Driver Wellbeing Form

> 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).

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

ℹ️ 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	Inputter Position
Tanya Herrera ...	20137589 ▾
00101992	Insight & Intelligence Lead
Employee*	Employee Position*
00101992 ▾	20137589 ▾
Tanya Herrera	Insight & Intelligence Lead
Start date	Expiry date
01/01/2022 🗓	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.
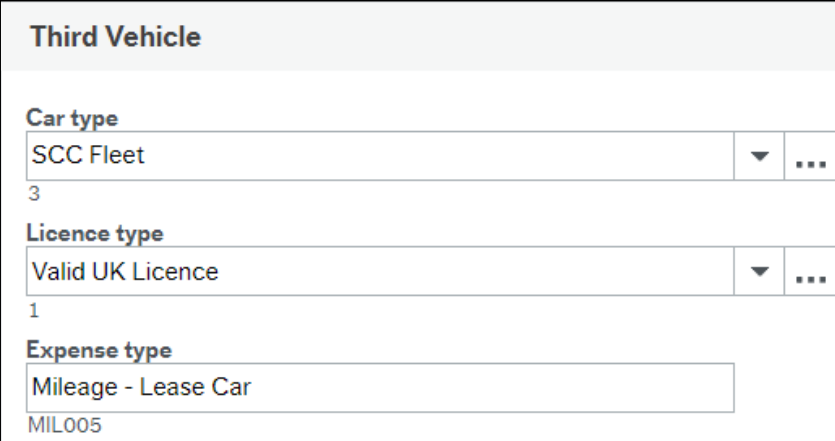
1D – Complete **Second Vehicle** and **Third Vehicle** sections (where applicable)

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
☐

4. 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.

Third Vehicle

Car type
SCC Fleet
3

Licence type
Valid UK Licence
1

Expense type
Mileage - Lease Car
MIL005
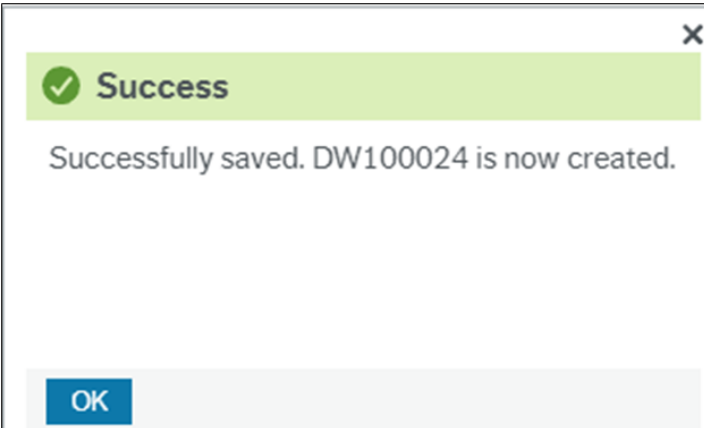
i The information required for each **Car Type** may vary. Ensure that you complete all relevant fields for each scenario.
A maximum of 3 vehicles can be added on one form. Additional forms may be submitted, if required, throughout the year.

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

1E – Save as Draft
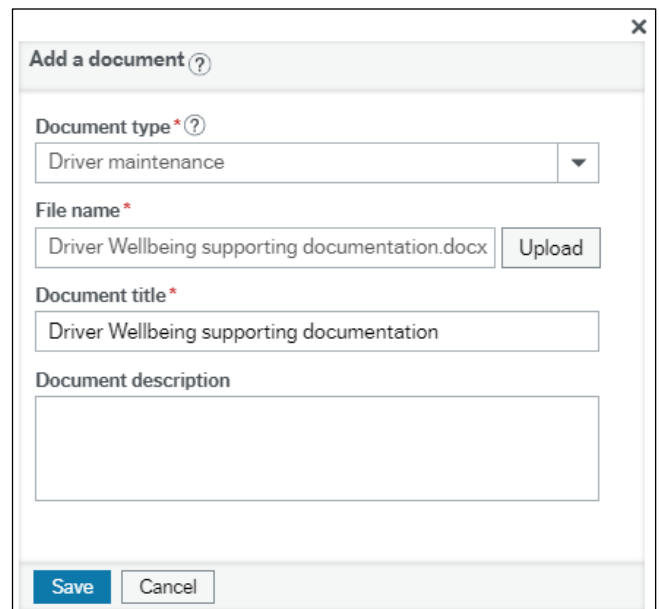
1. Click **Save as Draft** at the bottom of the screen.

A Form ID is generated.

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

✓ **Success**

Successfully saved. DW100024 is now created.

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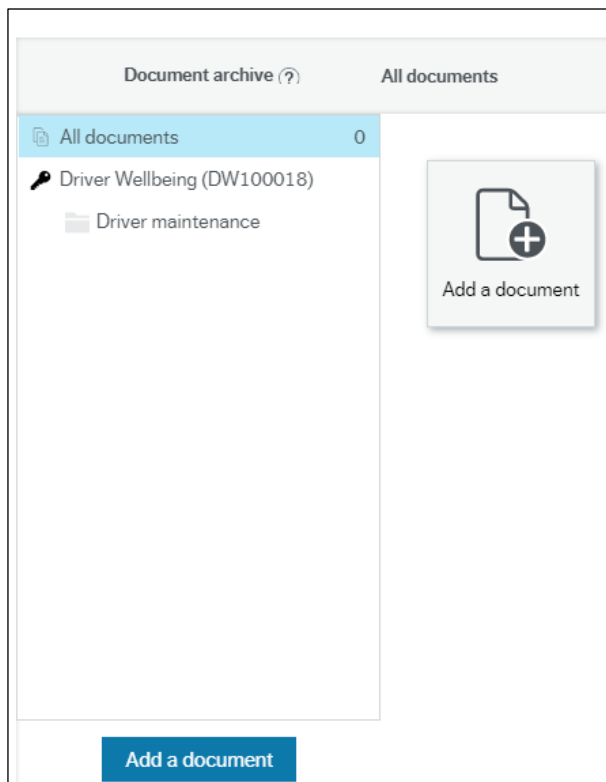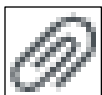
1. Click **Submit form** at the bottom of the screen.

| Clear | Print preview | Submit form | Save as draft |

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

✓ Success

Successfully saved. DW100042 is now created and is sent for approval if required.

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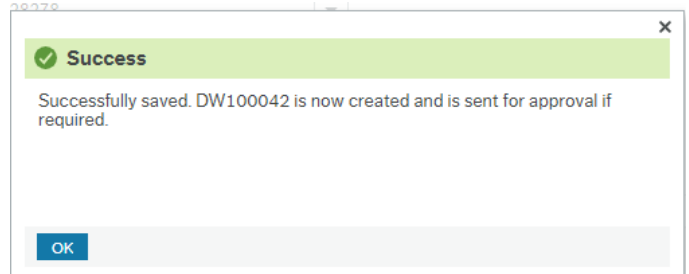
The form is sent for **Line Manager Approval**.

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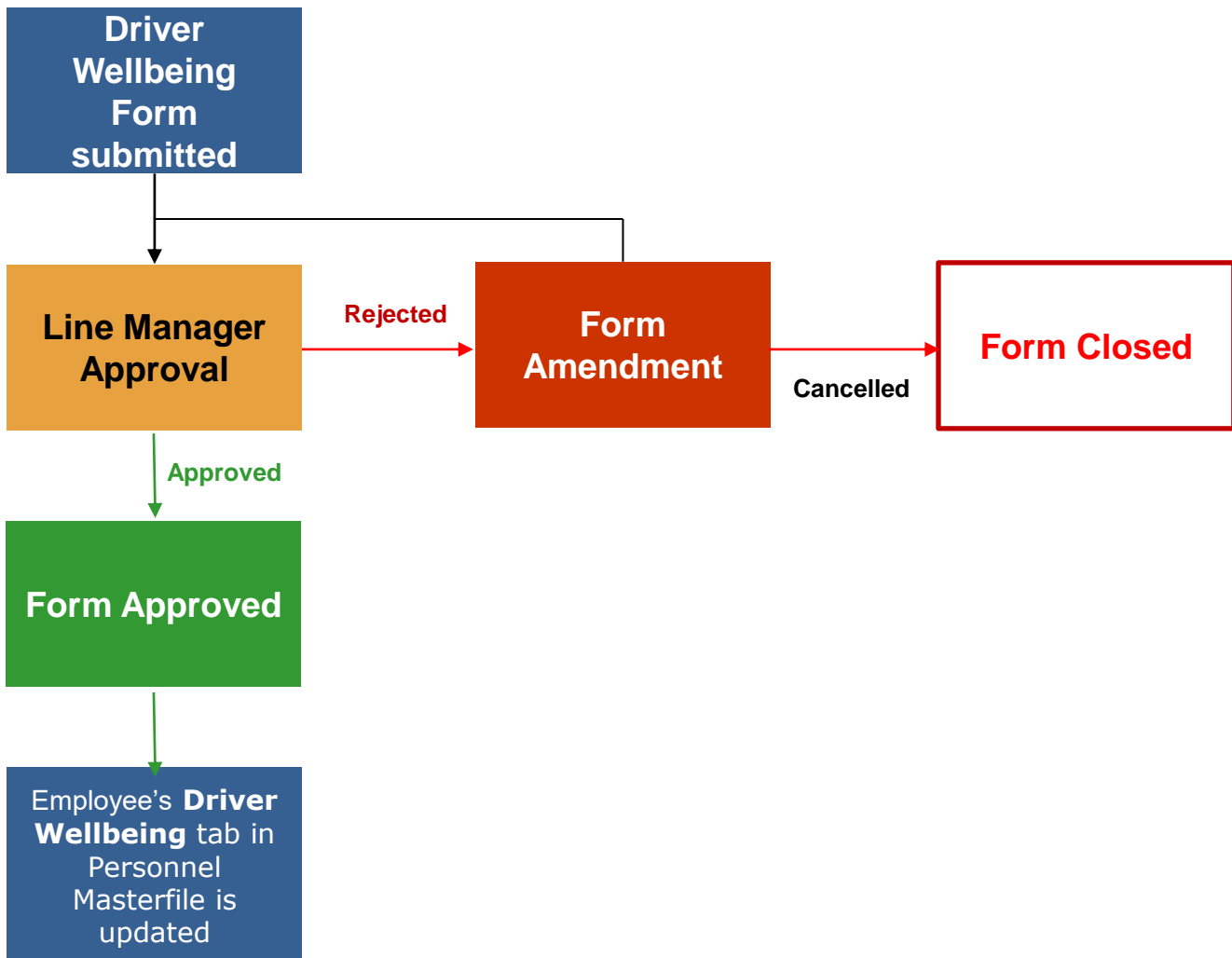
1. Click **X** in the top right of the **Driver Welling** tab.

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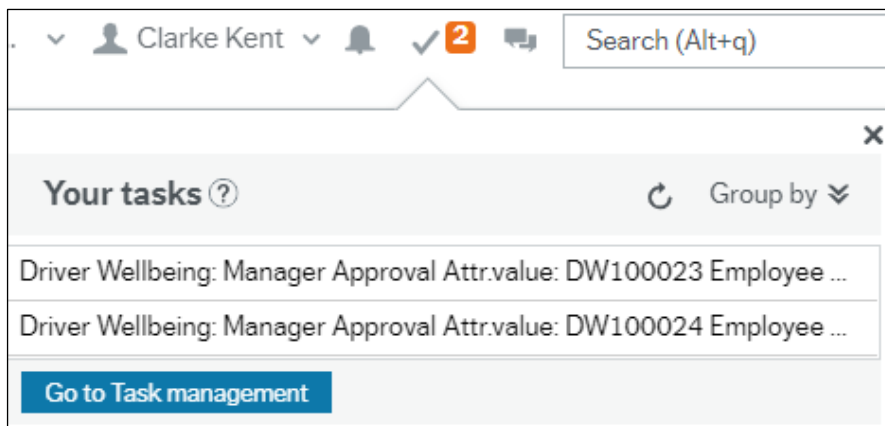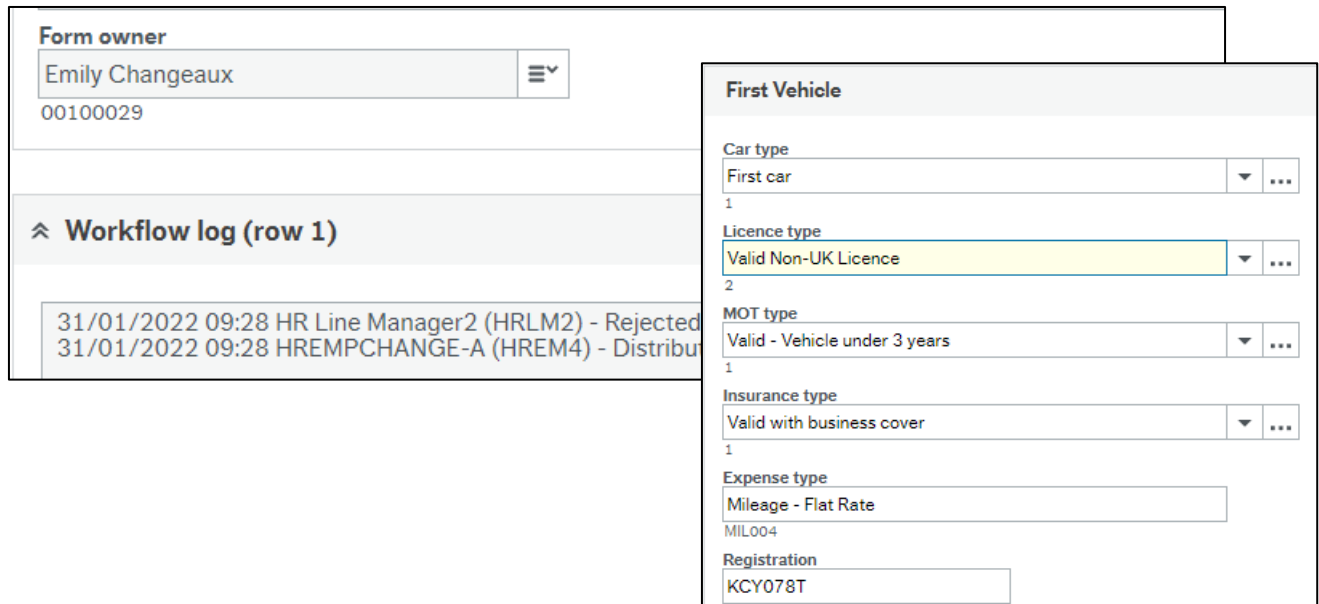
Part 3 – Employee amends a rejected **Driver Wellbeing** form (where applicable)

3A – Rejected Driver Details task
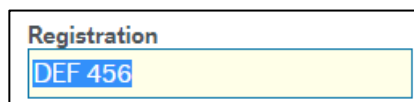
1. Click the **Tasks** icon in the top right corner to open **Your tasks** list.

2. Click the **Rejected Driver Details** task to open the form.
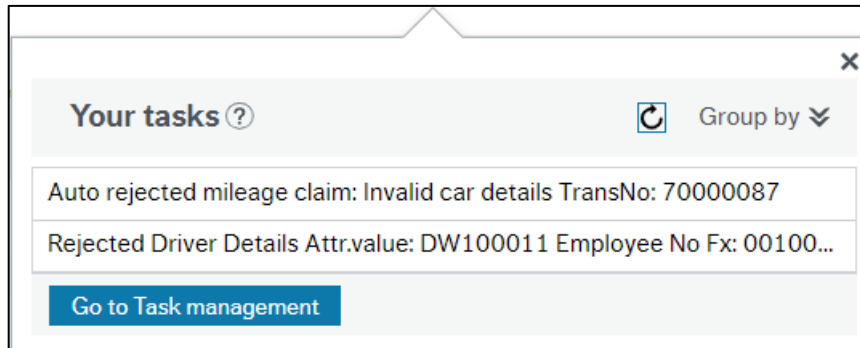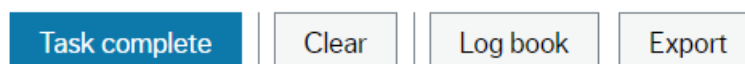
3. Review the task, taking note of any **Workflow Log** comments.

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.

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

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).
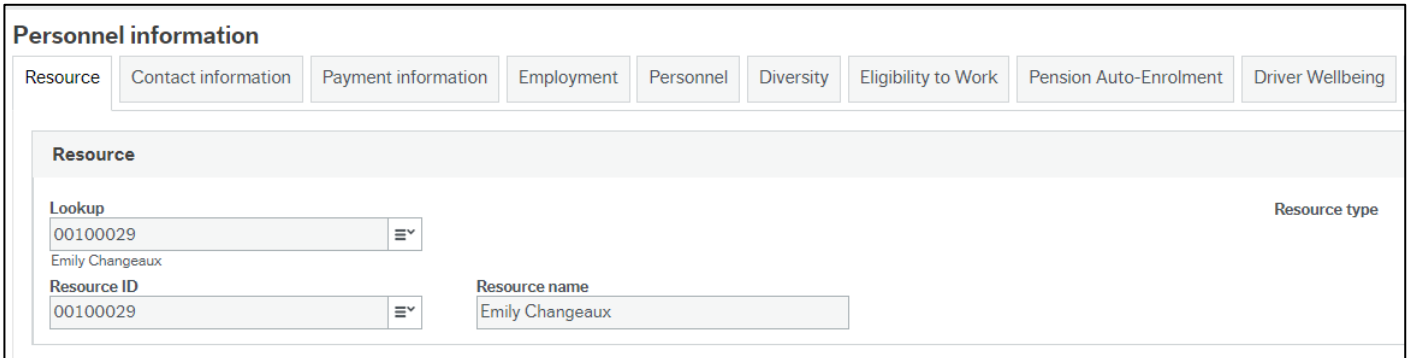
4A – Checking Personnel Information

1. Navigate to **Your Employment > Your Employment > Personnel Information**.
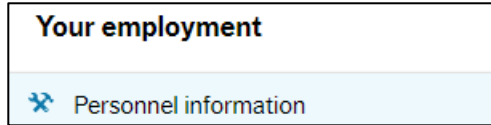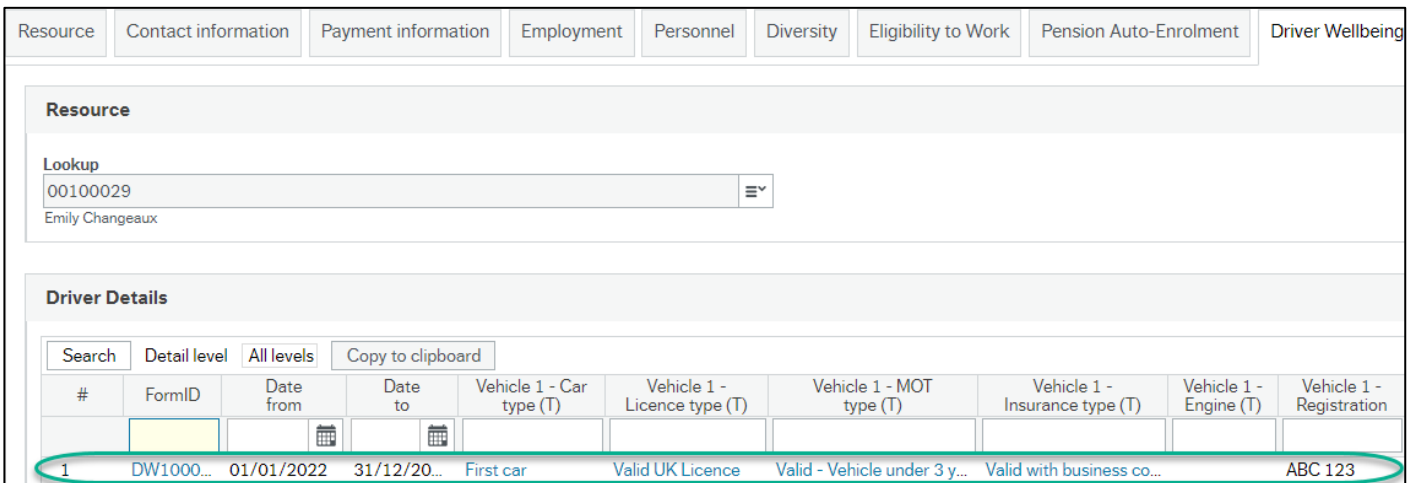
The **Personnel Information** screen opens, defaulting to show the **Resource** tab for the logged-in user.
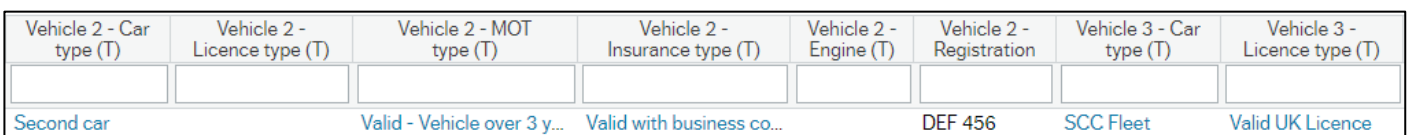

2. Click on the **Driver Wellbeing** tab.

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

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