

MSS – Viewing personal and employment details

Contents

| | |
|--|----|
| 1. Introduction | 3 |
| 2. Viewing Personal Details | 4 |
| 3. Viewing Employment Details | 8 |
| 4. Leaver Checklist | 13 |
| 5. Completing the Leaver Checklist | 13 |

1. Introduction

This guide will demonstrate how to view employee personal and employment information.

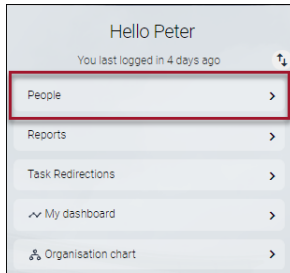
This information is read only, and employees will be responsible for updating their own personal information via Employee Self Service.

As a Line Manager user, you will only have access to the information related to staff who report to you. This information will include some personal information and details, it is important that you use it responsibly to ensure that the security of your employees' data is always maintained.

Line Managers are required to follow the [Corporate Information Security Policy](#), [Conditions of Acceptable Use](#) and align to the corporate requirements for data processing.

2. Viewing Personal Details

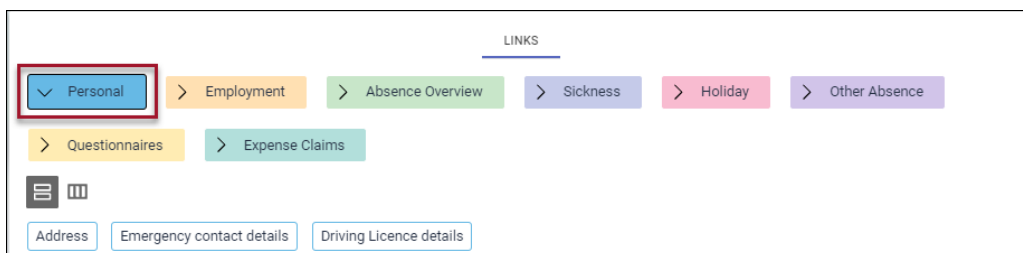
1. To access your employee's personal details, log into Manager Self Service and select the '**People**' section from the right-hand section's menu:



2. Search for or select the employee from the left-hand pane:



3. The **Person Summary** screen will open
4. To access your employee's personal details, select the '**Personal**' folder from the links section at the bottom of the screen:



5. Several links will appear giving you access to the selected employee's personal information

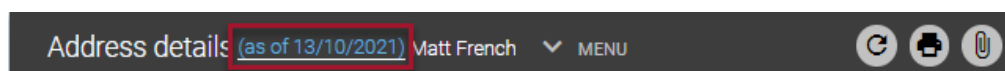
6. To view the information, click on the appropriate link, e.g., '**Address**':



7. Where multiple records exist, e.g., multiple addresses, you will need to select the record to view from the left-hand pane before the page will be displayed
8. Some pages will prompt you for an Effective Date before displaying the information, this gives you the ability to look at information as at a future date, past date, or the current date
9. In the '**Effective date**' prompt, enter the date you want to view the details; typically, today's date:



10. If you want to change the date, for example to view an employees' previous address, enter the date either by typing over the existing date or selecting from the calendar picker
11. Click '**OK**' to confirm the date and the relevant details will be displayed
12. The selected effective date will be displayed in the page menu bar:



13. Clicking on the date will open the '**Effective date**' pop-up

14. The 'Address details' page is shown:

Address details (as of 13/10/2021) Matt French MENU

Address type

Mailing address ☒

Country

House Name

Number/Street

Local Area

POSTTOWN

COUNTY

POSTCODE

Start date

End date

Note: This page is read only.

15. Click on 'MENU' at the top of the page to access additional links in the folder:

Address details (as of 13/10/2021) Matt French MENU

16. Click 'LESS' to minimise the menu again:

Address details (as of 13/10/2021) Matt French LESS

Address Emergency contact details Driving Licence details

17. Clicking on a link will take you to the relevant page for the same employee you have selected, alternatively select another employee from the left-hand pane

18. Or click on the person's name at the top of the screen to return to the 'Person Summary' screen:



The following links are also available in this folder and are read only:

- **Emergency contact details** – This page displays contact information and addresses for the employee's emergency contacts:

Emergency contact details Matt French

Name

Relationship

Contact at

Primary contact ☒

- **Driving Licence details** – This page displays the employee's driving licence information and details of current disqualifications:

Driving licence details Matt French

Licence details

Name on driving licence

Valid from

Valid until

Date verified

Licence number

Licence categories

Issuing country

Disqualified

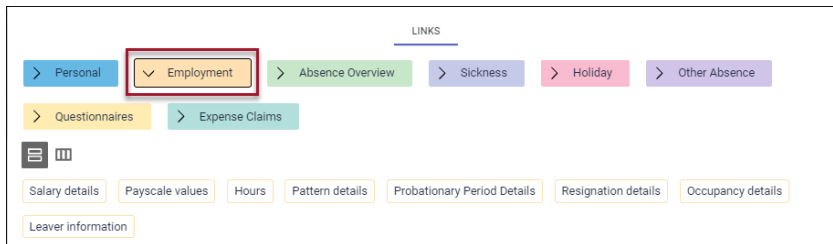
Currently disqualified ☐

Start date

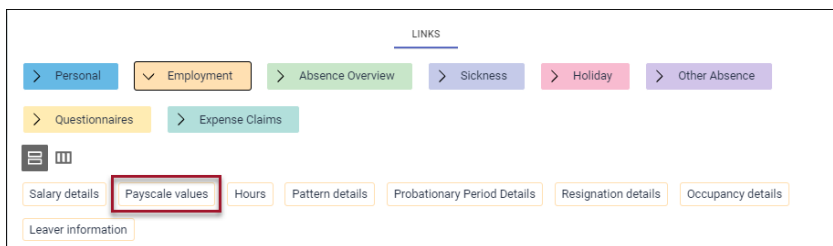
End date

3. Viewing Employment Details

1. To view an employee's employment details, select the '**Employment**' folder from the links section at the bottom of the screen:



2. Several links will appear giving you access to the selected employee's employment information
3. To view the information, click on the appropriate link, e.g. '**Payscale values**':



4. Some pages will prompt you for an **Effective Date** before displaying the information, this gives you the ability to look at information 'as at' a future or past date
5. In the '**Effective date**' prompt, enter the date you want to view the details; typically, today's date, or change the date by typing or using the date picker:

Effective date

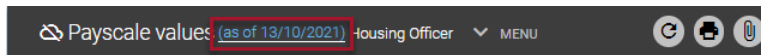


Please enter the date you wish to view or edit this information from.

13/10/2021 

OK CANCEL

6. Click OK to confirm the date and the relevant details will be displayed
7. The selected effective date will be displayed in the page menu bar:

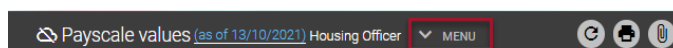


8. Clicking on the date will open the 'Effective date' pop-up
9. The 'Payscale values' page will be displayed

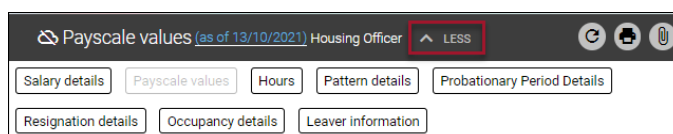
 A screenshot of the 'Payscale values' page. The header shows 'Payscale values (as of 13/10/2021)' and 'Housing Officer'. The main content area has a search bar with 'HDC Grade 11' entered. Below this are several dropdown menus and input fields: 'Payment table' (set to 'Harlow DC Salary Scales'), 'FT Salary' (28 - 32,234.00), 'Protected', 'Override minimum', 'Override bar point', 'Override maximum', 'Grade payment table' (Harlow DC Salary Scales), 'Grade minimum' (26 - 30,451.00), 'Bar point', 'Grade maximum' (28 - 32,234.00), 'Next increment date' (with a calendar icon), 'Additional increment points', 'Protected rate of pay', 'FTE value (rounded to 5 DP)', and 'Change reason'.

Note: This page is read only.

10. Click on 'MENU' at the top of the page to access additional links in the folder:



11. Click 'LESS' to minimise the menu:

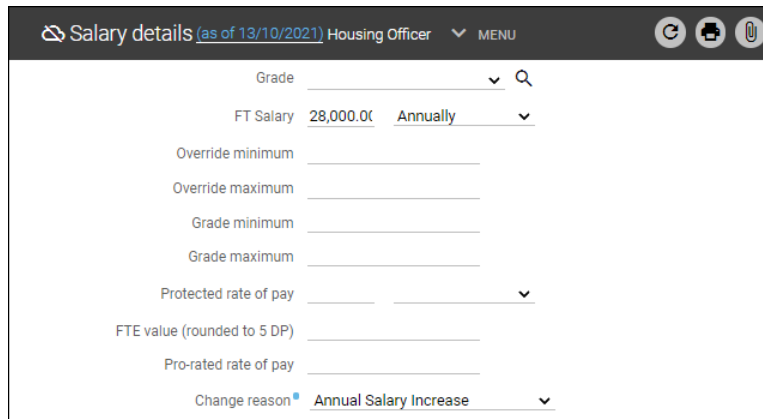


12. Clicking on a link will take you to the relevant page for the same employee you have selected, alternatively select another employee from the left-hand pane
13. Or click on the person's name at the top of the screen to return to the **Person Summary** screen:



The following links are also available in this folder and **are read only**, you should contact Human Resources if the information displayed is incorrect.

- **Salary details** – This page displays details of the employee Grade and/or Salary. Please note the employee may have Payscale values OR Salary details but will not have both:



Salary details (as of 13/10/2021) Housing Officer MENU

Grade

FT Salary

Override minimum

Override maximum

Grade minimum

Grade maximum

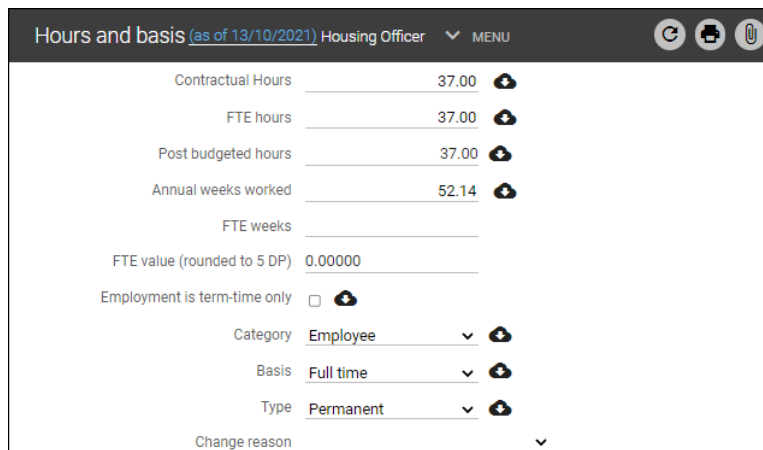
Protected rate of pay

FTE value (rounded to 5 DP)

Pro-rated rate of pay

Change reason

- **Hours** – This page displays the employee's current contractual hours and employment basis e.g. Permanent / Full time:



Hours and basis (as of 13/10/2021) Housing Officer MENU

Contractual Hours

FTE hours

Post budgeted hours

Annual weeks worked

FTE weeks

FTE value (rounded to 5 DP)

Employment is term-time only ☐

Category

Basis

Type

Change reason

- **Pattern details** - This page displays the employee's current working pattern:

Pattern details Working Pattern
MENU

Pattern information

Type Working Pattern

Pattern 37:30 M07:30 T07:30
W07:30 T07:30 F07:30
S00:00 S00:00x

Start day Week 1 / Day 5

Start date 01/01/2021

End date

Hours information

Contractual hours 37.50

Pattern days

Current day Week 1 / Day 3

| | Mon | Tue | Wed | Thu | Fri | Sat | Sun | Total |
|--------|-------|-------|-------|-------|-------|-------|-------|-------|
| Week 1 | 07:30 | 07:30 | 07:30 | 07:30 | 07:30 | 00:00 | 00:00 | 37:30 |

- **Probation Period Details** - This page displays the employee's probationary start and end dates:

Probationary period details Housing Officer
MENU

Job title Housing Officer

Reason New Appointment

Complete ☐

Start date 06/09/2021

End date 07/03/2022

- **Resignation details** – Where submitted by the employee, this page displays the resignation details entered in Employee Self Service:

Resignation details ▾ MENU

Last working day 22/10/2021

Resignation statement

I would like to notify you that I am resigning from my position of Housing Officer effective from October 29th 2021.

Cancel resignation ☐

- **Occupancy details** – This page displays the employee's occupancy details including occupancy type and occupancy start and end dates:

Occupancy details (as of 13/10/2021) Housing Officer ▾ MENU

Current status Live

Occupant Anita Oakhill

Occupancy start 06/09/2021

Occupancy end

Occupancy type Acting Up ▾

Position occ. reference 000834A

Expected occupancy end date

Expected occupancy end reason ▾

End occupancy ☐

- **Leaver information** - This page displays the employee's leaving date and reason for leaving if they have been made a leaver in the system:

Leaver information Matt French ▾ MENU

Leaving details

Leaving date 29/10/2021

Last working day 29/10/2021

Reason for leaving Resignation ▾

Last payment date 29/10/2021

Re-employable ☐

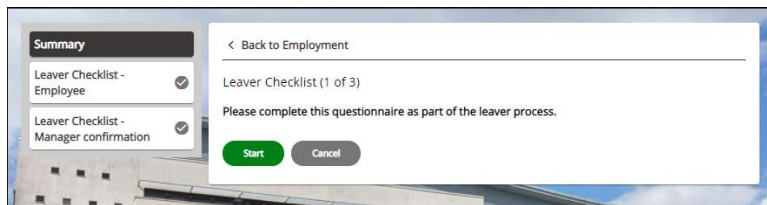
Exit interview complete ☐

4. Leaver Checklist

Employees will submit their resignation notice via Employee Self Service.

Once the colling off period has expired (24 hours) you will be notified of the submission via email.

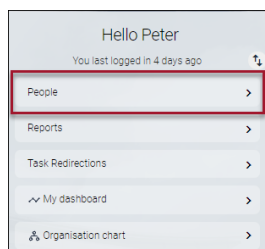
30 days before the employee's leaving date, they will automatically receive a '**Leaver Checklist**' form to complete in Employee Self Service:



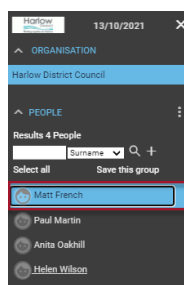
Your reportee will complete page one of the form, and once submitted you will receive an email alert and a task in your To do list prompting you to complete page two.

5. Completing the Leaver Checklist

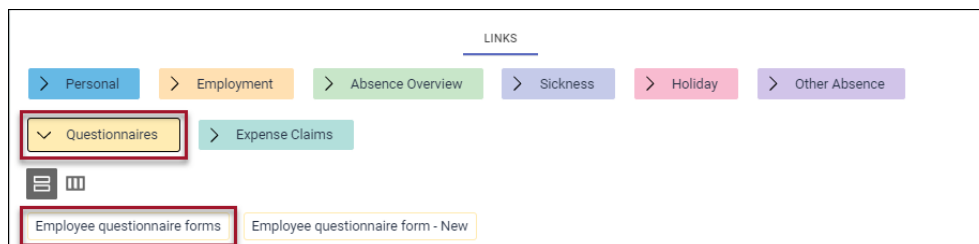
1. To access your employee's Leaver Checklist, log into Manager Self Service and select the '**People**' section from the right-hand section's menu:



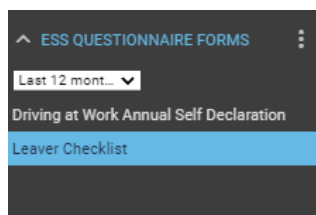
2. Search for or select the employee from the left-hand pane:



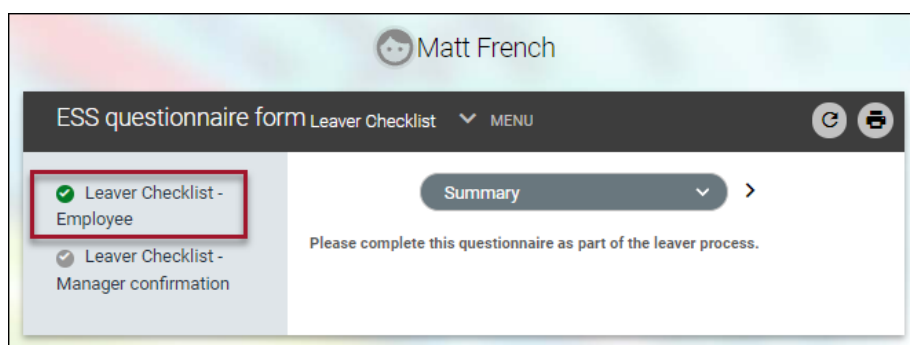
3. The **Person Summary** screen will open
4. Select the '**Questionnaires**' folder and the '**Employee questionnaire forms**' link:



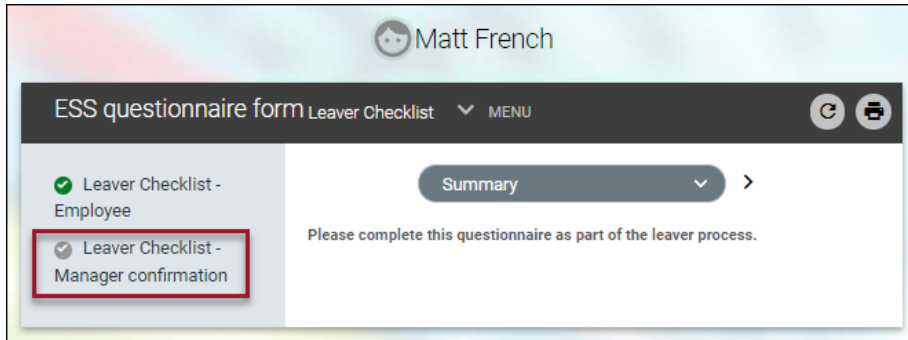
5. If more than one form has been attached, select the relevant form from the left-hand pane:



6. This will open the '**Leaver Checklist**' form and you will see that page one has been completed by your reportee:



7. Select the '**Leaver Checklist – Manager confirmation**' page to complete the details:



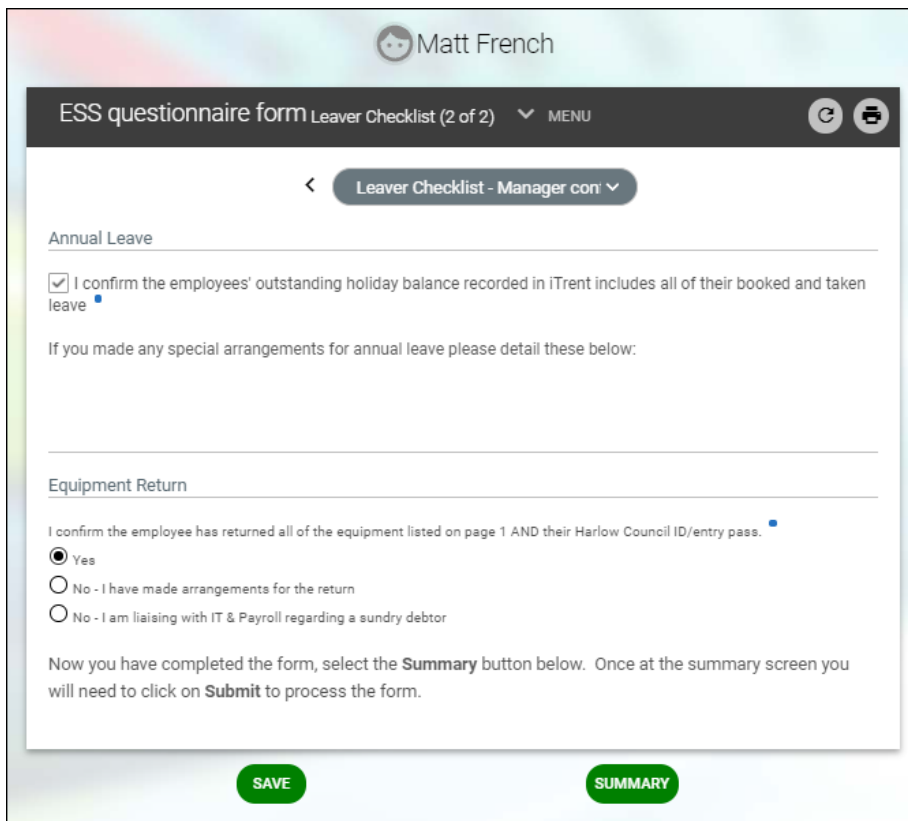
ESS questionnaire form Leaver Checklist MENU

Leaver Checklist - Employee

Leaver Checklist - Manager confirmation

Summary

Please complete this questionnaire as part of the leaver process.



ESS questionnaire form Leaver Checklist (2 of 2) MENU

Leaver Checklist - Manager confirmation

Annual Leave

☒ I confirm the employees' outstanding holiday balance recorded in iTrent includes all of their booked and taken leave

If you made any special arrangements for annual leave please detail these below:

Equipment Return

I confirm the employee has returned all of the equipment listed on page 1 AND their Harlow Council ID/entry pass.

☒ Yes

☐ No - I have made arrangements for the return

☐ No - I am liaising with IT & Payroll regarding a sundry debtor

Now you have completed the form, select the **Summary** button below. Once at the summary screen you will need to click on **Submit** to process the form.

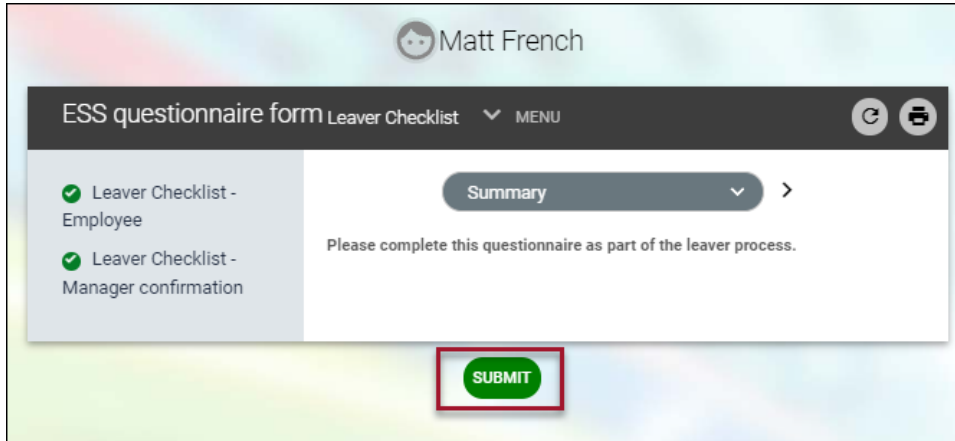
SAVE SUMMARY

8. Click the '**Summary**' button to return to the summary page:



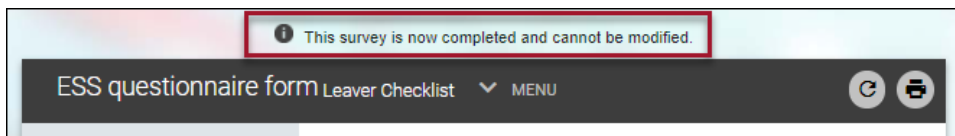
SUMMARY

9. Click '**Submit**' to submit the form:



The screenshot shows a web interface for a user named Matt French. The main heading is "ESS questionnaire form" with a sub-heading "Leaver Checklist" and a "MENU" button. On the left, there are two checklist items, both marked with green checkmarks: "Leaver Checklist - Employee" and "Leaver Checklist - Manager confirmation". In the center, there is a "Summary" button with a dropdown arrow and a right-pointing chevron. Below this, a message states: "Please complete this questionnaire as part of the leaver process." At the bottom center, there is a green "SUBMIT" button, which is highlighted with a red rectangular box.

10. You will be notified that the form is complete and cannot be modified:



The screenshot shows the same web interface as the previous one, but with a red rectangular box highlighting a notification message at the top: "This survey is now completed and cannot be modified." The notification has an information icon (i) on the left. Below the notification, the "ESS questionnaire form" heading and "Leaver Checklist" sub-heading are visible, along with the "MENU" button and a refresh/print icon.