Please think before printing this document.

Where printing is necessary, please ensure that it is printed double sided and in greyscale.
Contents

1 Introduction .............................................................................................................. 1
  1.1 What is MyView Dashboard? ................................................................. 1
  1.2 What is new about MyView Dashboard? ................................................. 1
  1.3 What is the Leave Management Module? ............................................. 2
  1.4 What types of Absence can be recorded via MyView Dashboard? .......... 2
  1.5 Further information .................................................................................... 3

2 Entering Absence for an Employee ................................................................. 4
  2.1 Editing an existing Absence ...................................................................... 7
  2.2 Editing an Open Ended Absence ............................................................. 9
  2.3 Entering Other Absences .......................................................................... 10
  2.4 Manager – uploading Attendance Management Documentation .......... 12
  2.5 Scanning Attendance Management documentation ................................ 12
  2.6 File Name .................................................................................................. 13
  2.7 Uploading a Scanned Attendance Management Document .................. 14

3 MyView Dashboard Alerts ............................................................................... 16

4 Frequently Asked Questions ........................................................................... 17
1 Introduction

This document is a guide to using the MyView Dashboard Mileage and Expenses Module. This module enables employees to complete expenses claims online.

Employees are advised to refer to the MyView Dashboard Mileage and Expenses Guidance that fully explains the principles and the basis on which mileage and expenses should be incurred and claimed.

1.1 What is MyView Dashboard?

MyView Dashboard is a web based self-service system which allows employees and managers to view and edit their own personal details online.

MyView Dashboard supports the Council’s objective of making processes more efficient and streamlined.

Revised user guidance documentation to support the use of MyView Dashboard and Frequently Asked Questions are available via www.durham.gov.uk/MyView.

Providing access to MyView Dashboard via the internet will give you 24/7 access allowing you to:

- View and update personal information, including name, address and emergency contact information.
- View, download and print payslips and P60 statements.
- Submit mileage and expenses claims as well as uploading receipts.
- Employees will be able to submit training requests for managers to authorise.
- Managers will be able to view expense submissions, authorise, and reject claims if required.

1.2 What is new about MyView Dashboard?

As well as providing access over the internet, MyView Dashboard has an enhanced look and feel and is much more intuitive to use. MyView Dashboard has a number of features and benefits including:

- Enhanced navigation, usability and appearance – MyView Dashboard can be accessed using smart devices mobile phones and tablets
- Customisable widgets that provide quick access to information
- Appearance and functionality has been improved
The ability to view authorisation progress across all MyView Dashboard forms

Removal of Payslip and P60 printing and postage costs by enabling access to e-Payslips and P60’s.

### 1.3 What is the Leave Management Module?

The Leave Management Module provides a facility for Managers to input their team’s absence episodes directly into MyView Dashboard Manager Self Service. In simple terms, the information recorded will include a Start Date, End Date, Return to Work date and a Reason for Absence.

In addition, Managers also have the ability to upload Attendance Management documentation against an employee record.

Entering absence into the system directly will ultimately improve the speed and accuracy of recording an absence event. This guidance document is intended to be used in conjunction with the Attendance Management Policy & Procedure.

Any queries in relation to the implementation of the Attendance Management Policy and Procedure should be directed to hradviceandsupport@durham.gov.uk

Any queries in relation to using MyView Dashboard should be directed to MyView@durham.gov.uk or call 03000 269 919.

### 1.4 What types of Absence can be recorded via MyView Dashboard?

<table>
<thead>
<tr>
<th>Absences Types Recorded via MyView</th>
<th>Absence Types NOT recorded via MyView</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Sickness</td>
<td>Maternity Leave</td>
</tr>
<tr>
<td>Other Leave (Paid and Unpaid) (Including)</td>
<td>Paternity Leave</td>
</tr>
<tr>
<td>Hospital Appointment</td>
<td>Annual Leave</td>
</tr>
<tr>
<td>Bereavement Leave</td>
<td>Flexi Leave</td>
</tr>
<tr>
<td>Compassionate Leave</td>
<td>Parental Leave</td>
</tr>
<tr>
<td>Extraneous Leave</td>
<td>Phased Returns to Work</td>
</tr>
<tr>
<td>Governor Duties</td>
<td></td>
</tr>
<tr>
<td>Jury Service</td>
<td></td>
</tr>
<tr>
<td>Moderator/Examiner Leave</td>
<td></td>
</tr>
<tr>
<td>TA Duties</td>
<td></td>
</tr>
<tr>
<td>Training Course</td>
<td></td>
</tr>
<tr>
<td>TU Duties</td>
<td></td>
</tr>
</tbody>
</table>
1.5 Further information

If you would like any further advice or would like the document in an alternative format, please contact the MyView Team within **HR Operations and Data** using the contact details below:

Please ask us if you would like this document summarised in another language or format.

<table>
<thead>
<tr>
<th>Language</th>
<th>Arabic (Arabic)</th>
<th>中文 (繁體字) (Chinese)</th>
<th>اردو (Urdu)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>polski (Polish)</td>
<td>ਪੰਜਾਬੀ (Punjabi)</td>
<td>Español (Spanish)</td>
</tr>
<tr>
<td></td>
<td>বাংলা (Bengali)</td>
<td>हिन्दी (Hindi)</td>
<td>Deutsch (German)</td>
</tr>
<tr>
<td></td>
<td>Français (French)</td>
<td>Türkçe (Turkish)</td>
<td>Melayu (Malay)</td>
</tr>
</tbody>
</table>

MyView@durham.gov.uk
03000 269 919

Braille  Audio  Large Print
2 Entering Absence for an Employee

Select the MY PEOPLE tab in MyView Dashboard.

Select the Submit Employee Absence tab in MyView Dashboard and the Employee you want to record the absence against. Click Next.
Note: If an employee has more than one post within your team then all of their posts will be listed. You will need to select the post you want to record the absence against. If the employee was absent in more than one of their posts then the absence entry will need to be added against each post.

Select the date (using Previous/Next or Calendar links) for the date you wish to enter the Sickness for. **Right Click** on the selected date, press “Add” and Select “SCK Sick”.

You should then record:

- From Date
- To Date
- Reason (must be the reason specified by the employee or doctor)
- Reason Type
- Cert Type
- Certificate Expiry Date (If applicable)
- Health and Safety
- RTW Interview Date (to be completed within 3 days of the employees return to work)
Note: Any field marked with an * is mandatory and you will not be able to submit the record without these fields being populated. Once completed click Submit and you will see the absence entry that you have submitted.
2.1 Editing an existing Absence

On occasion an Employee's absence record may need to be changed after it has been submitted, for example, an incorrect date has been recorded, an employee has returned to work after a prolonged period of absence or a sick reason needs to be changed. Please note that you cannot amend the start date of an absence.

Select the **MY PEOPLE** tab in MyView Dashboard

Select the **Submit Employee Absence** tab in MyView Dashboard and the **Employee** you want to edit the Absence for. Click **Next**
Find the Sickness period that you wish to make an amendment for using the Previous link or Calendar Option.

Select the Date where the amendment needs to be made, right Click and select “Edit”.

Once you have edited the record, click Submit.
2.2 Editing an Open Ended Absence

Click the **Full Day** radio button and add the **To Date**, once done, click **Submit**.
2.3 Entering Other Absences

Select the MY PEOPLE tab in MyView Dashboard

Select the **Submit Employee Absence** tab in MyView Dashboard and the **Employee** you want to record the absence against. Click **Next**
Note: If an employee has more than one post within your team then all of their posts will be listed. You will need to select the post you want to record the absence against. If the employee was absent in more than one of their posts then the absence entry will need to be added against each post.

Select the date (using Previous/Next or Calendar links) for the date you wish to enter the Sickness for. Right Click on the selected date, press “Add” and Select “OTH Other Absence”.
2.4 Manager – uploading Attendance Management Documentation

Managers can securely store an electronic copy of Attendance Management documentation for their team via MyView Dashboard. All completed Attendance Management documentation should be stored electronically against the relevant category.

- **Return to Work Form**
  
  Completed for all employees after a period of sickness absence

- **Attendance Management Interview Forms**
  
  These forms are usually completed where it has been identified that an employee’s level of absence has hit a trigger point and an attendance management interview (AMI) has been undertaken as a result. An another example of when an AMI can take place is where the pattern or nature of absence is giving rise for concern.

- **Fit Notes**
  
  A copy of a Fit Note provided by a GP (General Practitioner)

- **Phased Return to Work Form**
  
  Form detailing the arrangements of the phased return to work for an employee.

- **Absence Supporting Documentation**
  
  This can include letters requesting the attendance at a management interview or management referrals to Occupational Health.

In accordance with the Councils Attendance Management Policy and Procedure documents should be signed by both the Manager and Employee before it is scanned and uploaded onto MyView Dashboard. Once document is uploaded, both employee and manager will be able to view the documentation.

2.5 Scanning Attendance Management documentation

Once the Attendance Management documentation has been completed and signed by both Manager and the Employee, it will need to be scanned so that an electronic copy can be uploaded to MyView. Managers are advised to ‘scan to email’ so that the scanned document can be accessed securely.

- Place the document in the MFD feeder tray
- Select the ‘e-mail’ option on the MFD screen display
- Set up the required scan options (colour, single or 2 sided document, file name)
Full guidance on using the Xerox Multi-Functional Devices can be found on the Intranet. Alternatively please contact the ICT helpdesk on 03000 261100.

Once the document has been scanned, you will receive an email containing the scanned document.

![Email attachment](image)

You should save the email attachment to a secure network folder (e.g. ‘My Documents’).

### 2.6 File Name

Managers are advised to ensure that scanned documents are given an appropriate name before they are uploaded to MyView Dashboard. This will ensure that individual documents can be easily identified by managers, employees and Human Resources.

The preferred naming convention is:

**Employee Number, Attendance Management Type, Date of Completion**

*For example: 123456-RTW-011014*
2.7 Uploading a Scanned Attendance Management Document

Once you have logged into MyView Dashboard please select the “MY PEOPLE” option and select the employee you want to upload documentation against.

Select the Employee Electronic Documents Action and Attendance Management
Select the ‘Choose file’ option to locate the scanned sickness document and choose the appropriate Attendance Management Category. Click “Submit”.

Once Submitted, you can see the document that has been stored against the employee.
3 MyView Dashboard Alerts

The system will generate the following ‘MyView Alerts’, you may be required to take action upon receipt. Please take the time to read these alerts as they are designed to aid you in Managing Attendance in line with the requirements of the Attendance Management Policy and Procedure.

- Employee hits 10 Days of Absence in 12 Month Period
- Employee hits 2 Periods of Absence in 3 Month Period
- Monthly Summary: Open Ended Absence regarding direct reportees
- Employee’s Return to Work Interview Date Not Completed
- Employee Absence: 7 days+ Fit Note Required
- Employee Absence: Fit Note has expired

Note: Employees and Managers will receive confirmation notifications when Attendance Management documentation is uploaded via MyView.
4 Frequently Asked Questions

What do I need to do if I want to record Maternity, Adoption Leave and Paternity Leave?

At present requests for and the administration of these types of Leave are not automated via Leave Management. Please refer to the following policies for further guidance:

Maternity, Paternity and Adoption Policy

The Sickness Reason has changed over the course of the same Sickness period. What do I do?

Sometimes, especially in the case of Long Term Sickness, an employees reason for being off sick may change over the duration of the absence, for example, the sickness period may start off as Anxiety but then following receipt of a FIT note it may become Stress. In cases where this occurs, you should end the current absence and add a new entry with the new reason. Please ensure that the start date of the new entry is the day after the previous absence is ended. This will allow the system to treat the period of absence as continuous even though the reason for absence has changed over time.

Any FIT notes that have been submitted which correlate with the dates of the absence should be uploaded via MyView.

What happens if the recording manager is absent from work and is unable to enter a sickness record for the absent employee.

If the line manager is absent on a short term basis (3 days or less) then it is reasonable to wait until the line the line manager is back in order to record the absence episode. If the absence is greater than 3 days then it is managers manager who should record the absence via MyView. If this is not possible notification of the absence should be sent to the appropriate service email address.

- REAL: hrREAL@durham.gov.uk
- CYPS: hrCYPS@durham.gov.uk
- Resources: hrRESOURCES@durham.gov.uk
- AWH: hrAHS@durham.gov.uk
- TAP: hrTAP@durham.gov.uk

I have uploaded Attendance Management Documentation against the employee, what should I do with the paper documentation.

Once the documentation has been uploaded against the employee record, you should give the paper forms (including FIT notes) back to the employee.
It is not possible for me to upload Attendance Management Documentation against the employee record as I did not conduct the Attendance Management Interview.

This should only take place in exceptional circumstances given the sensitive nature of sickness information, “The Manager” is in most cases the first line manager supervising the employee. However, this may vary with local structures or practice. It may also be appropriate for this role to be taken on by another officer in particular circumstances. Please refer to the Attendance Management Policy and Procedure for further guidance in this area.

In the case where it is not possible for the line manager to upload Attendance Management Documentation then the documentation should be scanned and emailed to the following email addresses. Please note hard copy forms should not be submitted to HR.

- REAL: hrREAL@durham.gov.uk
- CYPS: hrCYPS@durham.gov.uk
- Resources: hrRESOURCES@durham.gov.uk
- AWH: hrAHS@durham.gov.uk
- TAP: hrTAP@durham.gov.uk

I need to record a ‘Phased Return to Work’, how do I do this?

The sickness period should be ended via MyView, however, managers should then ensure that they notify their respective services via the following email addresses detailing the phased return to work plan. The HR Operations team will then make the necessary adjustments to pay if appropriate. Managers are required to enter phased return to work document documentation on the appropriate category.

- REAL: hrREAL@durham.gov.uk
- CYPS: hrCYPS@durham.gov.uk
- Resources: hrRESOURCES@durham.gov.uk
- AWH: hrAHS@durham.gov.uk
- TAP: hrTAP@durham.gov.uk

I am getting a message which says ‘Current Pay Period not open' when trying to add or amend a period of absence

At the beginning of each month there is a small window in which absence cannot be added or amended, this is due to supplementary pay periods that are undertaken monthly by Payroll. This period lasts for a few days and the Leave Management Module is usually back up and running by the 7th of each month at the very latest.