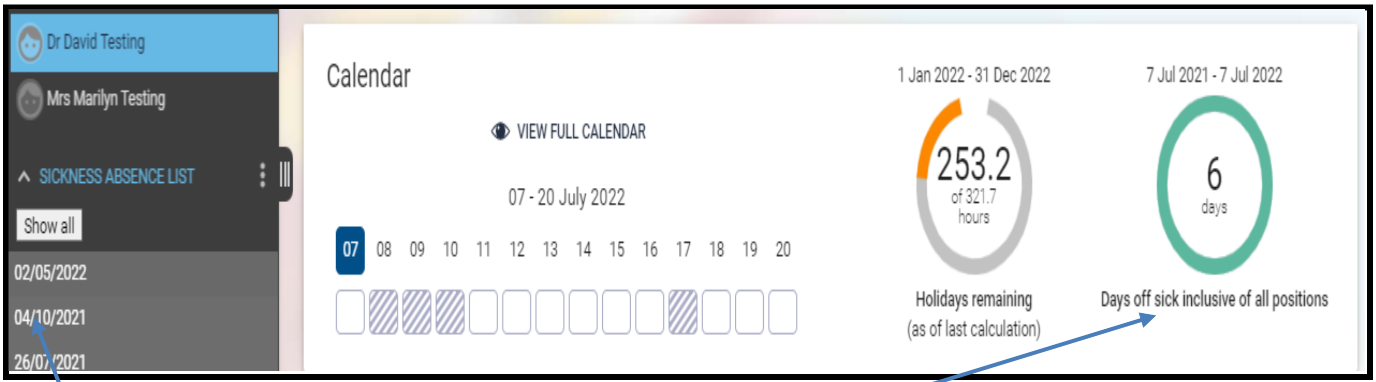
It is advising you that the absence has been joined to an existing absence for the same date (reporting manager for the other post has also keyed in an absence for these dates)

You should not be able to enter any absence for their other post(s) if the posts are in a different service.



Employees sickness absences in a previous post

Reporting managers can see sickness absences for employee who was in a previous post.

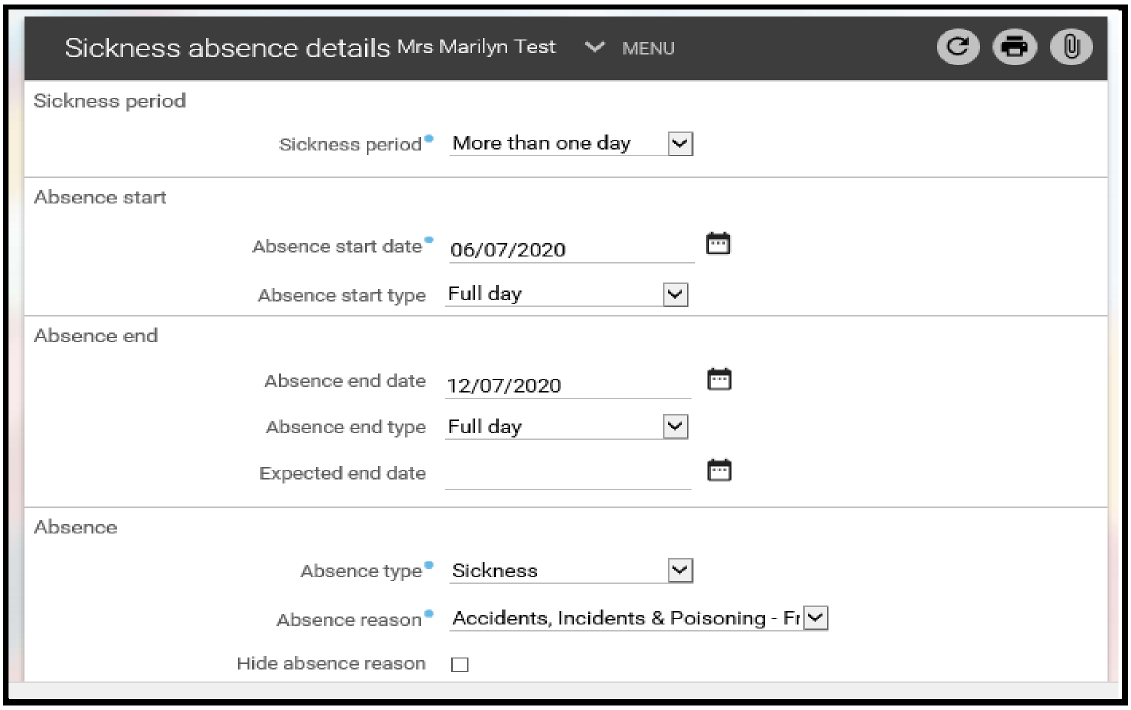


- **Click on Days off sick inclusive of all positions**
- **List of all absences displayed on left hand side**

Amending a sickness absence entry

To amend a sickness absence date

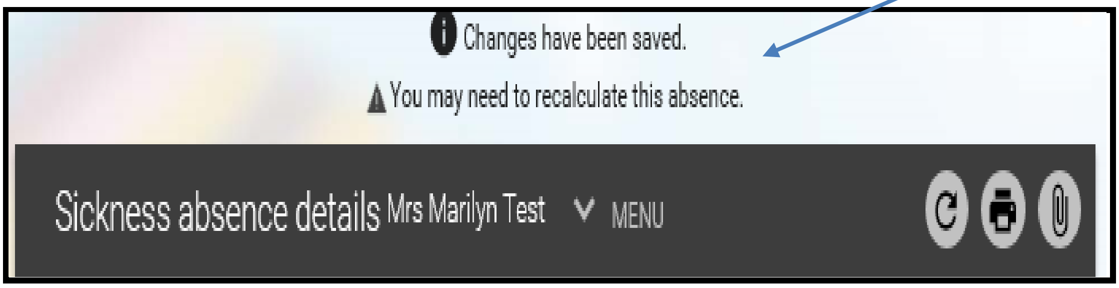
- Choose new dates from calendar
- Save



Dates have been changed

Employee will receive an email if a start date or end date is changed

Warning message "You may need to recalculate this absence is for Payroll use only"



Delete a sickness absence entry

If a sickness absence entry is to be deleted you will need to email Payroll requesting that this is to be done.

payroll@westlothian.gov.uk

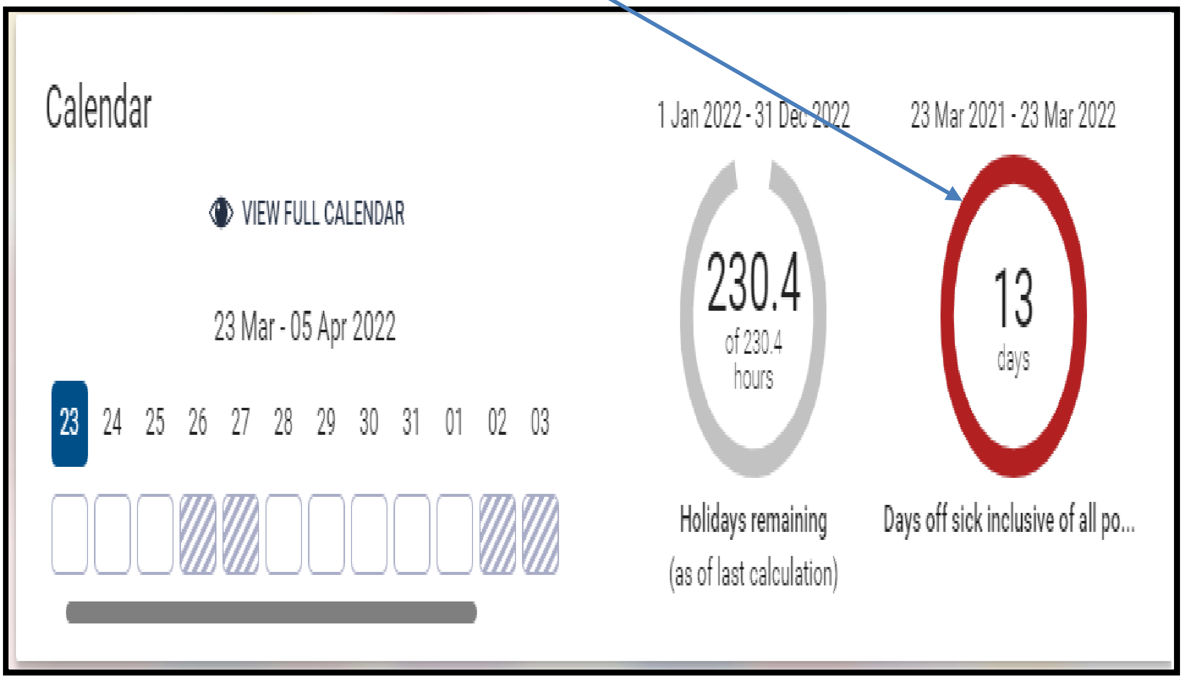
Reporting managers do not have access to delete sickness absence entries.

Sickness absences for employee who previously reported to a different manager and was in another position

You can view the number of days an employee was absent due to sickness in the sickness gauge on the employee summary page.

This will display number of days absent for a 12-month period only.

Example: This employee has had 13 days in total sickness absence for all his positions for the period 23 March 2021 to 23 March 2022.



If you require a breakdown of the number of absences an employee has had please contact sicknessabsence@westlothian.gov.uk

Keying absences for employee who reported to another manager when absences occurred.

New reporting managers can key in missed sickness absences for one of their reportees who reported to another manager at that time.

Sickness Absence Triggers

Long term triggers

As soon as an employee's absence hits a trigger level at:

4 weeks – 3 months – 6 months – 9 months you will receive an email notification.

Please follow the necessary actions to be taken as advised on email notification

Example: Email notification

> Dear Manager,
>
> Due to their ongoing absence this employee has reached the corporate action trigger point under the Supporting Attendance at Work Policy. As the Line Manager, can you please arrange to meet and discuss the absence with the employee and complete the necessary paperwork, unless you have already done so.
>
> Templates for the invite and outcome letters can be obtained on my toolkit at this link https://www.westlothian.gov.uk/article/33201/Supporting-Attendance-letter-templates
>
> You are required to confirm what action you have taken as a result of this trigger can you please email absence@westlothian.gov.uk with the action taken and the date that this was taken on (including any relevant paperwork).
>
> If you have any issues please contact your HR Adviser to discuss further.
>
> Regards

Other Absence

Employees can request the following leave in myHR

- **Career Break**
- **Other Paid Leave (Special Leave)**
- **Other Unpaid Leave**

When employees make a request you as their reporting manager will receive an email notification advising that you have a task to action (authorise/not authorise) in People Manager.

Please refer to "How to process a task in my to do list "page 54.

Please refer to the council's policy on Family Care and Special Leave before authorising requests.

Amend Other Absence request

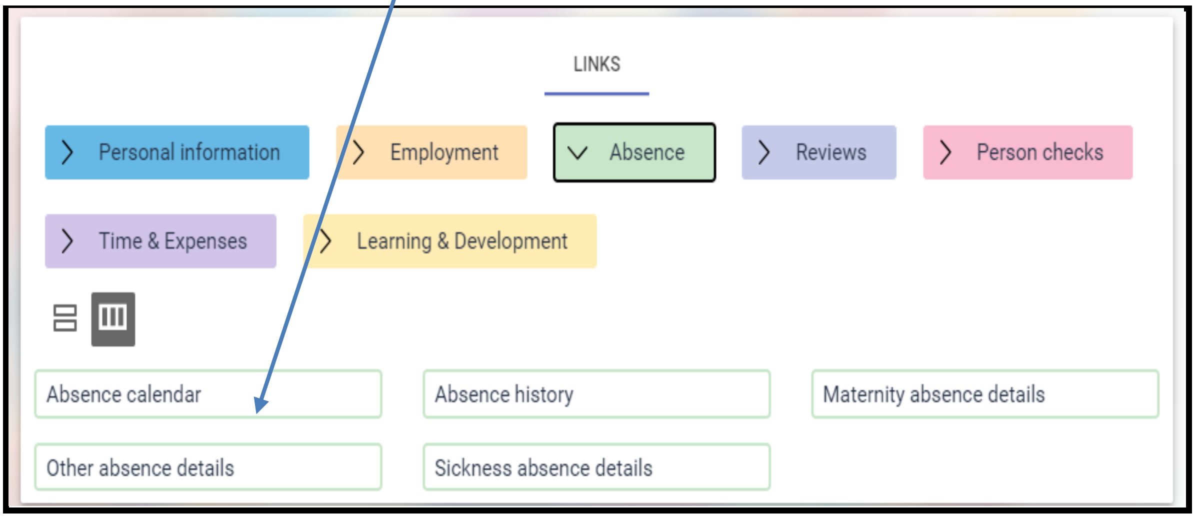
Employees can amend a future dated authorised request.

When an amended request is made a new task will be in your task list for amended date(s).

Reporting managers can amend a retrospective dated request that has been authorised. There will not be a task for this in your task list because you have made the change in People Manager.

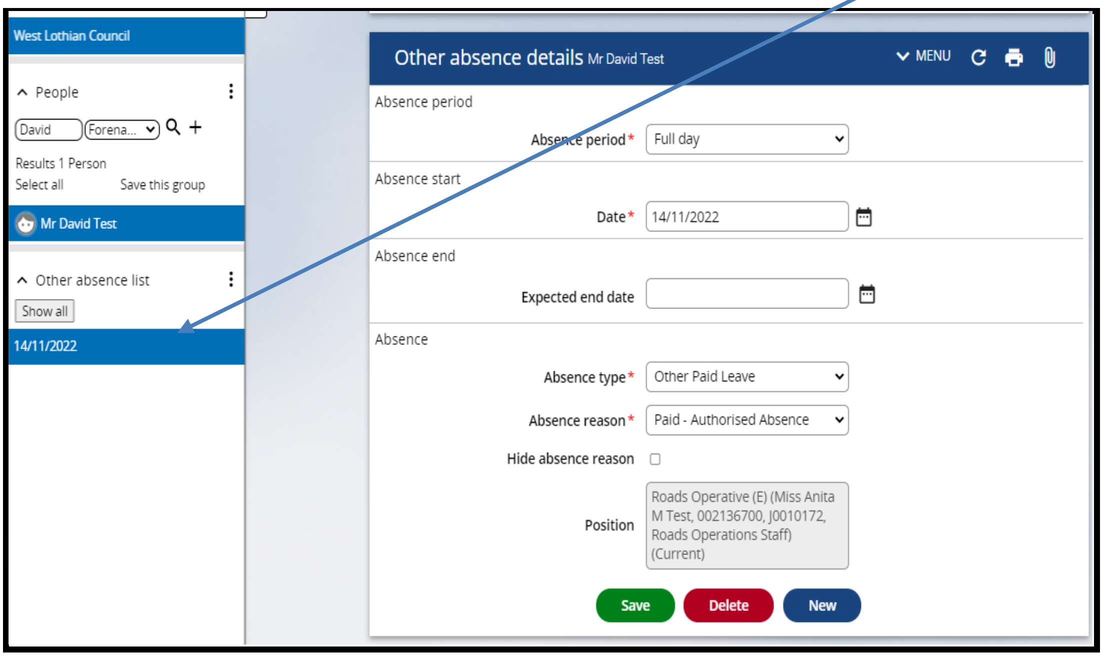
How to amend an Other Absence request in People Manager

Click on Other absence details tab



Search for employee (in side panel)

Employee's Other absence requests can be accessed in side panel – Click on date to be amended.



Make amendments e.g. Date

Save

Employee will receive a notification email

Reporting manager will receive a notification email – but there will not be a task in reporting managers task list because reporting manager has made the amendment.

Delete Other absence request

Future dated authorised request

- Employee can only delete a future dated authorised request in myHR
- Reporting manager can delete a future dated request in People Manager (Awaiting Authorisation or Authorised)
- Employee and reporting manager receive notification emails re deletion.

Delete Other absence request

Retrospective dated request

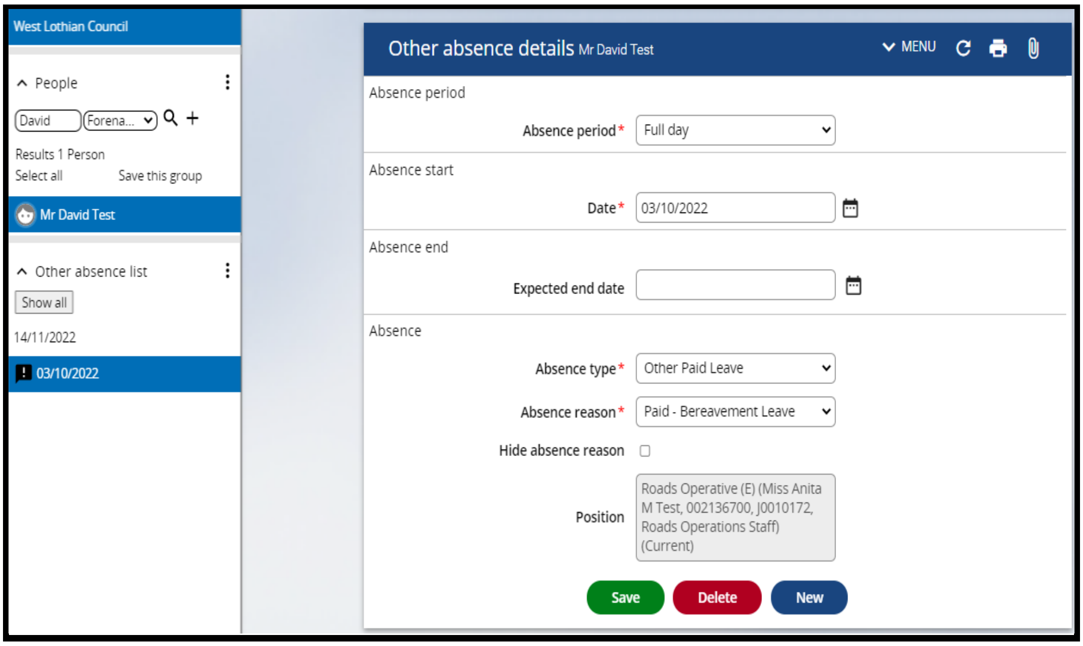
- Employee cannot delete a retrospective request
- Reporting manager can delete a retrospective dated request in People Manager (Awaiting Authorisation or Authorised)
- Employee and reporting manager receive notification emails re deletion.

How to delete an Other Absence request in People Manager

Click on Other Absence tab

Search for employee (in side panel)

Employee's Other absence requests can be accessed in side panel – Click on date to be deleted



Click Delete (will be removed from your task list if request is still awaiting authorisation)

Save

Issues:

1. **Employee submits an Other absence request – they receive a warning message "This absence overlaps with the following existing absence e.g. 31/08/20 – Sickness**
   - **This indicates that their reporting manager has not entered an end date in their sickness absence entry**
   - **Employee to contact their reporting manager**
   - **Reporting manager is required to enter end date and will now be able to action Other absence request in their task list.**

2. **Employee has already submitted an Other absence request prior to going off sick but is still absent on request date.**
   - **Reporting manager should delete this request in Absence – Other Absence**
   - **If this task is still in reporting managers task list waiting to be actioned it will disappear from reporting managers task list when it is deleted**

Please note

If employee clicks the Save button again on an Other absence request they have already saved, it generates another email and a task for you in your To do list

You will have two tasks for the same absence.

The system thinks that an amendment has been made to the original request.

Authorise one task (if applicable) and Not authorise the other task.

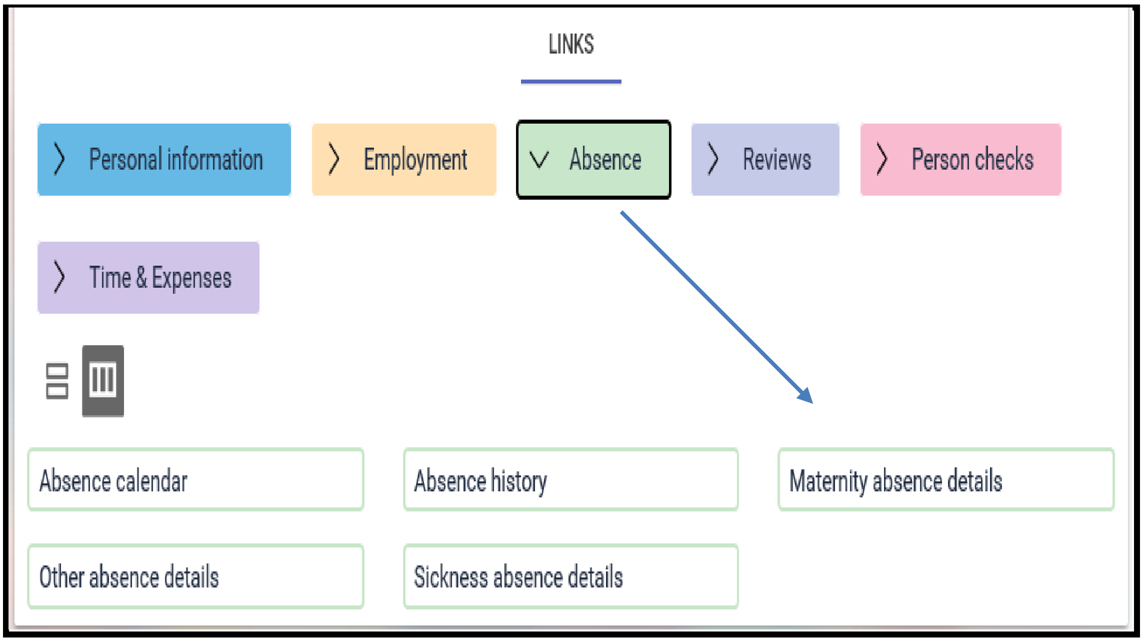
There will only be one entry in employees record and they will only see one request in myHR.

Employee will receive an email saying the request has not been authorised but this will just be for the second request.

Maternity absence details

Reporting managers can only view their reportees maternity absence details.

To do this click on Maternity absence details.



Reporting managers will receive an email to remind them that if they have been notified by employee with a return date to work they must contact hrsupport@westlothian.gov.uk to ensure that the Maternity Leave has been ended and employee's salary will be processed correctly.