View or Update Your Personnel Information

SURREY COUNTY COUNCIL

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.

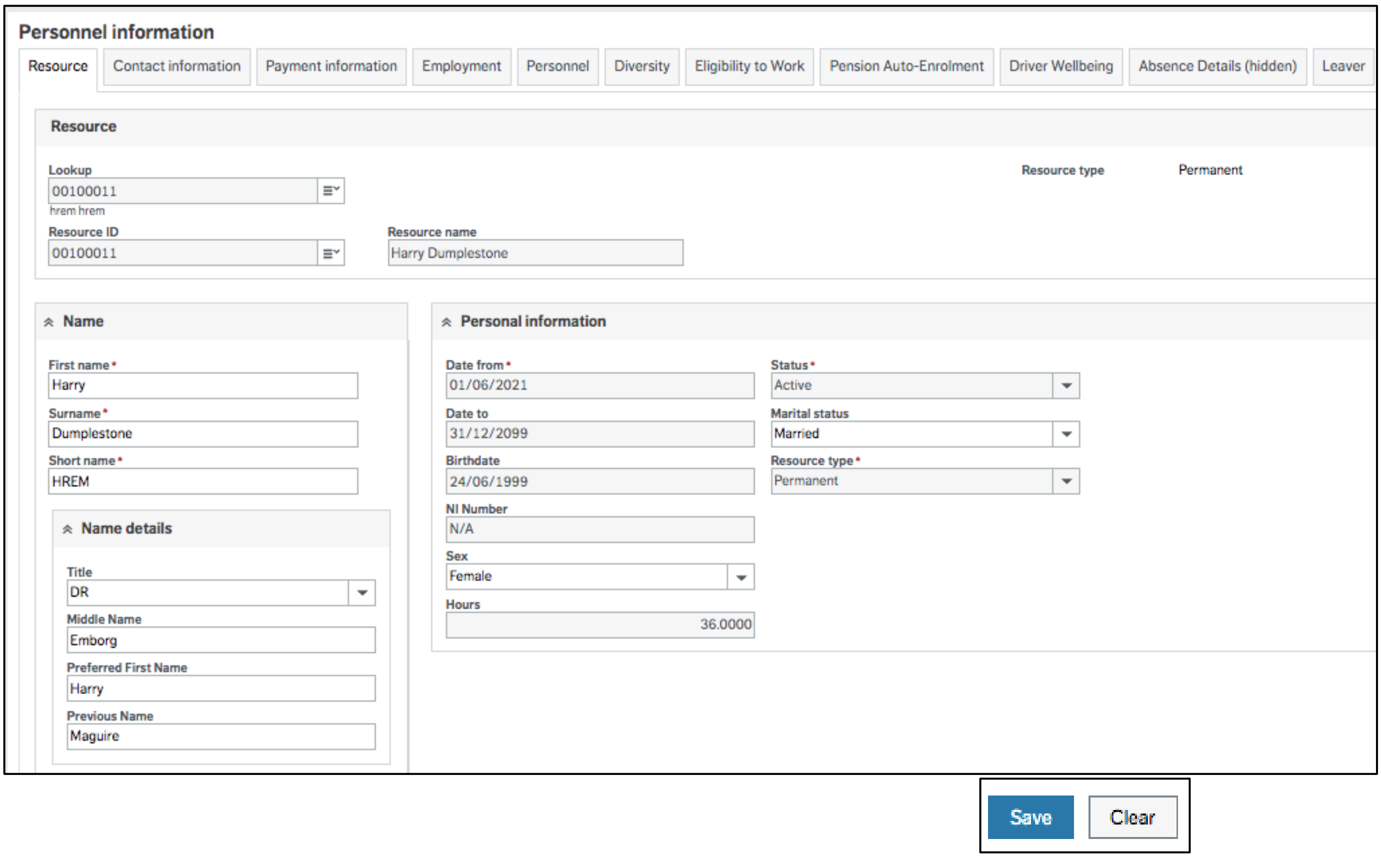
Part 1 – Viewing and Updating 'Personnel Information'

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).



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.

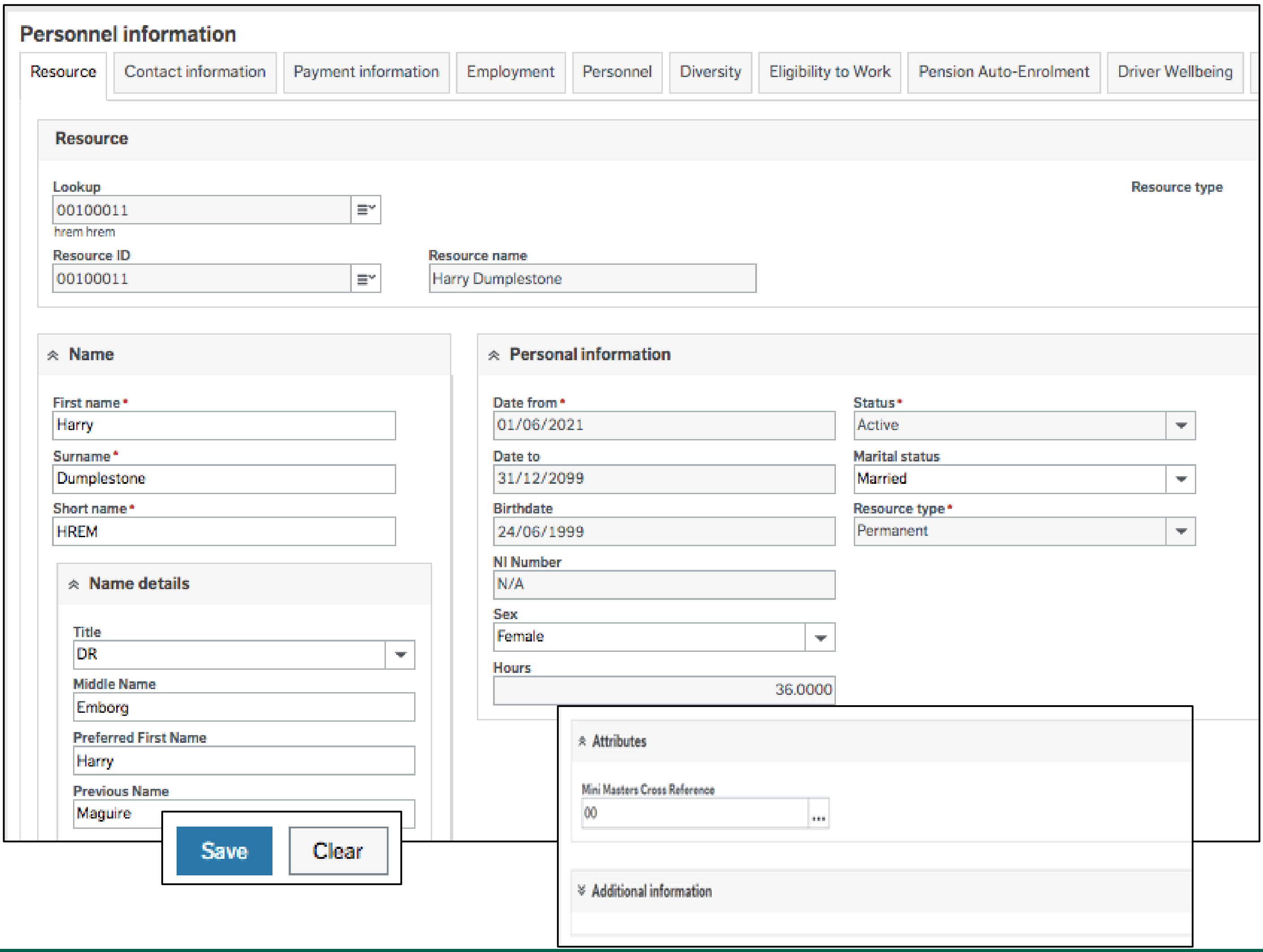
All fields in the screenshot below are visible to each employee. Many fields are self-explanatory so only those requiring further explanation are touched on below.

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.



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. screen. 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.

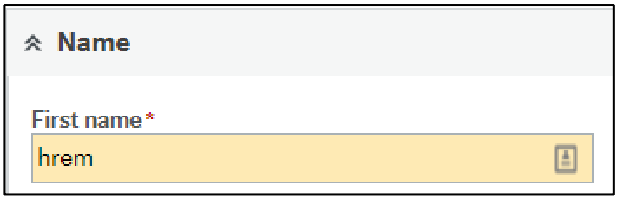
2B – Saving Personnel Information Updates

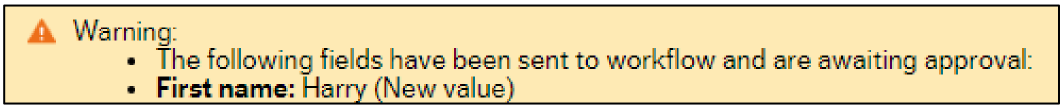
Upon completing any relevant updates on the **Resource** tab, you can either proceed to click on the next tab where changes are to be applied (before then saving), or if there are no other changes, just click **Save** at the bottom of the screen.

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

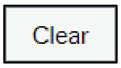
Upon saving a change to one or more of the above fields and clicking the **Save** button at the bottom of the screen, a Personnel Detail Changes task is workflowed to Employee Services for the documentation to be verified and subsequently approved/rejected. If approved, these changes are automatically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





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

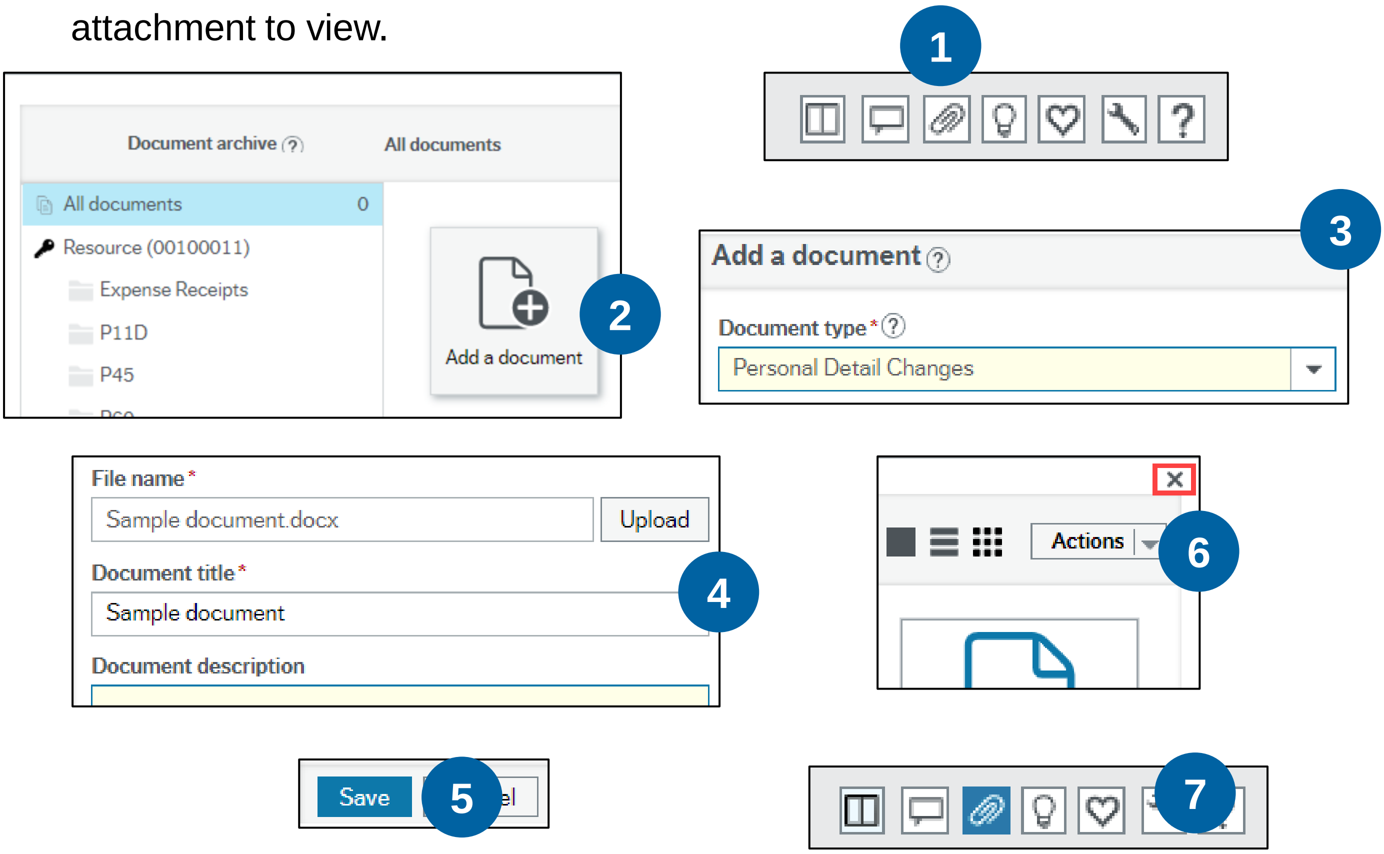


2C – Attach supporting documentation (where applicable)

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)

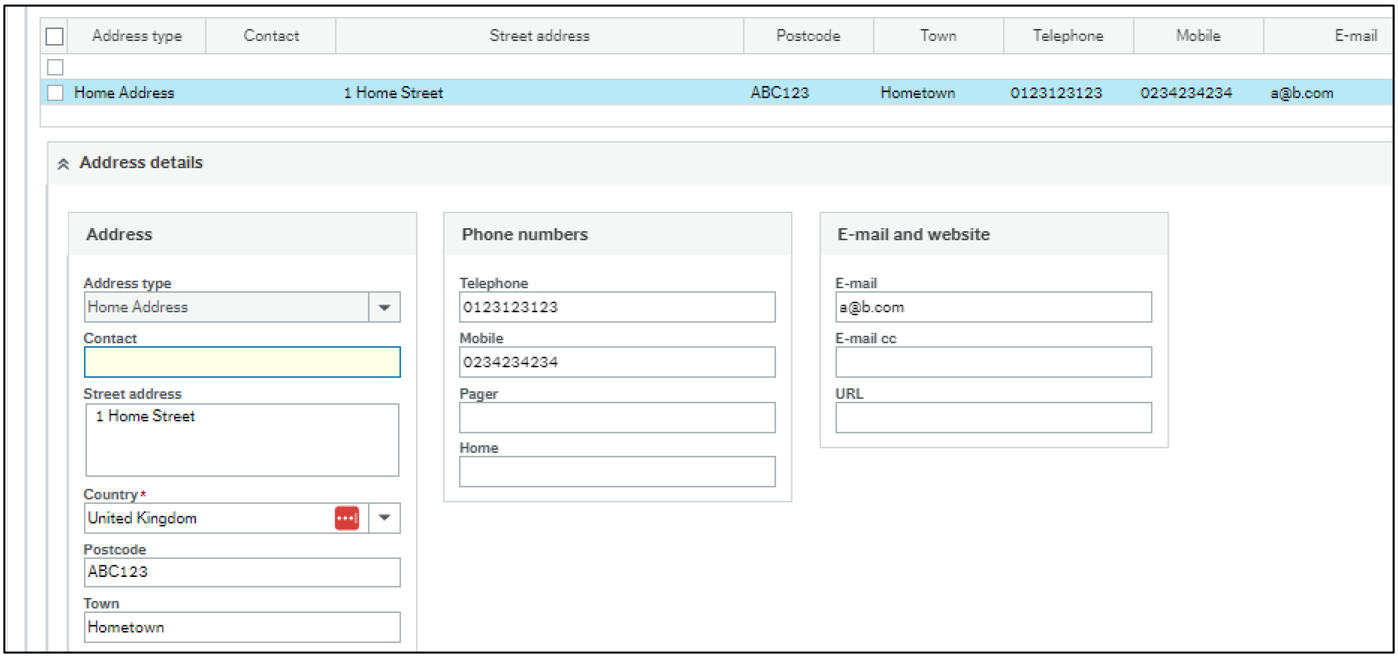
3A – View Existing Contact Information

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.



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.**

3B – Update Existing Contact Information

Address details cannot be amended directly within the table.

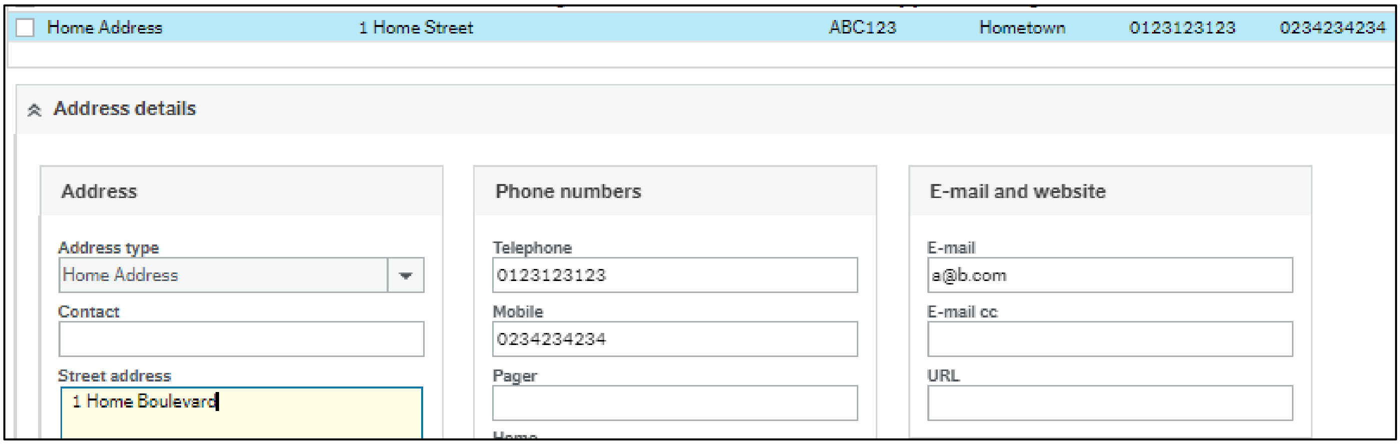
To amend address details:

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.

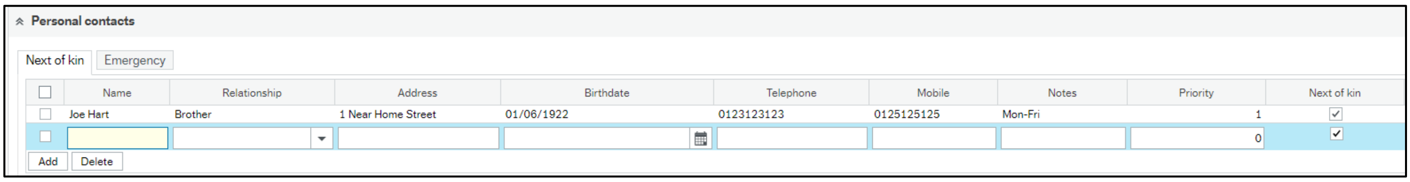
2. Click in the field you wish to edit - It highlights in yellow – then enter the relevant details (this depends on whether it is a free text field or another field type, such as a dropdown list for selection of **Country**.
3. Repeat the above steps for each field that needs to be updated.

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



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



> 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)

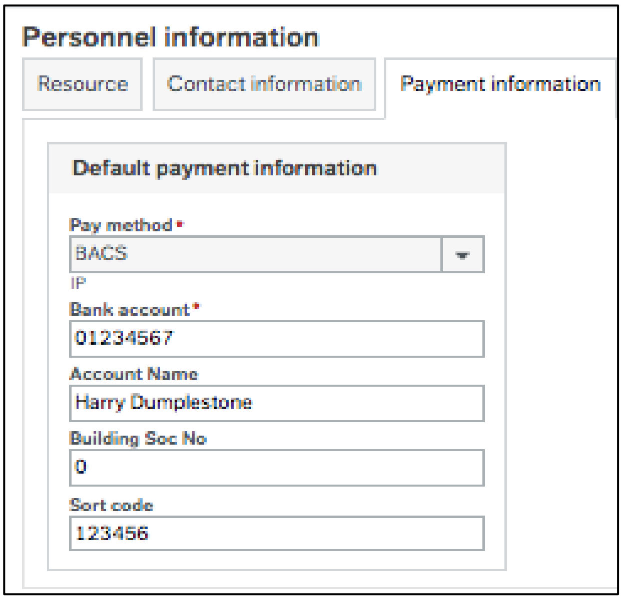
4A – View or Update Payment Information tab

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.



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.

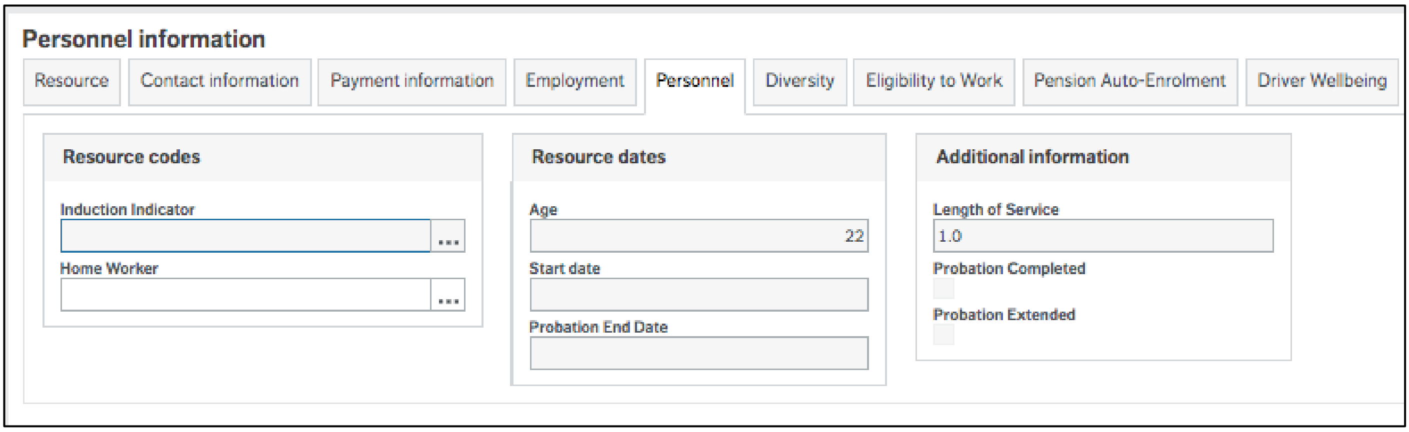
Having made all necessary updates, be sure to click **Save** before closing the **Personnel** record, or the updates will be lost.

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.

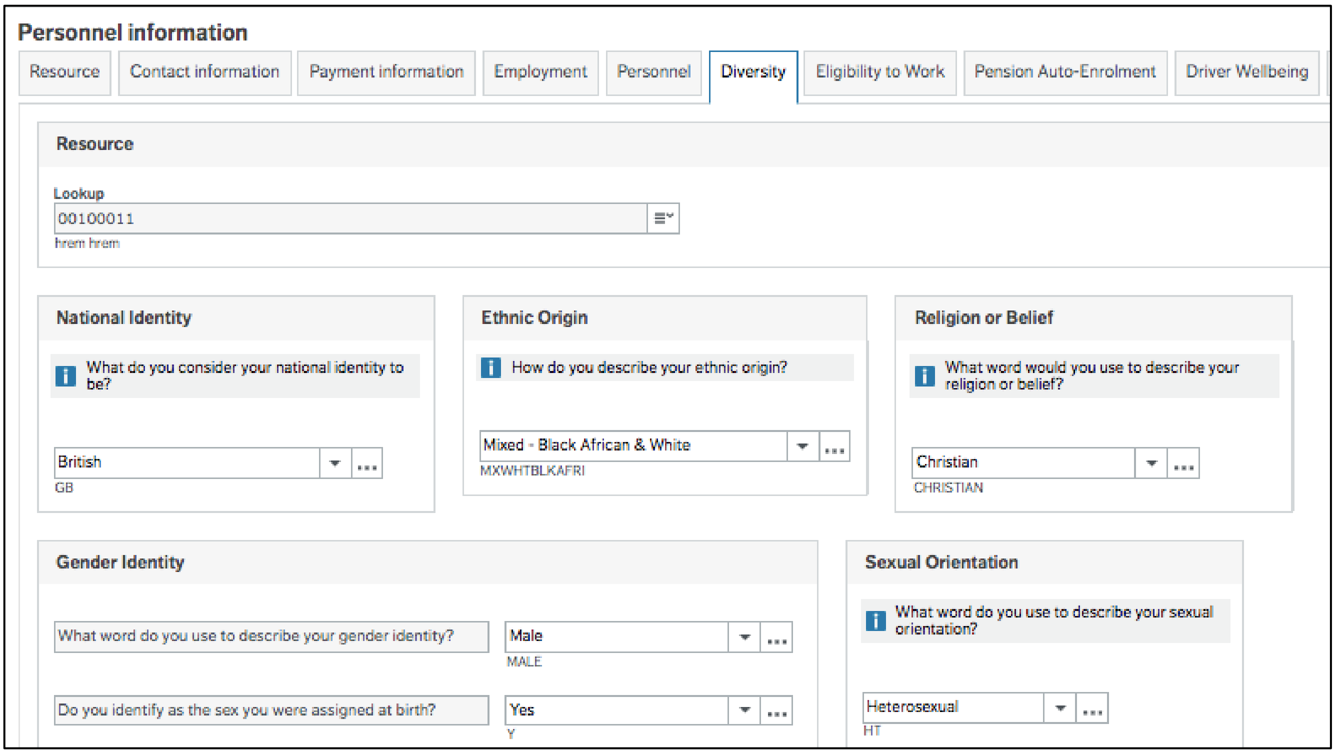


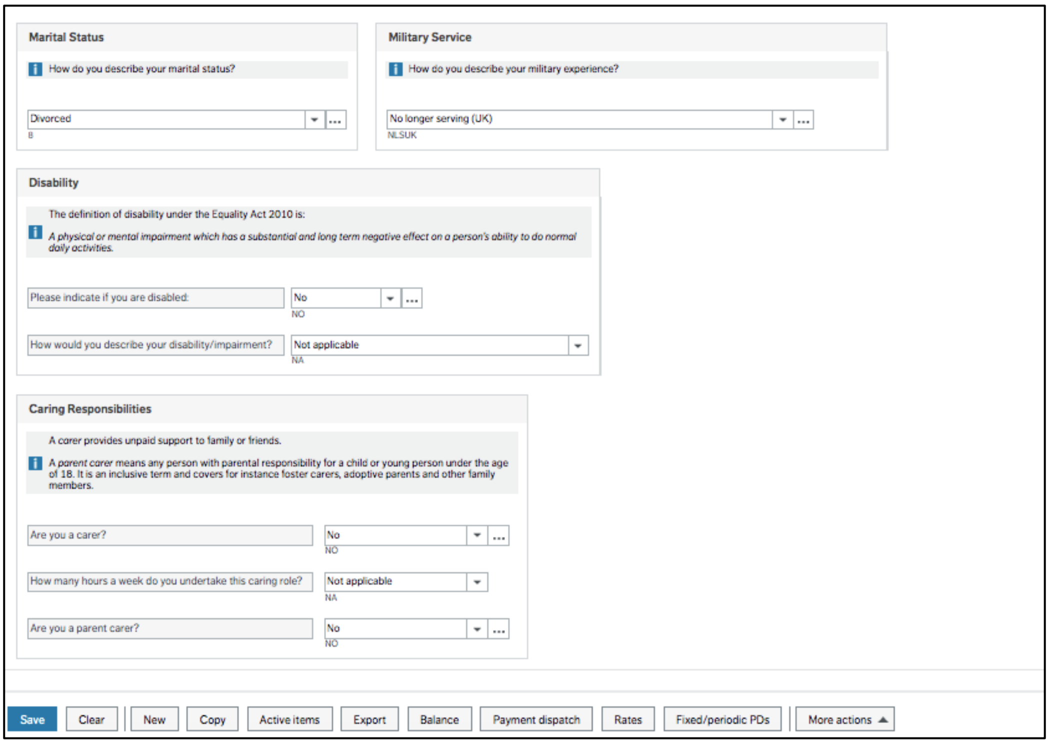
Part 6 – Diversity Tab (View and Update)

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**.





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

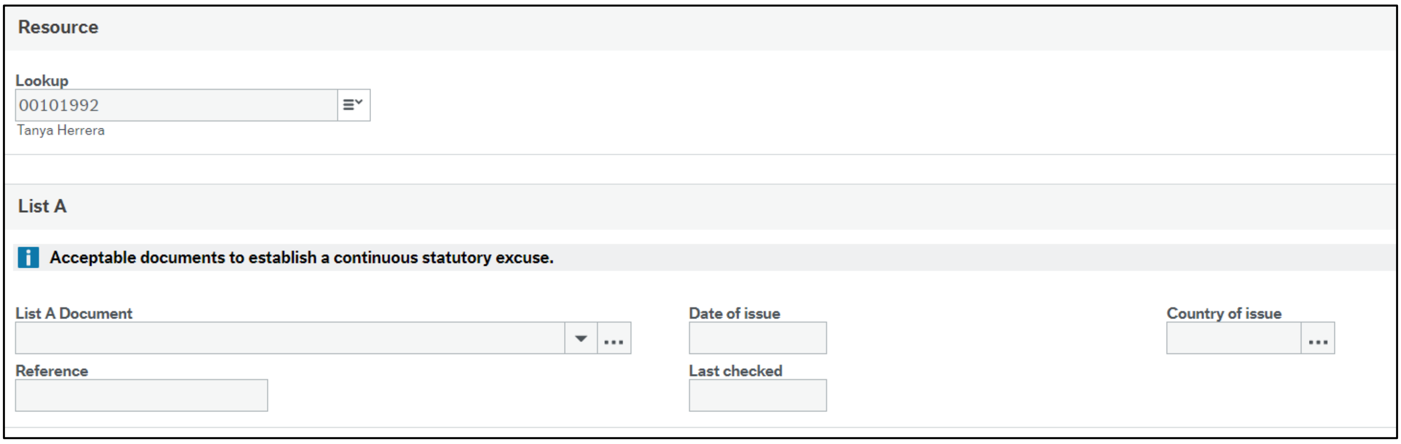
Part 7 – Eligibility to Work tab (View only)

7A – Viewing Your Eligibility to Work details

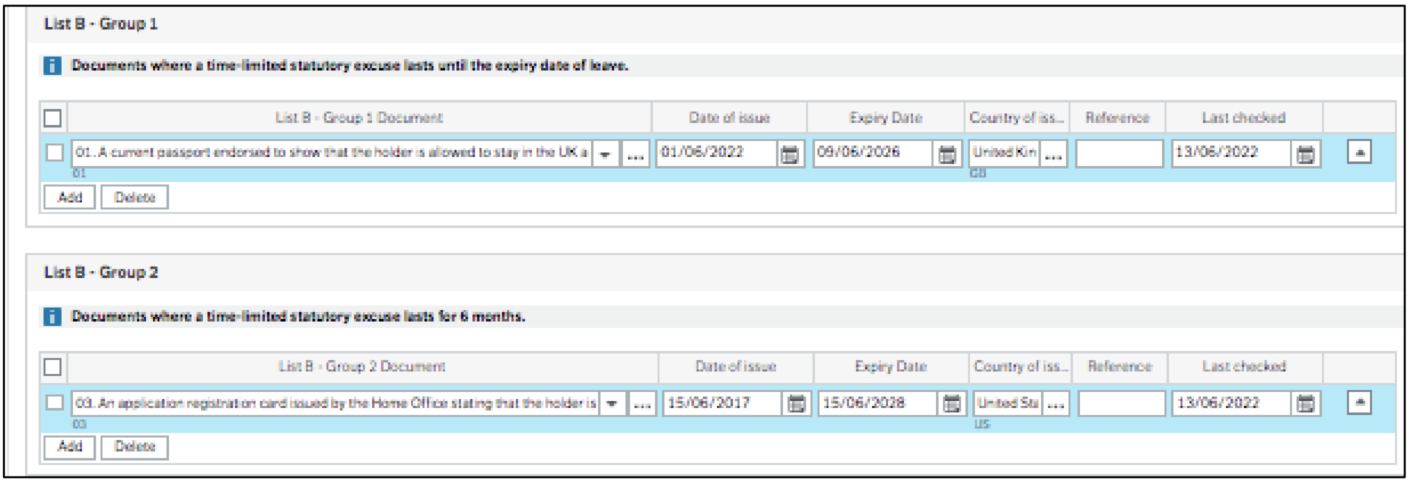
The Employee is expected to provide appropriate and valid documents to prove their eligibility to work both as a new starter, and potentially on a regular basis in line with organisational policy.

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.



List B is split into 2 separate groups:



- **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)

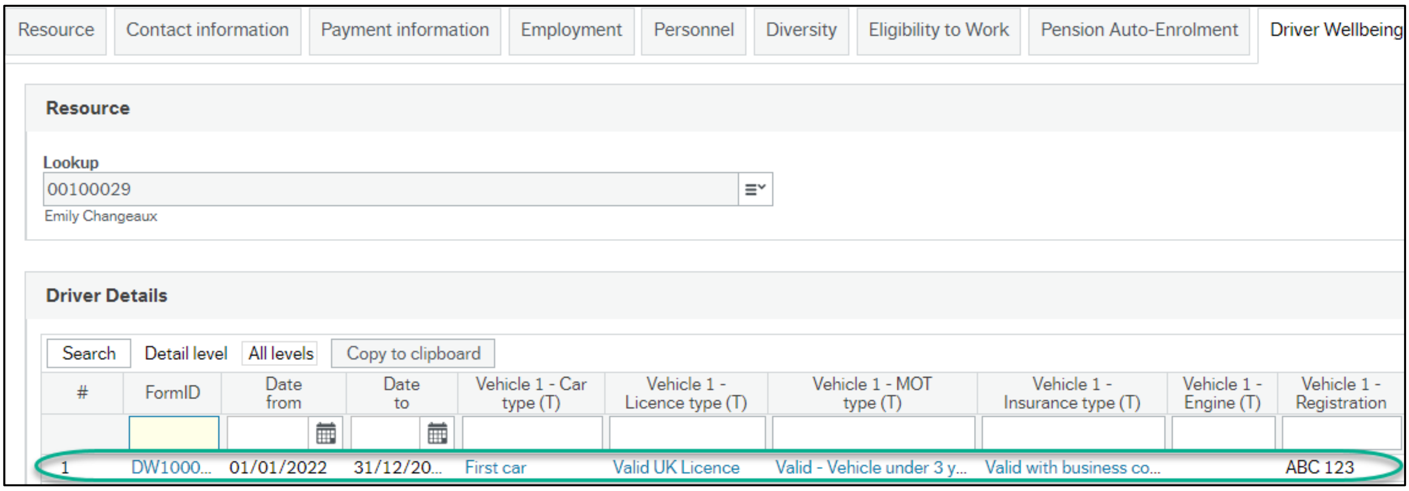
8A – Checking Your Driver Well-being Details

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.

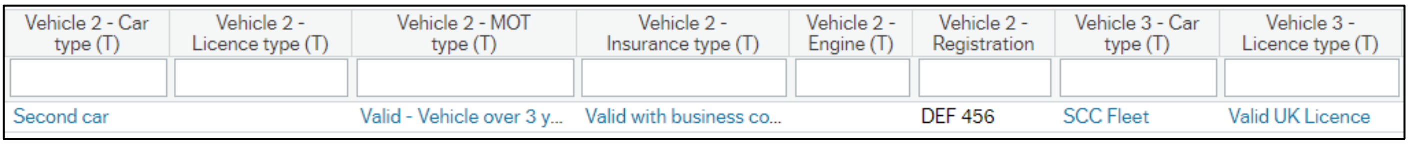
2. Click on the **Driver Wellbeing** tab.

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



#	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.



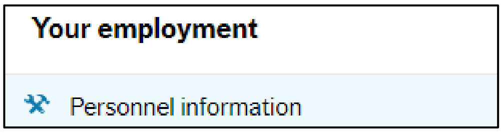
Vehicle 2 - Car type (T)	Vehicle 2 - Licence type (T)	Vehicle 2 - MOT type (T)	Vehicle 2 - Insurance type (T)	Vehicle 2 - Engine (T)	Vehicle 2 - Registration	Vehicle 3 - Car type (T)	Vehicle 3 - Licence type (T)
Second car		Valid - Vehicle over 3 y...	Valid with business co...		DEF 456	SCC Fleet	Valid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

Part 9 – Declarations tab (View Only)

9A – Viewing Declaration Details via Personnel Information

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

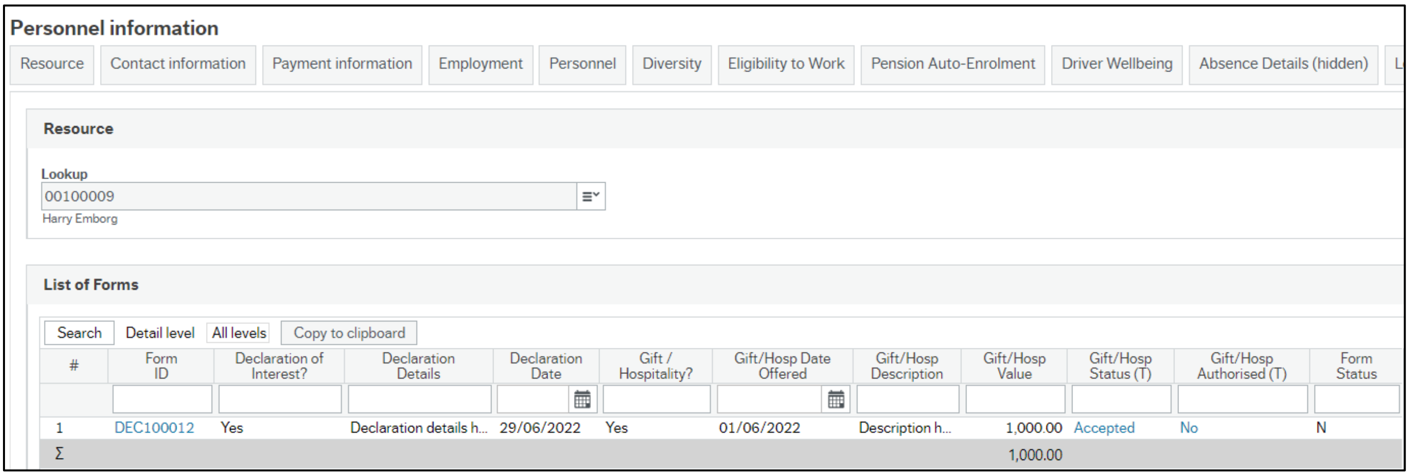


The **Personnel Information** screen opens, defaulting to show the **Resource** tab for the logged-in user.

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**



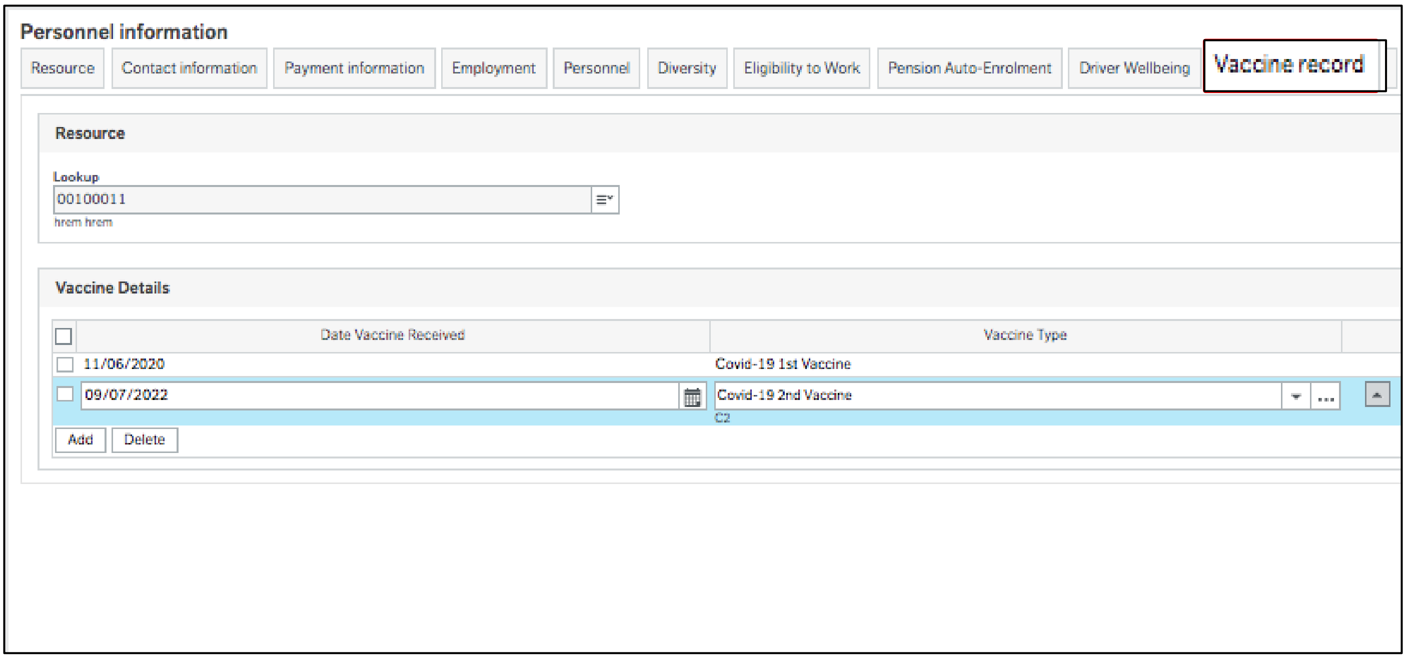
As this is a view-only screen, there is nothing to save, unless you have made amendments to other screens while checking these details. This page is automatically updated on the completion of the Declaration Form.

Part 10 – Vaccine Records (View and Update)

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)



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

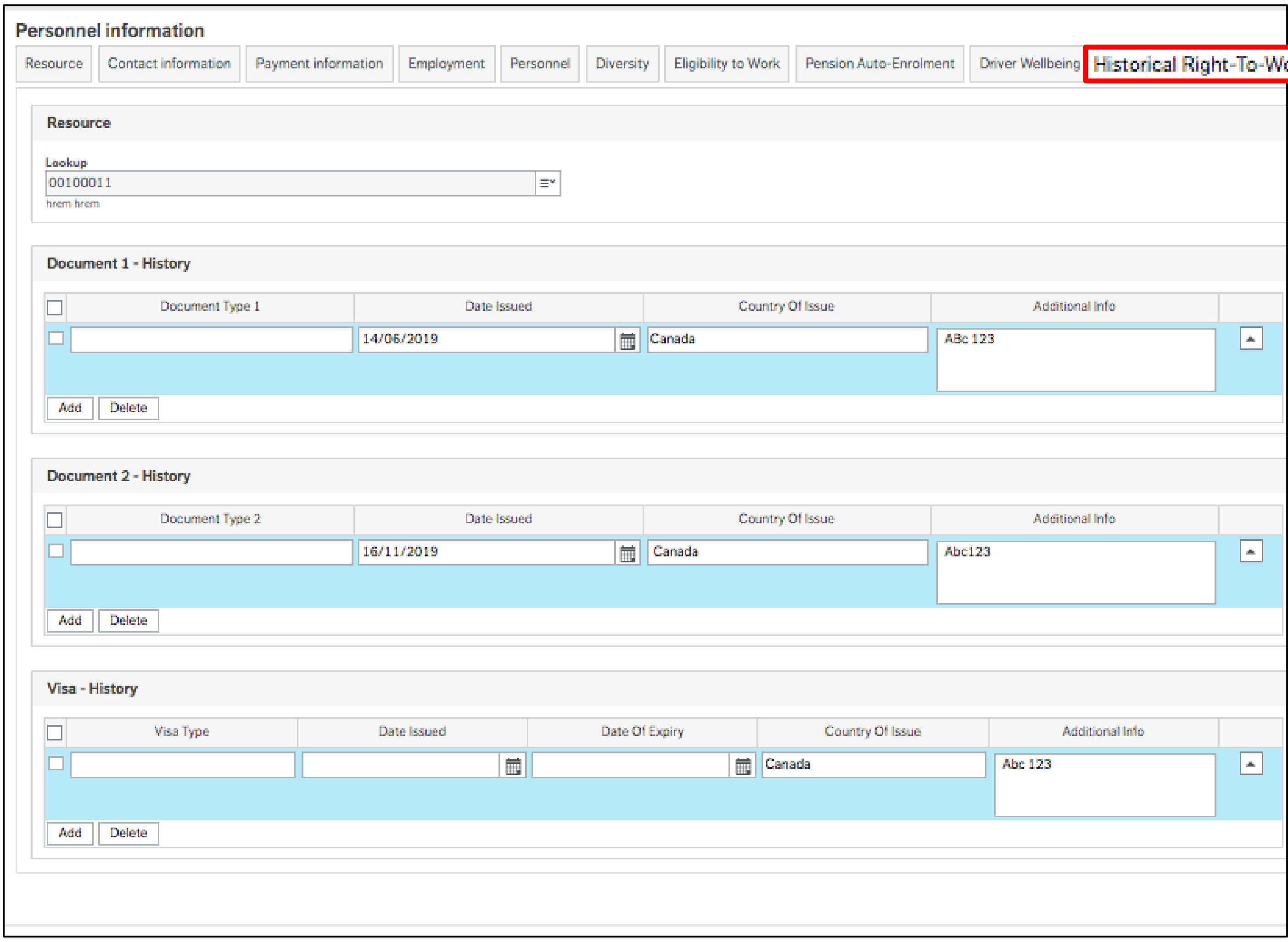
Having made all necessary updates, be sure to click **Save** before closing the **Personnel** record, or the updates will be lost.

Part 11 – Historical- Right-To-Work (View Only)

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.



This tab may not contain information for everyone.