

MY FORMS FOR MANAGERS & EMPLOYEES

OVERVIEW

These forms are available on **MyView – My Forms** .

It is important to ensure that all the information submitted is accurate and complete as it may be used to calculate pay.

When a form is in the **My People** tab, these are completed by the manager on behalf of their employee.

As at October 18 the current forms available are:

Form Title	Me	My People	Authorisation
New Vehicle Details	✓	✓	Manager
Vehicle Certificate Update	✓	✓	Manager
Change of Employee Start Date	n/a	✓	HR
Change of Employee Leave Date	n/a	✓	Employee / HR
Exit Questionnaire (only available for Leavers)	✓	n/a	
Monthly Probation (Not Final Probation)	n/a	✓	Employee
Probation Final	n/a	✓	Employee
New Employee Failure to Start	n/a	✓	HR
Absence - Return to Work Interview	n/a	✓	Employee
Paternity Leave	✓	✓	Manager
Maternity Leave	✓	✓	Manager
LGPS - APC - Request for contract	✓	✓	Pension Team
Self Certification Sick Form	✓	n/a	Manager
Establishment Control Form (ECAN)	✓	n/a	HR Advisor / Finance / Assistant Director / Chief Exec
Establishment Control Form - Increase in Hours	n/a	✓	HR Advisor / Finance / Manager
Name, DoB, National Insurance Number	✓	✓	Payroll
Keeping In Touch Days	✓	✓	Manager

MY FORMS FOR EMPLOYEES (ME)

My Forms

- Click **My Forms** from the menu on the left
- In the **My Forms** screen you will see a list of any forms that have already been submitted, authorised or rejected.
- Clicking on the dash to the right of each area minimises it on the screen.

Forms (CSTR010,Betty Boo)

[My Forms - Guide](#)
['Me' Forms - Guide](#)
['My Team' Forms - Guide](#)

*This area displays a history of previously submitted forms which can be reviewed at any time.
To complete a new form choose the appropriate option from the '--Select--' menu.
Details of the selected form will be shown below*

Submitted

Date	Time	Form	Description
19/09/2018	10:32:12	0000005861	Self Certification Sick Form

Authorised

Date	Time	Form	Description
19/09/2018	10:29:03	0000005860	New Vehicle Details

- To open a new form click the **Select** drop down at the bottom right of the screen and choose the form you want to use - click on **Complete Form**

--Select--

--Select--
Keeping In Touch Days
LGPS - APC - Request for contract
Maternity Leave
Name, DoB, National Insurance Number
New Vehicle Details
Paternity Leave
Self Certification Sick Form
Vehicle Certificate Update

A brief summary of each form is provided below. Once all mandatory questions have been answered click on **Save** or **Submit**. (NB – not all forms can be saved before submitting them). The **Back** button will take you back to the main **My Form** screen and any details input will be lost if this option is taken. Some forms will allow you to print them but as they will be available for you to access at any time this should not be necessary.

An error message is displayed if any of the mandatory fields marked with * are not completed, e.g.:

Error

- The MATB1/Matching certificate is mandatory

1. New Vehicle Details

This form is used to advise of a new vehicle which will be used to make business related mileage claims through **MyView**.

Once it is completed and submitted, it will be sent to the Manager for approval. You will need to complete licence and insurance information for the vehicle. The Manager will need to see the relevant documents relating to this vehicle to ensure that the employer complies with the Corporate Manslaughter Law 2008.

2. Maternity Leave

This form is used to advise of a period of Maternity or Adoption Leave. The information will be used to determine whether the employee qualifies for the leave and any associated pay, both occupational and statutory.

3. Self Certification Sick Form

For sickness absence of 7 calendar days or less, where you have not been supplied with a doctor's certificate for the absence period, this form must be completed on return to work. For periods of absence of 8 days or more, a doctor's certificate must be given directly to the Manager and this form will not be used. As the absence entered on **MyView** by the manager already includes all the details, this form requires simplified information to enable it to be logged against the relevant absence period.

'Times' are not important on this form as the actual pay calculations are based on the manager's input – this form is for self-certification purposes only.

When you submit the form, it will go to your manager for authorisation and prompt them to hold a Return to Work interview and to close the current open ended sickness they have set up for you on the system.

4. Name, DoB, National Insurance Number

This form is used to request that personal details are updated including names, surname, date of birth and NI number.

5. Vehicle Certificate Update

This form is used to provide details of vehicle certificates relating to the vehicle used to make mileage claims and should be completed annually. Once it is completed and submitted, the form will be sent to the Manager for approval. The Manager will need to see the relevant documents relating to this vehicle to ensure that the employer complies with the Corporate Manslaughter Law 2008.

6. Paternity Leave

This form is used to advise of a period of Paternity Leave. The information will be used to determine whether the employee qualifies for the leave and any associated pay, both occupational and statutory.

7. LGPS – APC – Request for contract

This form is for staff who are members of the Local Government Pension Scheme (LGPS) and wish to pay Additional Pension Contributions (APCs) to buy the pension 'lost' during a period of authorised unpaid leave. This includes any unpaid portion of maternity leave.

8. Establishment Control Form (ECAN)

This form needs completing to obtain approval for any vacancy (new post or re-hire into current post). It must be completed and approved prior to advertising or placement of a worker into the post (either externally or internally). If the post is connected to a pending restructure it must be discussed with an HR Change Lead before completing this form.

9. Keeping In Touch Days

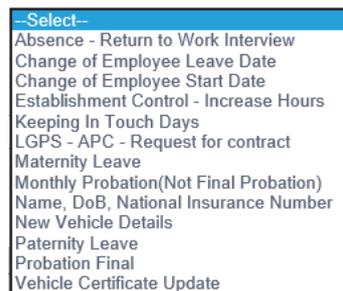
This form is used to advise of Keeping In Touch (KIT) days worked during an employee's maternity or adoption leave. The information supplied will be used to calculate payment for any work undertaken.

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- When a form is completed click **Save**, if you want to add to it later, or **Submit**, to submit for authorisation. Some forms can also be printed by clicking **Print Completed**
 - At confirmation that the form has been saved/submitted, click **Continue**
 - The form will be available for review in your form list.

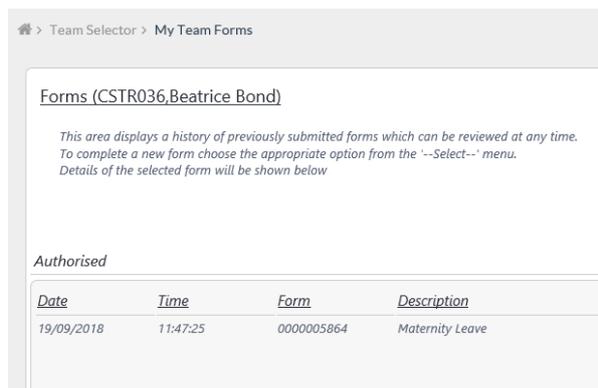
MY TEAM FORMS (MY PEOPLE)

When a staff member has been selected from the **My People** tab, additional forms are available to the Manager.

- Select the form from the list
- Create the form by clicking on **Complete Form**
- **Fill in the relevant details**
- **Save** or **Submit** the form
- Click **Continue** to see the saved/submitted form listed on the screen



--Select--
Absence - Return to Work Interview
Change of Employee Leave Date
Change of Employee Start Date
Establishment Control - Increase Hours
Keeping In Touch Days
LGPS - APC - Request for contract
Maternity Leave
Monthly Probation(Not Final Probation)
Name, DoB, National Insurance Number
New Vehicle Details
Paternity Leave
Probation Final
Vehicle Certificate Update



Team Selector > My Team Forms

Forms (CSTR036,Beatrice Bond)

*This area displays a history of previously submitted forms which can be reviewed at any time.
To complete a new form choose the appropriate option from the '--Select--' menu.
Details of the selected form will be shown below*

Authorised

Date	Time	Form	Description
19/09/2018	11:47:25	0000005864	Maternity Leave

Some forms will go straight to HR but others may go through an authorisation chain first before ending up with HR.

The Probation form, for example, will be completed by the Manager, agreed and authorised by the employee, and once approved by them, the data will be reported on but won't need any HR updates. The Establishment Control forms go to several people to authorise: the Line Manager, Finance, HR and Executive Head before ending up with HR to update the system.

Where applicable the employee will authorise forms completed by their manager through the **Authorisation** dashboard widget or **My Delegated Tasks**

1. Change of Employee Start Date

This form is to notify HR of a change to an employee's Start Date. Please note that any changes you make via this form will affect the pay calculation for this employee. This form will then be used to update the details by HR.

2. Change of Employee Leave Date

If you have previously completed a leaver process for one of your employees and that leave date has now changed, this form should be completed immediately. Any changes that you make via this form will affect the pay of the individual selected, so please ensure that the form is actioned promptly to prevent over / under payment being made. This form will then be used to update the details by HR.

3. Monthly Probation

A Probationary Period is a trial period for a new employee. It allows both the line manager and an employee to assess objectively whether or not the employee is suitable for the role, taking into account the individual's overall capability, skills, performance and general conduct in relation to the job in question

During an employee's probationary period the manager should complete this form for months 1 – 5. This form should be completed by the line manager, which will then be sent to the employee to agree and authorise. If there are any areas of disagreement over what should be recorded on the form, the line manager should try to resolve these with the employee prior to the form being completed.

Approximately 1 week before the end of the probationary period, the line manager should conduct a Final Progress Review of the employee's performance and suitability for the job using the Final Probation form.

It is important that this meeting is held before the end of the agreed probationary period in order to allow time to properly consider and review the employee's progress, especially if dismissal is a likely outcome.

4. Probation Final

On the completion of an employee's probation period, this final probation form needs completing regardless of whether the employee is successful or not. The questions on this final form are different than those completed in Mths 1-5. This form should be completed by the line manager, which will then be sent to the employee to agree and authorise. If there are any areas of disagreement over what should be recorded on the form, the line manager should try to resolve these with the employee prior to the form being completed.

Once the form is authorised, it will be sent to HR to follow up. If the employee was successful in completing their probation period, they will be advised in writing to confirm this. If the employee was unsuccessful, then HR will be in contact to review and discuss the situation.

5. Establishment Control Form - Increase in Hours

This form is used to request an increase in hours for a post that currently exists. Each post is limited to a set amount of hours as per the original Establishment Control form that was submitted to create the post. If you would like to increase these hours, it must be approved through this ECAN process before any changes can be made to the employee's record.

When you are increasing an employee's hours, regardless of the original ECAN agreement, you will need to complete a new ECAN Hours Form.

If you want to reduce the hours of an employee, do not complete this form but please refer to the Policy on: <http://insight/worklifebalance.htm>

Once the changes have been approved and the post updated, the employee's hours can be increased.

6. New Employee Failure to Start

This form is to notify HR and other relevant internal departments of a new employee who has failed to arrive on the agreed start date. Any changes that you make via this form will affect the pay calculation for this employee. This form will then be used to update the details by HR.

7. Absence - Return to Work Interview

This form is for managers to gather information as part of the Absence Policy as well as impart information regarding any details about the employee's role, department or organisation that

the employee may have missed due to the absence. It will not affect any other part of the absence process.

A new form must be completed for each period of absence, once the employee has returned to work and after adding an end date to the employee's absence period on **MyView**. If the employee is returning on a phased return to work, then the Phased Return to Work form will need to be completed. This form can be found on 'inSIGHT'.

VERSION CONTROL

Date	Page	Details of Change
September 2016	All	New guide
October 2018	All	<ul style="list-style-type: none">• Update to include KIT form.• Update of screenshots to reflect latest version of MyView.• Update of references to other documents and general text amendments