




If an Employee wishes to register vehicles used for work purposes along with any supporting documentation, a Driver Wellbeing form should be completed within MySurrey.

An annual reminder email will be sent to all staff every January to submit an updated form. Failure to submit the form may impact on the ability to claim various travel-related expenses.

Part 1 – Employee completes and submits the form

1A – Open the form and complete the header information

1. Go to: **Forms > Custom Forms > Expenses > Driver Wellbeing**
2. **[Tab]** past the **Form ID*** field which should have the value **[NEW]**.
3. Enter a suitable description in the **Form Description** field (e.g., Surname, Initial first name, Resource ID).



The screenshot shows a web form titled "Driver Wellbeing". It contains two input fields. The first field is labeled "Form ID*" and contains the text "[NEW]". The second field is labeled "Form description*" and contains the text "Buddy H 12345678".

1B – Complete the Driver Details section

1. The Inputter autofill's
2. The inputter Position will autofill with the main position, but you can choose the other position if relevant.
3. If you are the employee completing the form the **Employee No** autofill's. If you are a manager, you will need to choose from the drop-down box.
4. Select **Position** from the drop down. This autofill's if there is only 1 Position.
5. Enter a **Start date** using the **Calendar** icon or manually enter in the ddmmyyyy format, and press **[Tab]**.
6. The read-only **Expiry date** field auto-fills as end of the current calendar year.

1B – Complete the **Driver Details** section continued

Driver Wellbeing

i If you have any health concerns relating to work related driving, please ensure you access support and help to ensure you maintain good health

Driver Details

Inputter

Tanya Herrera

00101992

Employee*

00101992

Tanya Herrera

Start date

01/01/2022



Inputter Position

20137589

Insight & Intelligence Lead

Employee Position*

20137589

Insight & Intelligence Lead

Expiry date

31/12/2022

1C – Complete the **First Vehicle** section

1. Select the **Car type** from the drop down and press **[Tab]**. Fields relevant to your selection will then be displayed.
2. Select the applicable **License Type**, and **MOT Type**.
3. **Insurance Type** defaults automatically to 'Valid with Business Cover' as users should have this included in your insurance to claim mileage expenses.

First Vehicle

Car type
First car

1

Licence type
Valid UK Licence

1

MOT type
Valid - Vehicle under 3 years

1

Insurance type
Valid with business cover

1

Expense type
Mileage - Flat Rate

MIL004

Registration
ABC 123

Add an Additional Vehicle

1C – Complete the **First Vehicle** section

4. In the **Expense Type** field, press the **[Space Bar]** to view all available options, and click to select the relevant one.

Expense type	
Mileage - Electric	
Mileage - Electric	MIL006
Mileage - Flat Rate	MIL004
Mileage - Lease Car	MIL005
Mileage - Motorbike	MIL002

5. Enter the Vehicle **Registration** number.
6. If a second vehicle is to be added, tick the checkbox **Add an Additional Vehicle** in the bottom left corner of the section.

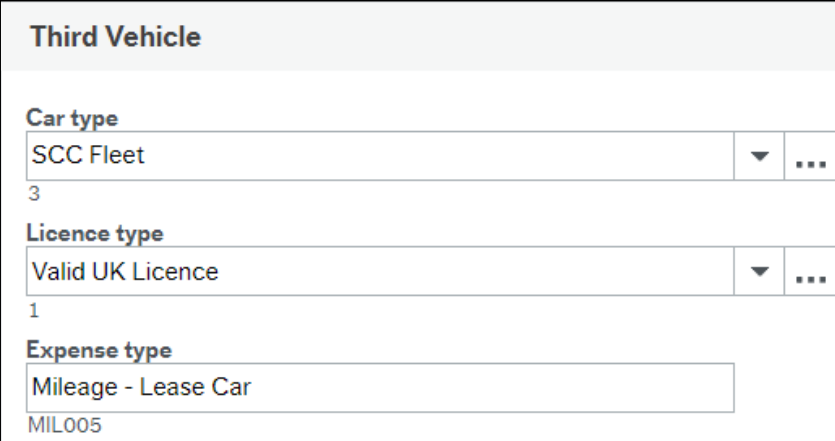
1D – Complete **Second Vehicle** and **Third Vehicle** sections (where applicable)

1. Having ticked the checkbox above, the **Second Vehicle** section displays.
2. Select the **Car type** from the drop down and press **[Tab]**. Fields relevant to your selection will then be displayed.
3. Complete the relevant fields, similar to the process in **1C** above.

Second Vehicle	
Car type	Second car ▼ ...
2	
MOT type	Valid - Vehicle over 3 years ▼ ...
2	
Insurance type	Valid with business cover ▼ ...
1	
Expense type	Mileage - Motorbike MIL002
Registration	DEF 456
Add an Additional Vehicle	<input type="checkbox"/>

1D – Complete **Second Vehicle** and **Third Vehicle** sections continued

- If a third vehicle is to be added, tick the checkbox **Add an Additional Vehicle** in the bottom left corner of the section. A new section displays and should be completed in a similar way.



The screenshot shows a form titled "Third Vehicle" with three sections:

- Car type:** A dropdown menu with "SCC Fleet" selected, a downward arrow, and a three-dot menu icon. Below it is the number "3".
- Licence type:** A dropdown menu with "Valid UK Licence" selected, a downward arrow, and a three-dot menu icon. Below it is the number "1".
- Expense type:** A text input field containing "Mileage - Lease Car" and a small "MIL005" label below it.



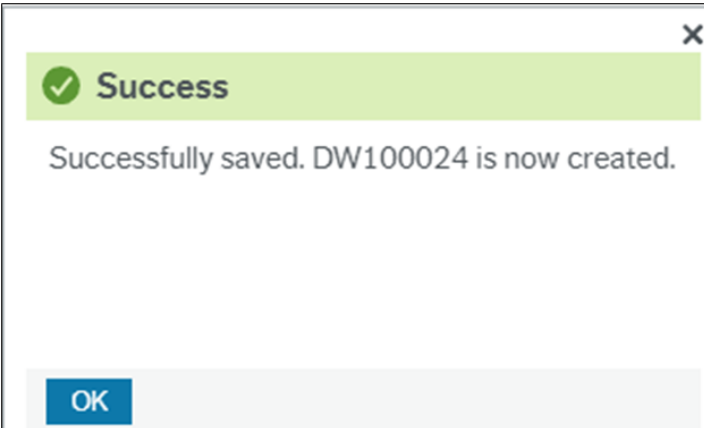
The information required for each **Car Type** may vary. Ensure that you complete all relevant fields for each scenario. A maximum of 3 vehicles can be added on one form. Additional forms may be submitted, if required, throughout the year.



Important note: You must save the form as a draft to be able to attach any documentation

1E – Save as Draft

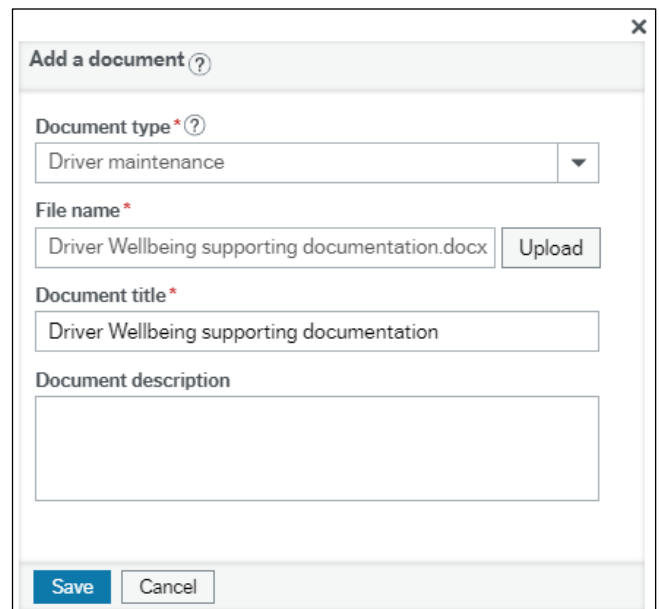
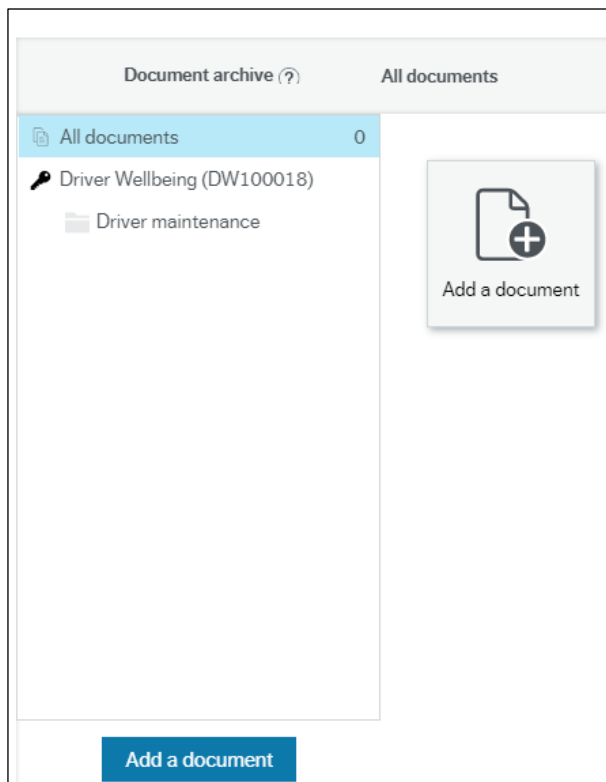
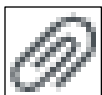
- Click **Save as Draft** at the bottom of the screen.
A Form ID is generated.
- Click **OK** to the success message.



The screenshot shows a success message dialog box with a green header bar containing a checkmark icon and the word "Success". Below the header, the text reads "Successfully saved. DW100024 is now created." At the bottom of the dialog is a blue button labeled "OK".

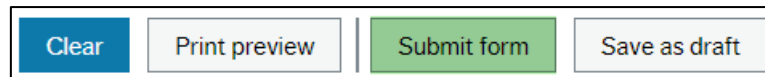
1F – Attach supporting documentation

1. Click the **Paperclip** icon in the top right corner to open the **Document archive**.
2. Click **Add a document**.
3. Click **Upload** to navigate to the document location then click **Open**.
The **File name** and **Document title** autofill.
4. Click **Save** in the bottom left corner of the pop up.
The uploaded document displays as an icon in the **Document archive**.
5. Click **X** in the top right corner of the **Document Archive** window to close it.
The **Paperclip** icon turns blue and the Form ID* displays the code.

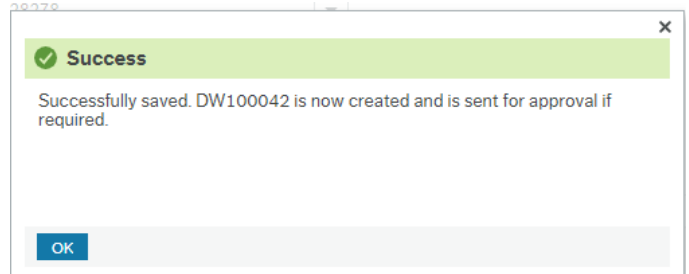
A screenshot of the 'Add a document' form. The form has a title bar 'Add a document (?)' with a close button 'X'. The fields are: 'Document type*' with a dropdown menu showing 'Driver maintenance'; 'File name*' with a text input containing 'Driver Wellbeing supporting documentation.docx' and an 'Upload' button; 'Document title*' with a text input containing 'Driver Wellbeing supporting documentation'; and 'Document description' with a large empty text area. At the bottom, there are 'Save' and 'Cancel' buttons.

1G – Submit the form for approval

1. Click **Submit form** at the bottom of the screen.

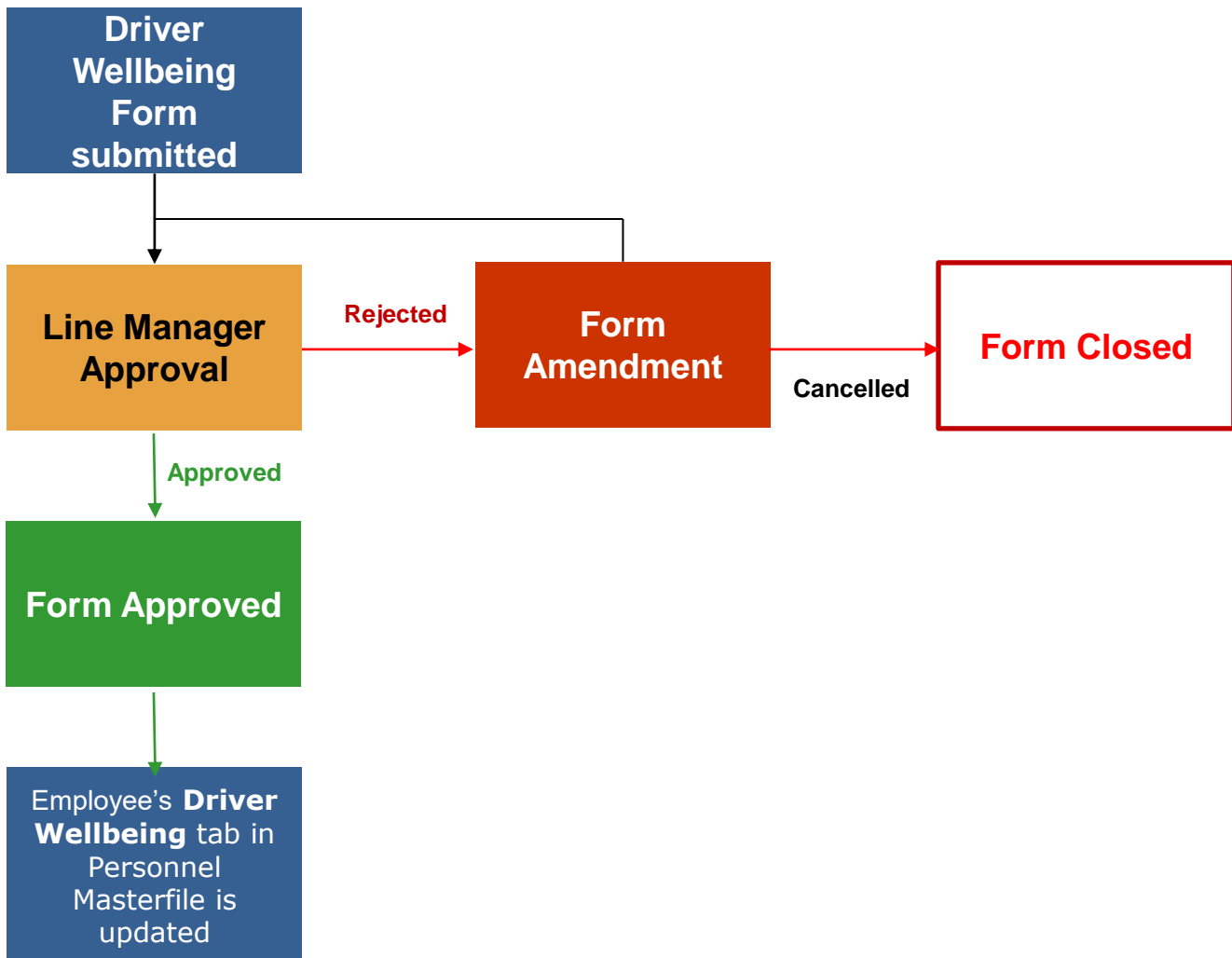


2. Click **OK** to the **Success** message.



The form is sent for **Line Manager Approval**.

- If the Line Manager **Approves** the form, the workflow is complete.
- If the Line Manager **Rejects** the form, it is sent back to the Employee to amend and **Resubmit** or **Cancel** the request.



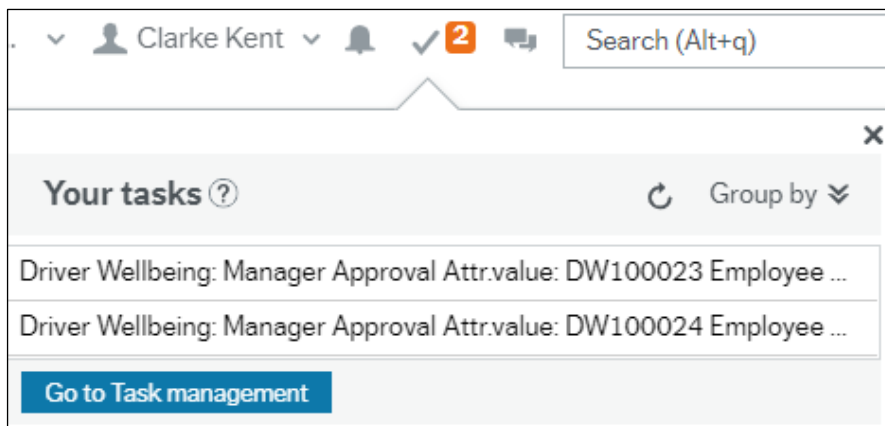
1H – Close the form

1. Click **X** in the top right of the **Driver Wellbeing** tab.

Part 2 – Line Manager reviews and approves the form

2A – Line Manager Approval task

1. Click the **Tasks** icon in the top right corner to open **Your tasks** list.
2. Click the **Driver Wellbeing: Manager Approval** task to open the form.
3. Scroll down the screen and review the information on the form.
4. Click **Approve** at the bottom of the screen if the information is correct.
or
5. Click **Reject** at the bottom of the screen if there is an error. Enter a comment in the popup box then click **Reject** again.
The form will be sent back to the Employee to amend.
7. Click **OK** to the **Success** message.



Form approval

i Please review the driver details provide and ensure the correct documentation has been attached and if not reject the task.

Driver Wellbeing

Form ID*
DW100024 ...
Driver Wellbeing Form - First Car and SCC Fleet

Form description*
Driver Wellbeing Form - First Car and SCC Fleet

Form owner
Ethan Hawke
00100115

Workflow log (row 1)

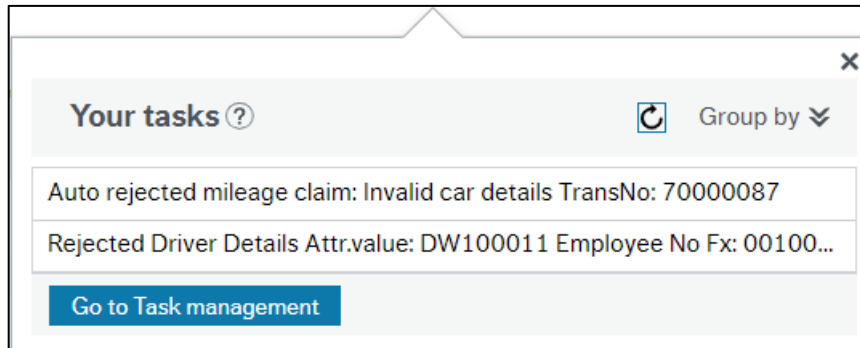
01/09/2021 16:32 Ethan Hawke (ETHAN HAWKE) - Distributed

Approve | **Reject** | **Clear** | **Log book** | **Export**

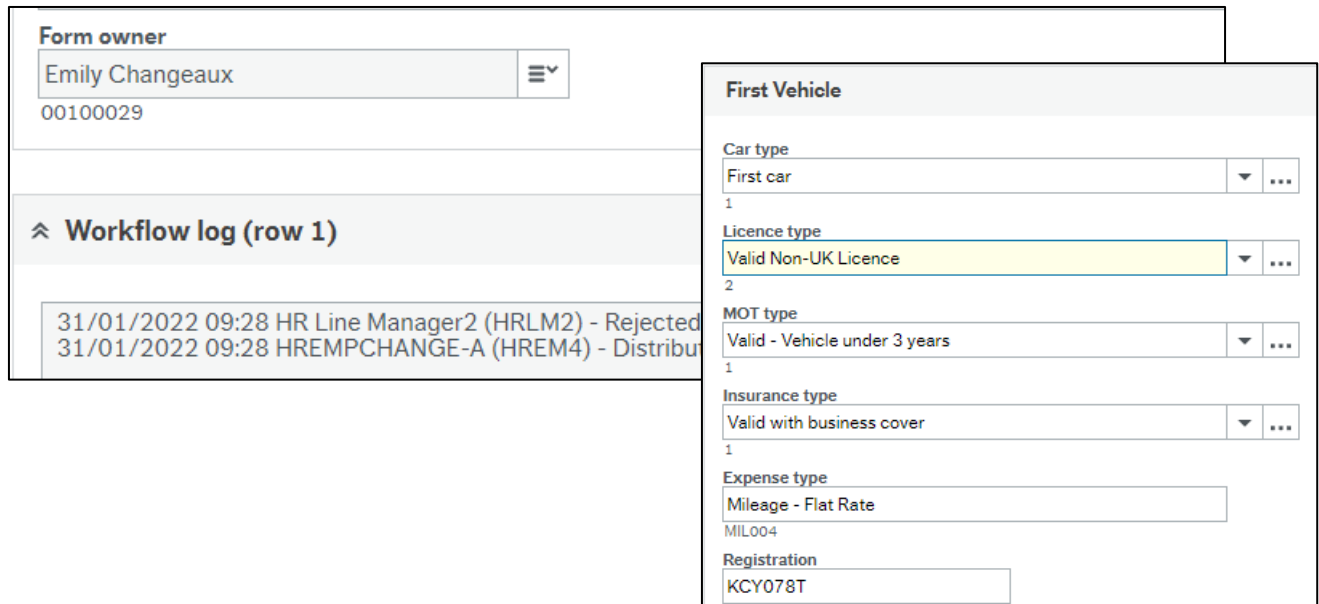
Part 3 – Employee amends a rejected Driver Wellbeing form (where applicable)

3A – Rejected Driver Details task

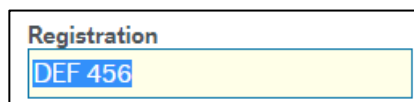
1. Click the **Tasks** icon in the top right corner to open **Your tasks** list.
2. Click the **Rejected Driver Details** task to open the form.



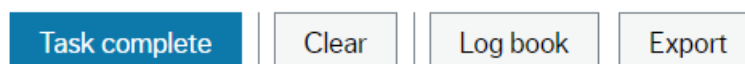
3. Review the task, taking note of any **Workflow Log** comments.

A screenshot of the 'Rejected Driver Details' form. The 'Form owner' section shows 'Emily Changeaux' with ID '00100029'. Below this is a 'Workflow log (row 1)' section with two entries: '31/01/2022 09:28 HR Line Manager2 (HRLM2) - Rejected' and '31/01/2022 09:28 HREMPCHANGE-A (HREM4) - Distrib'. The 'First Vehicle' section contains several dropdown menus: 'Car type' (First car), 'Licence type' (Valid Non-UK Licence), 'MOT type' (Valid - Vehicle under 3 years), and 'Insurance type' (Valid with business cover). There is also an 'Expense type' field (Mileage - Flat Rate) and a 'Registration' field (KCY078T).

4. Make any necessary amendments to the relevant fields, e.g., either selecting a different option from a drop down, or over-typing the contents of a field.

A screenshot of the 'Registration' field in the form. The field contains the text 'DEF 456' and is highlighted with a yellow background.

5. Click **Task Complete** at the bottom of the screen.

A screenshot of the bottom of the screen showing four buttons: 'Task complete' (blue), 'Clear', 'Log book', and 'Export'.

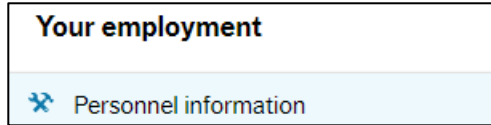
6. Click **OK** to the **Success** message.

The form will be automatically sent back to the Manager for approval (as covered above in **Part 2** of this Quick Guide).

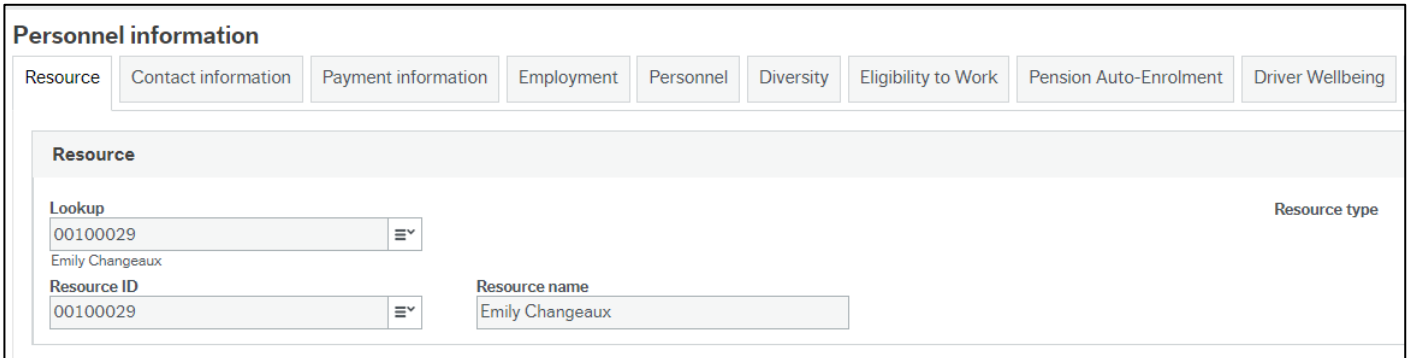
Part 4 – Employee Checks Driver Details via Personnel Information

4A – Checking Personnel Information

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



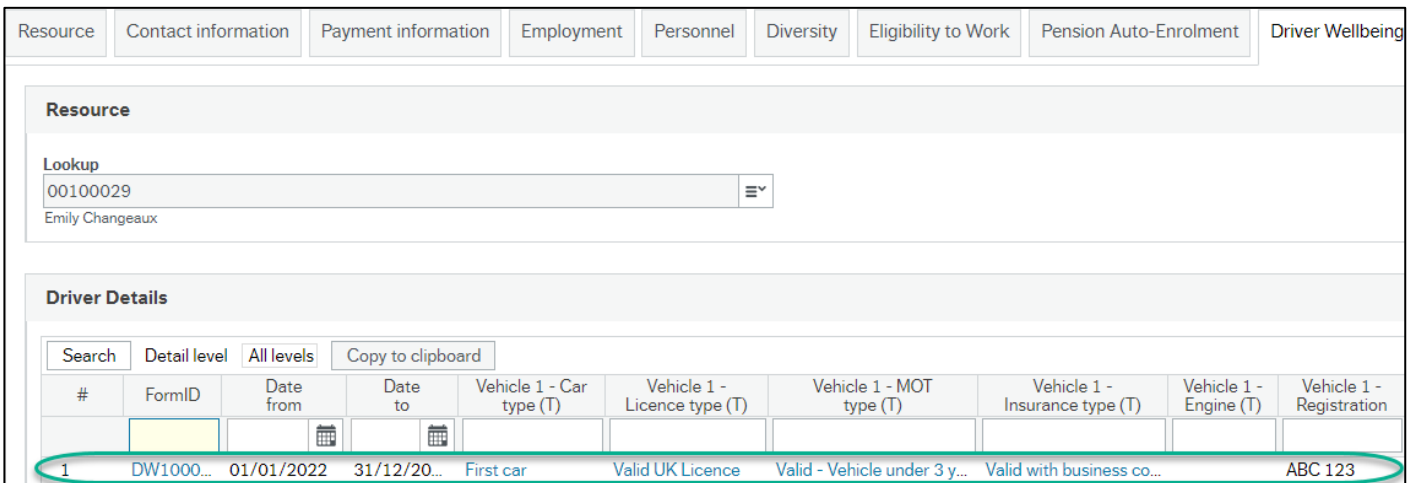
The **Personnel Information** screen opens, defaulting to show the **Resource** tab for the logged-in user.



The screenshot shows the "Personnel information" screen with several tabs: Resource, Contact information, Payment information, Employment, Personnel, Diversity, Eligibility to Work, Pension Auto-Enrolment, and Driver Wellbeing. The "Resource" tab is active. Below the tabs, there is a "Resource" section with a "Lookup" field containing "00100029" and "Emily Changeaux", a "Resource ID" field containing "00100029", and a "Resource name" field containing "Emily Changeaux".

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

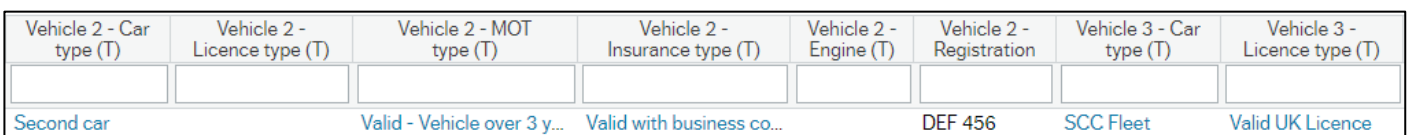
The tab displays details of all approved **Driver Wellbeing** forms for the logged-in user, in table format.



The screenshot shows the "Driver Wellbeing" tab with 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. The first row is highlighted with a green circle.

#	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" tab with a table of driver details. The table has 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 first row is highlighted with a green circle.

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