

View or Update Your Personnel Information



This Quick Card addresses the viewing (and updating) by employees of their own Personnel Information, including key details such as Name, Gender, Marital Status, Contact Information, Emergency Contacts, Diversity details, Vaccination records etc.

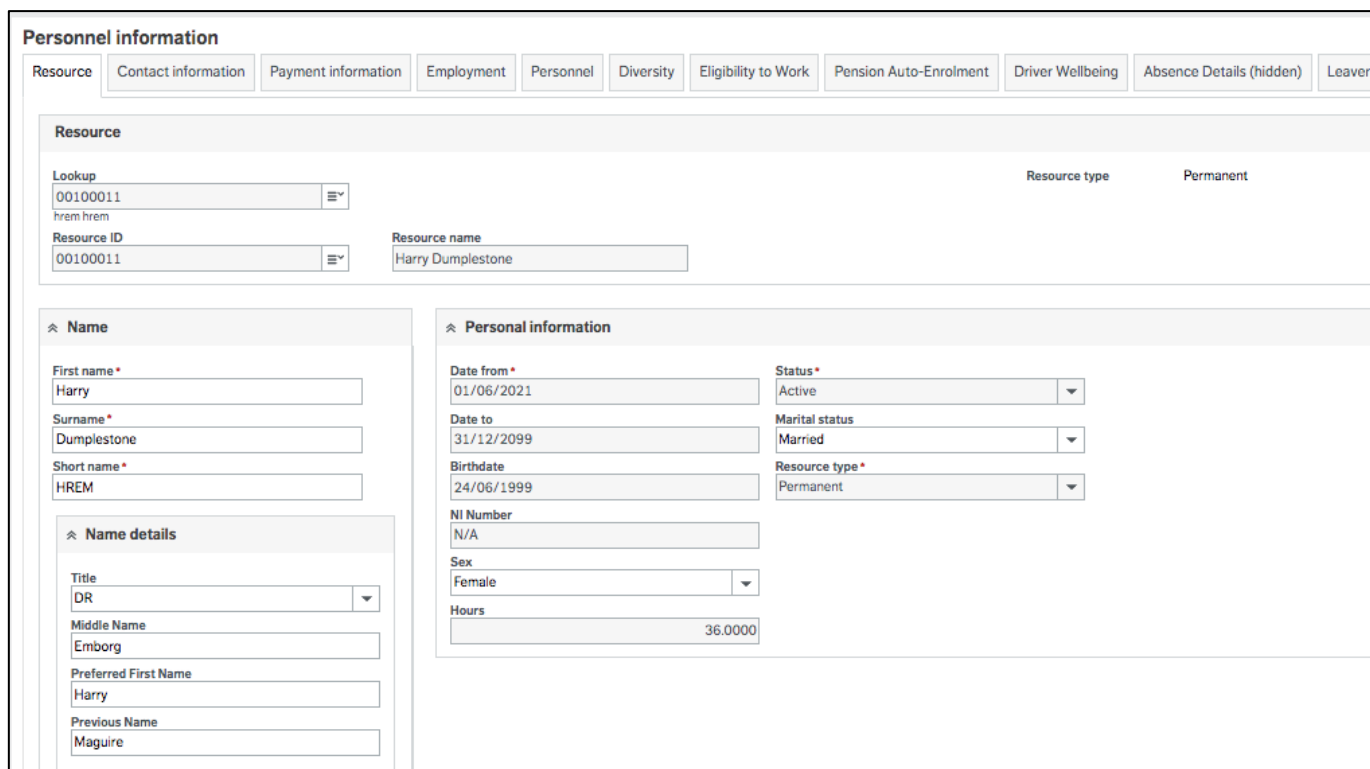
Part 1 – Viewing and Updating ‘Personnel Information’

1A – Intro to the ‘Personnel Information’ screen (for Employees)

On the various tabs of the **Personnel Information** screen, you can view and/or edit a set of your own (personal) details.

This screen holds various categories of data, spread across multiple “tabs” – including, for example: Name, Gender, Marital Status, Address, Emergency Contacts, Diversity details, Vaccination records etc.

To search for and view a Personnel record, go to: **Your employment > Your employment> Personnel Information**. Some fields can be amended (and those amendments then “saved”), while others are greyed out (or even hidden) and may only be editable by the central teams (e.g., Payroll and Employment Details).



Personnel information

Resource | Contact information | Payment information | Employment | Personnel | Diversity | Eligibility to Work | Pension Auto-Enrolment | Driver Wellbeing | Absence Details (hidden) | Leaver

Resource

Lookup: 00100011 (dropdown) Resource type: Permanent
Resource ID: 00100011 (dropdown) Resource name: Harry Dumblestone

Name

First name *: Harry
Surname *: Dumblestone
Short name *: HREM

Name details

Title: DR (dropdown)
Middle Name: Emborg
Preferred First Name: Harry
Previous Name: Maguire

Personal information

Date from *: 01/06/2021 (dropdown) Status *: Active (dropdown)
Date to: 31/12/2099 (dropdown) Marital status: Married (dropdown)
Birthdate: 24/06/1999 (dropdown) Resource type *: Permanent (dropdown)
NI Number: N/A
Sex: Female (dropdown)
Hours: 36.0000

Save Clear

Part 2 – Resource Tab (View and Update)

2A – View or Update Resource tab information

On the **Personnel information** screen, the **Resource** tab displays by default.

All fields in the screenshot below are visible to each employee. Many fields are self-explanatory so only those requiring further explanation are touched on below.

Some fields are editable (e.g., **First Name, Surname, Sex and Marital status**), while some are view-only (e.g., **Birthdate, NI Number** etc.)

The **Resource** tab displays information on Names, Resource type, Resource name, Marital Status, Sex, Working hours and the Date range of your employment. Greyed-out Fields cannot be altered by an employee. If a greyed-out field contains incorrect information, then you should notify Employee Services.

Date from refers to your start date with the organisation. If there is no pre-defined end-date (e.g., for permanent employees), then **Date To** defaults as 31/12/2099. Fixed-Term Contractors will have their current contract end date display in the **Date To** field.

Some staff may see some extra boxes these are used internally, and you do not have to do anything with them.

The screenshot shows the 'Personnel information' screen with the 'Resource' tab selected. The form is divided into several sections:

- Resource**: Contains 'Lookup' (00100011) and 'Resource ID' (00100011) dropdown menus, and a 'Resource name' field with the value 'Harry Dumblestone'.
- Name**: Includes 'First name' (Harry), 'Surname' (Dumblestone), and 'Short name' (HREM). Below this is a 'Name details' section with 'Title' (DR), 'Middle Name' (Emborg), 'Preferred First Name' (Harry), and 'Previous Name' (Maguire).
- Personal information**: Includes 'Date from' (01/06/2021), 'Date to' (31/12/2099), 'Birthdate' (24/06/1999), 'NI Number' (N/A), 'Sex' (Female), 'Hours' (36.0000), 'Status' (Active), and 'Marital status' (Married). 'Resource type' is set to 'Permanent'.
- Attributes**: Includes 'Mini Masters Cross Reference' (00).
- Additional information**: A section for further details.

At the bottom of the form, there are 'Save' and 'Clear' buttons.

Important Note: some edits e.g., **Name, Sex and Marital Status** require supporting documentation which must be attached to enable Safer staffing to do the final approval otherwise the changes will be rejected.



If an employee changes basic data, such as their Emergency Contact Details, Bank Account, or updates their Vaccination details, no approval is needed.

Change of Marital Status

If you make a change to the Marital Status field, you need to attach a copy of the Marriage Certificate or Decree Absolute. The change will not take effect until the relevant document has been attached and workflow has finished.

Change of Name

If you make a change to the Name field you need to attach a copy of the Name Change Certificate, Marriage Certificate or other related document. The change will not take effect until the relevant document has been attached and workflow has finished.

Change of Gender

Please note that upon making a change to the Gender field you need to attach a copy of the Gender Recognition Certificate. The change will not take effect until the relevant document has been attached and workflow has finished.

Details of how to attach supporting documentation via the Paper Clip icon are provided in Section 2C.

2B – Saving Personnel Information Updates



Upon completing any relevant updates on the **Resource** tab, you can either proceed to click on the next tab where changes are to be applied (before then saving), or if there are no other changes, just click **Save** at the bottom of the screen.

Multiple tabs can be updated in one session, before committing those updates by clicking the **Save** button at the bottom of the screen.

Save

Upon saving a change to one or more of the above fields and clicking the **Save** button at the bottom of the screen, a Personnel Detail Changes task is workflowed to Employee Services for the documentation to be verified and subsequently approved/rejected. If approved, these changes are automatically applied on MySurrey.

Whilst awaiting approval, the employee's Personnel record will display the requested change field/s in orange (with the original entry) and the requested change displayed in the Warning bar (at the bottom of the screen). For example:

Warnings: 9

^ Name

First name*

hrem



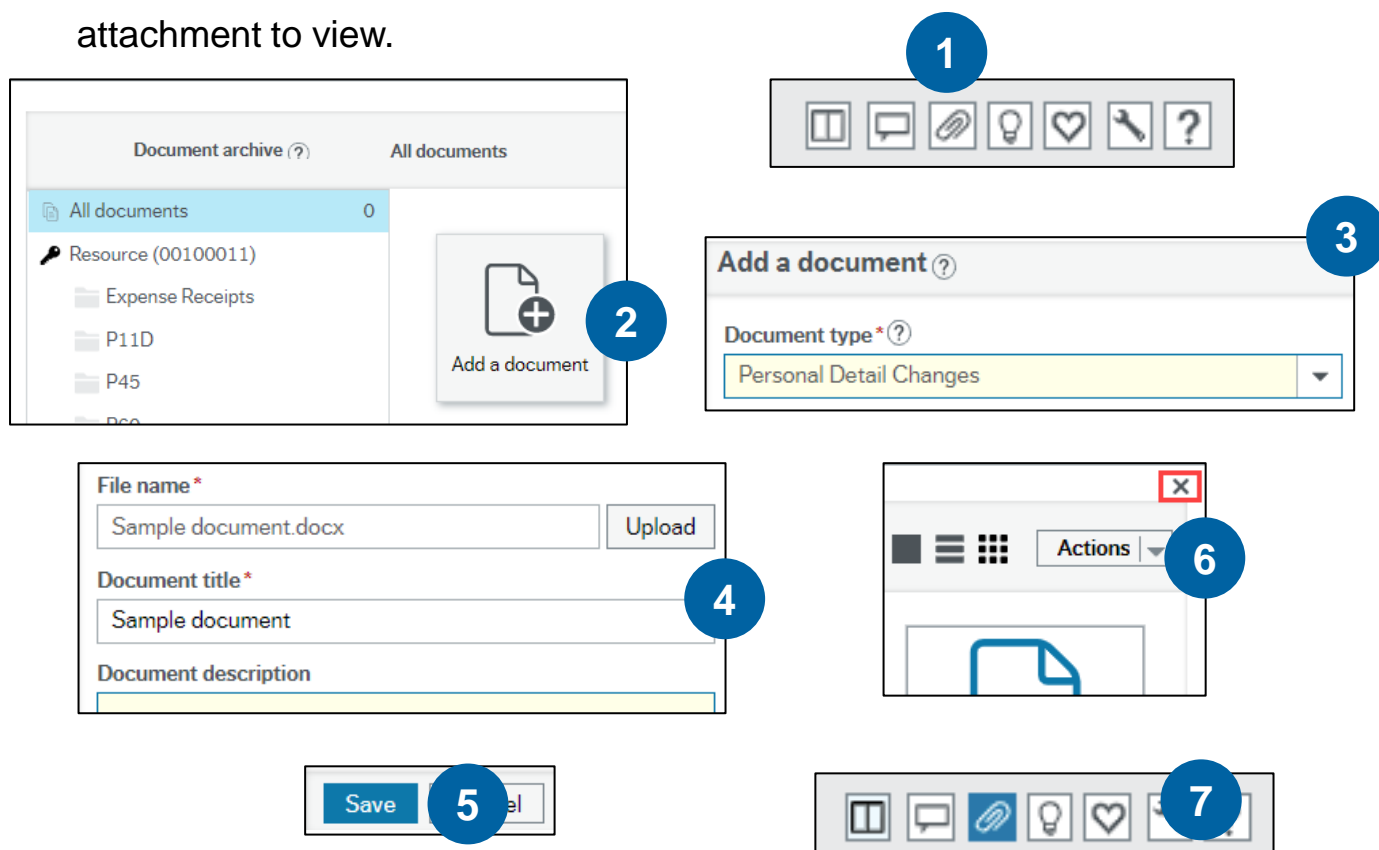
- Warning:
- The following fields have been sent to workflow and are awaiting approval:
 - First name:** Harry (New value)

To abandon changes made without saving, click **Clear** at the bottom of the screen.

Clear

2C – Attach supporting documentation (where applicable)

1. Click the **Paperclip** icon in the top right corner to open the **Document archive**.
2. Click **Add a document** in the popup window.
3. Select the relevant option from the **Document type*** dropdown.
4. Click **Upload** to navigate to the document location, then click **Open**.
The **File name** and **Document title** autofill.
5. Click **Save** in the bottom left corner of the pop up.
The uploaded document displays as an icon in the **Document archive**.
6. Click **X** in the top right corner of the **Document Archive** window to close it.
7. The **Paperclip** icon turns blue, to highlight to the approver that there is an attachment to view.



2D – Personnel Information Changes - Email Notifications



If the employee's name and/or address is changed, the employee receives an email notification advising them to notify any relevant 3rd parties such as HMRC or Pensions.

If Employee Services change an employee's bank details on their behalf, the employee will be notified via email.

Part 3 – View or Update Contact information tab (View and Update)

3A – View Existing Contact Information

The **Contact Information** tab comprises of two sections, **Address** and **Personal Contacts**.

The **'Home'** Address Type is the home address (there are various additional address types that can be added by the relevant teams if required).



Some information displays in the table rows, but to view more detailed information for any address listed in the **Address** section of the **Contact information** tab, click on the row in the table.

The selected row highlights in blue, and the details associated with the row display below (in the **Address Details** section), including full home address and postcode, phone numbers, email address etc.

| <input type="checkbox"/> | Address type | Contact | Street address | Postcode | Town | Telephone | Mobile | E-mail |
|--------------------------|--------------|---------|----------------|----------|----------|------------|------------|---------|
| <input type="checkbox"/> | Home Address | | 1 Home Street | ABC123 | Hometown | 0123123123 | 0234234234 | a@b.com |

Address details

Address

Address type: Home Address

Contact: [Empty]

Street address: 1 Home Street

Country: United Kingdom

Postcode: ABC123

Town: Hometown

Phone numbers

Telephone: 0123123123

Mobile: 0234234234

Pager: [Empty]

Home: [Empty]

E-mail and website

E-mail: a@b.com

E-mail cc: [Empty]

URL: [Empty]

The **Personal Contacts** section displays the **Next of Kin's** details and priority ranking in case of an emergency. It also enables the entry to be marked as an Emergency contact.

Relevant checkboxes should be ticked accordingly. The Checkboxes are **Next of kin** and **Emergency**.

Personal contacts

Next of kin: [] Emergency: []

| <input type="checkbox"/> | Name | Relationship | Address | Birthdate | Telephone | Mobile | Notes | Priority | Next of kin | Emergency |
|--------------------------|------|--------------|---------|------------|-----------|--------|-------|----------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | test | Brother | | 12/04/1986 | | | | 0 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Add Delete

3B – Update Existing Contact Information

Address details cannot be amended directly within the table.

To amend address details:

1. Click on the relevant Address row to select it.

The selected row highlights in blue, and current details associated with the row display below (in the **Address Details** section), including phone numbers, email, address etc.

2. Click in the field you wish to edit - It highlights in yellow – then enter the relevant details (this depends on whether it is a free text field or another field type, such as a dropdown list for selection of **Country**).
3. Repeat the above steps for each field that needs to be updated.



Employees do not typically have access to add new Address rows but can edit existing rows (most notably **Home Address**).

Home Address 1 Home Street ABC123 Hometown 0123123123 0234234234

Address details

Address

Address type: Home Address

Contact: [Empty]

Street address: 1 Home Boulevard

Phone numbers

Telephone: 0123123123

Mobile: 0234234234

Pager: [Empty]

E-mail and website

E-mail: a@b.com

E-mail cc: [Empty]

URL: [Empty]

Personal Contacts details *can* be amended directly in the table.

1. To amend an existing contact's details, click into the relevant field(s) and make the necessary changes.
2. To enter a new contact, click **Add**. A new blank row displays, to which you should then add the relevant details, including the **Priority** (1 being the highest), and ensuring you tick relevant checkboxes to indicate whether each contact is a **Next of kin**, **Emergency** contact

Personal contacts

Next of kin Emergency

| <input type="checkbox"/> | Name | Relationship | Address | Birthdate | Telephone | Mobile | Notes | Priority | Next of kin |
|--------------------------|----------|--------------|--------------------|------------|------------|------------|---------|----------|-------------------------------------|
| <input type="checkbox"/> | Joe Hart | Brother | 1 Near Home Street | 01/06/1922 | 0123123123 | 0125125125 | Mon-Fri | 1 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | | | | | | | | 0 | <input checked="" type="checkbox"/> |

Add Delete



Having made all necessary updates, be sure to click **Save** before closing the **Personnel** record, or the updates will be lost.

Part 4 – Payment Information tab (View and Update)

4A – View or Update Payment Information tab

This tab holds the employee's **Default Payment Information**.

Key fields include:

- **Pay method** (locked and cannot be changed by an employee)
- **Bank account**
- **Account name**
- **Building Society Number**
- **Sort Code**

The **Pay Method** and **Bank account** fields are mandatory.

The screenshot shows a web interface for 'Personnel information'. It has three tabs: 'Resource', 'Contact information', and 'Payment information'. The 'Payment information' tab is active. Inside this tab, there is a sub-section titled 'Default payment information'. This section contains several input fields: 'Pay method*' is a dropdown menu with 'BACS' selected; 'IP' is a text field; 'Bank account*' is a text field with '01234567' entered; 'Account Name' is a text field with 'Harry Dumblestone' entered; 'Building Sec No' is a text field with '0' entered; and 'Sort code' is a text field with '123456' entered.

Bank details may be amended either by the employee, or by Employee Services on behalf of the employee.



If Employee Services change an employee's bank details on his/her behalf, the employee will be notified via email.

Please note that any changes to bank details that are inputted after pay run will not take effect until the next pay run.



Having made all necessary updates, be sure to click **Save** before closing the **Personnel** record, or the updates will be lost.

Part 5 – Personnel Tab (View Only)

5A – Viewing Personnel tab details

This tab comprises of three sections, **Resource Codes**, **Resource dates** and **Additional information**. This tab is a view only tab and shows the below:

- **Induction Indicator** – shows a tick if the relevant line manager has confirmed that your induction (for new starters) was successfully completed. This is not yet being used.
- **Home Worker** - Displays if you are set up as a Home Worker (this is set up at the recruitment stage and the employee must have a **Home Worker** contract setup). Please note this is not the same as working from home as part of agile working.
- **Age and length of service** - These fields are calculated from a server process (run via the Desktop) based on the employee's Date of birth and their Start date.
- **Continuous service Date** - The Continuous service date is manually input based on information supplied by the new starter.
- **Probation End Date** - The end date is 6 months after the new employee's Start date.
- **Probation completed and Probation Extended** - These field are not yet being used.

The screenshot shows the 'Personnel information' tab selected in a navigation menu. The main content area is divided into three sections:

- Resource codes:** Contains two input fields: 'Induction Indicator' and 'Home Worker', both with three asterisks (***) to the right.
- Resource dates:** Contains three input fields: 'Age' (with the value '22' displayed), 'Start date', and 'Probation End Date'.
- Additional information:** Contains three input fields: 'Length of Service' (with the value '1.0' displayed), 'Probation Completed', and 'Probation Extended', each with a small square icon to its left.

Part 6 – Diversity Tab (View and Update)

6A – Viewing or Updating Your Diversity details

On this tab, fields in various sections can be viewed and/or updated, including:

National Identity, Ethnic Origin, Religion or Belief, Gender identity, Sexual Orientation, Marital Status, Military Service, Disability and Caring responsibilities.

Personnel information

Resource | Contact information | Payment information | Employment | Personnel | **Diversity** | Eligibility to Work | Pension Auto-Enrolment | Driver Wellbeing

Resource

Lookup
00100011
hrem hrem

National Identity

What do you consider your national identity to be?

British
GB

Ethnic Origin

How do you describe your ethnic origin?

Mixed - Black African & White
MXWHTBLKAFRI

Religion or Belief

What word would you use to describe your religion or belief?

Christian
CHRISTIAN

Gender Identity

What word do you use to describe your gender identity?

Male
MALE

Do you identify as the sex you were assigned at birth?

Yes
Y

Sexual Orientation

What word do you use to describe your sexual orientation?

Heterosexual
HT

Marital Status

How do you describe your marital status?

Divorced
D

Military Service

How do you describe your military experience?

No longer serving (UK)
NLSUK

Disability

The definition of disability under the Equality Act 2010 is:
A physical or mental impairment which has a substantial and long term negative effect on a person's ability to do normal daily activities.

Please indicate if you are disabled:

No
NO

How would you describe your disability/impairment?

Not applicable
NA

Caring Responsibilities

A carer provides unpaid support to family or friends.
A parent carer means any person with parental responsibility for a child or young person under the age of 18. It is an inclusive term and covers for instance foster carers, adoptive parents and other family members.

Are you a carer?

No
NO

How many hours a week do you undertake this caring role?

Not applicable
NA

Are you a parent carer?

No
NO

Save | Clear | New | Copy | Active items | Export | Balance | Payment dispatch | Rates | Fixed/periodic PDs | More actions



Having made all necessary updates, be sure to click **Save** before closing the **Personnel** record, or the updates will be lost.

Part 7 – Eligibility to Work tab (View only)

7A – Viewing Your Eligibility to Work details

The Employee is expected to provide appropriate and valid documents to prove their eligibility to work both as a new starter, and potentially on a regular basis in line with organisational policy.



An employee cannot amend their own details on **Eligibility to Work** tab. Relevant documentation must be provided to the Safer Staffing team upon request, to ensure continued eligibility to work.

List A document, displays the type of acceptable document that establishes a continuous statutory excuse. This is no longer required so greyed out.

Resource

Lookup
00101992
Tanya Herrera

List A

i Acceptable documents to establish a continuous statutory excuse.

List A Document Date of issue Country of issue

Reference Last checked

List B is split into 2 separate groups:

List B - Group 1

i Documents where a time-limited statutory excuse lasts until the expiry date of leave.

| <input type="checkbox"/> | List B - Group 1 Document | Date of issue | Expiry Date | Country of iss... | Reference | Last checked | |
|--------------------------|--|---------------------------------|---------------------------------|-------------------|-----------|---------------------------------|----------------------------------|
| <input type="checkbox"/> | 01. A current passport endorsed to show that the holder is allowed to stay in the UK a 01 | 01/06/2022 <input type="text"/> | 09/06/2026 <input type="text"/> | United Kin GB | | 13/06/2022 <input type="text"/> | <input type="button" value="v"/> |

List B - Group 2

i Documents where a time-limited statutory excuse lasts for 6 months.

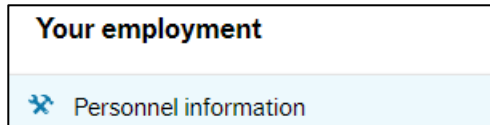
| <input type="checkbox"/> | List B - Group 2 Document | Date of issue | Expiry Date | Country of iss... | Reference | Last checked | |
|--------------------------|---|---------------------------------|---------------------------------|-------------------|-----------|---------------------------------|----------------------------------|
| <input type="checkbox"/> | 03. An application registration card issued by the Home Office stating that the holder is 03 | 15/06/2017 <input type="text"/> | 15/06/2028 <input type="text"/> | United Sta US | | 13/06/2022 <input type="text"/> | <input type="button" value="v"/> |

- Documents where a time-limited statutory excuse lasts until the expiry date of leave.
- Documents where a time-limited statutory excuse lasts for 6 months.

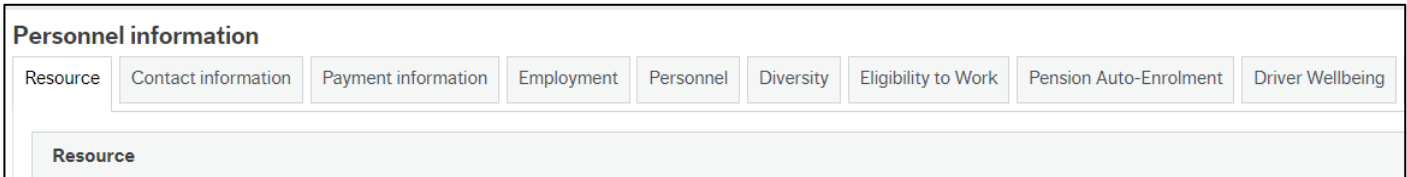
Part 8 – Driver Wellbeing tab (View Only)

8A – Checking Your Driver Well-being Details

1. Navigate to **Your Employment > Your Employment > Personnel Information**.

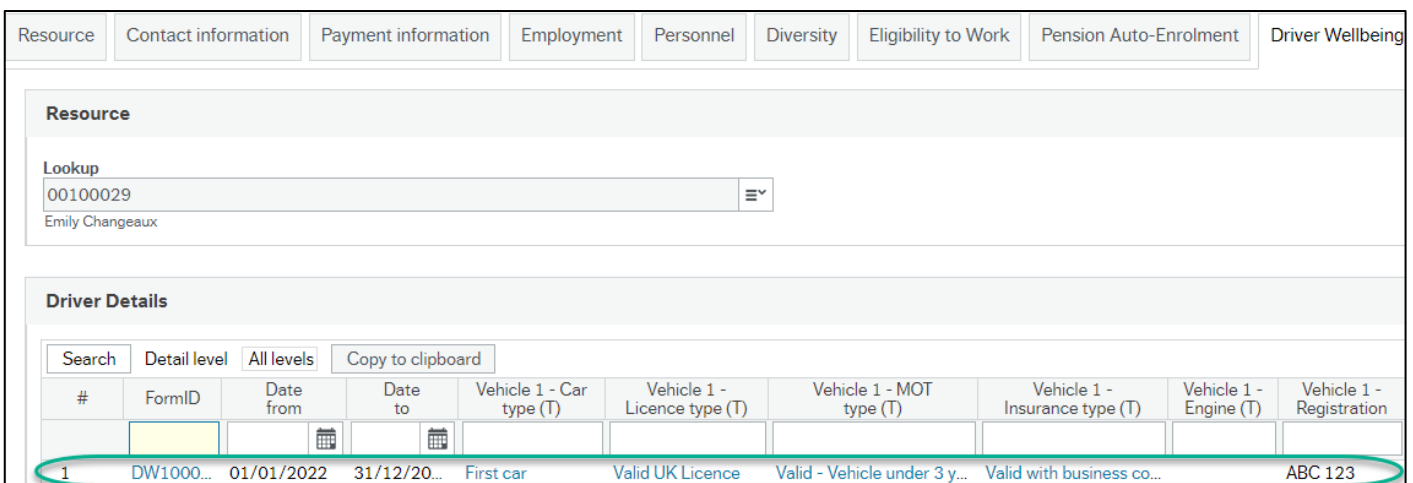


The **Personnel Information** screen opens, defaulting to show the **Resource** tab for the logged-in user.



2. Click on the **Driver Wellbeing** tab.

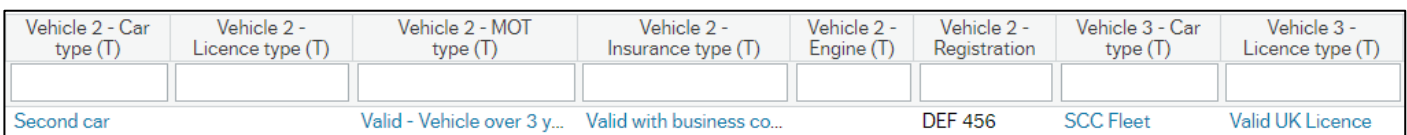
The tab displays details of all approved **Driver Wellbeing** forms for the logged-in user, in table format.



The screenshot shows the "Driver Wellbeing" tab selected. Below the tabs is a "Resource" section with a "Lookup" field containing "00100029" and "Emily Changeaux". Below that is a "Driver Details" section with a search bar and a table of driver details. The table has columns for #, FormID, Date from, Date to, Vehicle 1 - Car type (T), Vehicle 1 - Licence type (T), Vehicle 1 - MOT type (T), Vehicle 1 - Insurance type (T), Vehicle 1 - Engine (T), and Vehicle 1 - Registration. A single row is visible with the following data: 1, DW1000..., 01/01/2022, 31/12/20..., First car, Valid UK Licence, Valid - Vehicle under 3 y..., Valid with business co..., ABC 123.

| # | FormID | Date from | Date to | Vehicle 1 - Car type (T) | Vehicle 1 - Licence type (T) | Vehicle 1 - MOT type (T) | Vehicle 1 - Insurance type (T) | Vehicle 1 - Engine (T) | Vehicle 1 - Registration |
|---|-----------|------------|-------------|--------------------------|------------------------------|------------------------------|--------------------------------|------------------------|--------------------------|
| 1 | DW1000... | 01/01/2022 | 31/12/20... | First car | Valid UK Licence | Valid - Vehicle under 3 y... | Valid with business co... | | ABC 123 |

3. Scroll across to the right (where applicable) to see details of additional vehicles submitted using the form.



The screenshot shows the "Driver Wellbeing" table with columns for Vehicle 2 - Car type (T), Vehicle 2 - Licence type (T), Vehicle 2 - MOT type (T), Vehicle 2 - Insurance type (T), Vehicle 2 - Engine (T), Vehicle 2 - Registration, Vehicle 3 - Car type (T), and Vehicle 3 - Licence type (T). The data row shows: Second car, Valid - Vehicle over 3 y..., Valid with business co..., DEF 456, SCC Fleet, Valid UK Licence.

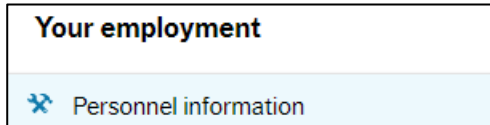
| Vehicle 2 - Car type (T) | Vehicle 2 - Licence type (T) | Vehicle 2 - MOT type (T) | Vehicle 2 - Insurance type (T) | Vehicle 2 - Engine (T) | Vehicle 2 - Registration | Vehicle 3 - Car type (T) | Vehicle 3 - Licence type (T) |
|--------------------------|------------------------------|-----------------------------|--------------------------------|------------------------|--------------------------|--------------------------|------------------------------|
| Second car | | Valid - Vehicle over 3 y... | Valid with business co... | | DEF 456 | SCC Fleet | Valid UK Licence |



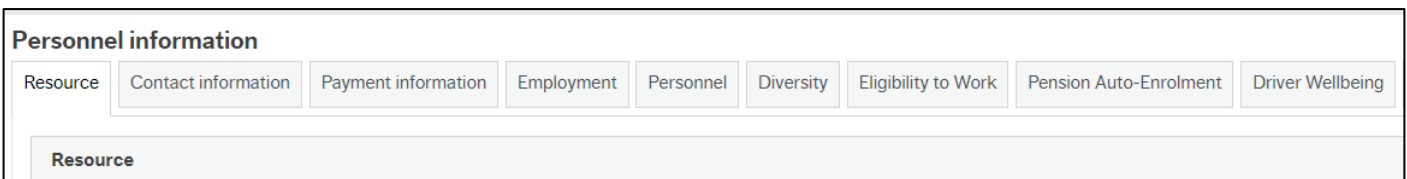
As this is a view-only screen, there is nothing to save, unless you have made amendments to other screens while checking your Driver Well-being details. This page is automatically updated on the completion of the Driver wellbeing form.

9A – Viewing Declaration Details via Personnel Information

1. Navigate to **Your Employment > Your Employment > Personnel Information**.



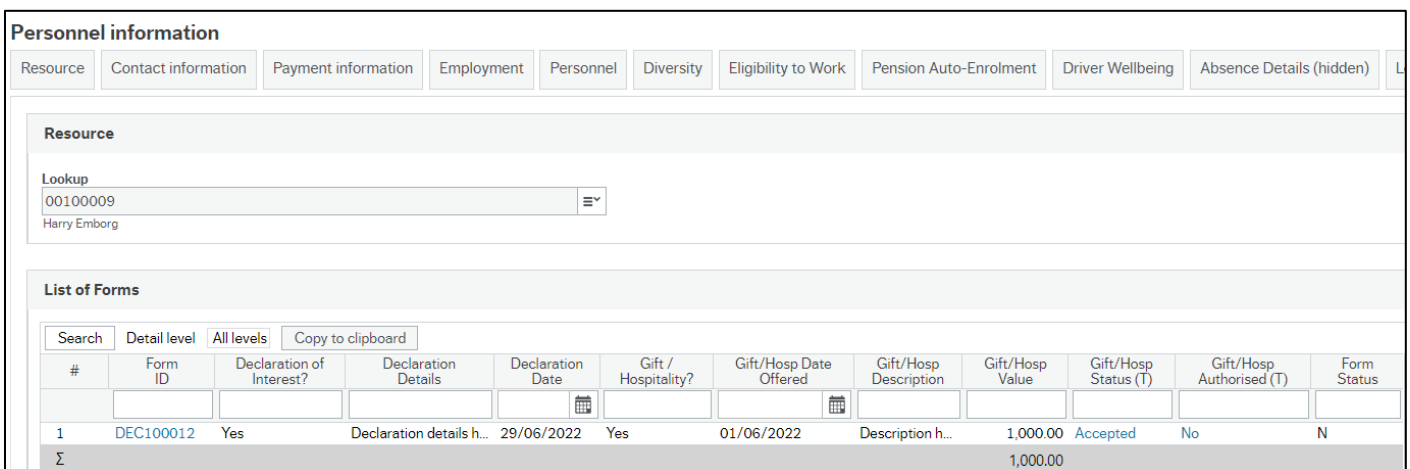
The **Personnel Information** screen opens, defaulting to show the **Resource** tab for the logged-in user.



2. Click on the **Declarations** tab.

The tab displays key details of all **Declaration** forms for the logged-in user, in table format, including:

- **Form ID**
- **Declaration of Interest / Gift / Both**
- **Key Dates relating to Declarations / Gifts**
- **Whether a Gift was Accepted**
- **Whether Acceptance of a Gift was Authorised**



A screenshot of the 'Personnel information' screen showing a list of declaration forms. The 'Resource' tab is selected. Below the tabs, the word 'Resource' is displayed. A 'Lookup' field shows '00100009' and 'Harry Emborg'. Below this is a 'List of Forms' section with a search bar and a table of declaration forms.

| # | Form ID | Declaration of Interest? | Declaration Details | Declaration Date | Gift / Hospitality? | Gift/Hosp Date Offered | Gift/Hosp Description | Gift/Hosp Value | Gift/Hosp Status (T) | Gift/Hosp Authorised (T) | Form Status |
|---|-----------|--------------------------|--------------------------|------------------|---------------------|------------------------|-----------------------|-----------------|----------------------|--------------------------|-------------|
| 1 | DEC100012 | Yes | Declaration details h... | 29/06/2022 | Yes | 01/06/2022 | Description h... | 1,000.00 | Accepted | No | N |
| Σ | | | | | | | | 1,000.00 | | | |



As this is a view-only screen, there is nothing to save, unless you have made amendments to other screens while checking these details. This page is automatically updated on the completion of the Declaration Form.

10A – Updating Your Vaccine Records

On this tab, two key pieces of information can be added and/or amended in relation to vaccinations received:

- **Vaccination Dates** (to be entered manually in the format DD/MM/YYYY or using the Date Control)
- **Vaccination Type** (to be selected from the dropdown list)

Personnel information

Resource | Contact information | Payment information | Employment | Personnel | Diversity | Eligibility to Work | Pension Auto-Enrolment | Driver Wellbeing | **Vaccine record**

Resource

Lookup
00100011
hrem hrem

Vaccine Details

| <input type="checkbox"/> | Date Vaccine Received | Vaccine Type |
|--------------------------|-----------------------|----------------------|
| <input type="checkbox"/> | 11/06/2020 | Covid-19 1st Vaccine |
| <input type="checkbox"/> | 09/07/2022 | Covid-19 2nd Vaccine |

Add | Delete

Vaccination Details can be added to or amended directly in the table.

To amend an existing vaccination record:

1. Click on the row, then click into the relevant field(s) and make the necessary changes to the date and/or the **Vaccination Type**.

To enter a new Vaccination record:

1. Click **Add**. A new blank row displays.
2. Select the **Date** the vaccine was received.
3. Select the **Vaccine Type** from the dropdown list



Having made all necessary updates, be sure to click **Save** before closing the **Personnel** record, or the updates will be lost.

11A – Viewing Historical Right-To-Work Details

This is tab is view-only.

Historical Right to Work information has been migrated from the legacy system, for information purposes of completeness of information.

Personnel information

Resource | Contact information | Payment information | Employment | Personnel | Diversity | Eligibility to Work | Pension Auto-Enrolment | Driver Wellbeing | **Historical Right-To-Work**

Resource

Lookup
00100011

from from

Document 1 - History

| <input type="checkbox"/> | Document Type 1 | Date Issued | Country Of Issue | Additional Info | |
|--------------------------|-----------------|---|------------------|-----------------|----------------------------------|
| <input type="checkbox"/> | | 14/06/2019 <input type="button" value="📅"/> | Canada | Abc 123 | <input type="button" value="▲"/> |

Document 2 - History

| <input type="checkbox"/> | Document Type 2 | Date Issued | Country Of Issue | Additional Info | |
|--------------------------|-----------------|---|------------------|-----------------|----------------------------------|
| <input type="checkbox"/> | | 16/11/2019 <input type="button" value="📅"/> | Canada | Abc123 | <input type="button" value="▲"/> |

Visa - History

| <input type="checkbox"/> | Visa Type | Date Issued | Date Of Expiry | Country Of Issue | Additional Info | |
|--------------------------|-----------|----------------------------------|----------------------------------|------------------|-----------------|----------------------------------|
| <input type="checkbox"/> | | <input type="button" value="📅"/> | <input type="button" value="📅"/> | Canada | Abc 123 | <input type="button" value="▲"/> |



This tab may not contain information for everyone.