Payroll and Employee Services – Leave Guidance (MyView) – Annual/Flexi/ESV Leave

Contents

1 Introduction

This document is a guide to using the MyView Leave Management Module. This module enables employees to request leave via MyView to be authorised by your manager.

1.1 What is the MyView Leave Management Module?

The Leave Management module also allows employees to submit leave requests using any device. Prior to requesting leave, employees will be able to use the absence calendar to view their absence history.

Managers are able to use the absence calendar (accessed via MyPeople) to view absence history of a selected employee.

Once a leave request is authorised, this is reflected on the employee Leave Balance widget accessed from the MyView dashboard.

Please note, whilst this does not replace the flexi recording system, it does allow employees to book flexi leave.

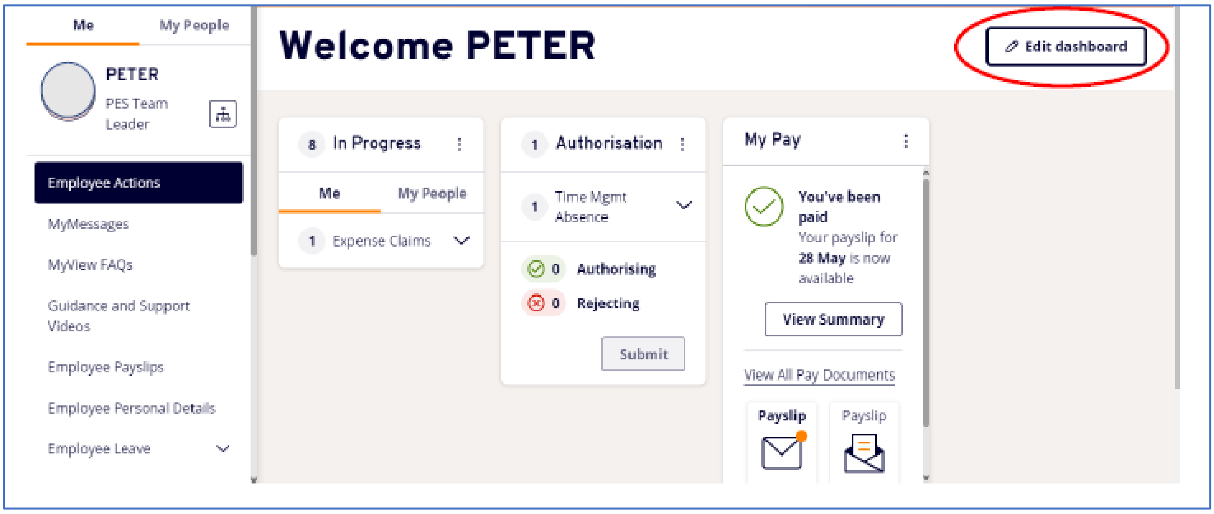
The module also ensures a standardised calculation of annual leave. The system has been configured to enable annual leave entitlements to be automatically calculated each year as well as considering changes of posts/hours mid-way through the year which affect entitlements, handling of annual leave during periods of sickness/maternity in addition to awarding additional holidays in line with continuous service and the treatment of annual leave carried over at year end, in line with Council policies.

1.2 What types of absence can be recorded by employees via MyView?

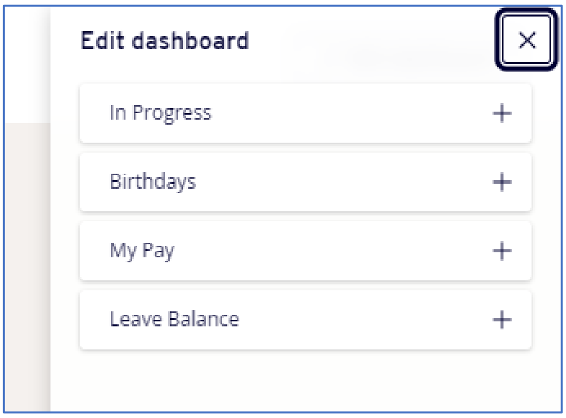
- Annual Leave
- Flexi Leave (where applicable)
- Employer Supported Volunteering Leave

2 Adding the Leave Balance widget to your MyView Dashboard

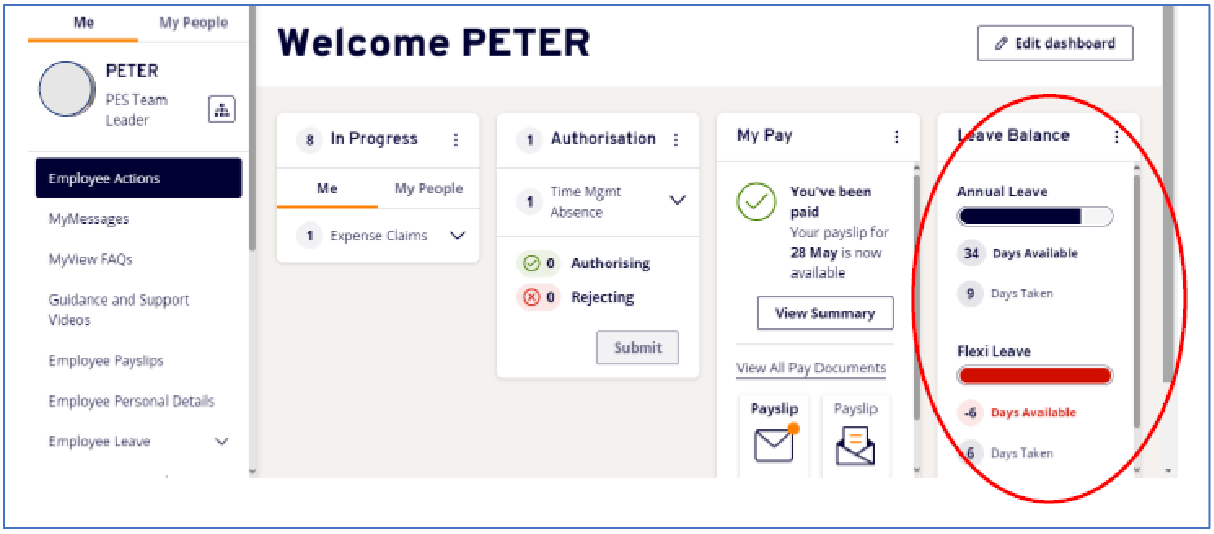
When you first log-in to MyView, select the **[Edit dashboard]** icon in the top right corner of your dashboard.



This will display dashboard widgets that are currently available to you. Click the **+** next to **Leave Balance** for the Widget to be added to your main dashboard.



The Leave Balance Widget will remain on your Dashboard for easy access to request leave.



You will see your leave entitlement is displayed on the widget. Employees who are in the flexi scheme can also book flexi days (regardless of whether they work full time or part time).

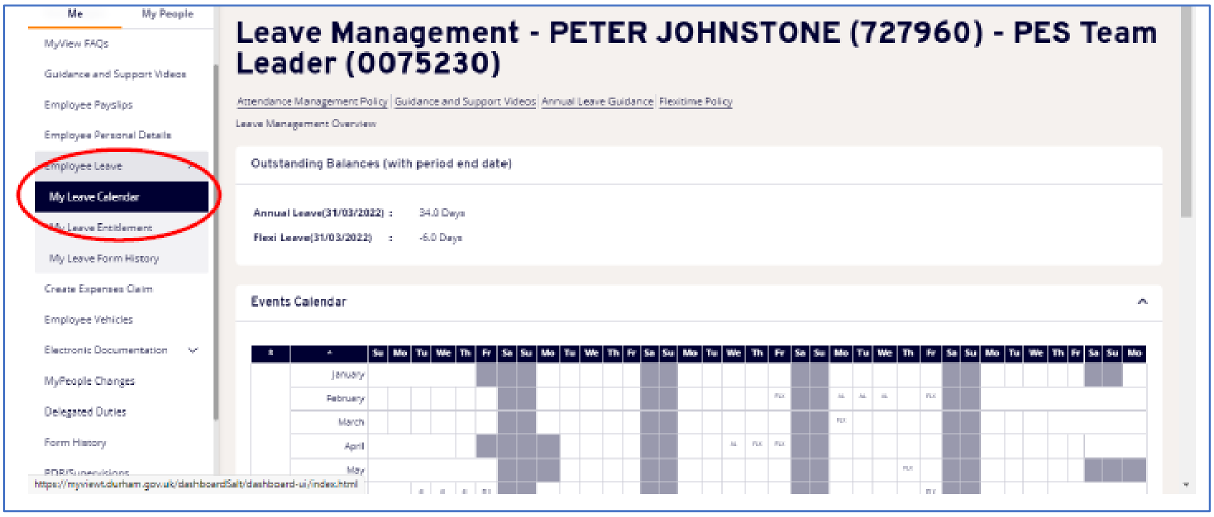
Please note, the system does not replace the current flexi recording system. Your flexi leave balance will show a reducing balance.

3 Checking your Team Calendar (Employees)

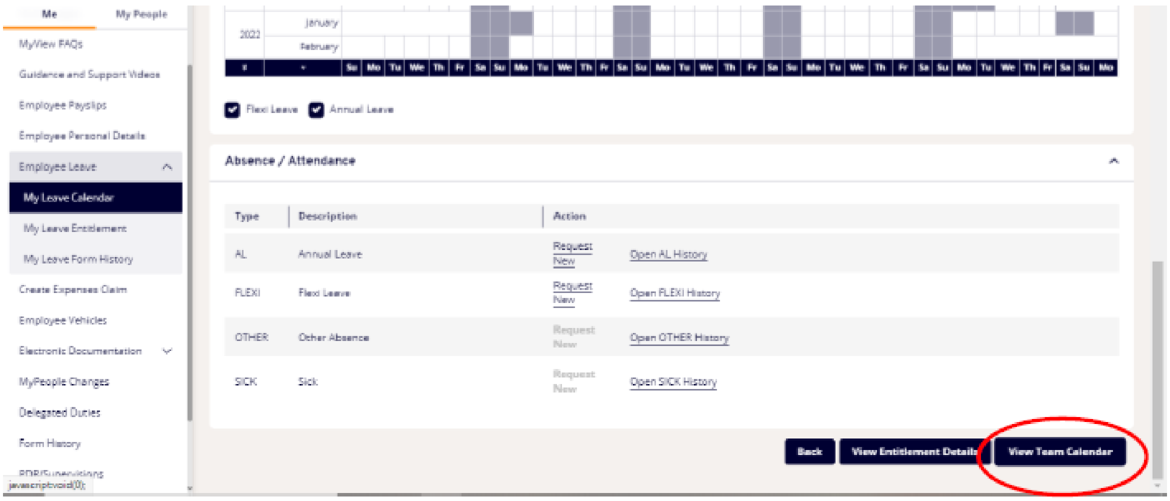
It is good practice to check team cover prior to requesting leave, as this may influence your manager's decision when authorising your leave requests. We therefore recommend that you review the Team Calendar prior to requesting leave.

To view the team calendar, select **Employee Leave** from the left-hand menu panel, and then select **My Leave Calendar.**

Note: If you have multiple posts, select the post you are submitting the leave request against and click **next**:



This screen will display your personal calendar, continue to the bottom of the screen and click **[View Team Calendar]**.



Once open, the team calendar displays employees (peers) who report to the same manager, as well as your manager, and it will display their approved leave requests.

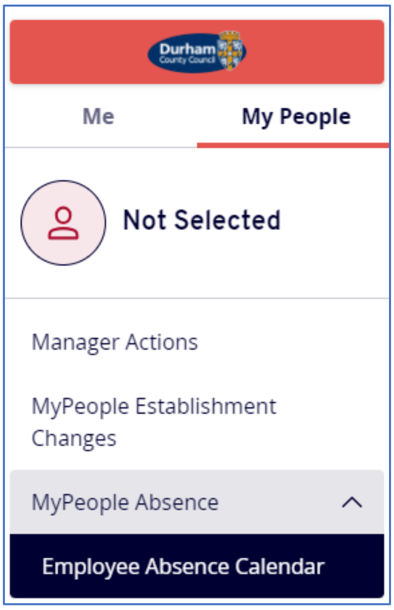
For GDPR reasons, all types of leave for all other employees in your work group are recorded as **generic absence (ABS)**. This is a handy tool to check other leave arrangements prior to submitting your leave request.

4 Checking your Team Calendar (Managers)

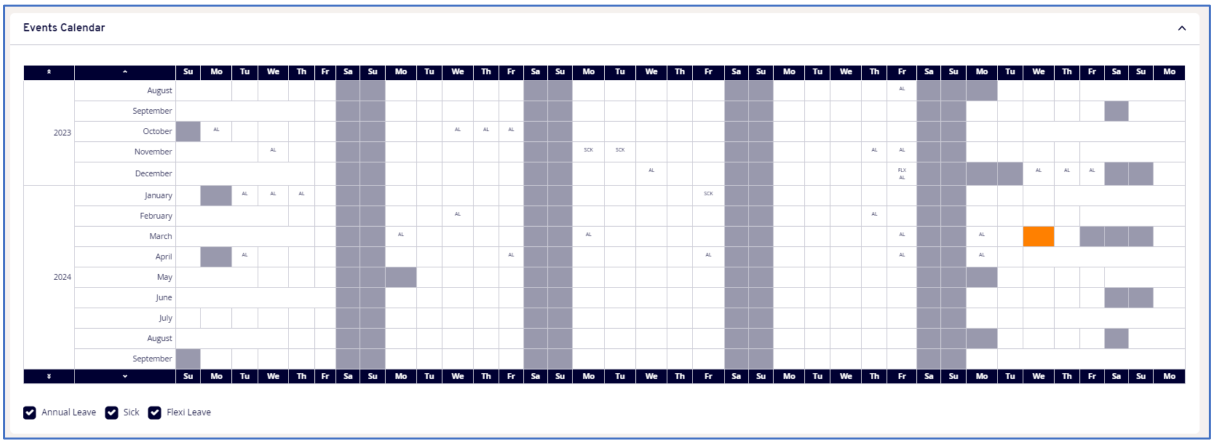
Managers may be required to check their direct reportees as well as other colleagues reporting to their manager to determine if there is sufficient team cover prior to requesting leave.

To check the leave of your own team as well as the wider teams within your service area select **MyPeople** on MyView.

To view the absence calendar, select **MyPeople Absence Calendar** from the left-hand menu panel, and then select **Employee Absence Calendar**.



Select the employees whose leave you wish to review and click **[Next]**. The selected employees leave calendar will then be displayed.

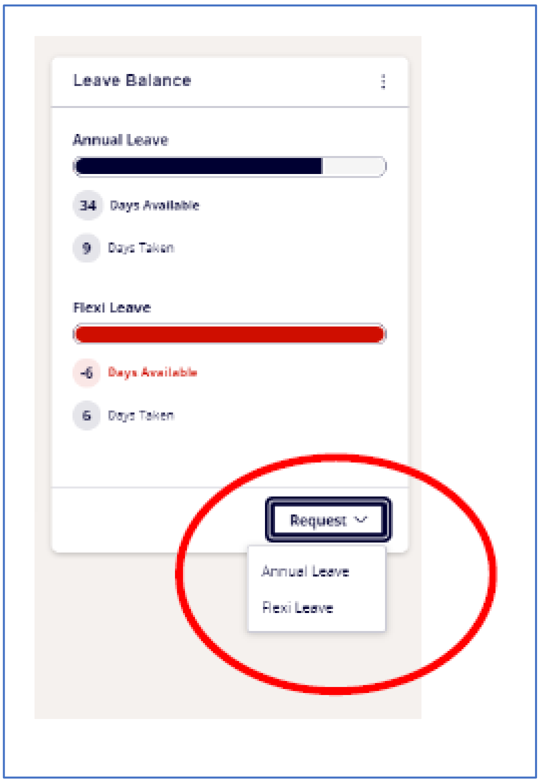


Click **[View Team Calendar]** to view absence calendar for all of your direct reports.

5 Requesting Annual Leave – Full Time Employees

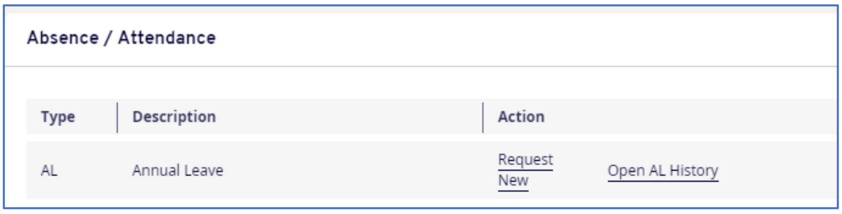
Leave can be requested either from the left-hand menu selecting **Employee Leave – My Leave Calendar or** via the **Leave Balance** widget from your main dashboard.

To request leave via the Leave Balance widget please select **Request** from the widget, or please select **My Leave Calendar** via the left-hand menu options:



Note: If you have more than one current post, you will need to select the relevant post against which you are taking leave.

If you have requested leave via the widget, please select **relevant leave type. I**f you have selected via the left-hand menu option **My Leave Calendar**, please scroll down past the calendar, and select [**Request New]** next to the applicable leave type:


Absence / Attendance

Type	Description	Action	
AL	Annual Leave	Request New	Open AL History

Complete the request form accordingly ensuring all mandatory fields are populated. The comments box is optional, but additional information can be included if required.

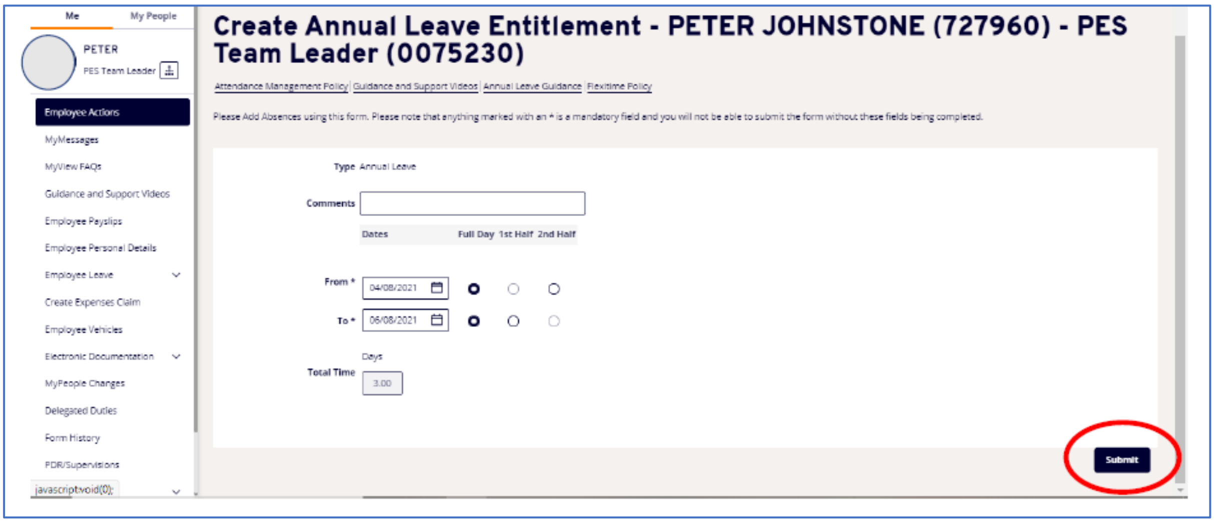
Note: any comments will be seen by your manager.

You will be required to record the dates requested. Please record the following information:

- **From** Date
- **To** Date
- Confirmation if full day or part day

The system will auto populate the total time required.

Note: leave requests for non-consecutive days will need to be submitted as separate leave requests. For example, Monday, Wednesday, Friday would need to be requested as 3 separate days.



Once the request is updated, click [**Submit]**. The request has now been sent to your manager and is pending approval.

Note: your leave balance on the Leave Balance widget will not be updated until the request has been authorised by your manager.

Once the request has been approved by your manager, you will receive an e-mail notification from resourcelink@durham.gov.uk. If the request is approved, there is no further action required. The period of leave will also be reflected in your outlook calendar and your managers outlook calendar.

6 Requesting Annual Leave – Part Time Employees

Part-Time employees (and those working full time compressed hours) will have their holiday entitlement calculated in hours.

As a Part-time employee you are required to submit leave requests for Bank Holidays that fall on any of your normal working days. Additional hours have been added to your annual leave entitlement to account for all bank holidays. Therefore, to ensure a correct leave balance going forward you must ensure these are booked and authorised. The leave request should include the number of hours you would ordinarily work on that day.

For example, if you usually work on a Monday, you will be required to submit all bank holiday Monday's as annual leave. We recommend that you submit leave requests for bank holidays at the start of the leave year to ensure you have an accurate leave balance moving forward.

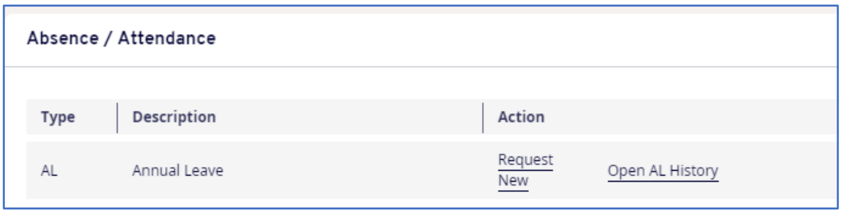
We also advise that you include 'Bank Holiday' in the comments section on these leave requests, so that it is easily identifiable.

Leave can be requested either from the left-hand menu selecting **Employee Leave – My Leave Calendar or** via the **Leave Balance** widget from your main dashboard.

To request leave via the Leave Balance widget please select **Request** from the widget, or please select **My Leave Calendar** via the left-hand menu options:

Note: If you have more than one current post, you will need to select the relevant post against which you are taking leave.

If you have requested leave via the widget, please select **relevant leave type. I**f you have selected via the left-hand menu option **My Leave Calendar**, please scroll down past the calendar, and select [**Request New]** next to the applicable leave type:



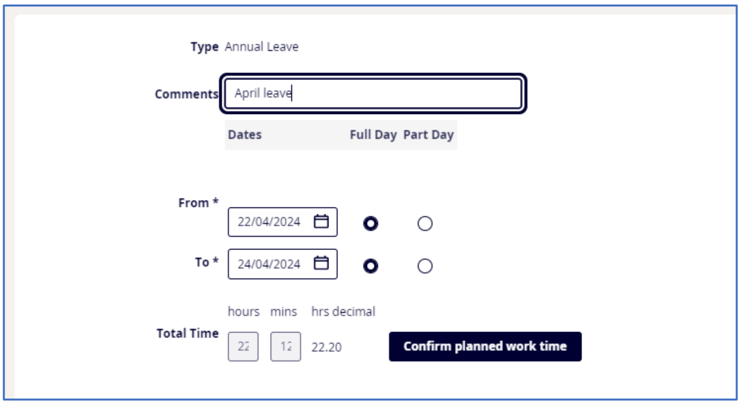
Complete the request form accordingly ensuring all mandatory fields are populated. The comments box is optional, but additional information can be included if required.

Note: any comments will be seen by your manager.

Note: leave requests for non-consecutive days will need to be submitted as separate leave requests. For example, Monday, Wednesday, Friday would need to be requested as 3 separate days.

You will be required to record the dates requested. Please record the following information:

- **From** Date
- **To** Date
- Confirmation if full day or part day



Select the **[Confirm planned work time]** icon to ensure that the correct number of hours are taken for the leave according to your working pattern. This is important so that the system takes the correct number of hours from your entitlement.

Note: You must confirm the planned work time before you are able to submit the leave request.

	SUN	MON	TUE	WED	THU	FRI	SAT	Weekly Hours		
Week Ending	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hours	mins	hrs decimal
27/04/2024	0:00	09:15	09:15	09:15	09:15	00:00	0:00	37	0	37.00

Once correctly updated, click **[Save]**.

Note: If the planned work time does not total the total contracted hours, you will receive an alert similar to below. This message can be disregarded as long as the hours are correctly recorded for the days which you are requesting leave.

Alerts
Average hours entered is different from contract hours of 37. Are you sure you wish to continue?

You will notice that the system has now pre-populated the total hours being requested for this period of leave.

Once the request is updated, click [**Submit].** The request has now been sent to your manager and is pending approval.

Note: your leave balance on the Leave Balance widget will not be updated until the request has been authorised by your manager.

Once the request has been approved by your manager, you will receive an e-mail notification from resourcelink@durham.gov.uk. If the request is approved, there is no further action required. The period of leave will also be reflected in your outlook calendar and your managers outlook calendar.

7 Requesting Employer Supported Volunteering Leave

From 1 April 2024 – all employees have the option to request employer supported volunteering (ESV) leave. All DCC employees (excluding casuals and schools) are in scope of ESV leave via MyView.

Some key principles:

- Managers have access to record ESV leave on behalf of employees without MyView access. Employees without access to MyView will submit a paper-based leave request to their manager who would then record the ESV leave via MyView .
- Employees will receive 24 hours ESV leave entitlement (pro-rata for part time employees) per year. All employees will receive their ESV leave entitlement in hours, irrespective of whether they are part time, or full time.
- No carry forward of ESV leave is permitted from one leave entitlement year to another.
- ESV leave is not set to be concurrent with other leave types (i.e., you can't book ESV leave in middle of period sickness or annual leave)
- Employees can book ESV leave alongside annual leave in same way as flexi and annual leave – as long as times don't clash (i.e., not concurrent).
- Employees/managers will be prompted to delete and rebook ESV leave (if required) following a change of hours.

Leave can be requested either from the left-hand menu selecting **Employee Leave – My Leave Calendar or** via the **Leave Balance** widget from your main dashboard.

To request leave via the Leave Balance widget please select **Request** from the widget, or please select **My Leave Calendar** via the left-hand menu options:

Note: If you have more than one current post, you will need to select the relevant post against which you are taking leave.

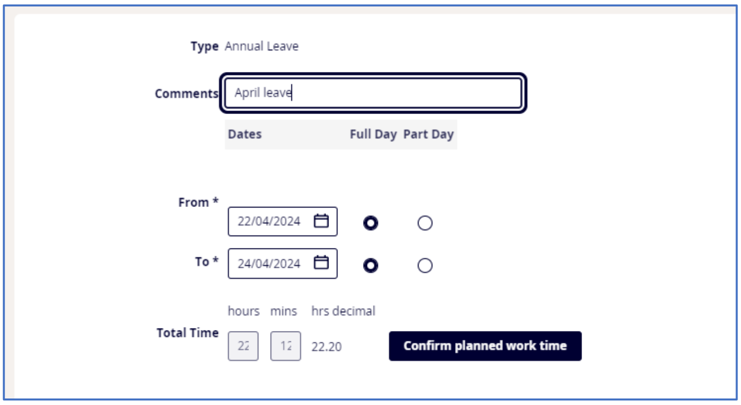
If you have requested leave via the widget, please select **relevant leave type. I**f you have selected via the left-hand menu option **My Leave Calendar**, please scroll down past the calendar, and select [**Request New]** next to the applicable leave type:

Complete the request form accordingly ensuring all mandatory fields are populated. The comments box is optional, but additional information can be included if required.

Note: any comments will be seen by your manager. Within the comments box it is essential that you provide details of the voluntary organisation / activity to provide further information to your manager:

You will be required to record the dates requested. Please record the following information:

- **From** Date
- **To** Date
- Confirmation if full day or part day



Select the **[Confirm planned work time]** icon to ensure that the correct number of hours are taken for the leave according to your working pattern. This is important so that the system takes the correct number of hours from your entitlement.

Note: You must confirm the planned work time before you are able to submit the leave request.

	SUN	MON	TUE	WED	THU	FRI	SAT	Weekly Hours		
Week Ending	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hh:mm	hours	mins	hrs decimal
27/04/2024	0:00	09:15	09:15	09:15	09:15	00:00	0:00	37	0	37.00

Once correctly updated, click **[Save]**.

Note: If the planned work time does not total the total contracted hours, you will receive an alert similar to below. This message can be disregarded as long as the hours are correctly recorded for the days which you are requesting leave.

You will notice that the system has now pre-populated the total hours being requested for this period of leave.

Once the request is updated, click [**Submit].** The request has now been sent to your manager and is pending approval.

Note: your ESV leave balance on the Leave Balance widget will not be updated until the request has been authorised by your manager.

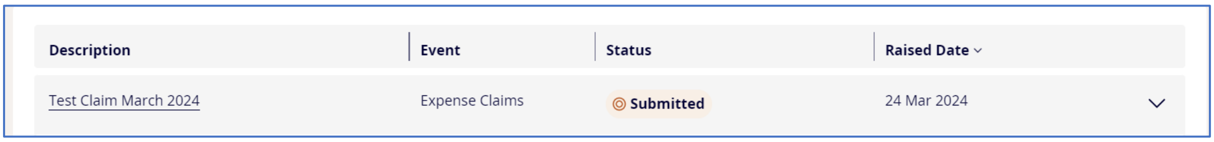
Once the request has been approved by your manager, you will receive an e-mail notification from resourcelink@durham.gov.uk. If the request is approved, there is no further action required. The period of leave will also be reflected in your outlook calendar and your managers outlook calendar.

8 Form History – View Authorisation Progress

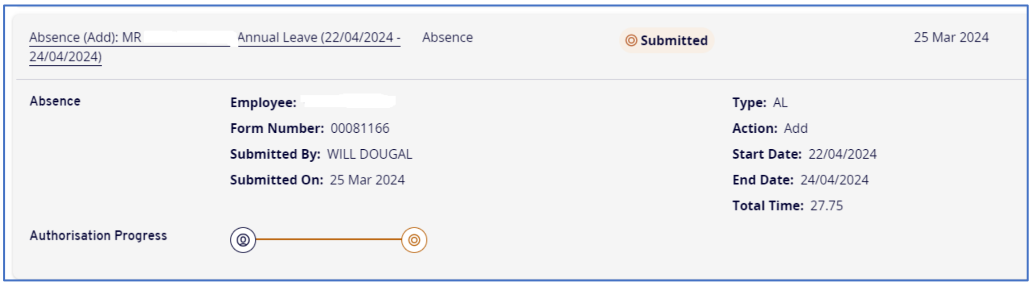
You can view the authorisation progress of your leave request as well as being able to view details of previously authorised/rejected request. This includes audit details of who authorised/rejected your form and when this took place.

Click on the **[Form History]** link on the left-hand navigation panel.

Click on the form name under **[Description]** to open the relevant form.



The form includes a section called **[Authorisation Progress]**. Click on the orange circle icon to view authorisation status details.

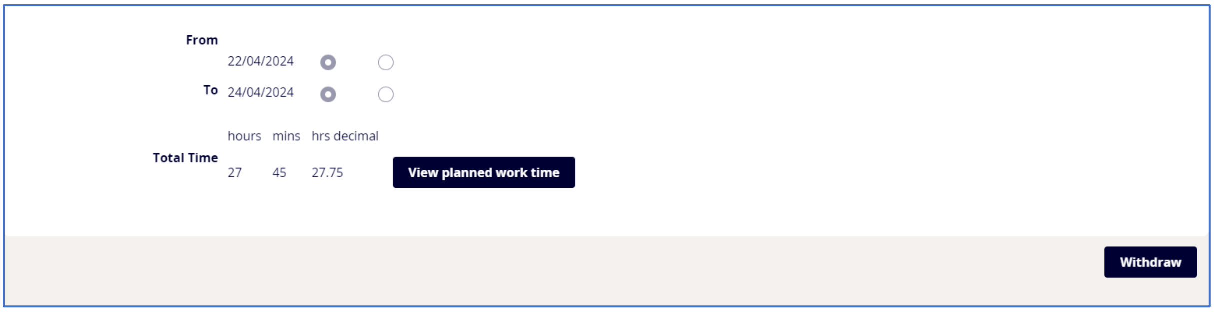


8.1 Withdrawing a submitted leave request

To do this, select **My Leave Form History** from the left-hand navigation menu.

Locate the appropriate request which can be identified as pending approval by the red **submitted** status icon.

Open the request and click **[Withdraw].**



8.2 Resubmitting a rejected leave request

If your leave request has been rejected by your manager (or timed out) you will receive an e-mail notification from myview@durham.gov.uk.

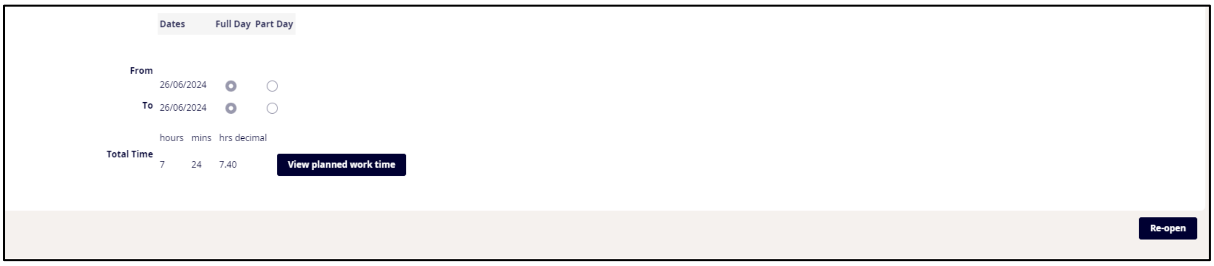
Reasons for the rejection will **not** be included in the e-mail, therefore please discuss this with your manager if you have any queries.

To resubmit the rejected/timed-out request, please navigate to your **Form History** from the left-hand navigation panel.

Click on the **[Form History]** link on the left-hand navigation panel.

Locate the rejected request which can be identified as rejected by the red **rejected** status icon. Click on the form name under **[Description]** to open the relevant form.

Select **[Re-open].**



Open the request form. If the request has timed out (i.e., not approved by your manager within 30 calendar days), you could easily click **submit** whilst in the form – the request will then be re-sent to your manager. This prevents you needing to create a new request for the same period of leave.

If the request has been rejected for other reasons, you can make any amendments accordingly – this will be quicker than keying in a new request.

Click **[Submit]** once the request is ready to be re-sent for approval.

8.3 Editing or deleting an authorised leave request

To do this, select **My Leave Calendar** from the left-hand navigation menu. Select the relevant **Leave History** to locate the relevant leave period.

Absence / Attendance

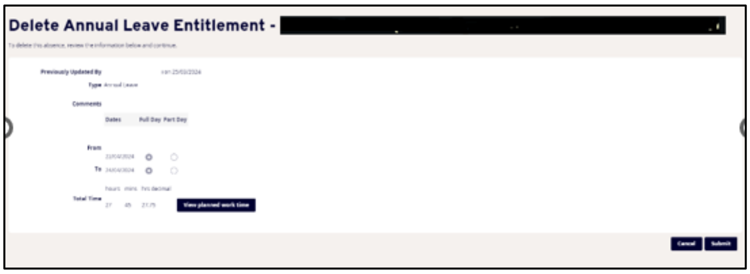
Type	Description	Action	
AL	Annual Leave	Request New	Open AL History

Click **[Edit]** or **[Delete]** on the absence period previously authorised.

AL	Annual Leave	22/04/2024	24/04/2024	View Edit Delete

- If **editing** the absence, please amend the dates and confirm the planned work time again if required before clicking **[Submit]**. A further authorisation request will then be sent to your manager.

- If **deleting** the absence, click **[Submit]**. A deletion approval request will then be sent to your manager.



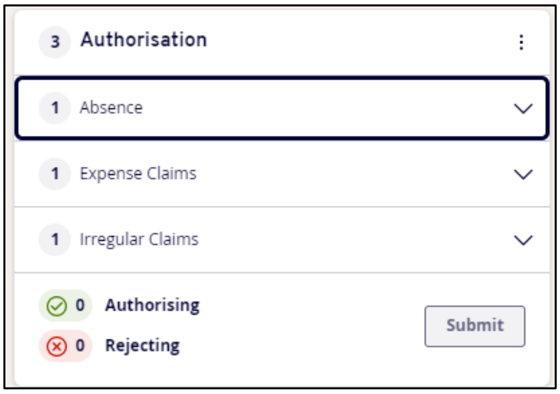
Once your edit/deletion request has been authorised by your manager, your leave balance will update accordingly.

9 Approving and Rejecting Requests – Manager/Approver Actions

If you have requests awaiting authorisation you will have received an email from resourcelink@durham.gov.uk asking you to log into MyView Dashboard to authorise the request.

The requests pending authorisation are displayed in the **Authorisations** widget on the Dashboard. You can open a pending authorisation to view further details. Alternatively, you can authorise and reject authorisations directly from this widget without having to open the leave request.

All leave authorisation requests need to be actioned within **30 days** before the request would be automatically rejected back to the employee, who would then need to resubmit the request via the Form History module.



To view/authorise the leave requests pending authorisation click on the drop-down button on the **[Absence]** option under Authorisation widget. This will display a brief detail of the leave requests awaiting authorisation.

Click on the form you wish to view. The full details of the claim form will now appear.

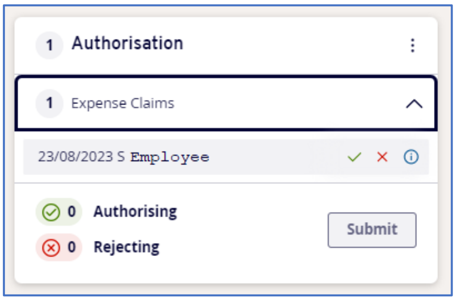
If you are happy to authorise the request, you can add any notes in the **Authorisation/Rejection Notes** section before clicking [**Authorise**].

After the request is authorised or rejected it is removed from the list of requests pending authorisation. The employee will receive a notification from myview@durham.gov.uk to confirm when the request has been approved or rejected.

If a request has not been authorised or rejected within 30 calendar days, it will be automatically rejected, and the request will be returned to the employee.

9.1 Quick Authorisation

If you hover over the request form name, you have the option to quickly authorise/reject the request without opening the request form to view the details.



If you select the information icon, you can bring up summary details of the authorisation request;

If you select the green tick or the red cross icon, you will then be able to click **[Submit]** to action the request.

A further message will ask you to confirm the authorisation/rejection. Click **[OK].**

9.2 Create, edit or delete leave requests on behalf of the employee

As a manager, you have access to **create, edit or delete** leave requests on behalf of your employees.

To **create** a leave request on behalf of an employee:

- Select the **MyPeople** tab in MyView Dashboard;
- Select the **Employee Absence Calendar** menu option;
- Select the relevant employee and click **Next;**
- Click **Request New** against the relevant **leave type**.

The manager will then submit the leave request in exactly the same way as an employee would do so themselves (please refer to sections 5 for full time, section 6 for part time submissions). Once submitted by the manager, the employee leave balance will be updated accordingly without any requirement for further authorisation.

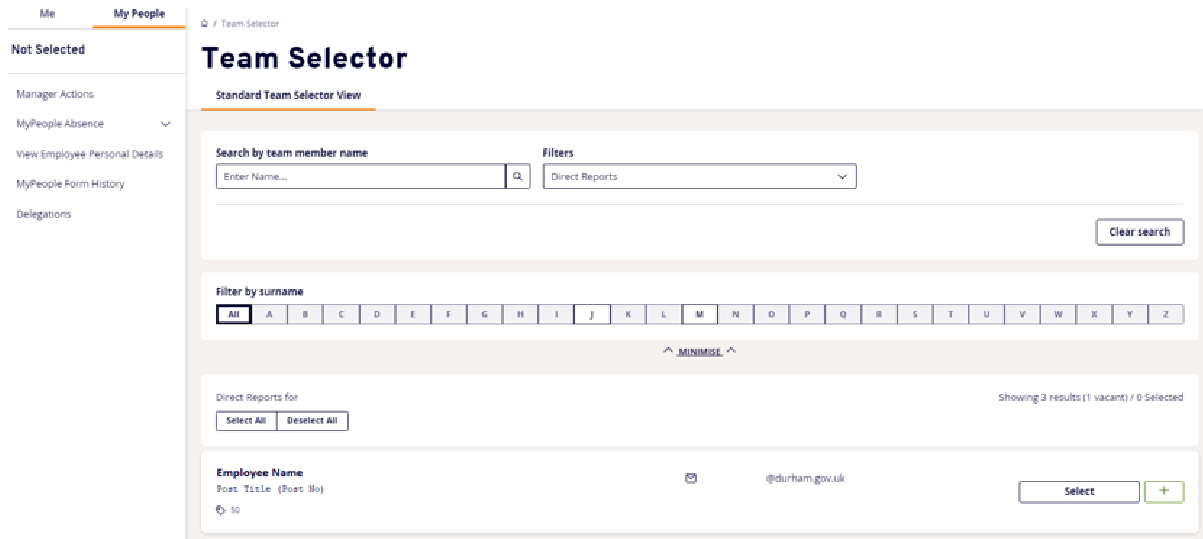
To **edit ot delete** a leave request on behalf of an employee:

- Select the **MyPeople** tab in MyView Dashboard;
- Select the **Employee Absence Calendar** menu option;
- Select the relevant employee and click **Next;**
- Open the relevant Leave History

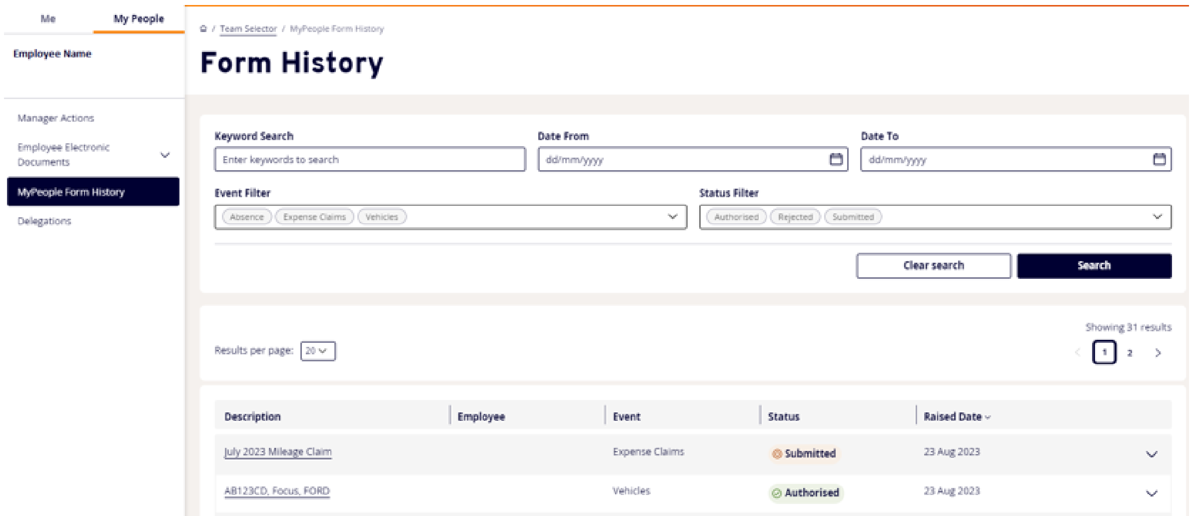
You now have access to edit or delete a leave request in the same way as an employee (see section 8 for further details).

10 MyPeople Form History

You can view all the forms that your employees have previously submitted. Within MyPeople, click **[Select]** against the relevant employee. Click **MyPeople Form History** from the left-hand navigation panel.



This will bring up the Form History for the selected employee displaying a summary of all forms. Click on the form name under **Description** to open the relevant form. Alternatively, click on the downward arrow icon to display a summary of the form.



The form includes a section called **Authorisation Progress**. Click on the green/orange icon to view authorisation status details. An authorised form will show a green tick whilst a submitted form will show an orange icon.

When clicking either the green or orange icon, further details of the authorisation progress are displayed including who authorised it and date/time.

Once a form has been authorised the status will change from **Submitted** to **Authorised**.

11 Help and Support

If you require any further advice or guidance, you can refer to the 'MyView Guidance' section or please contact our MyView Helpdesk via:

- telephone: 03000 269 919; or
- email: MyView@durham.gov.uk.