



Shropshire  
Council

**Business World User Guide**  
**Business World for Line Managers**  
**Shropshire Council**



## Contents

<b>1. General Information .....</b>	<b>1</b>
1.1. Introduction .....	1
1.2. Conventions in this document: .....	1
<b>2. Overview .....</b>	<b>2</b>
<b>3. Navigation.....</b>	<b>3</b>
3.1. The Employee Home Page .....	3
3.2. Global Toolbar .....	3
3.3. Page Toolbar .....	4
3.4. Screen Tabs .....	4
3.5. Alerts .....	4
3.6. Tasks .....	5
3.6.1 Overview .....	5
3.6.2 Action a Specific Task.....	6
3.6.3 Action a Task from the Task Manager.....	7
3.7. Favourites .....	8
3.7.1 Add to Favourites.....	8
3.7.2 View Favourites .....	8
3.7.3 Remove from Favourites.....	9
3.8. Recently Used.....	9
3.9. Split View .....	10
3.9.1 Open Two Screens .....	10
3.9.2 Return to a Single Screen .....	11
3.9.3 Task management .....	11
3.10. What sort of tasks could your receive? .....	12
<b>4. Personnel and Your Employee Records.....</b>	<b>13</b>
4.1. Resource Tab .....	14
4.2. Contact Information Tab.....	15
4.3. Payment Information Tab.....	16
4.4. Employment Tab.....	16
4.4.1 Employment Details Section .....	17
4.4.2 Employment Tab Section .....	18
4.4.3 Tasks and responsibilities Tab Section .....	18
4.5. Line Management Tab .....	18
4.6. Right to Work Tab .....	19



4.7.	Company Assets Tab.....	20
4.8.	Resource Checks Tab.....	20
4.9.	Probation Status Tab .....	21
4.10.	Diversity Tab .....	21
4.11.	Action Buttons .....	22
4.11.1	Balance Screen.....	22
4.11.2	Rates Screen – Rates Overview Tab .....	23
<b>5.</b>	<b>Unplanned Absences.....</b>	<b>24</b>
5.1.	Staff Sickness - Recording Sickness.....	24
5.1.1	Absences Section .....	24
5.1.2	Absence Entry Section.....	25
5.1.3	Details Section.....	26
5.2.	Sickness Absences - Adjusting a Sickness Record.....	26
5.2.1	Changing a Submitted Sickness Absence.....	26
5.2.2	Deleting a submitted Sickness Absence .....	27
<b>6.</b>	<b>Competence .....</b>	<b>28</b>
6.1.	Staff Competence Entry .....	28
6.1.1	Competence Entry Section.....	28
6.1.2	Viewing Current Competences.....	30
<b>7.</b>	<b>Activate Your Substitutes.....</b>	<b>31</b>
7.1.1	Activate Substitutes .....	31
7.1.1	End Active Substitutes .....	31
<b>8.</b>	<b>Attachments .....</b>	<b>33</b>
8.1.	Adding Attachments .....	33
8.2.	Viewing Attachments.....	34
8.3.	Deleting Attachments .....	35
<b>9.</b>	<b>Forms.....</b>	<b>37</b>
9.1.	Forms .....	37
9.2.	Form Introduction.....	37
9.3.	Position Change Form .....	38
9.3.1	Requester Details Section.....	38
9.3.2	Request Type Section.....	38
9.3.3	Position Details Section .....	39
9.3.4	Sections not used by Line Managers .....	39
9.3.5	Job and Task Analysis Section .....	39



9.3.6	Action Buttons.....	40
9.4.	Position Grade Evaluation (Manager) Form .....	40
9.4.1	Grade Evaluation Details Tab .....	41
9.4.2	Action Buttons.....	41
9.5.	Contractual Changes Form - Change in Hours.....	42
9.5.1	Resource Details Section .....	42
9.5.2	Finance Approval .....	43
9.5.3	Position Change Section.....	43
9.5.4	Change Details Section.....	43
9.5.5	Change in Hours Tab .....	43
9.5.6	Action Buttons.....	44
9.6.	Contractual Changes Form - Change in Working Schedule .....	45
9.6.1	Resource Details Section .....	45
9.6.2	Finance Approval .....	45
9.6.3	Position Change Section.....	46
9.6.4	Change Details Section.....	46
9.6.5	Change in Hours Tab .....	46
9.6.6	Action Buttons.....	46
9.7.	Contractual Changes Form - Extension to Fixed Term Dates.....	48
9.7.1	Resource Details Section .....	48
9.7.2	Finance Approval .....	48
9.7.3	Position Change Section.....	49
9.7.4	Change Details Section.....	49
9.7.5	Extension to Fixed Term Tab .....	49
9.7.6	Action Buttons.....	50
9.8.	Induction Form .....	51
9.8.1	Resource Details Section .....	51
9.8.2	Induction Checklist.....	52
9.8.2.1.	Getting Started .....	52
9.8.2.2.	Business Area & Role Fam.....	53
9.8.2.3.	Technical Training Reqs.....	53
9.8.3	Action Buttons.....	53
9.8.4	How to re-open a previously saved form. ....	54
9.9.	Probation Form .....	56
9.9.1	Resource Details section .....	56



9.9.2	Target Review section.....	57
9.9.3	How to re-open a previously saved form. ....	57
9.9.4	First Review tab .....	58
9.9.5	Second Review tab, Final Review tab, or Third review .....	61
9.9.6	Further Probation details .....	63
9.10.	Return to Work Form .....	64
9.10.1	Resource Details section .....	64
9.10.2	Absence management section .....	65
9.10.3	Discussion Points.....	66
9.10.4	Review Attendees .....	66
9.10.5	Action Buttons.....	66
9.11.	OH Referral Form .....	68
9.11.1	OH Referral Process.....	68
9.11.2	OH Referral Form Section.....	69
9.11.3	Resource Details Section .....	69
9.11.4	Manager Details Section .....	70
9.11.5	HR Officer Deatils Section .....	71
9.11.6	Employee Work Details Section .....	71
9.11.7	Work Related Hazards Section .....	71
9.11.8	Referral - Attendance Section .....	72
9.11.9	Reason for Referral Section .....	72
9.11.10	Type of Advice Required Section.....	73
9.11.11	Background Information Section.....	73
9.11.12	Manager Declaration Section .....	73
9.12.	Forms and Scenarios – Overview .....	74
<b>10.</b>	<b>Reports .....</b>	<b>76</b>
10.1.	Fixed Criteria Report .....	76
10.2.	Variable Criteria Report .....	76
10.2.1	Filtering Results .....	77



# 1. General Information

## 1.1. Introduction

This manual has been written to help you work with the Training Administration element of Business World. As several services will be using Business World, this user guide is specific to the area for which it is written.

You must also be familiar with Microsoft Windows and understand workflow (which is covered in the E-Learning introduction courses).

## 1.2. Conventions in this document:

This manual uses icons to illustrate comments with the following purposes



Warning



Useful tips



Best Practice

### **Navigate to:**

**Personnel → Work schedule → Day type master file**

[\*\*\*] Key from the PC keyboard e.g. Press [Tab]

### **This User Guide covers:**

- Personnel information
- Absences
- Competences
- Forms
- Activating substitutes
- Reports



## 2. Overview

Line Management is about the viewing and maintaining employees' personnel records, recording unplanned absences, using forms to manage resources and positions, and running reports.

Occupational Health Referrals may be raised by Line Managers. All OH Referrals are workflowed to an OH Advisor. The outcome of the referral is notified to the Line Manager in the form of a report and an Alert.

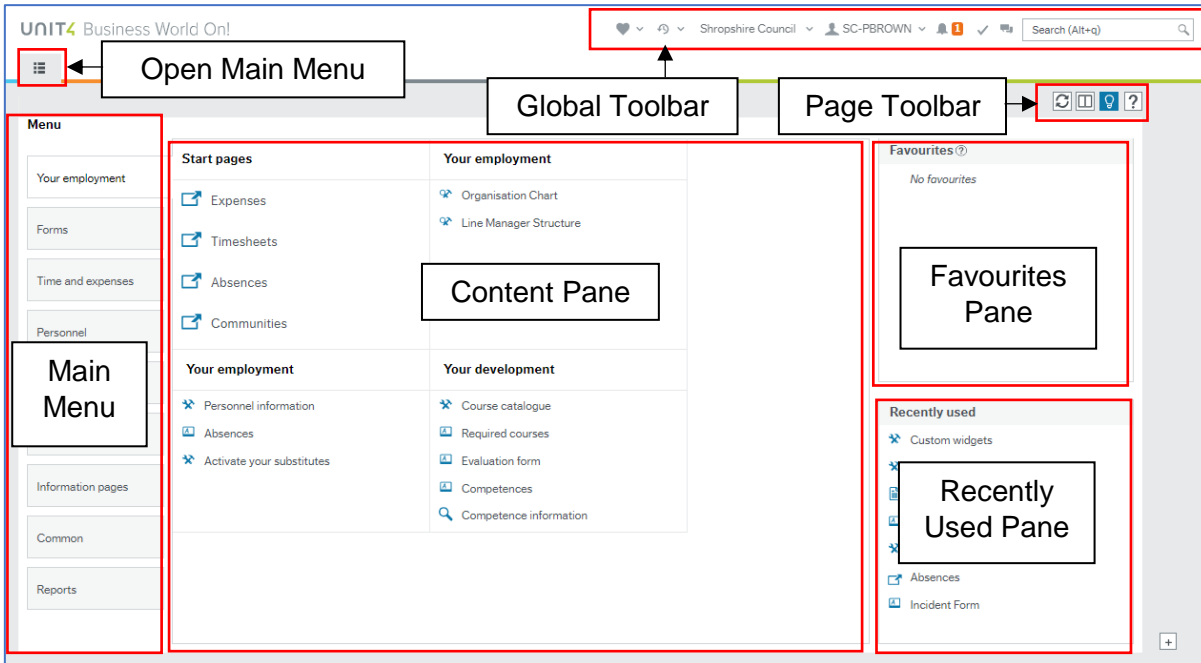
Resource and position changes can be raised on the relevant forms by Line Managers but the changes in BW are actioned by HR



### 3. Navigation

#### 3.1. The Employee Home Page

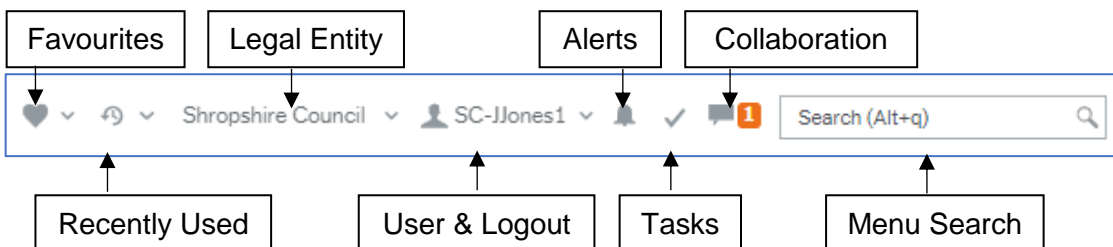
When you log on Business World Web you will 'land' on the Employee Home Page.



- **Open Main Menu** – opens the main menu from any page you are working in
- **Main Menu** – opens navigation options for the module selected
- **Content Pane** – is where the contents specific pages are opened and worked in
- **Favourites Pane** – contains shortcuts to any page you add to it
- **Recently Used Pane** - contains shortcuts to recently opened and closed pages

#### 3.2. Global Toolbar

The Global Toolbar is visible from everywhere in BW.



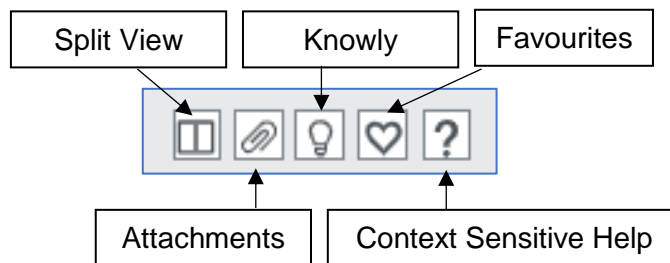
- **Favourites** – opens the list of favourite shortcuts
- **Recently Used** - opens the list of recently used pages
- **Legal Entity** – displays the organisation you are logged in to



- **User & Logout** – displays your user name and the drop-down contains options, including Logout
- **Alerts** – is where your alerts are accessed from. A white number on an orange background indicates how many alerts you have
- **Tasks** - is where your tasks are accessed from. A white number on an orange background indicates how many alerts you have
- **Collaboration** – is a messaging function for BW users that allows you to add screenshots and BW links
- **Menu Search** – allows you to search for, then open screens

### 3.3. Page Toolbar

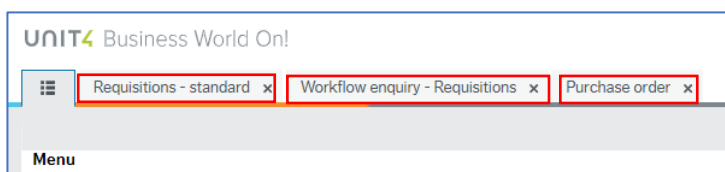
The Page Toolbar icons will change to reflect the open screen.



- **Split View** – allows two screens to be open at the same time
- **Attachments** – allows files to be added to records
- **Knowly** – is a means of sharing knowledge with other users or recording notes for yourself
- **Favourites** – opens the list of favourite shortcuts
- **Context Sensitive Help** – opens help for the screen that is active

### 3.4. Screen Tabs

It is possible to have multiple screens opened in BW and each will open in its own tab.

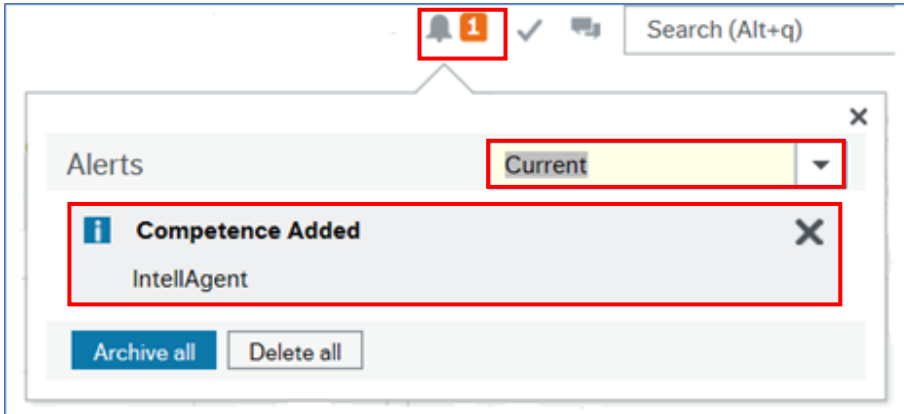


Click on a screen tab to make it the active screen or click on its cross to close it.

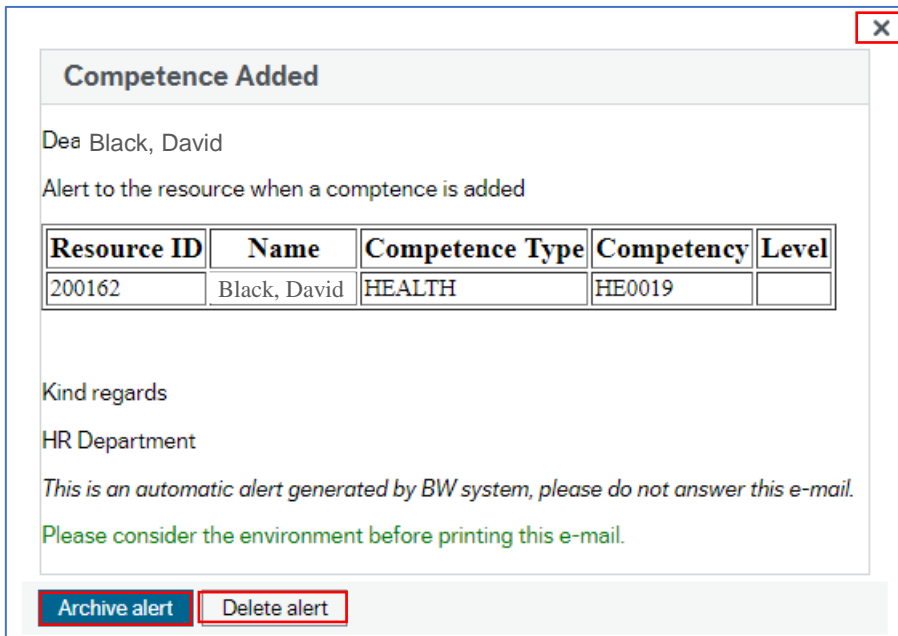
### 3.5. Alerts

An **Alert** provides information that may be useful to you. They do not require actioning to progress anything, but they may be related to an action or triggered by an action which has taken place in a Workflow. An example would when a competence is added, you will receive an alert to tell you which competence has been added.

If you have any **Alerts**, a number will appear telling you how many.



1. Click **Alerts**
2. Click a specific alert to see more details



When you have read the information, you can:

- Close the popup window using the cross. This will keep the alert in the list
- Click **Archive alert**, to send the alert to the archive
- Click **Delete alert**

## 3.6. Tasks

### 3.6.1 Overview

Workflow Tasks are generated by BW according to a set of rules which are:

- Specific to each type of transaction
- Specific to each approval level

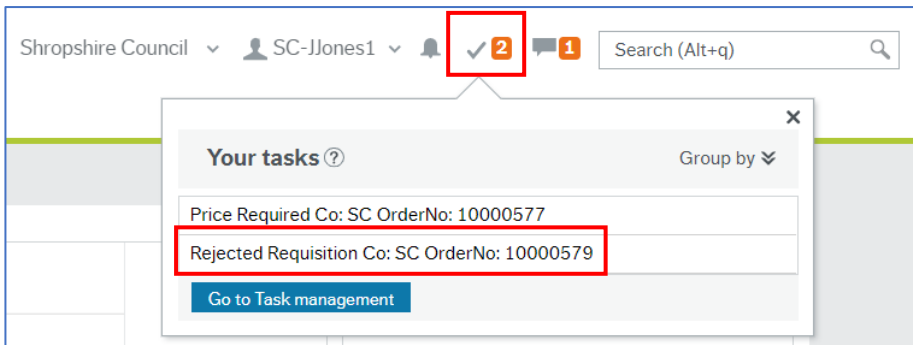


The Workflow Tasks ensure that:

- The correct person or team is notified of an action requirement.
- A link is provided to open the record requiring action
- The relevant action options are available

The example below is for a Rejected Requisition task.

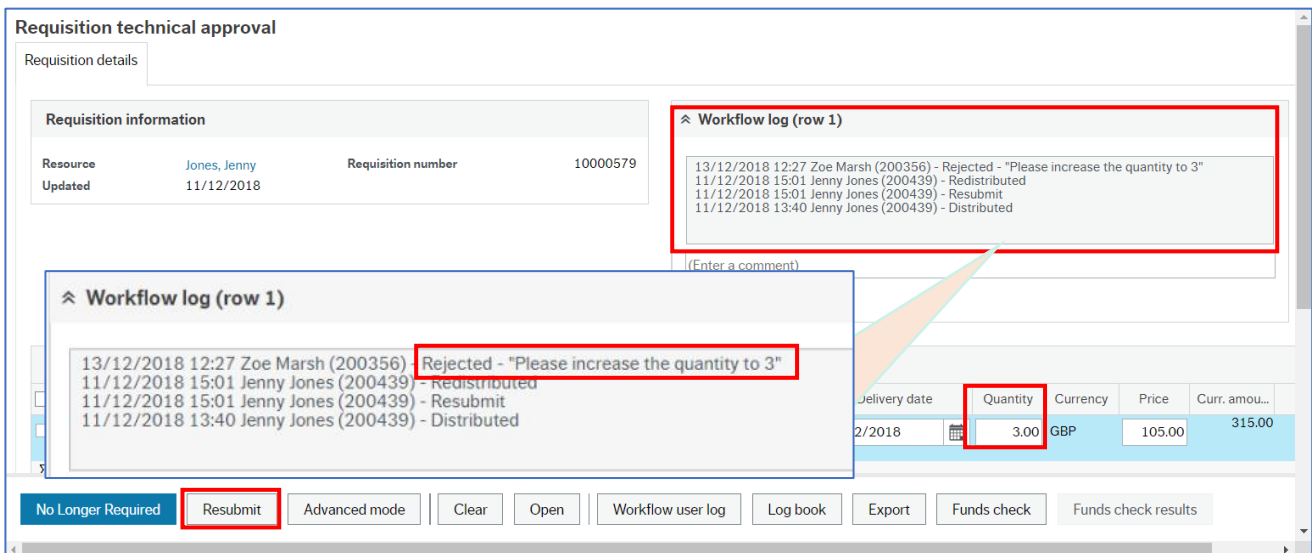
## 1. Click Tasks



You can click an individual line to open a specific task or you can click **Go to Task management** to open the task manager with all tasks available.

## 3.6.2 Action a Specific Task

### 1. Click the required task



### 2. Read the **Workflow Log**. Rejected requisitions must always have a reason entered:

- Click **No Longer Required** if the requisition, or product line, is to be cancelled or
- Enter the changes and click **Resubmit**

The Success popup will open.

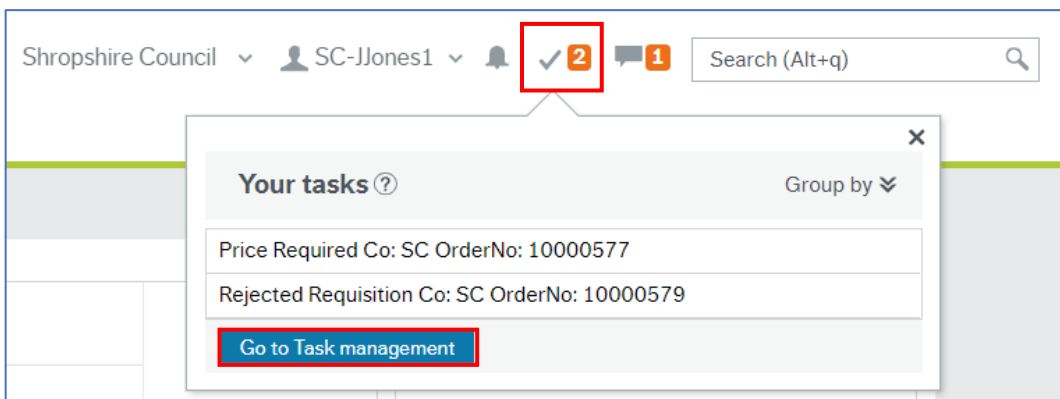
3. Click **OK**

The number of outstanding Tasks is reduced.

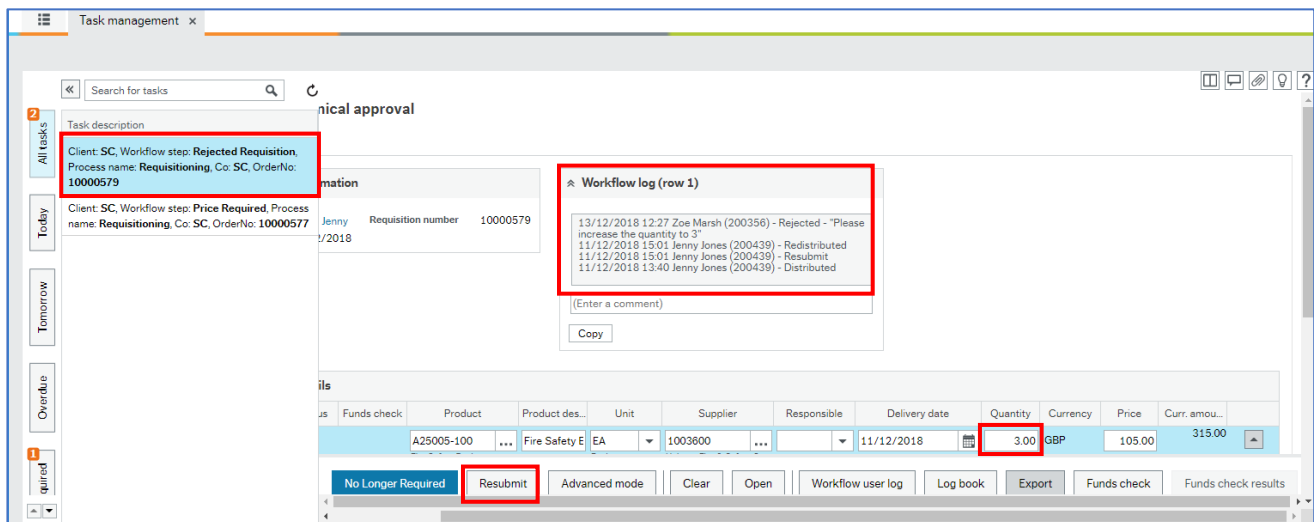


### 3.6.3 Action a Task from the Task Manager

1. Click **Tasks**



2. Click **Go to Task management**
3. Select the Task type – in this case **Rejected Requisition**
4. Click the required task



5. Read the **Workflow Log**. Rejected requisitions must always have a reason entered:
  - Click **No Longer Required** if the requisition, or product line, is to be cancelled or
  - Enter the changes and click **Resubmit**

The **Success** popup will open.

6. Click **OK**



The number of outstanding Tasks is reduced.

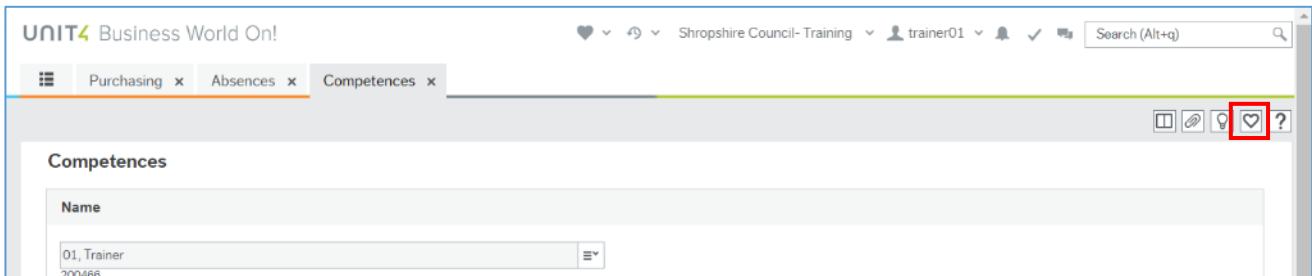


### 3.7. Favourites

Favourites is a means of creating shortcuts to the screens you use most often.

#### 3.7.1 Add to Favourites

1. Navigate to the required screen



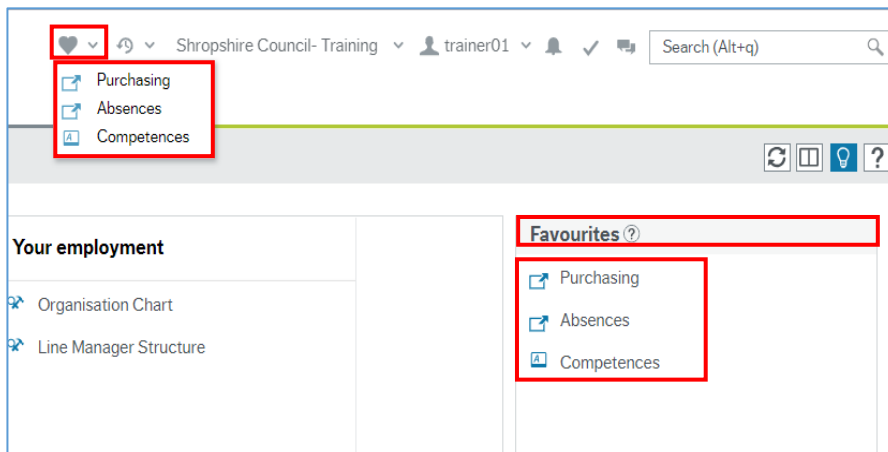
2. Click **Mark as favourite**



The icon will become blue. Clicking it again will remove it from the favourites list.

#### 3.7.2 View Favourites

Favourites can be accessed from the Home Page in two places.

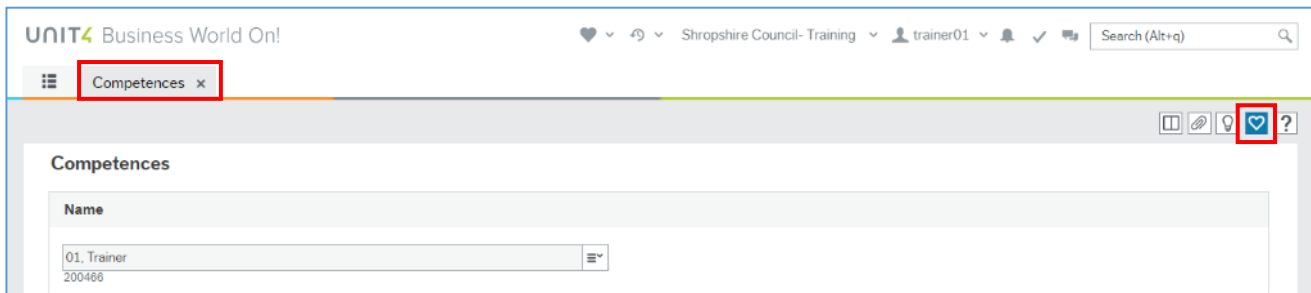


- The **Favourites** icon on the Global Toolbar produces a popup list of screen shortcuts
- The **Favourites** pane contains the same list of screen shortcuts

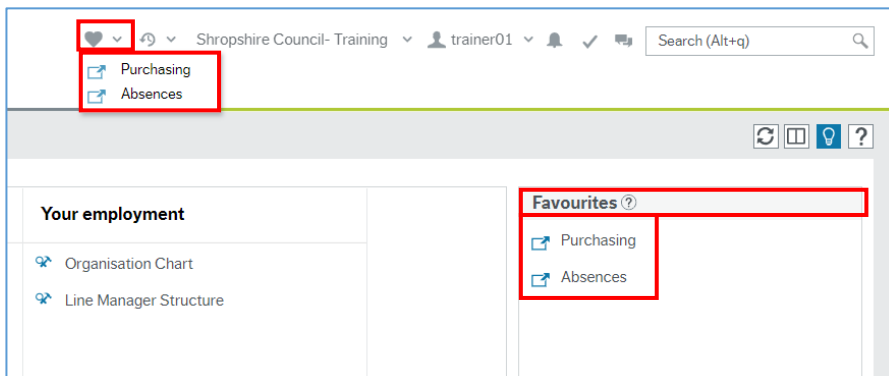
1. Click any of the links listed to open them

## 3.7.3 Remove from Favourites

1. Open the screen to be removed from Favourites



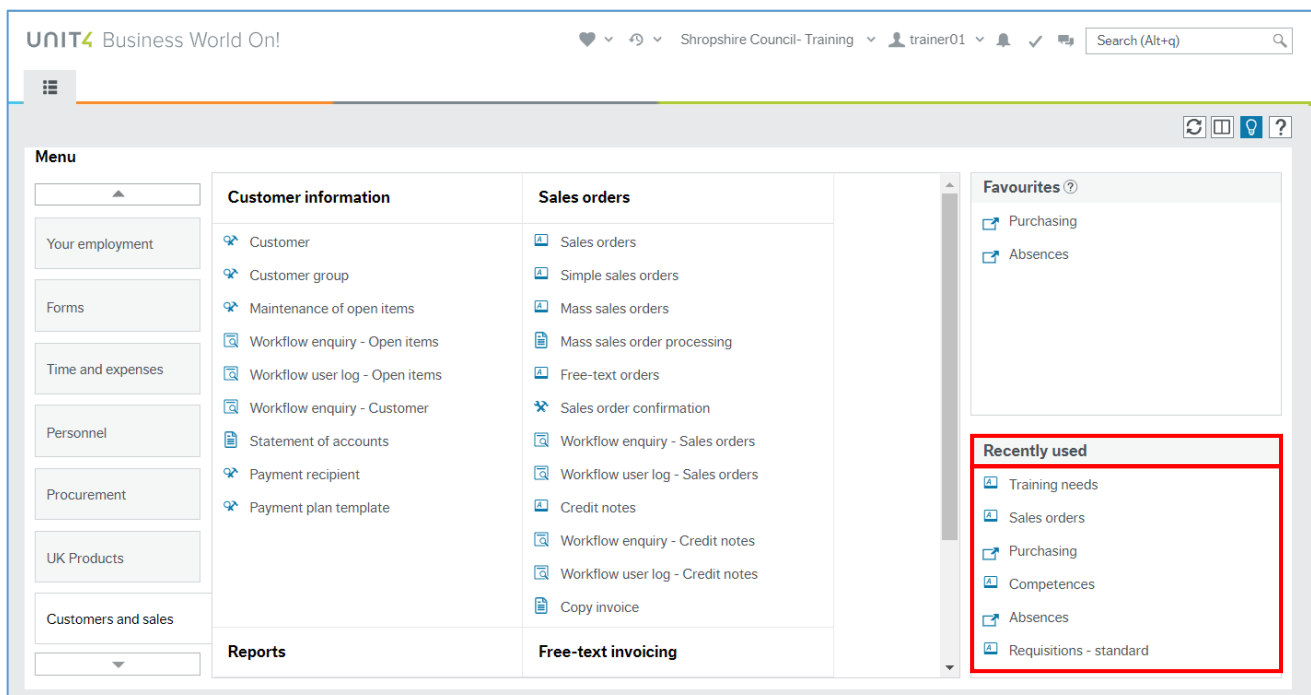
2. Click the blue **Remove from favourites** icon



In this example the Competences screen has been removed from Favourites.

## 3.8. Recently Used

The **Recently used** pane is a list of shortcuts to the 20 most recently opened screens, whether or not they are in the Favourites pane.

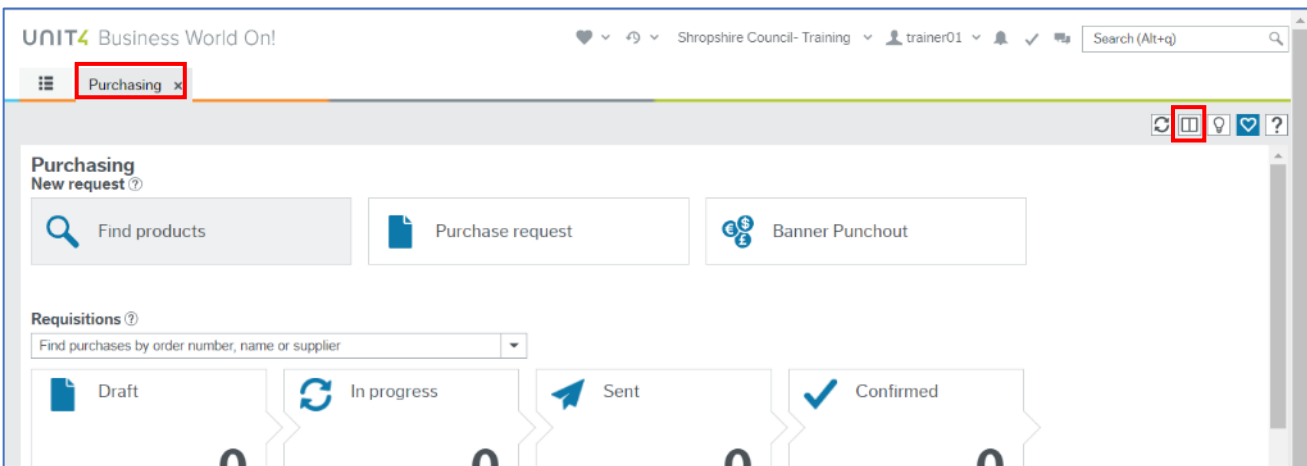


Each new screen that is opened is automatically added to the **Recently used** pane.

## 3.9. Split View

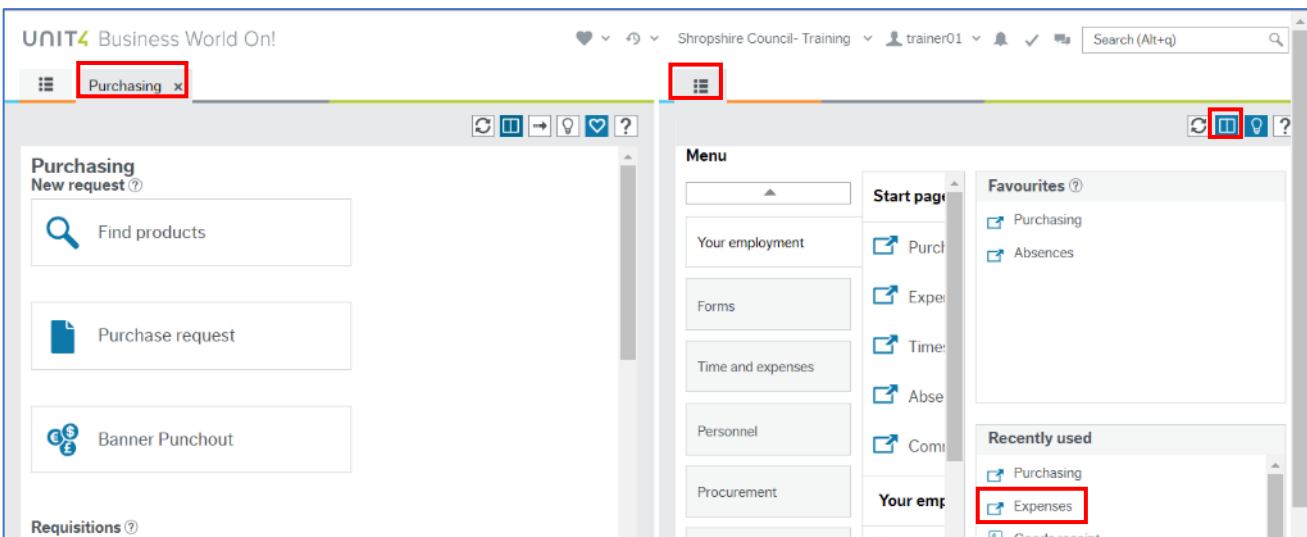
The **Split View** function allows you to have two screens open at the same time.

### 3.9.1 Open Two Screens

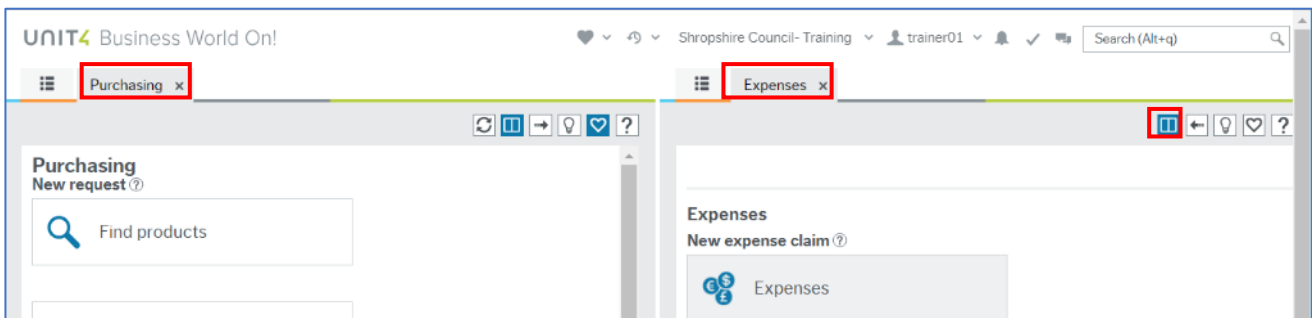


1. Open the first screen that you want, **Purchasing** in this example
2. Click **Split view**

The **Menu** is now open to the right of the selected screen and the split view icon is blue.



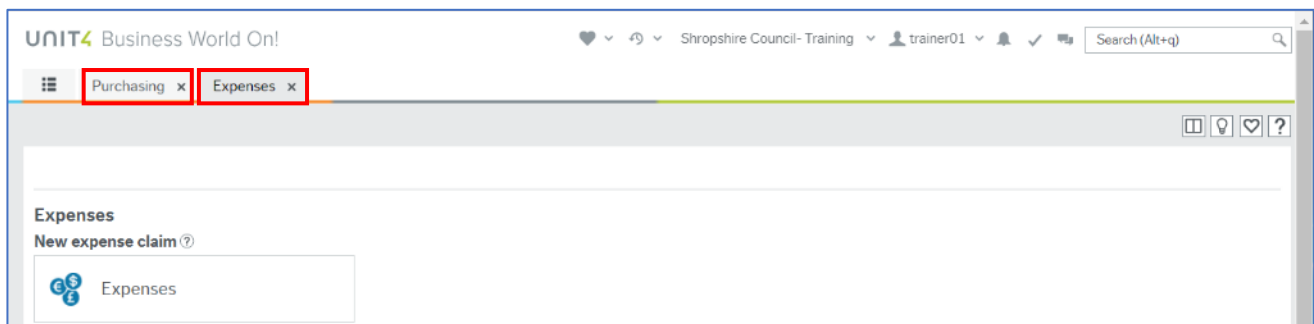
3. Select the next screen to be opened from the menu, **Expenses** in this example.



Both the **Purchasing** and **Expenses** screens are open at the same time.

### 3.9.2 Return to a Single Screen

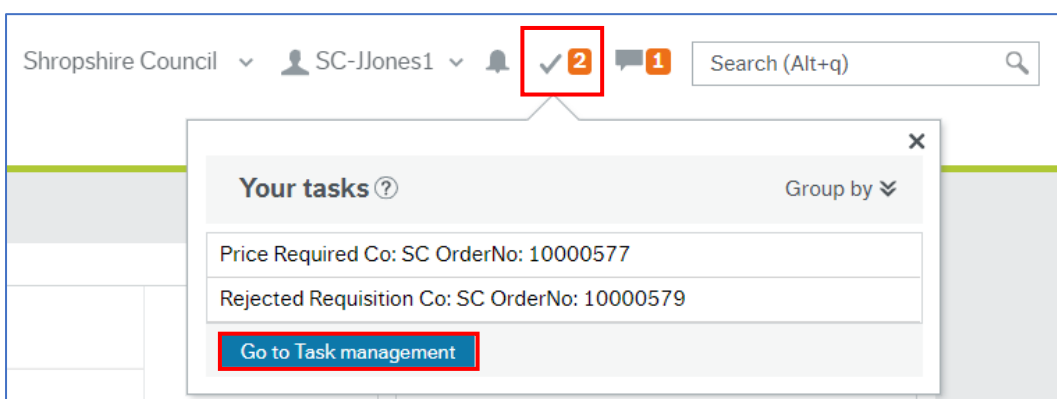
1. Click **Split view**



A single screen is open but there are now two Screen tabs available.

### 3.9.3 Task management

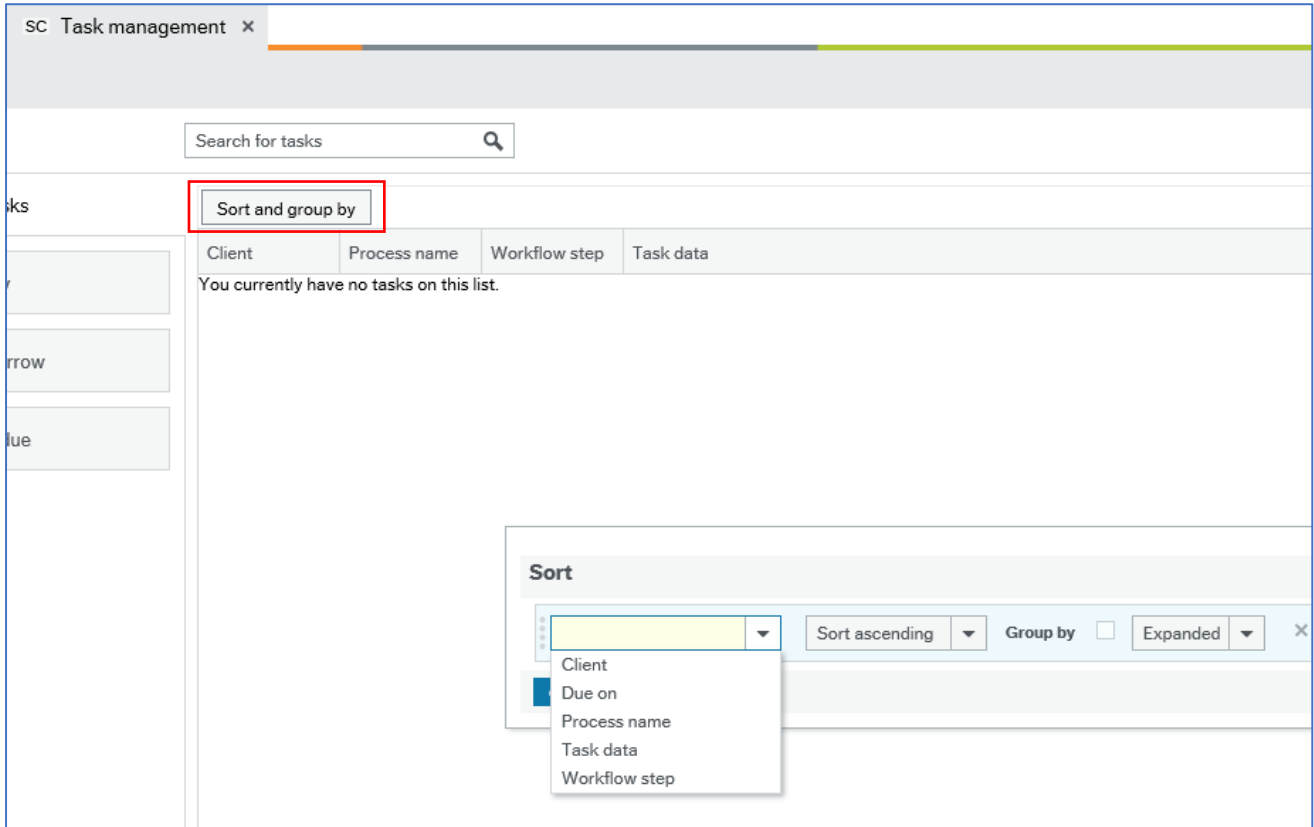
As touched on in section 3.6 Tasks can be organised and grouped to make them easier to sort and see which is a priority to action.



If you select task management or type this into the search bar, you will be taken to the task management window

Once in Task management click on “Sort and Group by” to perform a more detailed sort.





If this isn't required you can use the tabs down the left of the screen to select which workflows you wish to work through by element type.

### 3.10. What sort of tasks could you receive?

As a Line Manager you will receive many tasks, some of the more common tasks will be:

- Annual leave requests
- Timesheet
- Expenses
- Forms

## 4. Personnel and Your Employee Records

The Personnel section is where the details of all employees are held. It is the primary HR record. It is also visible to Payroll/HR staff, as well as HR Business Partners and those with the appropriate HR Menu Access Roles in BW.

A slimmed down version of this screen is accessible to Line Managers and all employees where this screen is known as Your employees or Personnel information, respectively. All staff and Line Managers are expected to maintain certain information for themselves, such as the Diversity tab.

To see your own personnel information, navigate to:

**Your employment → Your employment → Personnel information**

To see your employees' information, navigate to:

**Personnel → Personnel → Your employees**

Different user roles have different levels of access to the HR screens. The table below shows which screens can be seen by the different user types.

Tab	HR	Employee	Line Manager	OH
Resource	✓	✓	✓	✓
Contact information	✓	✓	✓	✓
Relations	✓	✓	✗	✗
Payment Information	✓	✓	✗	✗
Payroll	✓	✓	✗	✗
Employment	✓	✓	✓	✗
Personnel	✓	✓	✓	✗
Line Management	✗	✓	✓	✗
Action Overview	✓	✗	✗	✗
Right to Work	✓	✓	✓	✗
Company Assets	✓	✓	✓	✗
Resource Checks	✓	✓	✓	✗
Probation Status	✓	✓	✓	✗
Diversity	✓	✓	✗	✗
HR Casework	✓	✗	✗	✗
OH Referrals	✓	✗	✗	✓
OH Activity	✗	✗	✗	✓
Pension Auto-enrolment	✓	✓	✗	✗
Apprenticeship info	✓	✓	✗	✗
School Workforce Census	✓	✗	✗	✗
SWC Curriculum	✓	✗	✓	✗

### 4.1. Resource Tab

This is the “header record” for the Resource Profile. It is used to capture basic information such as name, start and finish dates, birthdate, etc.

Below is a table of some of the fields that may need further explanation.

Field	Description
Lookup	The field to use Type-Ahead to look for a name (first or surname), in <b>Your employees</b> only. In <b>Personnel information</b> the resource cannot be changed from the person logged in
Resource ID/Name	The staff member’s HR/Payroll unique number and name
Date from	The date this resource started at the Council/Other entities
Date to	Defaults to 31/12/2099 when the end date is not known
Status	The options are: Active, Parked, Closed and Terminated. Resources in use must be Active. When a resource leaves, the <b>Date to</b> is completed and the status changed to Closed.
Contract Hrs	The contracted weekly hours
Resource classification	Employee, Members, Apprentice, Agency Temp etc. in Your employees only
Leaving reason	Should be blank unless Status is closed

## 4.2. Contact Information Tab

This tab is used to record all contact details for a resource. Every resource must have a **General** address which is used to record details of where they work and a **Home** address.

The screenshot shows the 'Personnel information' tab with the 'Contact information' sub-tab selected. The 'Resource' field is a lookup field containing '203346' and '10, Manager'. The 'Address' section includes a table with columns for Address type, Street address, Postcode, Town, Telephone, Mobile, and E-mail. A 'Home' address is listed with details: Shropshire Council, SY2 6ND, Shrewsbury, 01743000000, 01743000000, erptest@shropshire.gov.uk. Below this is an 'Address details' form with fields for Address type (Home), Street address (Shropshire Council), Country\* (United Kingdom), Postcode (SY2 6ND), Town (Shrewsbury), County (Shropshire), Telephone (01743000000), Mobile (01743000000), Pager, Home, E-mail (erptest@shropshire.gov.uk), E-mail cc, and URL. The 'Personal contacts' section has tabs for 'Next of kin', 'Emergency', and 'Beneficiary', with a table for recording contact details.

There are three sections on this tab:

- **Resource** – The field to use Type-Ahead to look for a name (first or surname), in **Your employees** only. In **Personnel information** the resource cannot be changed from the person logged in
- **Address** – Every resource must have a **General** address which is used to record details of where they work and a **Home** address
- **Personal contacts** – this section has three tabs for **Next of Kin**, **Emergency** and **Beneficiary** contact details

### 4.3. Payment Information Tab

Seen in Personnel information only

This tab is where the personal bank details for the resource are kept. It is added when the person starts as part of the starter details and initial creation process. It can be amended by the resource.

### 4.4. Employment Tab

This is the screen that links a resource to a position.

When creating a new resource, or adding a position to an existing resource for the first time, the fields in this screen will be blank. Once a position is linked to a resource, the current and main position details will be displayed when this screen is first accessed.

The screen has two sections. An upper section in which the data relating to the main position is displayed in row form, and a lower section in which the position(s) actual details and position history can be displayed.

<input type="checkbox"/>	Position	Contract Hrs	Pay scale	Pay step	Status	Date from	Date to	Main position	Sorting	Create history
<input type="checkbox"/>	Area HQ Officer Central (92000641...	37.0000	G10	LGW33	Active	01/04/2018	31/12/2099	<input checked="" type="checkbox"/>	0	<input type="button" value=""/>
<input type="checkbox"/>	Casual Peripatetic Site Mger (9200...	0.0000	G5	LGW14	Active	01/04/2018	31/12/2099	<input type="checkbox"/>	0	<input type="button" value=""/>



1. Click on **Show history** to reveal previous Positions held by this resource

2. Click on the **Position description**, or the row, to reveal the bottom half of the screen's data

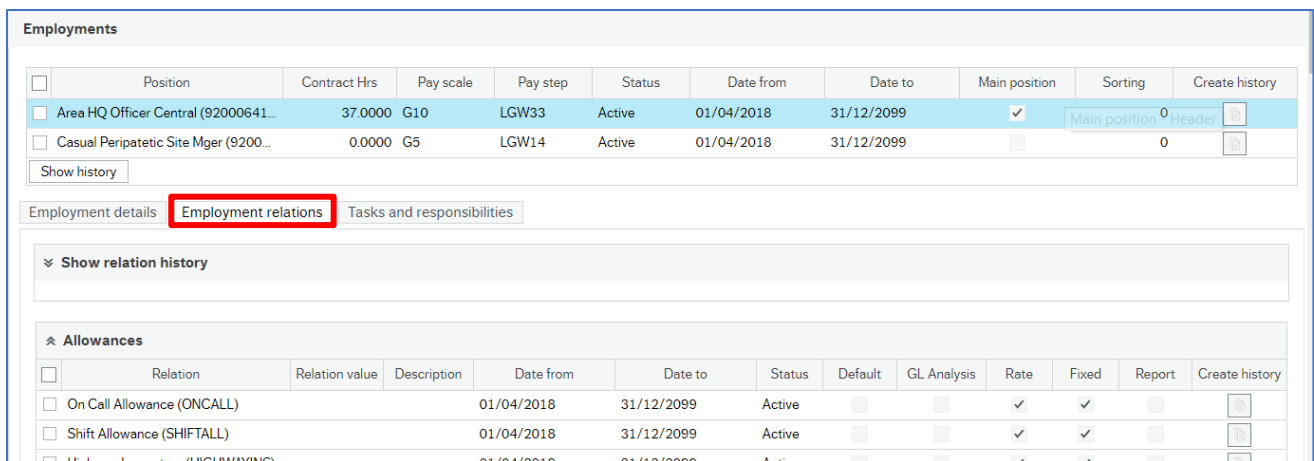
#### 4.4.1 Employment Details Section

This shows detailed information for the selected position in the Employment section.

Field	Description
Position	This is the Position to which the resource is linked. Hover over this to reveal the Position ID code P*****
Job Family	The corresponding Job Family will be displayed here (associated terms and conditions)
Contract hrs	This person's agreed hours in this Position
Work schedule	Every resource needs to be linked to a work schedule to correctly record their absence
Employment type	Whether this is a Permanent, Temporary acting up or Casual position etc. Many values exist- See dropdown arrow
Attribute	Relates directly to Attribute value field below. Acts as a heading only
Attribute value	The reason for change, should this position and data have been changed. Will show <b>Migration</b> if no change has happened
Pay scale	Shows the default values of pay scale, interval and interval pay step related directly from the Position register. Applies to all in this Position, but tailored individually here for the Resource should it be necessary
Reason change	Will show one of 2 reasons (Cost of Living Increase or Incremental Increase) should the Pay step have been altered
Position status	Shows the status of the position on the record. Options are: <b>Active:</b> Position is active and therefore in use.

	<p><b>Parked:</b> Position temporarily closed.  <b>Closed:</b> Position is closed, but can be re-opened.  <b>Terminated:</b> Position is closed - cannot be re-opened.</p>
Date from	The date that this person started in this Position only
Date to	Will show 31/12/2099 if this is the current Position, except where it is a known end date e.g. FTC. Historical positions will show when the person left that position
Main position	Ticked if this Position is their only or substantive Position. Should a person have more than one Position then only one is ticked if both are current or within date. Main Position is normally ticked for the Position with most hours attributed to it

#### 4.4.2 Employment Tab Section



The screenshot shows the 'Employments' tab with a table of positions. Below the table, there are three tabs: 'Employment details', 'Employment relations' (highlighted with a red box), and 'Tasks and responsibilities'. Under 'Employment relations', there is a 'Show relation history' section and an 'Allowances' table.

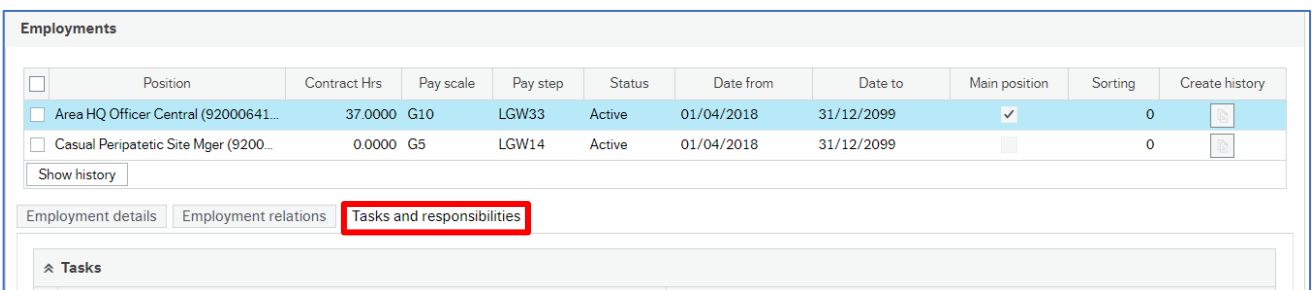
Position	Contract Hrs	Pay scale	Pay step	Status	Date from	Date to	Main position	Sorting	Create history
<input type="checkbox"/> Area HQ Officer Central (92000641...	37.0000	G10	LGW33	Active	01/04/2018	31/12/2099	<input checked="" type="checkbox"/>	0	<input type="button" value="Header"/>
<input type="checkbox"/> Casual Peripatetic Site Mgrer (9200...	0.0000	G5	LGW14	Active	01/04/2018	31/12/2099	<input type="checkbox"/>	0	<input type="button" value="Header"/>

Relation	Relation value	Description	Date from	Date to	Status	Default	GL Analysis	Rate	Fixed	Report	Create history
<input type="checkbox"/> On Call Allowance (ONCALL)			01/04/2018	31/12/2099	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Header"/>
<input type="checkbox"/> Shift Allowance (SHIFTALL)			01/04/2018	31/12/2099	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Header"/>
<input type="checkbox"/> Highway Inspectors (HIGHWAYINS)			01/04/2018	31/12/2099	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Header"/>

Employment relations are a sub-set of relations that relate to the person or resource in this Position and therefore different to the Relations tab.

#### 4.4.3 Tasks and responsibilities Tab Section



The screenshot shows the 'Employments' tab with the same table of positions as above. Below the table, there are three tabs: 'Employment details', 'Employment relations', and 'Tasks and responsibilities' (highlighted with a red box). Under 'Tasks and responsibilities', there is a 'Tasks' section.

This tab is not used.

### 4.5. Line Management Tab

Seen in **Your employees** only

On this tab it's possible to see who the resource reports to other than their line manager. If the person only reports to the person viewing this screen, this will be blank.



**Your employees**

Resource Contact information Relations Employment **Line Management** Right to Work Company Assets Resource Checks Probation Status OH Referrals

**Resource**

Lookup  
 203632  
 10, Trainee

**HR: LM Resources**

OK

Search Detail level All levels Copy to clipboard

#	Line Manager	Line Manager (T)	ResID	ResID (T)	Resource type	Position	Position (T)	Employment Type	Employment Type (T)	Pay step	Position Date from	Position Date to	Resno Date to	Resno Date from

Time executed 11/02/2019 10:21:28 Number of rows 0

## 4.6. Right to Work Tab

This screen is used to capture the right to work details relating to the resource.

Personnel information x Your employees x

**Your employees**

Resource Contact information Relations Employment Line Management **Right to Work** Company Assets Resource Checks Probation Status OH Referrals

**Resource**

Lookup  
 203632  
 10, Trainee

**Proof Received?**

Proof Received?

**Proof of Eligibility**

<input type="checkbox"/>	Type	Valid From	Valid To	Documents Uploaded?

**Visa Applications**

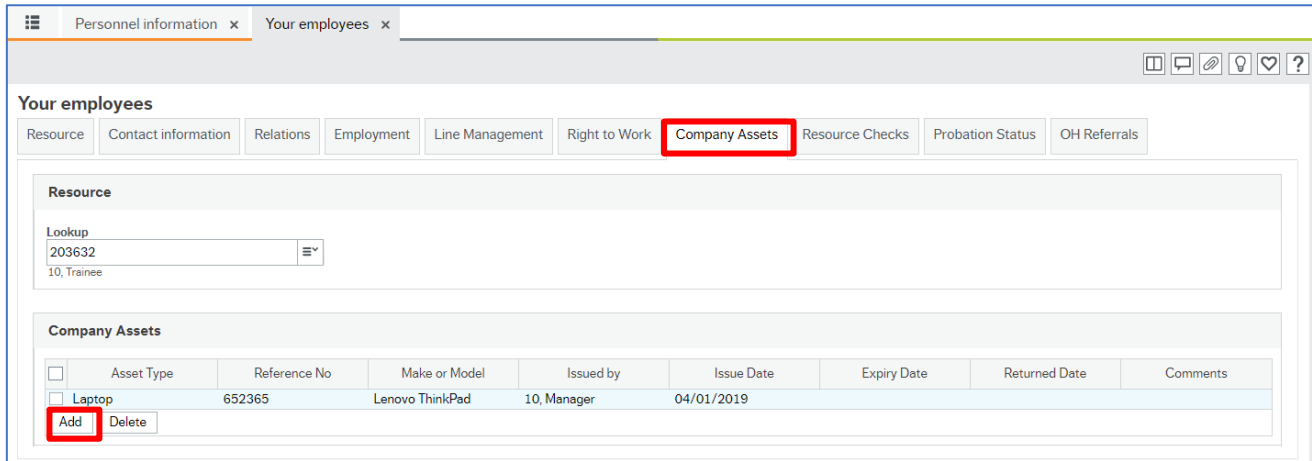
<input type="checkbox"/>	Visa / Work Permit Type	Reference Number	Application Date	Received Date	Application Status	Valid From	Expiry Date	Sponsorship Details	Cost	Documents U...

- **Resource** – The field to use Type-Ahead to look for a name (first or surname), in **Your employees** only. In **Personnel information** the resource cannot be changed from the person logged in
- **Proof Received**- Declaration for a new starter or those on continuous checks that proof has been received
- **Proof of Eligibility** – Documentation that supports eligibility, such as Immigration status documents, Work permit, Certificate of Naturalisation etc.
- **Visa Application** – All types of Visa or Work Permit applications for applicable staff should be listed here



## 4.7. Company Assets Tab

This screen is used to monitor the company assets (mobile phone, laptop, key pass, PPE etc) and control the issue to, and return of assets form, the resource. It is updated by Line Managers for employees.



The screenshot shows the 'Your employees' interface with the 'Company Assets' tab selected. Below the navigation tabs, there is a 'Resource' section with a lookup field containing '203632' and '10, Trainee'. The main area is a table of company assets:

<input type="checkbox"/>	Asset Type	Reference No	Make or Model	Issued by	Issue Date	Expiry Date	Returned Date	Comments
<input type="checkbox"/>	Laptop	652365	Lenovo ThinkPad	10, Manager	04/01/2019			

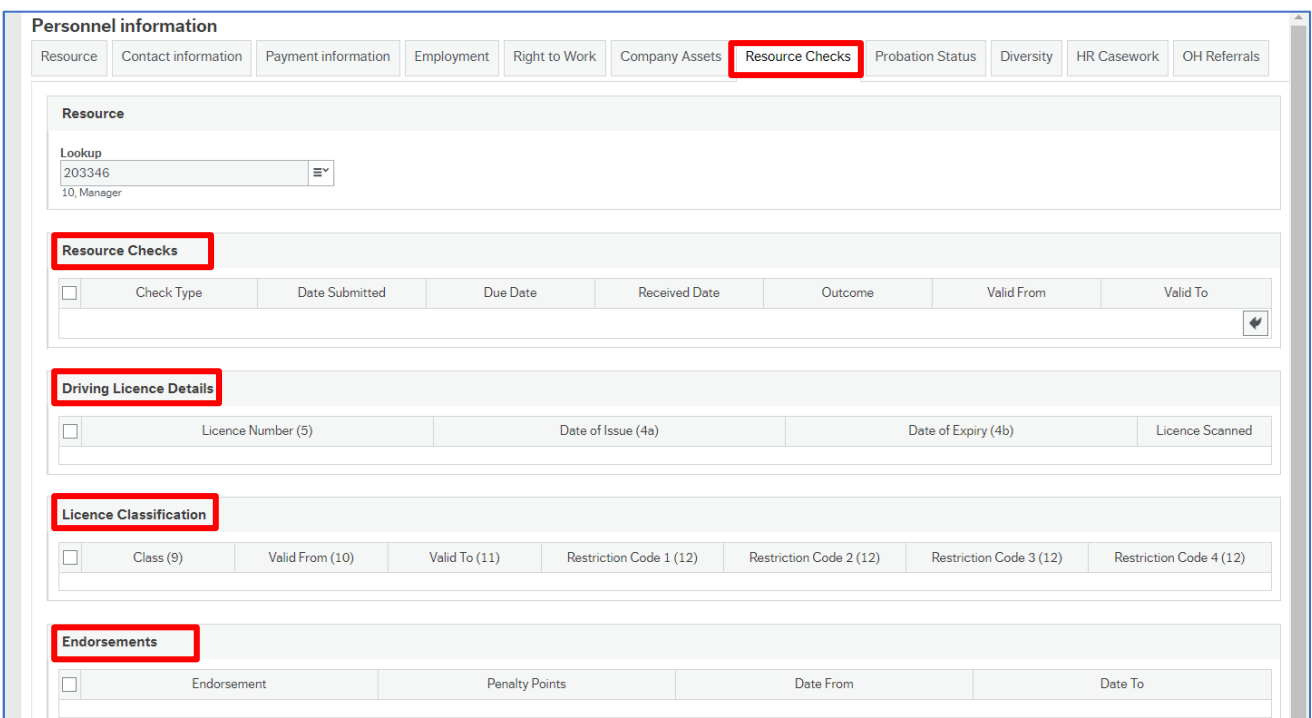
Below the table are 'Add' and 'Delete' buttons, with the 'Add' button highlighted by a red box.

### To update this tab

1. Click **Add** to insert a new row
2. Press [**Space bar**] to select the **Asset Type**
3. In **Reference No** enter the asset ID
4. Ensure all **Date** fields are complete
5. Add any relevant comment for this asset e.g. Slight scratch on laptop
6. Click **Save** when each row is complete
7. When an asset is handed back ensure **Return date** is completed, and click **Save**

## 4.8. Resource Checks Tab

This tab is normally completed retrospectively by HR when a resource has started. Pre-employment checks will take place outside of BW but recorded within BW once the resource record has been created via the recruitment process.



The screenshot shows the 'Personnel information' interface with the 'Resource Checks' tab selected. The 'Add' button is highlighted with a red box. Below the navigation tabs, there is a 'Resource' section with a lookup field containing '203346' and '10, Manager'. The main area is a table of resource checks:

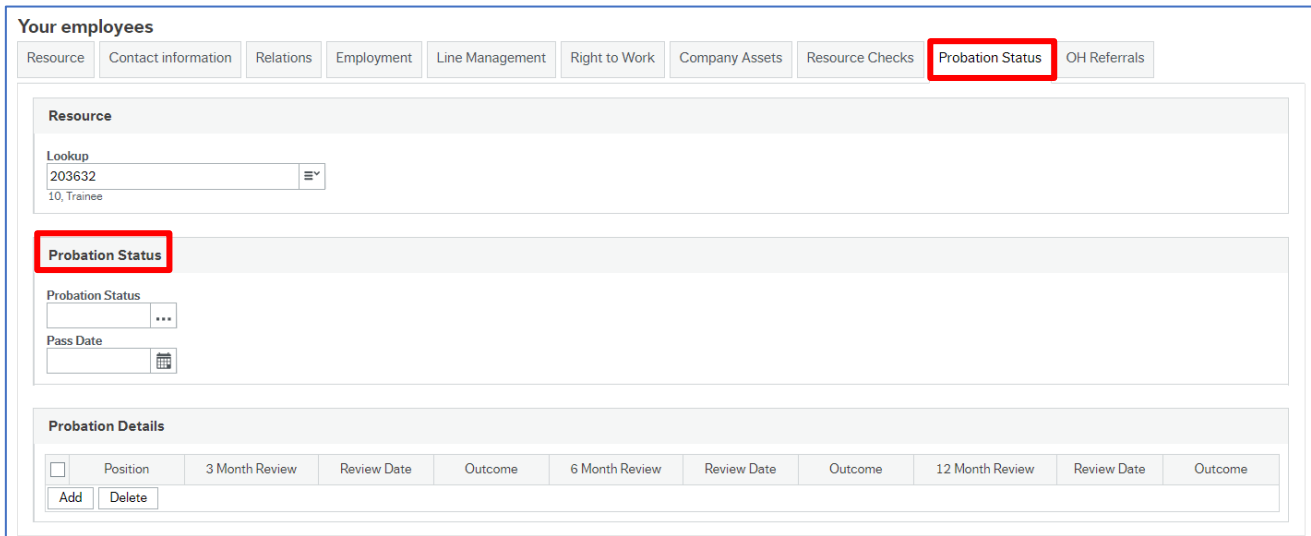
<input type="checkbox"/>	Check Type	Date Submitted	Due Date	Received Date	Outcome	Valid From	Valid To
<input type="checkbox"/>							

Below the table are several sections, each with a red box around its title:

- Driving Licence Details**: Licence Number (5), Date of Issue (4a), Date of Expiry (4b), Licence Scanned
- Licence Classification**: Class (9), Valid From (10), Valid To (11), Restriction Code 1 (12), Restriction Code 2 (12), Restriction Code 3 (12), Restriction Code 4 (12)
- Endorsements**: Endorsement, Penalty Points, Date From, Date To

### 4.9. Probation Status Tab

This is set up for a Starter or where it is necessary for an employee to go on a probation period. It will be automatically completed for a New Starter but can be added to/edited and updated by the Line Manager when they have completed the reviews. Should the outcome be unsuccessful, this may invoke the Leaver Process and you should seek HR advice. Line managers can run a report that shows where their staff are in the probation process.



**Your employees**

Resource | Contact information | Relations | Employment | Line Management | Right to Work | Company Assets | Resource Checks | **Probation Status** | OH Referrals

**Resource**

Lookup  
 203632  
 10, Trainee

**Probation Status**

Probation Status  
 ...

Pass Date  
 ...

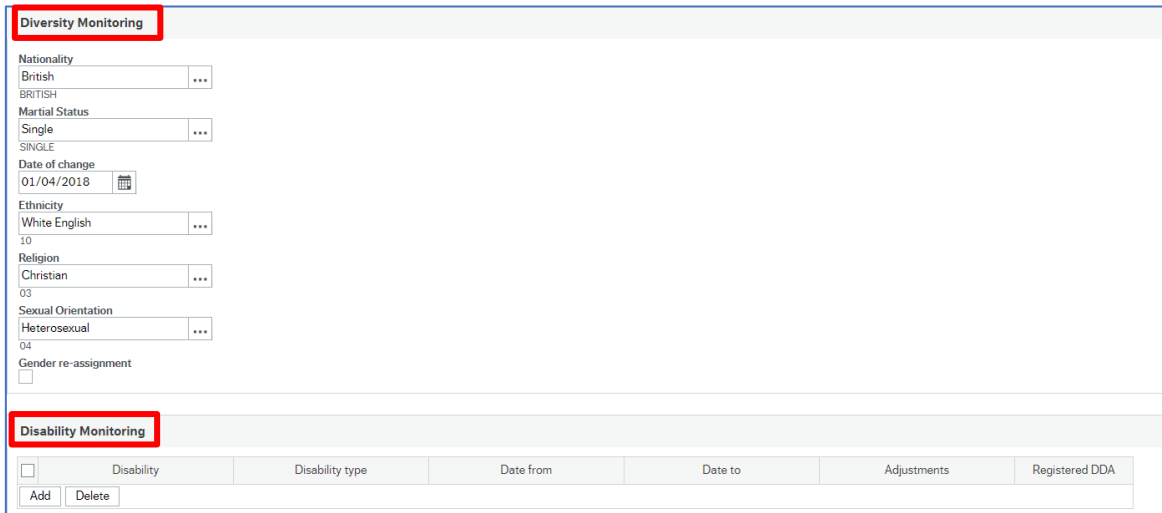
**Probation Details**

<input type="checkbox"/>	Position	3 Month Review	Review Date	Outcome	6 Month Review	Review Date	Outcome	12 Month Review	Review Date	Outcome
<input type="checkbox"/>										

Add Delete

### 4.10. Diversity Tab

This is completed by HR from the Recruitment Monitoring Form but can be maintained by both HR and the Resource.



**Diversity Monitoring**

Nationality  
 British  
 BRITISH

Martial Status  
 Single  
 SINGLE

Date of change  
 01/04/2018

Ethnicity  
 White English  
 10

Religion  
 Christian  
 03

Sexual Orientation  
 Heterosexual  
 04

Gender re-assignment

**Disability Monitoring**

<input type="checkbox"/>	Disability	Disability type	Date from	Date to	Adjustments	Registered DDA
<input type="checkbox"/>						

Add Delete

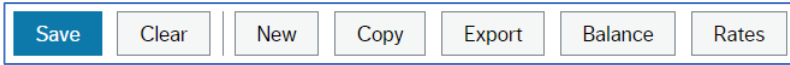
This tab has two sections:

- **Diversity Monitoring** – for Nationality, Ethnicity, Religion etc.
- **Disability Monitoring** – Disability, Dates, Adjustments and Registered DDA



### 4.11. Action Buttons

The action buttons apply to the Personnel information screen, whichever tab is being viewed.



- **Save** - this will save any changes made to the record
- **Clear** – this normally clears the current data. Does not work on Personnel information
- **New** – for **HR use only** when creating new resources. It is not used by **Line Managers**
- **Copy** - for **HR use only** when creating new resources. It is not used by **Line Managers**
- **Export** – this produces a report that could be printed
- **Balance** – this opens the Balance screen displaying balances for things such as Annual Leave, Tax, NIC etc.
- **Rates** – this opens the Rates screen displaying rates of pay

#### 4.11.1 Balance Screen

1. Click **Balance**

#	Value reference	Attribute 2	Attribute value 2	Date from	Date to
1	Annual Leave	Position (POSNO)	Senior Committee Officer (9200...	01/01/2019	31/12/2019
2	Current Entitlement	Position (POSNO)	Senior Committee Officer (9200...	01/01/2019	31/12/2019

2. Click **Personnel information** to return to the previous screen



## 4.11.2 Rates Screen – Rates Overview Tab

### 1. Click Rates

The screenshot shows the 'Rates' screen with the 'Personnel information' tab selected. The 'Rate overview' sub-tab is also selected. The main content area is titled 'Rate overview for 01, Manager (202739)'. It contains a search criteria section with fields for Value reference, Effective date (30/01/2019), Attribute, Attribute value, Attribute 2, and Attribute value 2. Below the search criteria is a table with the following data:

#	Value refere...	Description	Position	Attribute	Attribute value	Attribute 2	Attribute value 2	Date from	Date to	Rate	Calculated
1	C100	Annual Salary	P10012	Pay step (PAYS...	LGW39			01/10/2018	31/12/2099	35,229.00...	
2	C101	Actual Annual Sa...	P10012	Resource numb...	202739			01/10/2018	31/12/2099	35,229.00...	✓

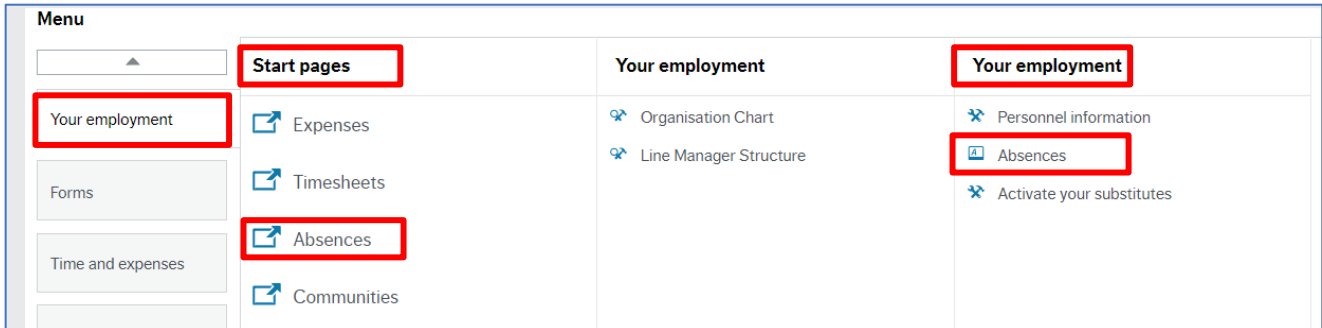
### 2. Click Rates overview

### 3. Click Personnel information to return to the previous screen



## 5. Unplanned Absences

As a Line Manager you can access Absence from two places, but each has a different use:



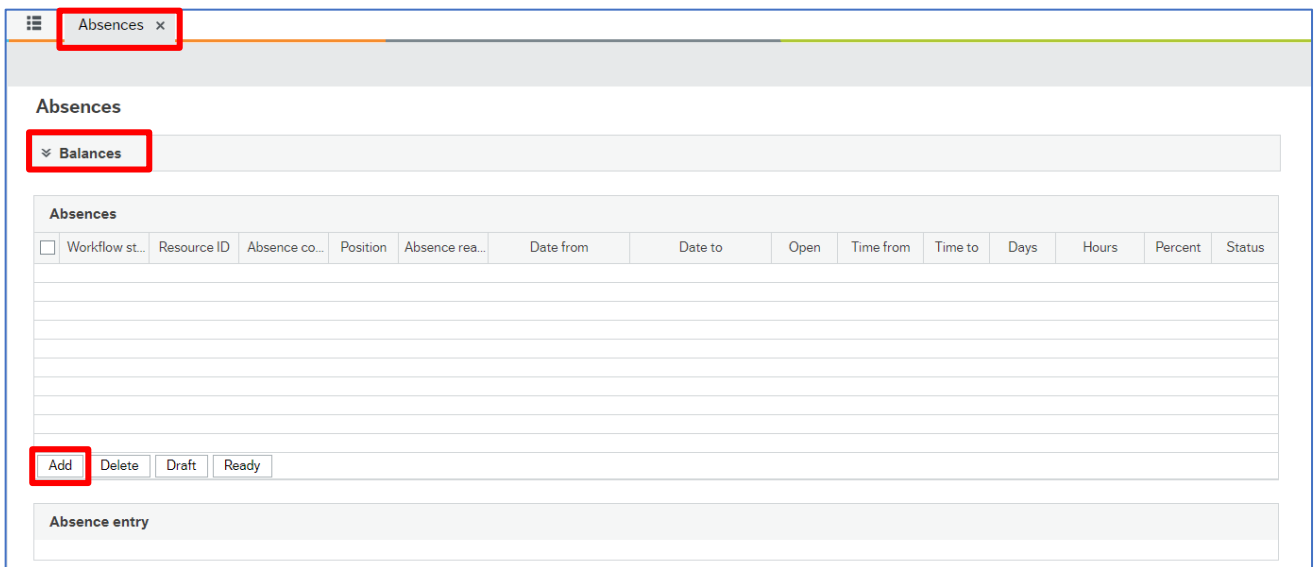
**Your employment → Start pages → Absences** is used to request Annual Leave and planned absences primarily for yourself, but can be used if the staff member cannot access by themselves. This is only for those who record Annual Leave or normal planned absences, which for the most part will not be teaching staff.

**Your employment → Your employment → Absences** is used to report unplanned absences for your employees especially Sick type absences.

### 5.1. Staff Sickness - Recording Sickness

To record staff sickness or unplanned absences, navigate to:

**Your employment → Your employment → Absences**



This section records the history of absences and is populated from the entries made in the **Absence entry** section and it updates each time you tab out of a filed in the Absence entry section. It is also the place where absence entry begins.

1. Click **Add**

The **Absence entry** section opens



5.1.2 Absence Entry Section

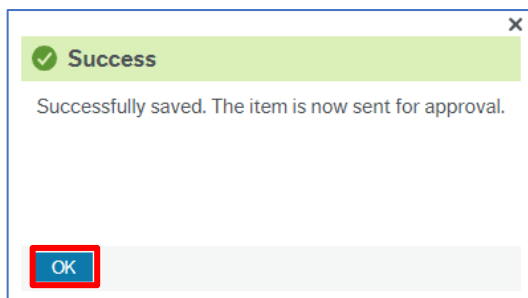
As this section is completed, the screen will change depending on the options used.

1. **Resource ID** - press **[Space bar]** or use type ahead to select the resource
2. **Absence code** – select the type of absence from the drop down
3. **Status** – this defaults to Active
4. **Absence reason** – press **[Space bar]** or use type ahead to select the reason
5. **Position** – select **All positions** from the drop down
6. **Date from** – enter the date the absence began
7. **Open ended absence** – if the return date is known, leave blank. If the return date is not known, select the check box
8. **Date to / Preliminary end date** – this field name will change if **Open ended absence** is selected. Enter the relevant date
9. **Percent** – leave as default 100.00

The Absences section is populated with the details.

10. Click **Save**

The **Success** popup opens.



11. Click **OK**

### 5.1.3 Details Section

#### 1. Click **Details**

Details						
<input type="checkbox"/>	Date	Time from	Time to	Hours	Percent	Planned hours
<input type="checkbox"/>	11/02/2019	09:00	16:00	7.00	100.00	7.00
<input type="checkbox"/>	12/02/2019	09:00	16:00	7.00	100.00	7.00
<input type="checkbox"/>	13/02/2019	09:00	16:00	7.00	100.00	7.00
<input type="checkbox"/>	14/02/2019	09:00	17:00	8.00	100.00	8.00
<input type="checkbox"/>	15/02/2019	09:00	17:00	8.00	100.00	8.00
<input type="checkbox"/>	16/02/2019	00:00	00:00	0.00	100.00	0.00
<input type="checkbox"/>	17/02/2019	00:00	00:00	0.00	100.00	0.00
<input type="checkbox"/>	18/02/2019	09:00	16:00	7.00	100.00	7.00

Update details    Reset details

This section displays the work schedule for the resource and which days/hours are impacted by the absence.

## 5.2. Sickness Absences - Adjusting a Sickness Record

On occasion, when an Absence has been recorded incorrectly, it will be necessary to open that Absence line and correct it. This is more prevalent for those Sick type absences where an “Open ended” date, known as “preliminary end date” was recorded. It is very important the correct amount of days of absence is recorded as this may affect that person’s pay.

### 5.2.1 Changing a Submitted Sickness Absence

To open a previous absence, navigate to:

**Your employment → Your employment → Absences**

1. Click **Open**
2. In the dialogue box that appears, enter the Resource name and Absence code of Sick

**Open previous absences** ✕

**Search criteria**

Resource:

10, Trainee

Containing date:

Absence code:

Sick Absence

Workflow state:

Position:

**Status**

Active     Parked

Transferred     Partly transferred

Reversed     Reversed transferred

#### 3. Take note of the status section. The following Statuses mean:

- **Active** - still in the system and ready to be edited
- **Transferred** - transferred to Payroll for payroll calculations, if they apply
- **Reversed** – those Transferred by Payroll, but then “reversed” as they were incorrect
- **Parked** - any absence that did not enter Workflow due to being “parked” up to edit later (these, if found, should be dealt with - delete or process through)
- **Partly Transferred** - where a long-term absence across 2 Payroll periods has had the first part taken over by Payroll, but the second part is still available to the User

- **Reversed Transferred** - those that had been fully processed by Payroll, beyond Payroll Processing, but were found to be incorrect/need removal
4. Leave the tick in **Active**, as they ought to be still active unless this is beyond the Payroll cut-off date for your Payroll
  5. Click **Load**
  6. Click on the Absence row that needs changing

Absences							
<input type="checkbox"/>	Workflow state	Resource ID	Absence co...	Position	Absence reas...	Date from	Date to
<input type="checkbox"/>	No workflow	10, Trainee	SICK	Admin Assist...	Back Proble...	11/02/2019	18/02/2019

7. In the **Details** section below, make the change to the **Date to**, **Time**, **Absence reason** etc.

<b>Resource ID*</b> 203632 10, Trainee	<b>Absence code*</b> SICK Sick Absence	<b>Status*</b> Active
<b>Absence reason</b> Back Problems BACK	<b>Position</b> P10911 Admin Assistant (920003833)	<b>Preliminary end date*</b> 18/02/2019
<b>Date from*</b> 11/02/2019	<b>Open ended absence</b> <input checked="" type="checkbox"/>	<b>Time from</b> 09:00
<b>Time from</b> 09:00	<b>Time to</b> 16:00	<b>Time to</b> 16:00
<b>Percent</b> 100.00	<b>Days</b> 6	<b>Hours</b> 44.00

8. Check your entries then click **Save**
9. The Success banner will appear and the Workflow status will change to **Workflow in progress**. This, in turn, will become **No workflow** as this is self-approving by Managers

### 5.2.2 Deleting a submitted Sickness Absence

If you have entered an Absence for the wrong person you can delete the transaction altogether. **Note-** this is **not** possible if it is **Transferred** or **Partly Transferred** to Payroll. Contact SC Payroll if this is the case.

1. Follow all the steps previously, up to step 6
2. Now loaded, click on the row to check the details, in case this is not the correct one to delete
3. Tick the check-box on the left of the row of Absence (or rows, as necessary)

Absences							
<input type="checkbox"/>	Workflow state	Resource ID	Absence co...	Position	Absence re...	Date from	Date to
<input checked="" type="checkbox"/>	No workflow	11, Trainee	SICK	Project & Se...	Asthma	24/01/2019	13/02/2019

4. Click **Delete**. The row will disappear and will not be transferred by Payroll

Add	Delete	Draft	Ready
-----	--------	-------	-------





## 6. Competence

Competences can be recorded for your resources, but the norm is that they enter their own. These are then routed to the Line Manager as a Task. Examples are Educational & Professional qualifications or Job-related competencies.

As a Line Manager you can enter a Competence from two places, but each has a different use.

**Your employment → Your development → Competences** is used to enter competences for yourself.

**Personnel → Competence → Competence** is used to record competences for your employees and yourself.

### 6.1. Staff Competence Entry

To record staff competences, navigate to:

**Personnel → Competence → Competence**

Competence x

Competence

Name

10, Trainee  
203632

Competence type

Professional Qualification

1. **Name** - press **[Space bar]** or use type ahead to select the resource
2. **Competence type** – select the type of competence from the drop down

Competence

<input type="checkbox"/>	Workflow state	Competence	Period from
<b>Add</b>	Delete		

3. **Competence** – click **Add** to open Competence entry

#### 6.1.1 Competence Entry Section

As this section is completed, the screen will change depending on the options used.

Competence entry

Competence\*  
Institute of Leadership & Management  
ILM

Professional Membership Level  
Fellowship  
FELLOW

Member From  
01/01/2006

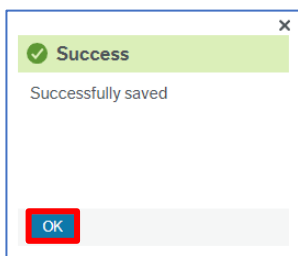
Member to

Comment



1. **Competence** - select the competence type from the drop down. This will determine what the following fields are called. This example uses a professional competence
2. **Professional Membership Level** – select the level from the drop down
3. **Member From** – enter the membership start date
4. **Member to** – enter the membership end date, if time limited
5. **Comment** – relevant comments can be entered
6. **Attachment** – add an image/scanned copy of the relevant certificate for HR confirmation checks. See the Attachments section
7. Click **Save**

The **Success** popup opens.



8. Click **OK**

The Competence section is populated with the details.

^ Competence						
<input type="checkbox"/>	Workflow state	Competence	Member From	Member to	Professional Membership Level	Info
<input type="checkbox"/>	Finished	Institute of Leadership & Manageme...	01/01/2006		Fellowship	
Add Delete						

	Initially the Workflow will state <b>Workflow in Progress</b> but will then become <b>Finished</b> , as this is self-approving.
--	---



### 6.1.2 Viewing Current Competences

Viewing a Competence for staff members is a case of loading the name, then the Competence Type, or using a Global report such as **HR: LM Current Competence Record per Resource**.

Name						
11, Trainee						
205369						
Competence type						
Educational Qualification						
Competence						
<input type="checkbox"/>	Workflow state	Competence	University/College	Education Subject	Qualification Result	Year Qualification Gained
<input type="checkbox"/>	Finished	Degree	Wolverhampton	Geography	2:2	1994

1. **Name** - press **[Space bar]** or use type ahead to select the resource
2. **Competence type** – select the type of competence from the drop down
3. **Competence** – use the dropdown to choose Educational Qualification, for example



## 7. Activate Your Substitutes

In the event of a planned absence, such as Annual Leave, you can nominate a Substitute to act on your behalf to receive Tasks and Alerts, and to action them with the same levels of approval as yourself. You can do this as a General substitute where one person assumes all of your responsibilities or by individual elements where you have several substitutes responsible for different areas. In both cases, you can only select a substitute from a pre-defined list of resources.

### 7.1.1 Activate Substitutes

1. Navigate to:

**Your employment → Your employment → Activate your substitutes**

Type	Element type	Absence approval	Substitute	Valid from	Valid until
General		Manager: 181	Manager: 181	04/04/2019	14/04/2019
				15/04/2018	16/04/2018

In the Substitutes section:

2. Click **Add** to open a new line
3. **Type** - select the type of substitute from the drop down, **Element** or **General**
4. **Element type** – press **[Space bar]** or use type ahead to select the type of element if it is not a **General** substitute
5. **Substitute** – press **[Space bar]** or use type ahead to select the substitute
6. **Valid from** – enter the substitute start date
7. **Valid until** – enter the substitute end date
8. Click **Save**

### 7.1.1 End Active Substitutes

Substitutes automatically end at midnight on the **Valid until** date.

If you return early, you can simply change the Absence status to “I am currently in the office”. This will turn off the Workflow substitution.



Activate your substitutes x

### Activate your substitutes

**Substitute date range**

WF user  
203346  
Manager 10 (203346)

Absence status\*

I am currently in the office

I am currently out of the office

I am currently in the office

**Substitutes**

Show only valid substitutes

<input type="checkbox"/>	Type	Element type	Substitute	
<input type="checkbox"/>	Element type	Absence approval	Julie Lutwyche	26
<input type="checkbox"/>	General		Julie Lutwyche	15

Add Delete

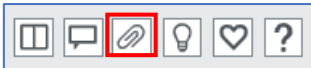


## 8. Attachments

It is possible to add supporting attachments of any standard file format to records in BW. The documents are added to the Document Archive and can be seen by anybody who has access to the relevant record.

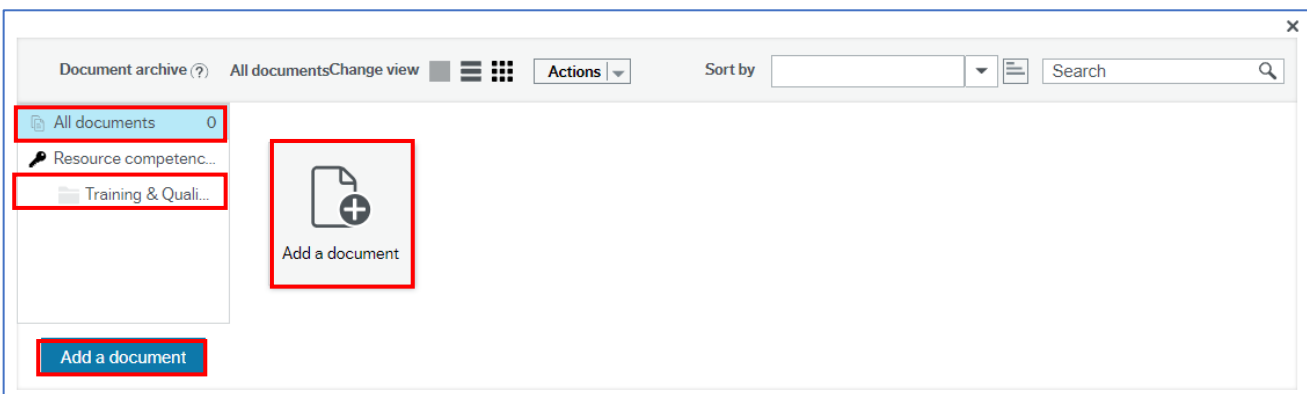
### 8.1. Adding Attachments

1. Navigate to the required person, position record or other relevant screen



2. Click **Open documents**

The **Document Archive** popup opens. Ensure the popup-blocker is not on.

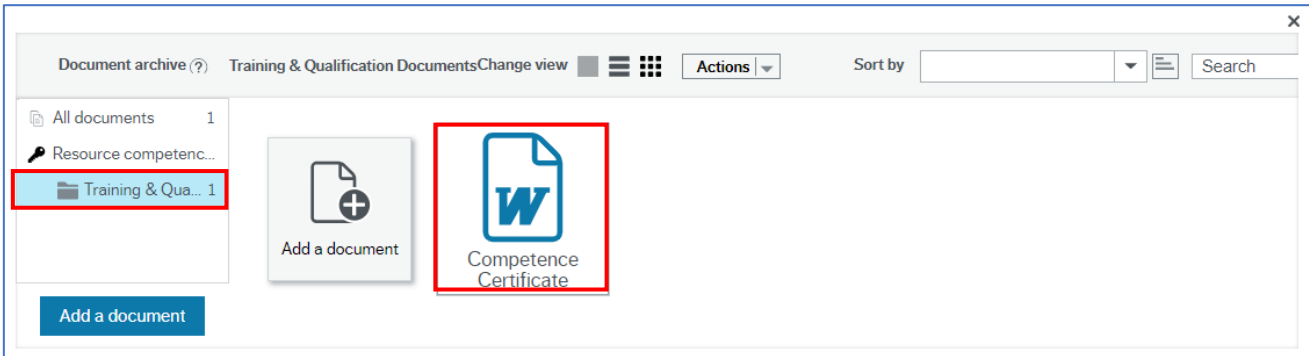
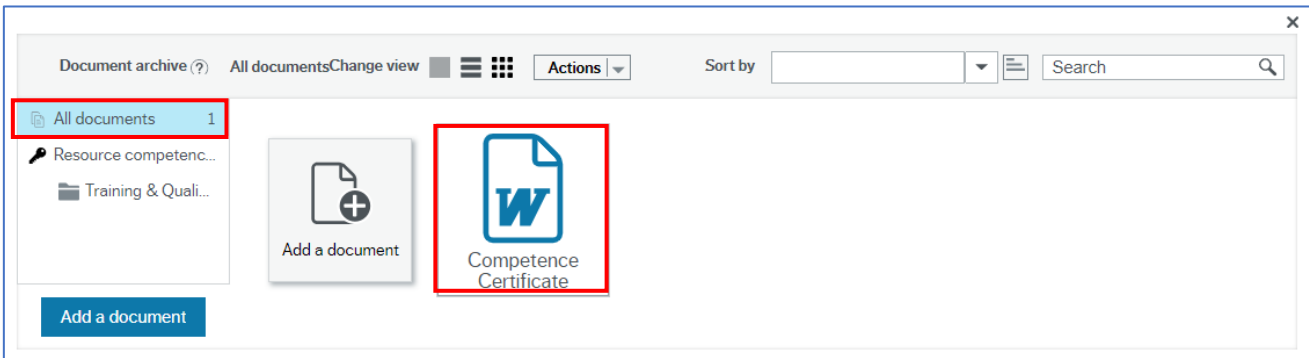


Documents can be added to either **All documents** or a specific folder.

3. Select the correct folder for the attachment to be added to
4. Click **Add a document**, the icon or the button
5. Click **Upload** to locate the required file

6. Enter a **Document description**, if needed
7. Click **Save**

The **Add a document** popup closes.

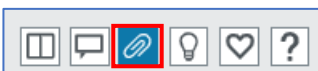


The document appears in the **Document archive**, the folder it is in is indicated with the number of documents in that folder and the **All documents** folder shows how many documents in total are held against the person or position.

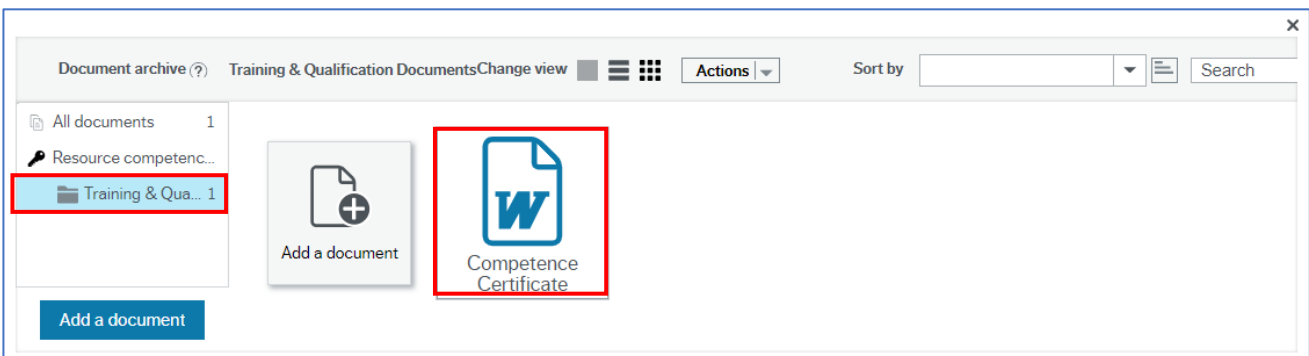
8. Close the **Document archive**

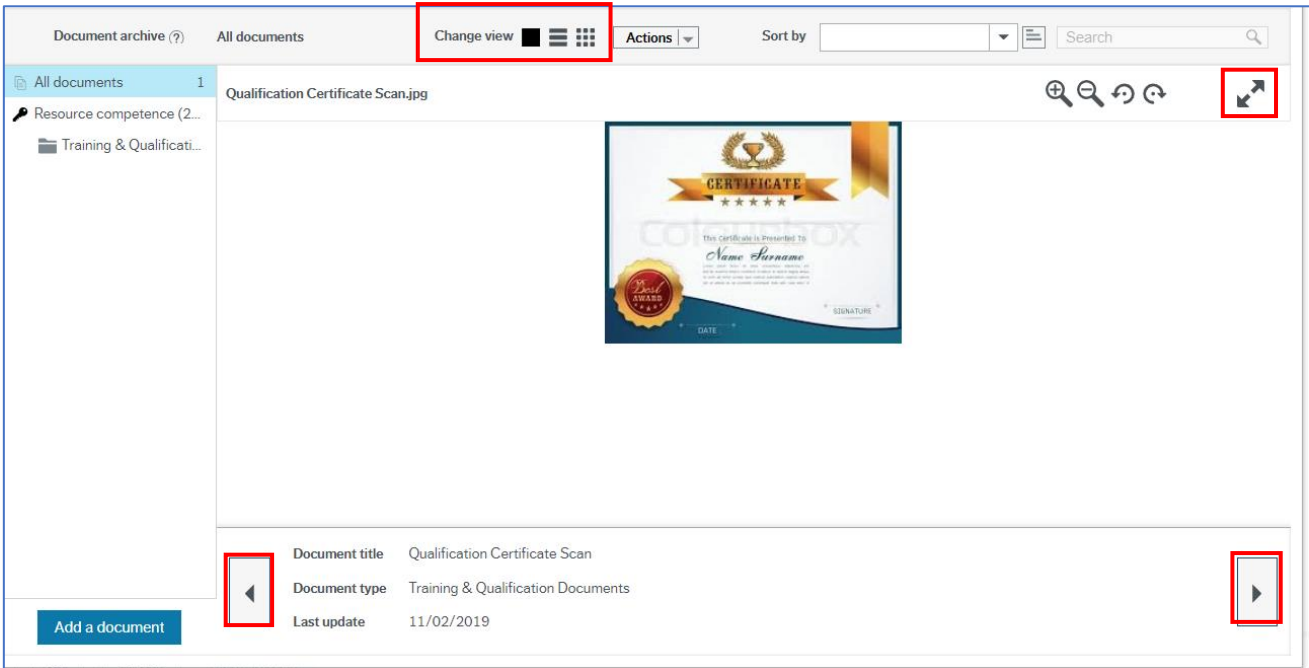
8.2. Viewing Attachments


If a record has attachments in the Document archive, the **View documents** icon will be blue.



1. Click **View documents** to open the **Document archive**
2. Click on the folder you wish to view documents within or select **All documents**
3. Double click the file to view



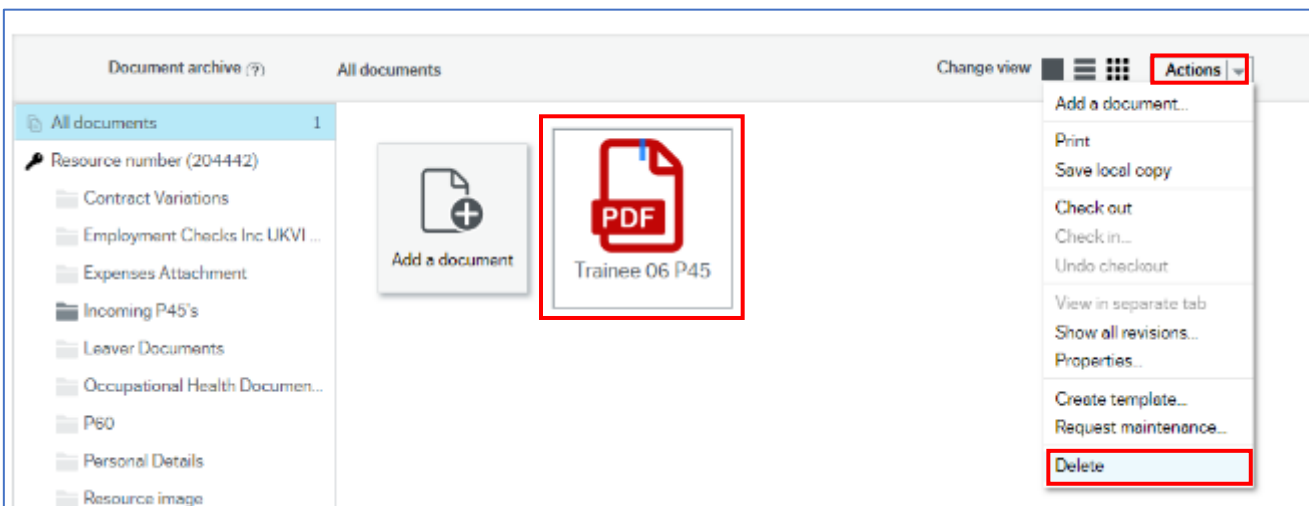


4. Click **Full screen**  to maximise the image size
5. Click the direction arrows to navigate to additional attachments
6. Click the **Change view** icons to return to all attachments

### 8.3. Deleting Attachments

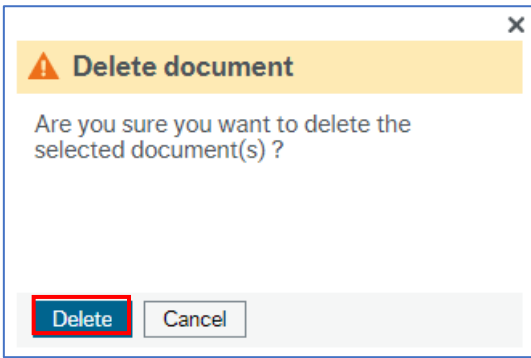
You should only delete attachments you have added in error. Do not delete any other attachments.

1. Click once on the attachment to be deleted



2. Click **Actions**
3. Select **Delete**





4. Click **Delete** on the confirmation popup



## 9. Forms

### 9.1. Forms

Forms should be named in line with the organisation naming convention to ensure that no sensitive data is added into the form title.

The naming convention is:

Form Description/Resource ID/Initials/Directorate/mm/yy

### 9.2. Form Introduction

Forms are all stored within the forms tab from the main menu in various sections.

Reports	Case Management (SC)	Absence (SC)
<ul style="list-style-type: none"> <li>Create new report</li> <li>Shared</li> <li>Private</li> <li>Across companies</li> </ul>	<ul style="list-style-type: none"> <li>Grievance Form</li> <li>OH Referral - External</li> <li>Capability Case Form</li> <li>Disciplinary / Conduct Form</li> <li>Sickness Case Form</li> <li>OH Referral Form</li> <li>Incident Form</li> </ul>	<ul style="list-style-type: none"> <li>Additional Paternity/Shared Parenta...</li> <li>Adoption Leave Request Form</li> <li>Maternity Notification Form</li> <li>Paternity Leave Request Form</li> <li>Return to Work Form</li> </ul>
New Starter (SC)	Organisation and Position (SC)	Contractual Changes (SC)
<ul style="list-style-type: none"> <li>New Starter Form</li> <li>IT Request Form</li> <li>Probation Form</li> <li>Induction Form</li> </ul>	<ul style="list-style-type: none"> <li>New Position Form</li> <li>Position Change Form</li> <li>Right to Recruit Form</li> <li>Position Grade Evaluation (Employee)</li> <li>Position Grade Evaluation (Manager)</li> </ul>	<ul style="list-style-type: none"> <li>Flexible Working Request Form</li> <li>Contractual Changes Form</li> <li>Transfer Within Team Form</li> </ul>
Leaver (SC)	Performance (SC)	Finance
<ul style="list-style-type: none"> <li>Exit Questionnaire Form</li> <li>Leaver Checklist Form</li> <li>Leaver Notification Form</li> <li>Exit Interview</li> </ul>	<ul style="list-style-type: none"> <li>Performance Review Form</li> </ul>	<ul style="list-style-type: none"> <li>Finance</li> <li>Approval Hierarchy Changes</li> <li>Periodic Request</li> <li>Project Amendment Request</li> <li>Project Request</li> </ul>

Review this user guides section **Forms and Scenarios – Overview**, page 74 for more summary information about each form, when it is to be used and the documents that are to be attached with the form.

To attach a document to a form, you should complete the form details first, and then click **Save as draft**. Then you can attach the documents as required and then if needed, click **Submit form**.

Forms are sent for approval where needed to the appropriate approvers.

Some forms are designed that you should retrieve a previously saved or submitted form and update this with the latest details at a later date or a later stage in the staff member's induction or probation.



### 9.3. Position Change Form

The Position Change Form is used to Amend and Close positions. Use the **Create Position Form** to create a new post in the establishment.

1. Navigate to **Forms → Organisation and Position (SC) → Position Change Form**

The Position Change Form is completed by the Line Manager requesting the change, and starts with the Position Change Form section by entering a Form description which is like a title and summary, making the form easier to search for.

#### 9.3.1 Requester Details Section

1. **Position** - press **[Space bar]** to select the position in which you are completing this form.

The remaining fields in this section are read only.

#### 9.3.2 Request Type Section

1. **Type of Request** - press **[Space bar]** to select; **Amend, Close** or **Create**
2. **Supporting Comments** - explain why the change is required



### 9.3.3 Position Details Section

Position Details		
Position ID P10911 Admin Assistant (920003833)	Position Title Admin Assistant (920003833) P10911	Budget Hours 37.00
Weeks Per Year 52.14	Job Family Shropshire Local ... 10	Grade/Pay Scale LGW Grade 5 (SI) ... G5
Line Manager Position Area HQ Officer Central (*) ... P11018	Location The Shirehall ... 241	Contract Type Permanent ... P01
FTC Reason ...	End Date 31/12/2099	Headcount Position? Yes ... Y
Cost Centre Facilities Management ... 10514	Division A2R009 ... Facilities Management	Directorate A1R001 ... Commercial Services

1. **Position ID** - press **[Space bar]** to select the affected position

The remaining position details are populated.

### 9.3.4 Sections not used by Line Managers

The section highlighted below are not used by Line Managers.

Position Relations										
<table> <tr> <td>Politically Restrict Post</td> <td>LGA Number</td> <td>School Number</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	Politically Restrict Post	LGA Number	School Number	<input type="text"/>	<input type="text"/>	<input type="text"/>				
Politically Restrict Post	LGA Number	School Number								
<input type="text"/>	<input type="text"/>	<input type="text"/>								
Allowance Details										
<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Allowance Type</th> <th>Allowance Value</th> <th>Amount</th> <th>End Date (if known)</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Add"/></td> <td><input type="button" value="Delete"/></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	<input type="checkbox"/>	Allowance Type	Allowance Value	Amount	End Date (if known)	<input type="button" value="Add"/>	<input type="button" value="Delete"/>			
<input type="checkbox"/>	Allowance Type	Allowance Value	Amount	End Date (if known)						
<input type="button" value="Add"/>	<input type="button" value="Delete"/>									
System Menu Access										
<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Role</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Add"/></td> <td><input type="button" value="Delete"/></td> <td></td> </tr> </tbody> </table>	<input type="checkbox"/>	Role	Comments	<input type="button" value="Add"/>	<input type="button" value="Delete"/>					
<input type="checkbox"/>	Role	Comments								
<input type="button" value="Add"/>	<input type="button" value="Delete"/>									
System Workflow Access										
<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Role</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Add"/></td> <td><input type="button" value="Delete"/></td> <td></td> </tr> </tbody> </table>	<input type="checkbox"/>	Role	Comments	<input type="button" value="Add"/>	<input type="button" value="Delete"/>					
<input type="checkbox"/>	Role	Comments								
<input type="button" value="Add"/>	<input type="button" value="Delete"/>									

### 9.3.5 Job and Task Analysis Section

Job and Task Analysis		
<p><b>i</b> JOB AND TASK ANALYSIS (please tick as appropriate). It is a legal requirement for managers to carry out a risk assessment. If the risk assessment identifies significant health risks due to exposure to some hazards (e.g. vibration, noise, working at heights), then further assessments are required. See highlighted areas below.</p>		
<input type="checkbox"/> Home Care <input type="checkbox"/> Driving duties <input type="checkbox"/> Residential care <input type="checkbox"/> Food handling <input type="checkbox"/> Confined space <input type="checkbox"/> Exposure to noise <input type="checkbox"/> High mental stress	<input type="checkbox"/> Lone isolated work <input type="checkbox"/> Driving (LGV/PSV) <input type="checkbox"/> Shifts/night working <input type="checkbox"/> Regular heavy lifting <input type="checkbox"/> Work with vibrating tools <input type="checkbox"/> Sedentary/Semi-sedentary <input type="checkbox"/> Physical/Sports/leisure	<input type="checkbox"/> Reg.Outdoors all weather <input type="checkbox"/> Regul./prolonged standing <input type="checkbox"/> Work at heights/ladders <input type="checkbox"/> Contact hazardous subst. <input type="checkbox"/> Significant use of DSE <input type="checkbox"/> Other - specify below

If the change being requested is impacted by any of the assessment types listed, they must be selected.



### 9.3.6 Action Buttons

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl] + [P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens

1. Click **OK** to close the message

## 9.4. Position Grade Evaluation (Manager) Form

This form has a workflow associated with it because it may require action by Payroll and will require approval by a corporate director. This example covers the change in pay grade option.

1. Navigate to **Forms → Organisation and Position (SC) → Position Grade Evaluation (Manager)**

This form is completed by the Line Manager requesting the change and starts with the MGR Position Grade Eval Req section by entering a Form description which is like a title and summary, making the form easier to search for.



9.4.1 Grade Evaluation Details Tab

**Grade Evaluation Details**

<p><b>Resource ID</b> 203632 <span style="float: right;">▼ ...</span></p> <p><small>10, Trainee</small></p> <p><b>Team</b> T10035 <span style="float: right;">...</span></p> <p><small>Facilities Management</small></p> <p><b>New Position?</b> <input type="checkbox"/></p> <p><b>Request Reason</b> Manager Request/Advice <span style="float: right;">...</span></p> <p><small>10</small></p> <p><b>Relevant Details</b> Please provide relevant details below or appropriate business case / report. This can also be attached to the form</p> <div style="border: 1px solid #ccc; padding: 2px; min-height: 20px;"> <p><small>Details</small></p> <p>The position should be upgraded by one step as it now additional responsibilities in terms of producing financial reports from the new ERP system that never existed before</p> </div> <p><b>Approval info 1</b> Please tick to indicate you have attached an up to date Job Description and Person Specification</p> <div style="border: 1px solid #ccc; padding: 2px; min-height: 20px;"> <p><small>Job Description Attached</small></p> <p><input checked="" type="checkbox"/></p> </div> <p><b>Approval info 2</b> Please tick to indicate you are approving the form and information contained within for further consideration.</p> <div style="border: 1px solid #ccc; padding: 2px; min-height: 20px;"> <p><small>Form Approval</small></p> <p><input checked="" type="checkbox"/></p> </div>	<p><b>Position</b> P10911 <span style="float: right;">▼ ...</span></p> <p><small>Admin Assistant (920003833)</small></p> <p><b>Directorate</b> A1R001 <span style="float: right;">...</span></p> <p><small>Commercial Services</small></p> <p><b>Current Grade</b> LGW Grade 5 (SC) <span style="float: right;">...</span></p> <p><small>G5</small></p>
--	---

1. **Resource ID** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – press **[Space bar]** to select the position for which you are completing this form
3. **Team** – populated from the position
4. **Directorate** - populated from the position
5. **New Position?** – select if applicable
6. **Current Grade** – populated from the position
7. **Request Reason** – press **[Space bar]** to select the reason
8. **Details** – enter/attach relevant details or appropriate business case / report
9. **Job Description and Person Specification Attached** – select and attach before submitting. Only documents you have attached in error should be deleted
10. **Form Approval** – select to confirm

9.4.2 Action Buttons

Clear

Print preview

Submit form

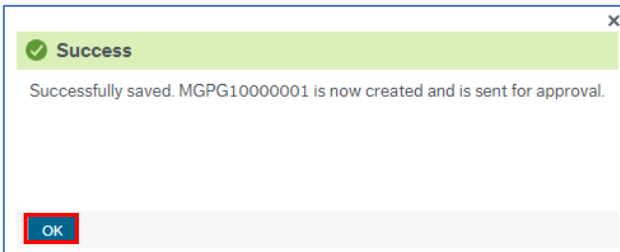
Save as draft

Export

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl] + [P]** to print the form
- **Submit form** - sends the form into workflow to the HR Business Partner
- **Save as draft** - saves the form without sending it into the workflow



The **Success** message opens



1. Click **OK** to close the message

## 9.5. Contractual Changes Form - Change in Hours

This form covers changes to contractual details with the type of change being selected from within the form. This example covers the Change in Hours option.

1. Navigate to **Forms** → **Contractual Changes (SC)** → **Contractual Changes Form**

The Contractual Changes Form is completed by the Line Manager requesting the change and starts with the Contractual Changes Form using the naming convention outlined at the start of this section.

### 9.5.1 Resource Details Section

1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, press **[Space bar]** to select the position for which you are completing this form
3. **Effective date changes** – enter by typing or using the calendar



### 9.5.2 Finance Approval

**Finance Approval**

Please confirm you have gained approval from Finance for any applicable changes in this form

Finance Approval

- Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval

### 9.5.3 Position Change Section

**Position Change**

Please confirm you have submitted a position change form if this contractual change requires a change to the position. HR may reject this change if this has not been submitted.

Change to Position

- Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

### 9.5.4 Change Details Section

**Change Details**

Please indicate the type of change

Type of Change\*

Additional Increment	40
Additional Payment	10
<b>Change in Hours</b>	<b>20</b>
Change in Working Schedule	70
Change in Working Weeks	80
Change to Contract Type	60
Extension to Fixed Term Dates	30

- Type of Change** – select the type of change from the drop down. A second tab opens

### 9.5.5 Change in Hours Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.

Resource Details | **Change in hours**

**Change in hours**

Please input the current contract hours if you are only changing the work schedule. You should aim to always choose from the available work schedules where possible, if you cannot, please specify below in additional information the work schedule requirements in detail. HR will scrutinise any new schedule and reject any that are not genuinely new.

Current hours: 37.00  
 New Contracted Hours: 10.00

Current FTE: 100.00  
 New FTE (if applicable): 0.00

Current Work Schedule: 37 Hrs (7 / 7 / 7 / 8 / 8 / 0 / 0)  
 New Work Schedule: 10 Hrs (2 / 2 / 2 / 2 / 0 / 0)

Variable Hours Contract: If this is a Variable Hours Contract, please state the range of hours

Additional Information: The majority of the work has been transferred to the new Admin post with this post now being part time support

Question: Do you wish to add another change as part of this change form?  
 Answer:

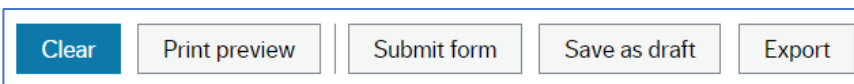
Type of Change:





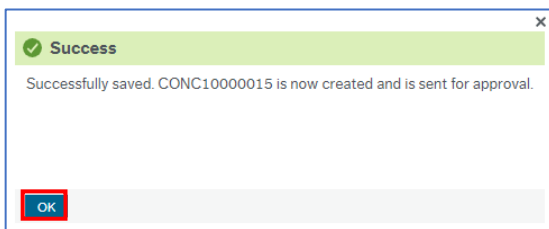
1. **New Contracted Hours** – enter the new hours
2. **New Work Schedule** - press **[Space bar]** to select the new work schedule
3. **Range of hours** – enter the range for Variable Hours Contracts
4. **Additional Information** – enter any additional details about the change
5. **Answer** – select **Yes** or **No** from the drop down to answer the question
6. **Type of Change** – select the type of change from the drop down

### 9.5.6 Action Buttons



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl] + [P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



7. Click **OK** to close the message.



## 9.6. Contractual Changes Form - Change in Working Schedule

This form covers changes to contractual details with the type of change being selected from within the form. This example covers the Change in Working Schedule option.

1. Navigate to **Forms → Contractual Changes (SC) → Contractual Changes Form**

The screenshot shows the 'Contractual Changes Form' interface. At the top, there is a breadcrumb trail: 'Contractual Changes Form'. Below this, a message states: 'The system will automatically generate the Attribute value when you click Save.' The main form area is titled 'Contractual Changes Form' and contains several fields: 'Form ID\*' with a dropdown menu showing '[NEW]'; 'Form description\*' with a text input field containing 'Change in Working Schedule'; and 'Form owner' with a dropdown menu showing '10, Manager' and the ID '203346'.

The Contractual Changes Form is completed by the Line Manager requesting the change, and starts with the Contractual Changes Form section by entering the naming convention as outlined at the start of this section.

### 9.6.1 Resource Details Section

The screenshot shows the 'Resource Details' section of the form. It contains several fields: 'Name' with a dropdown menu showing '203632'; 'Position' with a dropdown menu showing 'P10911'; 'Line Manager' with a dropdown menu showing '203346'; 'Cost Centre' with a dropdown menu showing 'Facilities Management'; 'Resource Start Date' with a date picker showing '02/01/2019'; 'Date of Form Submission' with a date picker showing '12/02/2019'; and 'Effective date changes\*' with a date picker showing '01/04/2019'.

1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, press **[Space bar]** to select the position for which you are completing this form
3. **Effective date changes** – enter by typing or using the calendar

### 9.6.2 Finance Approval

The screenshot shows the 'Finance Approval' section of the form. It contains a message: 'Please confirm you have gained approval from Finance for any applicable changes in this form'. Below this, there is a dropdown menu for 'Finance Approval' with the option 'YES' selected.

1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval



### 9.6.3 Position Change Section

**Position Change**

**i** Please confirm you have submitted a position change form if this contractual change requires a change to the position. HR may reject this change if this has not been submitted.

Change to Position  
 NA

1. **Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

### 9.6.4 Change Details Section

**Change Details**

**i** Please indicate the type of change

Type of Change\*  
 Change in Working Schedule

1. **Type of Change** – select the type of change from the drop down

A second tab opens.

### 9.6.5 Change in Hours Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.

Resource Details **Change in Work Schedule**

**Change in Work Schedule**

**i** You should aim to always choose from the available work schedules where possible, if you cannot, please specify below in additional information the work schedule requirements in detail. HR will scrutinise any new schedule and reject any that are not genuinely new.

Current Work Schedule  
 37 Hrs (7 / 7 / 7 / 8 / 8 / 0 / 0)  
 37-77788NN

New Work Schedule  
 37 Hrs (7.4 / 7.4 / 7.4 / 7.4 / 7.4 / 0 / 0)  
 37-7474747474NN

WSDetail (if not in list)

Question  
 Do you wish to add another change as part of this change form?

Answer  
 No

Type of Change  
 Change in Working Schedule

1. **New Work Schedule** - press **[Space bar]** to select the new work schedule
2. **WSDetail (if not in list)** – enter the details if it is not in the list of new work schedules
3. **Answer** – select **Yes** or **No** from the drop down to answer the question
4. **Type of Change** – select the type of change from the drop down

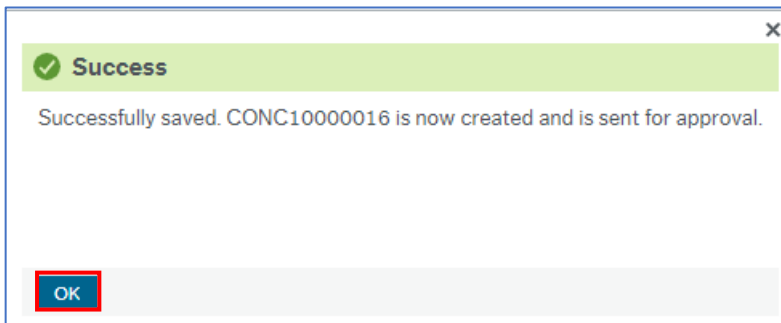
### 9.6.6 Action Buttons

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



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl] + [P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens

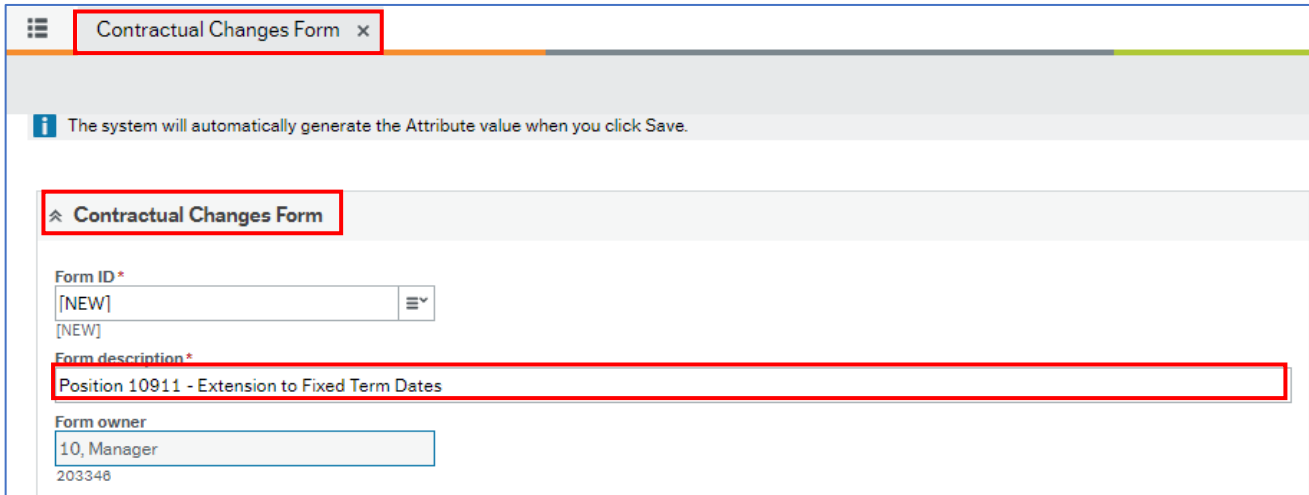


1. Click **OK** to close the message.

## 9.7. Contractual Changes Form - Extension to Fixed Term Dates

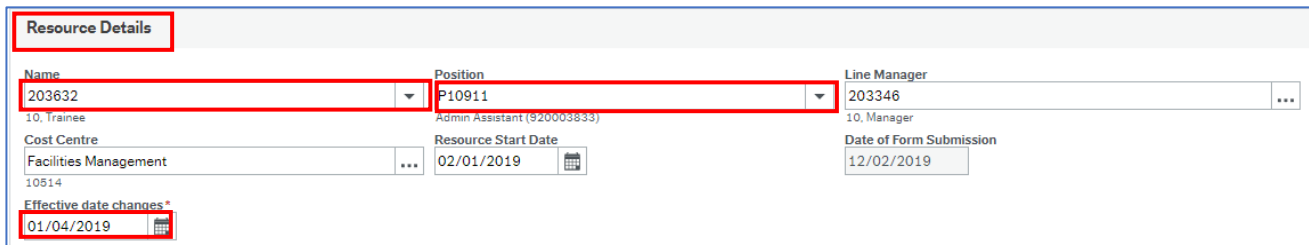
This form covers changes to contractual details with the type of change being selected from within the form. This example covers the Extension to Fixed Term Dates option.

1. Navigate to **Forms → Contractual Changes (SC) → Contractual Changes Form**



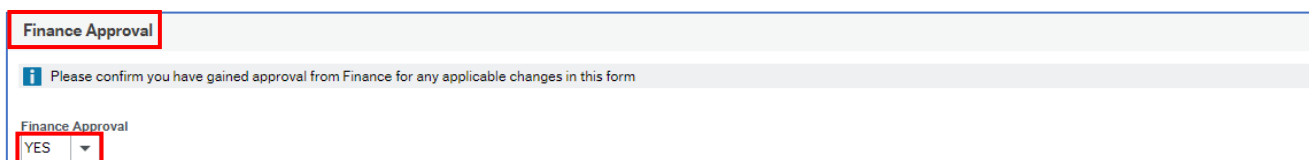
The Contractual Changes Form is completed by the Line Manager requesting the change, and starts with the Contractual Changes Form section by entering the naming convention as outlined at this start of this section.

### 9.7.1 Resource Details Section



1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, press **[Space bar]** to select the position for which you are completing this form
3. **Effective date changes** – enter by typing or using the calendar when the change is effective from

### 9.7.2 Finance Approval



1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval



### 9.7.3 Position Change Section

**Position Change**

Please confirm you have submitted a position change form if this contractual change requires a change to the position. HR may reject this change if this has not been submitted.

Change to Position  
NO

1. **Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

### 9.7.4 Change Details Section

**Change Details**

Please indicate the type of change

Type of Change\*  
Extension to Fixed Term Dates

1. **Type of Change** – select the type of change from the drop down

A second tab opens.

### 9.7.5 Extension to Fixed Term Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.

Resource Details **Extension to Fixed Term**

**Extension to Fixed Term**

Curr Employment End Date: 31/12/2019  
New End Date: 30/04/2019

FTC Justification: Short Term Additional Support

Additional Information: New functionality requires documenting

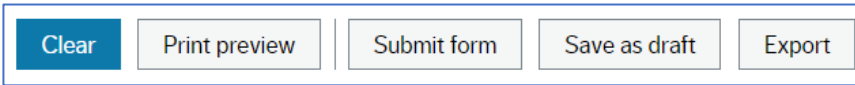
Question: Do you wish to add another change as part of this change form?  
Answer: No

Type of Change: Extension to Fixed Term Dates

1. **New End Date** – enter the new contract end date
2. **FTC Justification** - press **[Space bar]** to select the justification
3. **Additional Information** – enter any additional details about the change
4. **Answer** – select **Yes** or **No** from the drop down to answer the question
5. **Type of Change** – select the type of change from the drop down

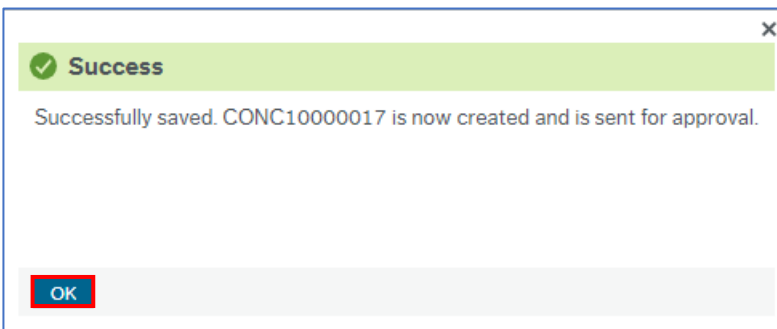


### 9.7.6 Action Buttons



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl] + [P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



1. Click **OK** to close the message

## 9.8. Induction Form

This form covers the induction checklist for new starters, a resource beginning on an additional position, or a resource transferring into a different position.

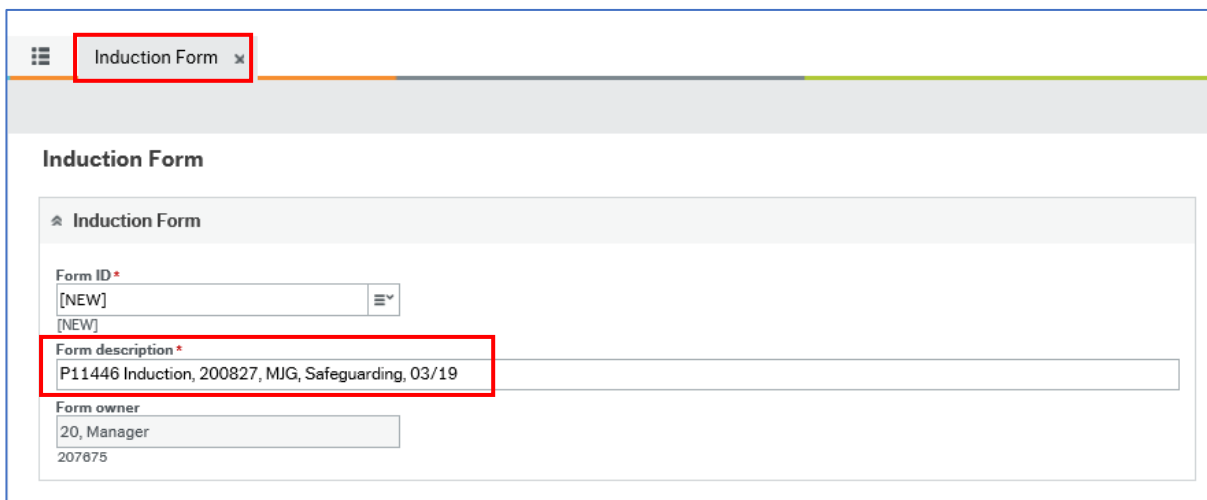
It is completed by the resource’s line manager.

There is no approval required for this form, instead, the form can be saved and then later re-opened by the line manager. The form should be saved and then updated as needed throughout the staff member’s induction programme.

The form is complete when each section of the Induction checklist tab has been updated with the appropriate **Date completed**.

To create a new induction checklist for your staff member:

1. Navigate to **Forms → New Starter → Induction Form**



**Induction Form**

Induction Form

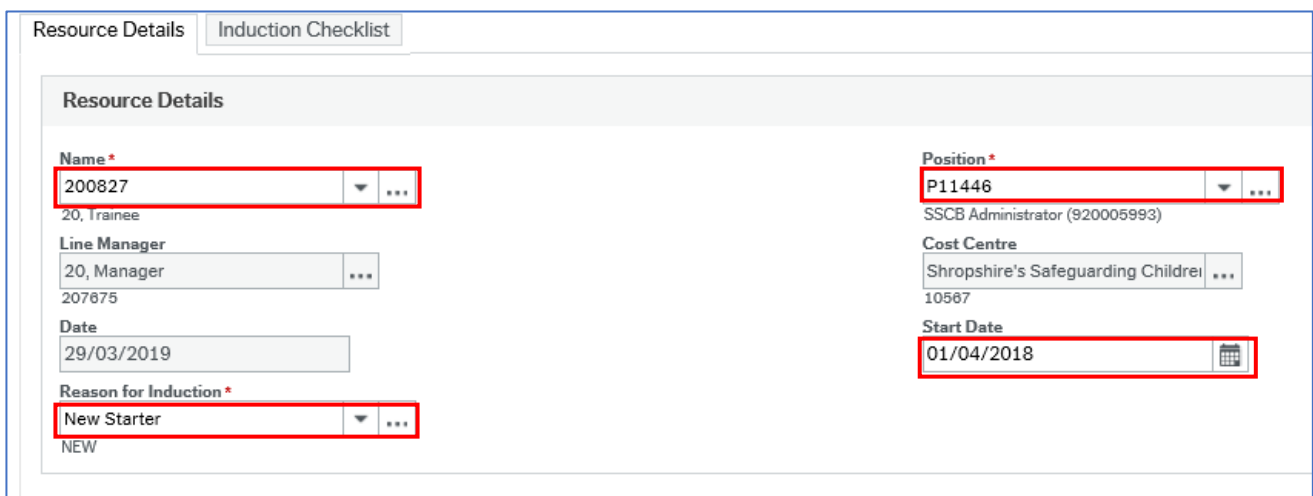
Form ID\*  
[NEW]

Form description\*  
P11446 Induction, 200827, MJG, Safeguarding, 03/19

Form owner  
20, Manager  
207675

2. Enter a meaningful **Form description**, as a title. Use the naming convention “*Description, Resource ID, Initials, Directorate, mm/yy*”

### 9.8.1 Resource Details Section



Resource Details Induction Checklist

**Resource Details**

Name\*  
200827  
20, Trainee

Line Manager  
20, Manager  
207675

Date  
29/03/2019

Reason for Induction\*  
New Starter  
NEW

Position\*  
P11446  
SSCB Administrator (920005993)

Cost Centre  
Shropshire's Safeguarding Childre  
10587

Start Date  
01/04/2018

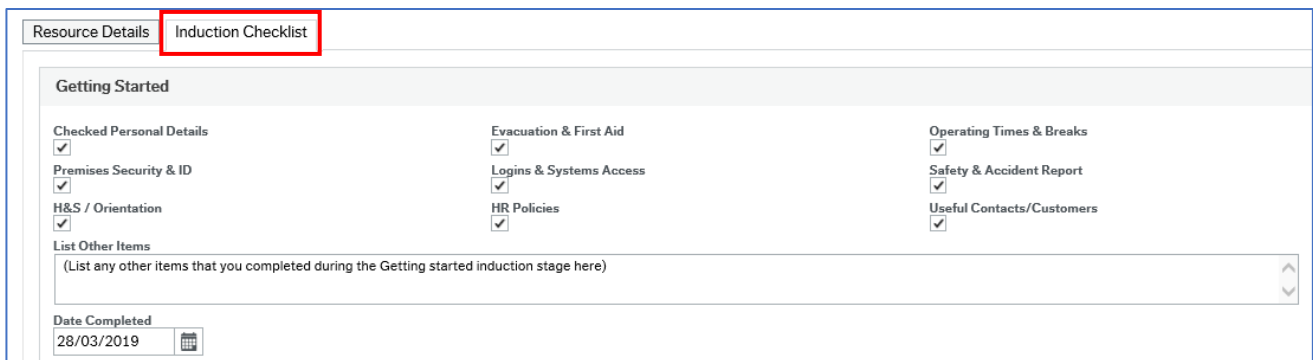
1. **Name** - press [Space bar] to select the resource for whom you are completing this form



2. **Position** – if the resource has more than one position, or if this field is blank, press [**Space bar**] to select the position for which you are completing this form
3. **Start date** – the date that the staff member started is entered automatically. This could be changed if needed.
4. **Reason for induction** – press [**Space bar**] to select the applicable reason; *New starter*, *Additional post*, or *Transfer*.

### 9.8.2 Induction Checklist

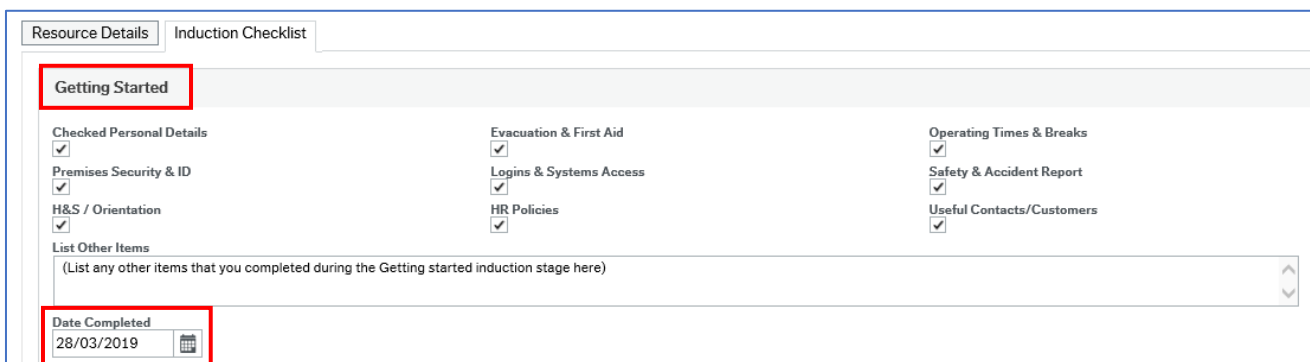
1. Choose the **Induction Checklist** tab



The screenshot shows a web interface with two tabs: 'Resource Details' and 'Induction Checklist'. The 'Induction Checklist' tab is active. Under the 'Getting Started' heading, there are three columns of checkboxes, all of which are checked. The first column includes 'Checked Personal Details', 'Premises Security & ID', and 'H&S / Orientation'. The second column includes 'Evacuation & First Aid', 'Logins & Systems Access', and 'HR Policies'. The third column includes 'Operating Times & Breaks', 'Safety & Accident Report', and 'Useful Contacts/Customers'. Below these is a text area for 'List Other Items' with a placeholder '(List any other items that you completed during the Getting started induction stage here)'. At the bottom left, there is a 'Date Completed' field with the value '28/03/2019' and a calendar icon.

This section contains topics to be covered at each stage of a staff member's induction; *Getting Started*, *Business Area & Role Fam* (Familiarity), and *Technical Training Reqs* (Requirements).

#### 9.8.2.1. Getting Started



This screenshot is identical to the previous one, but with two red boxes highlighting specific areas. One box highlights the 'Getting Started' heading, and another box highlights the 'Date Completed' field with the value '28/03/2019'.

1. Review each topic listed and tick the corresponding checkboxes to confirm that this has been covered with the employee.
2. Enter any other areas/topics covered during the induction with the staff member in the **List Other Items** text field.
3. Enter the **Data completed** for this section.



9.8.2.2. Business Area & Role Fam.

**Business Area & Role Fam.**

<input checked="" type="checkbox"/> Meet Key Colleagues <input checked="" type="checkbox"/> Meet Key Stakeholders <input checked="" type="checkbox"/> Processes & Procedures <input checked="" type="checkbox"/> Services We Provide <input type="text" value="List Other Items"/> <small>(List any other items that you completed during the Business Area &amp; Role Fam stage here)</small>	<input checked="" type="checkbox"/> Contract, Benefit, Reward <input checked="" type="checkbox"/> Job Description <input checked="" type="checkbox"/> Reviewing Performance <input checked="" type="checkbox"/> Service Development	<input checked="" type="checkbox"/> Absence Policy <input checked="" type="checkbox"/> Confidentiality <input checked="" type="checkbox"/> Communication
--	--	--

**Date Completed**

1. Review each topic listed and tick the corresponding checkboxes to confirm that this has been covered with the employee.
2. Enter any other areas/topics covered during the induction with the staff member in the **List Other Items** text field.
3. Enter the **Data completed** for this section.

9.8.2.3. Technical Training Reqs

**Technical Training Reqs**

**i** Please select relevant tick boxes as required.

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><b>Mandatory Requirements</b></div> <input checked="" type="checkbox"/> <b>Date Completed</b> <input type="text" value="29/03/2019"/>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><b>Tech Skill Requirements</b></div> <input checked="" type="checkbox"/> <b>Date Completed</b> <input type="text" value="03/04/2019"/>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><b>Corporate Induction</b></div> <input checked="" type="checkbox"/> <b>Date Completed</b> <input type="text" value="02/04/2019"/>
--	---	---

(List any other items that you completed during the Technical Training Reqs stage here)

**Date Completed**

1. Review the **Mandatory Requirements** for the position with the staff member; when completed/achieved tick the checkbox, and enter the corresponding **Date completed**.
2. Review the **Tech Skill Requirements** for the position with the staff member; when completed/achieved tick the checkbox, and enter the corresponding **Date completed**.
3. Review the **Corporate Induction** for the position with the staff member; when completed/achieved tick the checkbox, and enter the corresponding **Date completed**.
4. Enter any other training completed during the induction with the staff member in the **List Other Training** text field.
5. Enter the **Data completed** for this section.

9.8.3 Action Buttons

Clear

Print preview

Submit form

Save as draft

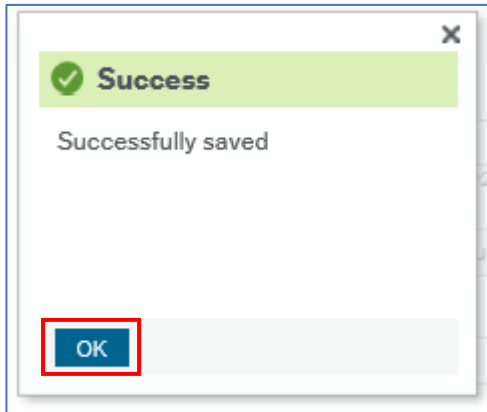
Export

You can use the Action buttons while you complete the form.



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl] + [P]** to print the form
- **Submit form** – this saves the form.
- **Save as draft** – this saves the form as a draft.

1. If you click **Submit form**, or **Save as draft** the *Success* message opens

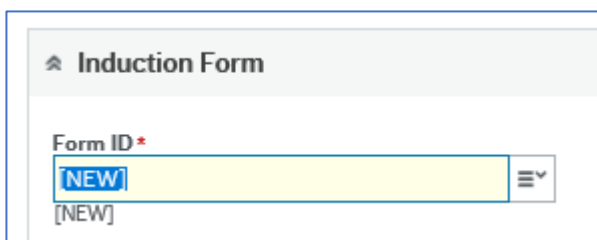


2. Click **OK** to close the message.
3. You can close the form.

#### 9.8.4 How to re-open a previously saved form.

You need to re-access the Induction form and update the form throughout the staff member's induction programme.

1. Navigate to **Forms → New Starter → Induction Form**
2. To reopen the existing form, you need to first delete the tag *[NEW]* from the **FormID** field.



3. With the cursor in the empty **Form ID** field, press **[Space bar]** to view the list of forms you have previously saved. (Alternatively, you can start typing in part of the form description that you used when you first saved or submitted the form).



The screenshot shows a web application interface for an 'Induction Form'. At the top, there is a breadcrumb trail 'Induction Form' with a close icon. Below this, the main heading is 'Induction Form'. Underneath, there is a sub-heading 'Induction Form' with a star icon. The 'Form ID' field is highlighted with a red box. It contains the text 'INDU10000000' and a dropdown arrow. Below the field, a list item is visible: 'INDU10000000 P11446 Induction, 200827, MJG, Safeguarding, 03/19'. Below the list, there is a 'Form description' field which is currently empty.

4. Select the required form from the list that appears, and press **[Tab]**.
5. You can now amend the form as necessary.
6. You can click **Submit form** or **Save as draft** to keep your changes. (Note that if you have previously clicked **Submit form**, then **Save as draft** is no longer an option).

## 9.9. Probation Form

This form covers the probation process for new starters, or any staff member that requires a period of probation.

It is completed by the resource's line manager.

The form can be saved and then later re-opened by the line manager. You need to re-open and update the form for each probation review that you complete for the staff member.

If during the probation period the Second or Final Review section of the form is marked with an **Outcome** as *Unsuccessful*, then the form is submitted to the HR team to initiate the staff leaver process. The Line manager must discuss this with their HR Business Partner.

To initiate a probation period for your staff member:

1. Navigate to **Forms → New Starter → Probation Form**

The screenshot shows the 'Probation Form' interface. At the top, there is a breadcrumb trail: 'Forms → New Starter → Probation Form'. Below this, the form title 'Probation Form' is displayed. Underneath, there is a section titled 'Probation Form' containing two input fields. The first field is 'Form ID \*' with the value '[NEW]'. The second field is 'Form description \*' with the value 'P10476 Probabtion, 200827, MJG, Safeguarding, 03/19'. Both fields are highlighted with red boxes.

2. Enter a meaningful **Form description**, as a title. Use the naming convention “*Description, Resource ID, Initials, Directorate, mm/yy*”

### 9.9.1 Resource Details section

The screenshot shows the 'Resource Details' section of the form. It includes several fields: 'Name \*' (value: 200827), 'Position \*' (value: P10476), 'Line Manager \*' (value: 207675), 'Division' (value: A2R013), 'Directorate' (value: Children's Services), 'Start Date' (value: 01/06/2009), 'Probation Date From' (value: 25/03/2019), 'End Date Probation Period' (value: 27/05/2019), and 'Continuous Service Date' (value: 04/01/2006). The 'Name', 'Position', 'Probation Date From', and 'End Date Probation Period' fields are highlighted with red boxes.

1. **Name** - press [**Space bar**] and select the resource for whom you are completing this form. Press [**Tab**].
2. **Position** – if the resource has more than one position, or if this field is blank, press [**Space bar**] to select the position for which you are completing this form
3. **Probation Date From** – enter the first date of the probation period.
4. **End Date Probation Period** – enter the expected last first date of the probation period.



### 9.9.2 Target Review section

1. Enter the expected dates for the 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> target review dates.  
You need to keep this information up to date throughout the probation process.
2. You can now click **Submit form** using the action buttons at the bottom of the screen to save a copy of the probation form.

3. Click **OK** to close the message. You can close the form.

You need to re-access the form, and update the **First Review**, **Second Review**, **Final Review** or **Third Review** tab as appropriate throughout the probation period.

### 9.9.3 How to re-open a previously saved form.

At the appropriate stages of the staff member's probation, you need to re-access the existing probation form and update the results for each review.

To re-open an existing Probation form;

1. Navigate to **Forms** → **New Starter** → **Probation Form**
2. To reopen the existing form, you need to delete the tag *[NEW]* from the **FormID** field.



3. With the cursor in the empty **Form ID** field, press **[Space bar]** to view the list of forms you have previously saved. (Alternatively, you can start typing in part of the form description that you used when you first saved or submitted the form).

The screenshot shows a web browser window with a tab titled "Probation Form". The main heading is "Probation Form". Below it, there is a sub-heading "Probation Form" with a dropdown arrow. A red box highlights the "Form ID\*" field, which contains "PROB10000000". A dropdown menu is open, showing a list of saved forms. The first item is "PROB10000000 P10476 Probation, 200827, MJG, Safeguarding, 03/19". Below the dropdown is a "Form description\*" field.

4. Select the form from the list that appears, and press **[Tab]**.
5. You can now amend the form as necessary.
6. You can click **Submit form** or **Save as draft** to keep your changes. (Note that if you have previously clicked **Submit form**, then **Save as draft** is no longer an option).

## 9.9.4 First Review tab

1. Choose the **First Review** tab.

The screenshot shows the "First Review" tab selected in a navigation bar. The main heading is "Review Details". Below it, there is a paragraph of text: "At the end of any probation period the Resource must have demonstrated the capacity to fully meet the normal requirements of the position or grade concerned. All comments on this report must be discussed with the Resource during the probation review meetings. The Reporting Officer must comment on why a marking has been given but also what improvements may be necessary." Below this is a "Review Date" field with a calendar icon, containing "29/04/2019". Below that is the "Overall Performance" section, which has two radio buttons: "Achieved Fully Effective" (unchecked) and "Not Achieved" (checked). Below the radio buttons is a "Comments" field with a placeholder text "(enter comments as to why performance was or wasn't achieved)". Below that is the "Overall Attendance" section, which has an "Overall Attendance" field and a "Comments" field.

This tab contains sections for you to record the outcomes and comments from the first review.

2. Enter the actual **Review date**.
3. Review the *Overall Performance* section.



- a. Mark by ticking the appropriate checkbox if this was **Achieved Fully Effective**, or **Not Achieved**
- b. Enter your supporting **Comments**.

**Overall Attitude/Conduct**

Attitude / Conduct  
  
 ACC  
 Comment  
 (enter comments as to explain results)

**Resource Comments**

Comments  
 (enter the comments noted by the staff member during the review here)

4. Review the *Overall Attendance* section.

- a. Select the **Overall Attendance** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. (*Acceptable, Not acceptable, Not applicable*).
- b. Enter your supporting **Comments** to explain the outcome.

5. Review the *Overall Attitude/Conduct* section

- a. Select the **Attitude / Conduct** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. (*Acceptable, Not acceptable, Not applicable*).
- b. Enter your supporting **Comments** to explain the outcome.

**Duties**

Duties  
 [What duties have been undertaken to date?]

Employee Perception  
 [How does the employee think they have performed so far?]

Areas of Difficulty  
 [Are there any areas of difficulty?]

Job Satisfaction  
 [Is the employee achieving job satisfaction?]

LM Judgement  
 [Line Manager's professional judgement of the performance so far and if there are any areas that require improvement]

Improvement Plans  
 [Outline any plans to improve performance]

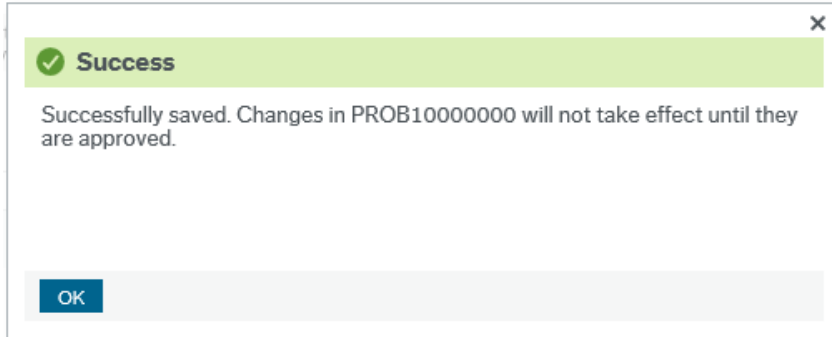
6. Review the *Duties* section:

- a. Provide the details as directed in each field; **Duties, Employee Perception, Areas of difficulty, Job Satisfaction, LM Judgement, Improvement Plan**.





7. You can now click **Submit form** using the action buttons at the bottom of the screen to save the changes to the form.



8. Click **OK** to close the message. You can close the form.

You need to re-access the form, and update the **First Review**, **Second Review**, **Final Review** or **Third Review** tab as appropriate throughout the probation period.



9.9.5 Second Review tab, Final Review tab, or Third review

1. Choose the **Second Review** tab (or **Final Review** or **Third review** as appropriate).

The screenshot shows a web application interface for a 'Probation Form'. The 'Second Review' tab is selected and highlighted with a red box. The form contains the following elements:

- Form ID:** PROB10000000
- Form description:** P10476 Probation, 200827, MJG, Safeguarding, 03/19
- Review Details:**
  - Review Date:** 30/05/2019
  - Outcome:** Extended
  - Extension Months:** 1
- Overall Performance:**
  - Achieved Fully Effective:**
  - Not Achieved:**
  - Comments:** (enter comments as to why performance was or wasn't achieved)

This tab contains sections for you to record the outcomes and comments from the subsequent reviews.

2. Enter the actual **Review date** (or **Extended Review Date** if this is a third review)
3. Use the drop-down menu to choose the appropriate **Outcome**. (*Extended, Successful, Unsuccessful*)
4. If the outcome is an extension, enter the **Extension months**.
5. Review the *Overall Performance* section.
  - a. Mark by ticking the appropriate checkbox if this was **Achieved Fully Effective**, or **Not Achieved**
  - b. Enter your supporting **Comments**.



**Overall Attitude/Conduct**

Attitude / Conduct  
Acceptable  
ACC  
Comment  
(enter comments as to explain results)

**Resource Comments**

Comments  
(enter the comments noted by the staff member during the review here)

6. Review the *Overall Attendance* section.

- a. Select the **Overall Attendance** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. (*Acceptable, Not acceptable, Not applicable*).
- b. Enter your supporting **Comments** to explain the outcome.

7. Review the *Overall Attitude/Conduct* section

- a. Select the **Attitude / Conduct** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. (*Acceptable, Not acceptable, Not applicable*).
- b. Enter your supporting **Comments** to explain the outcome.

**Duties**

Duties  
[What duties have been undertaken to date?]

Employee Perception  
[How does the employee think they have performed so far?]

Areas of Difficulty  
[Are there any areas of difficulty?]

Job Satisfaction  
[Is the employee achieving job satisfaction?]

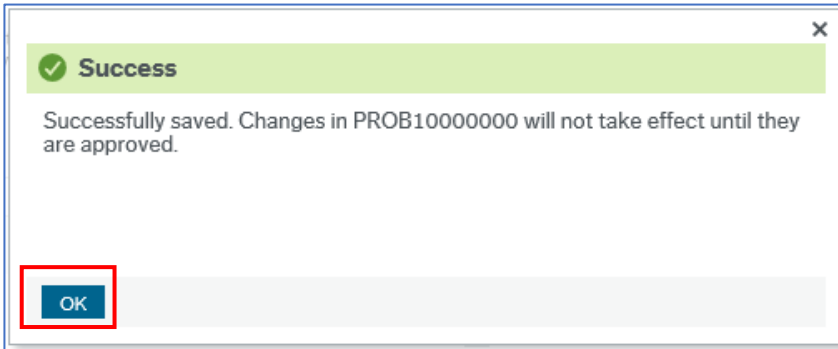
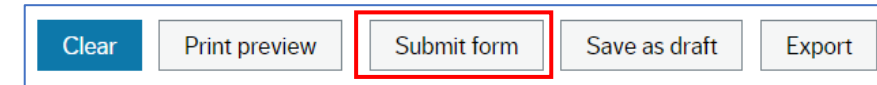
LM Judgement  
[Line Manager's professional judgement of the performance so far and if there are any areas that require improvement]

Improvement Plans  
[Outline any plans to improve performance]

8. Review the *Duties* section

- b. Provide the details as directed in each field; **Duties, Employee Perception, Areas of difficulty, Job Satisfaction, LM Judgement, Improvement Plan.**

9. You can now click **Submit form** using the action buttons at the bottom of the screen to save the changes to the form.



10. Click **OK** to close the message. You can close the form.

You need to re-access the form, and update the **First Review**, **Second Review**, **Final Review** or **Third Review** tab as appropriate throughout the probation period.

### 9.9.6 Further Probation details

The Line Manager is also required to update the **Probation** tab on the **Personnel** → **Personnel** → **Your Employees** screen for the resource.

Line managers can run reports to view details about their staff members that are currently on probation.

1. Navigate to **Reports** → **Reports across client** → **Global reports** → **HR / Payroll** → **Line Manager Reports** → **Probation**.
2. Hover your mouse over each report to read the full report name.
3. Click to open a report.
4. Click **Search** to view the results.



## 9.10. Return to Work Form

This form covers the Return to Work interview and administration required for a staff member returning after a period of sickness absence. It is to be completed after any period of sickness absence for a staff member.

It is completed by the resource's line manager.

To record a Return to Work for your staff member:

1. Navigate to **Forms → Absence (SC) → Return to work**

**Return to Work Form**

**Return to Work Form**

Form ID \*  
[NEW] [NEW]

Form description \*  
20190329 P10476 Return to work, 200827, MJG, Safeguarding, 03/19

Form owner  
20, Manager  
207675

2. Enter a meaningful **Form description**, as a title. Use the naming convention “*Description, Resource ID, Initials, Directorate, mm/yy*”

### 9.10.1 Resource Details section

**Return to Work Details**

**Resource Details**

Name \*  
200827

Position \*  
P10476

Line Manager  
20, Manager


Date Raised  
29/03/2019


1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, or if this field is blank, press **[Space bar]** to select the position for which you are completing this form
3. **Date Raised** – this is filled in automatically.



9.10.2 Absence management section

1. Enter the **First day of absence**.
2. **Sickness reason** - use the drop-down menu to choose the relevant reason.
3. Enter any supporting **Comments** as needed.
4. **Fit note attached** - tick this checkbox as confirmation that a fit note if appropriate was attached to the specific sickness absence record(s) in Business World.
5. **Whole absence certified** - tick this checkbox as confirmation that certification is available for the full absence, and that this has been attached to the specific sickness absence record(s) in Business World.
6. **Date of return to work** - enter or select the date that the staff member returned to work.
7. **EAP Contact advised** - tick this checkbox as confirmation if the employee assistance programme contact has been advised.
8. **OH Advised** - tick this checkbox as confirmation if the Occupations Health team have been advised.
9. **Date of RTW Review** - enter or select the date that the return to work review was conducted.
10. **Absence closed off** - tick this checkbox as confirmation that the specific absence record(s) in Business World have been updated appropriately. The **Open ended absence** check box has been unticked, and the appropriate **Date to** entered (this is the last date of absence for the staff member).

 You need to record sickness absence in Business World using the **Your employment > Your employment > Absences** screen. See section Staff Sickness - Recording Sickness, page 24 for details.

 When a staff member returns, you need to update the specific absence record in Business World using the **Your employment > Your employment > Absences** screen. See section Sickness Absences - Adjusting a Sickness Record , page 26 for details



9.10.3 Discussion Points

**Discussion Points**

Discussion Point 1  
Do you think that this will be a recurring issue?

Comments & Actions 1  
The doctor thinks it was a one off condition and Antibiotic and bed rest have returned staff member to health

Discussion Point 2  
Was the illness contagious.

Comments & Actions 2  
Doctor advised limiting contact with others just in case.

Discussion Point 3

Comments & Actions 3

Discussion Point 4

Comments & Actions 4

Discussion Point 5

Comments & Actions 5

Use this section to record any **Discussion Points**, and specific related **Comments & Actions**

9.10.4 Review Attendees

Enter the details of the staff members present during the review.

**Review Attendees**

	Attendee at Review	Attendee position
<input type="checkbox"/>	20, Manager	14-19 Development Officer (920001327)
<input type="checkbox"/>	20, Trainee	SSCB Training Administrator (920001846)

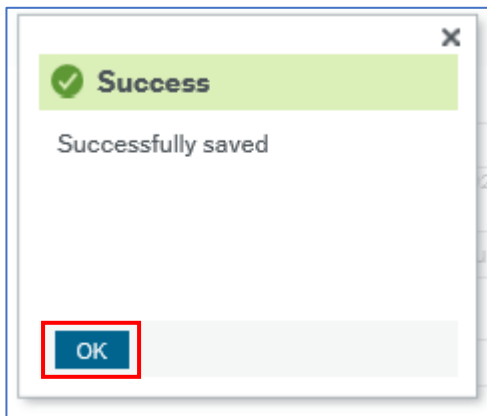
1. Click **Add**. A new row is added to the table.
2. Click the **Attendee at review** field.
3. Enter part of the name of the staff member attending.
4. Click to select them from the list that appears, and press **[Tab]**.
5. In the **Attendee position** field, enter the code or description of the staff member's position. Click to select the position from the list that appears, and press **[Tab]**.
6. Click **Add** to create a new row in the table, and repeat the staff above to list any other attending staff members.
7. If you need to delete a row, tick the checkbox on the left for the row to be deleted, and click **Delete**.

9.10.5 Action Buttons



You can use the Action buttons while you complete the form.

- **Clear** - clears the contents of the form and removes the **Print preview** button
  - **Print preview** - provides a view of the printed form; use **[Ctrl] + [P]** to print the form
  - **Submit form** – this saves the form. Note that the form will be *Closed* and cannot be further amended if you were to attempt to re-open an existing form.
  - **Save as draft** – this saves the form as a draft.
4. If you click **Submit form**, or **Save as draft** the *Success* message opens



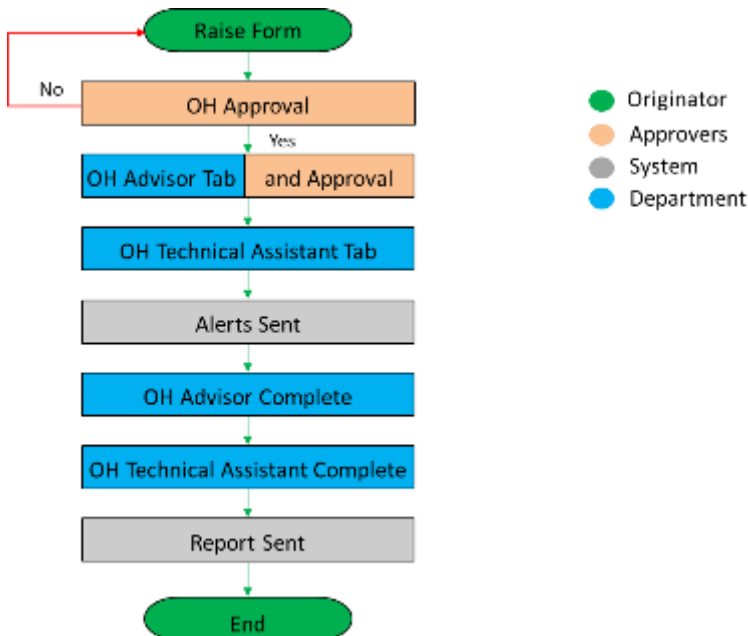
5. Click **OK** to close the message.
6. You can close the form.



## 9.11. OH Referral Form

### 9.11.1 OH Referral Process

The OH Referral Process begins with the form being raised and the OH Referral Tab being completed by Line Managers and then following the steps outlined below.



- **OH Approval** – on being submitted the form is workflowed to the OH Advisor, who checks whether the OH Referral Tab has been completed correctly and has sufficient information to proceed. If not, the form is rejected with an explanation
- **OH Advisor Tab** – when the form is correct and the OH Advisor has determined the course of action; the details are entered on the OH Advisor Tab. The form is again submitted and it is workflowed to the OH Technical Assistant
- **OH Technical Assistant Tab** – the OH Advisor determination is actioned by the OH Technical Assistant and appointment details sent out
- **Alerts** - the HRO and the resource are notified that a referral has been made

At this point the form may go through several updates by both the OH Advisor and the OH Technical Assistant until the case is complete.

- **OH Advisor Complete** – the OH Advisor will triage the referral and inform the OH Technical Assistant what type of appointment is needed
- **OH Technical Complete** – the OH Tech Assistant will confirm on the form, then date when it was sent out to the resource
- **Report Sent** – the referral is complete and the final report is sent out

The OH Referral Form can be raised by Line Managers.

1. Navigate to **Forms** → **Case Management (SC)** → **OH Referral Form**

On opening, the form has ten sections.



### 9.11.2 OH Referral Form Section

OH Referral Form

OH Referral Form

Form ID\*  
[NEW]

Form description\*  
Back Pain

Form owner  
10, Manager  
203346

**Form description\*** - enter the **Form description** as:

- **Resource Number**
- **Initials**
- **Directorate** or **School**
- **MM/YY**

1. **Form owner** – is read only and is populated from the user record

### 9.11.3 Resource Details Section

Resource Details

Resource ID  
203632

Resno  
203632

First Name  
Trainee

Surname  
10

Question  
Are there any particular requirements in relation of access, mobility and/or communication? If yes, please provide details below:

Answer  
No

Details

1. **Resource ID** – use type ahead or select from the drop down
2. **Resno** – is populated from the Resource ID selected
3. **First Name** – is populated from the Resource ID selected
4. **Surname** – is populated from the Resource ID selected
5. **Question** – is read only
6. **Answer** – press [**Spacebar**] to select **Yes** or **No** in response to the Question above
7. **Details** – if the answer to the question is Yes, enter the details of the requirement



9.11.4 Manager Details Section

Manager Details	
Resource ID 203346	First Name Manager
Surname 10	Position ▼
Phone	Email erptest@shropshire.gov.uk
Team ...	Directorate ...
Preferred/Other Contact ...	
Cost Centre ▼ ...	Work Location Address Head Office Shirehall

The first six fields, Resource Id, First Name, Surname, Position, Phone and Email, in this section are populated from the Resource ID selected in the OH Referral Section.

1. **Team** – use the lookup to select the team
2. **Directorate** – is populated from the Team selected
3. **Preferred / Other Contact** – details of other contact can be entered here



**9.11.5 HR Officer Details Section**

**HR Officer Detail**

Resource ID  
205108 ▼ ...

10, TrainHR

Name  
10, TrainHR

- Resource ID** – use type ahead or select from the drop down

The other fields in this section are populated from the Resource ID selected.

**9.11.6 Employee Work Details Section**

**Employee Work Details**

Position ID P10911 <span style="float: right;">▼</span> <small>Admin Assistant (92000...</small>	Position Admin Assistant (920003833)	Hours per Week 0.00
Hours per Week (Total) 37.00	No of Current Employment 1	Regular overtime worked? <input style="border: 1px solid red;" type="checkbox"/>

This section is read only except for one field.

- Regular overtime worked?** – press [**Spacebar**] to select **Yes** or **No**

**9.11.7 Work Related Hazards Section**

**Work Related Hazards**

Hazard 1 Generally office based sedentary work	Hazard check 1 <input type="checkbox"/>
Hazard 2 Display Screen Equipment	Hazard check 2 <input type="checkbox"/>
Hazard 3 Noise	Hazard check 3 <input type="checkbox"/>
Hazard 4 Chemicals and pesticides	Hazard check 4 <input type="checkbox"/>
Hazard 5 Driving	Hazard check 5 <input type="checkbox"/>
Hazard 17 Extreme temperatures	Hazard check 17 <input type="checkbox"/>
Other Details  	
Hazard 18 Vulnerable service users and service users who have challenging behaviour	Hazard check 18 <input type="checkbox"/>
Hazard 19 Inhalation exposure to dust, fumes, mists, cases or vapours- specify below	Hazard check 19 <input type="checkbox"/>
Other Details  	

This section contains a series of 17 questions. Select the check box for each hazard that applies.

Other Details

- Other Details** – enter the details of each hazard selected

There are a further two questions. Select the check box for each hazard that applies.

- Other Details** – enter the details of each of these hazards selected



**9.11.8 Referral - Attendance Section**

**Referral - Attendance**

**Question 1**  
Is the resource currently in work at the time of this referral?

**Answer 1**  
Yes   
Y

**Question 2**  
At the time of referral is the employee subject to disciplinary/grievance/capability/work review/management action?

**Answer 2**  
No   
N

**Mngmt. Action Details**

**Details**  
Provide any details of sickness absences for the past 2 years if applicable

**Sickness Details**

- Question 1** – the question is read only
- Answer** – press [**Spacebar**] to select **Yes** or **No** or select from the drop down
- Question 2** – the question is read only
- Answer** – press [**Spacebar**] to select **Yes** or **No** or select from the drop down
- Mgmt. Action Details** – enter the details of any management action taken
- Details** – the request is read only
- Sickness Details** – enter details of any relevant periods of sickness in the past 2 years

**9.11.9 Reason for Referral Section**

**Reason for Referral**

<b>Reason 1</b> Frequent short term sickness absence	<b>Reason check 1</b> <input type="checkbox"/>
<b>Reason 2</b> Concerns about health in relation to work	<b>Reason check 2</b> <input type="checkbox"/>
<b>Reason 3</b> Long term sickness absence	<b>Reason check 3</b> <input type="checkbox"/>
<b>Reason 4</b> Advice on return to work	<b>Reason check 4</b> <input type="checkbox"/>
<b>Reason 5</b> Other	<b>Reason check 5</b> <input type="checkbox"/>

**If other, provide details**

This section contains a series of 5 questions. Select the check box for each reason that applies.

- if other, provide details** – enter the details of other reason if reason 5 is selected



**9.11.10 Type of Advice Required Section**

**Type of Advice Required**

**i** Please tick as appropriate

**Question 1**  
Is there an underlying health problem affecting this individual's performance or attendance at work?

**Check 1**

**Comments 1**

**Question 2**  
Are they currently fit to carry out the duties outlined in the job description? (please ensure you supply the job description with this referral request)

This section contains a series of 8 questions. Select the check box for each type of advice required then add any relevant comment for each one selected.

1. **Additional Info** – use this field to detail any other advice you might need or questions that may need answering

**9.11.11 Background Information Section**

**Background Information**

**i** Please provide as much background information as possible about why you are referring this person as well as information on any adjustments you've already made to support the employee. Also include additional specific questions you would like to be addressed in the report.

**Background Information**

1. **Background Information** – provide as much background information as possible including reasons for referral, actions already taken

**9.11.12 Manager Declaration Section**

Each of the statements in this section should be selected as all of them should be complied with, in every case.

**Manager Declaration**

**i** By submitting you agree that you are the manager named in the section above and the statements made in this form are true to the best of your knowledge. Further guidance to assist you with the referral can be found within the Occupational Health pages on the intranet or Shropshire Learning Gateway. Alternatively, call 01743 252633. The Occupational Health Team, Shropshire Council, Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND

**Declaration 1**  
I have discussed the request for Occupational Health Assessment with the employee and explained the reasons for this.

**Check 1**

**Declaration 2**  
The employee is aware that a written report from Occupational Health will be forwarded to their Manager and HR and copied to the employee.

**Check 2**

**Declaration 3**  
I have provided the employee with a copy of this request.

**Check 3**

**Date of Submission**  
14/01/2019

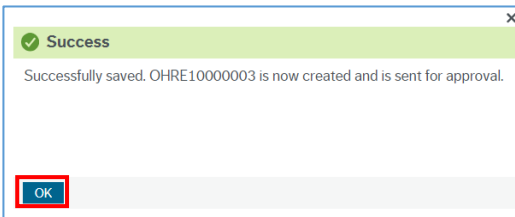
Clear
Print preview
Submit form
Save as draft
Export

1. Select each of the declarations, when they have been actioned



2. **Date of Submission** – select the date using the calendar
3. Click **Submit form**

The **Success** popup opens.



1. Click **OK**

## 9.12. Forms and Scenarios – Overview

Scenario	Form Required	Documents to Attach
<b>Recruitment</b>		
If a new post is required that isn't in your establishment	New Position Form	Job Evaluation if not already existing / Job Description / Person Specification
Job Evaluation of an existing post - restructure	Position Grade Evaluation (Manager)	Job Evaluation / Job Description / Person Specification
Vacancy to be advertised	Right to Recruit Form	Job Advert / Job Description / Person Specification / any additional information you would like the applicant to receive. (this may save admin time emailing applicants information)
<b>New Starter</b>		
Informing IT about new starter to request access to system	IT Request Form	
Induction Form to be used on first day where employee will input bank details directly onto Business World. This will alert payroll that the new resource has started.	Induction Form	P45
Probation set up dates for new starters	Probation form	



<b>Amendment to contract</b>		
Hours/working weeks/change to contract type TEMP to PERM) /extension to fixed term dates	Contractual Change form	
Additional payment / additional increment	Contractual Change form	
Change in work schedule	Contractual Change form	
Transfer of post within Directorate	Transfer Within Team Form	
Use this form if changes are required to a position, not a resource	Position change form	
<b>Leaver</b>		
Resource leaving a post	Leaver Notification form	Resignation letter is no longer required as a form has been completed
Resource leaving establishment	Leaver Notification form	Resignation letter is no longer required as a form has been completed
Leaver checklist	Leaver Checklist form	
Exit Interview	Exit Questionnaire	





## 10. Reports

Reports work in one of two ways:

- **Fixed Criteria Reports** - open the report and click Search
- **Variable Criteria Reports** - open the report, enter Selection Criteria to filter the results, then click Search

### 10.1. Fixed Criteria Report

This example uses the Total Sickness absence by individual report, which is a fixed criteria report.

1. Navigate to

**Reports → Reports across clients → HR/Payroll → Line Manager reports → Absence**

2. Select **HR: LM Total Sickness absence by individual**

**HR: LM Total Sickness absence by individual**

Selection criteria

Abs. code like: SICK\*

Line Manager like: 203346

as of date:  Today's date:

**Results**

Search

#	ResID	ResID (T)	Absence reason (T)	Date from	Date to	Days	Hours	%	Status	Cost Centre (T)

The **Selection criteria** is read only.

3. Click **Search**

**Results**

Search

#	ResID	ResID (T)	Absence reason (T)	Date from	Date to	Days	Hours	%
1	200001	10, Trainee	Cold, Cough, Flu - Influenza	22/11/2017	24/11/20...	3	0.00	100.00
2	200001	10, Trainee	Ear, nose, throat (ENT)	27/06/2018	29/06/20...	3	0.00	100.00
3	200001	10, Trainee	Ear, nose, throat (ENT)	04/07/2018	04/07/20...	1	0.00	100.00

The results are listed below the headings. Any field that is blue, is a hyperlink which will open a new tab with more detail about the field.

### 10.2. Variable Criteria Report

This example uses the Total Sickness absence for a resource report, which is a variable criteria report.

1. Navigate to

**Reports → Reports across clients → HR/Payroll → Line Manager reports → Absence**

2. Select **HR: LM Total Sickness absence for a resource**



**HR: LM Competencies held by competence type**

Selection criteria

Competence like

Line Manager like  as of date

Company like

Results

The **Selection criteria** section has fields in which criteria to report on can be determined. There may be multiple fields and they may work using lookups or calendars.

In this example, there is a single variable criteria field allowing you to specify the competence type.

3. Enter the criteria
4. Click **Search**

Results									
<input type="button" value="Search"/> <input type="button" value="Detail level"/> <input type="button" value="All levels"/> <input type="button" value="Copy to clipboard"/>									
#	Line Manager	ResID	Competence	Competence value	Heading 1	Heading 2	Heading 3	Heading 4 (T)	Head (T)
1	203346	201478	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			
2	203346	203543	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			
3	203346	202469	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			
4	203346	205631	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			

The results displayed are only for the criteria entered.

**10.2.1 Filtering Results**

Report results can be filtered by entering criteria in the Filter Bar and clicking Search. In this example the results are filtered on Absence reason.

HR: LM Competencies held by competence type									
Selection criteria									
Competence like <input type="text" value="HEALTH"/>									
Line Manager like <input type="text" value="203346"/> as of date <input type="text" value="Today's date"/>									
Company like <input type="text" value="SC"/>									
Results									
<input type="button" value="Search"/> <input type="button" value="Detail level"/> <input type="button" value="All levels"/> <input type="button" value="Copy to clipboard"/>									
#	Line Manager	ResID	Competence	Competence value	Heading 1	Heading 2	Heading 3	Heading 4 (T)	Head (T)
		<input type="text" value="203632"/>							
1	203346	201478	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			
2	203346	203543	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			
3	203346	202469	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			
4	203346	205631	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			
5	203346	207886	HEALTH	HE0001	Asbestos Awareness	HSASBESTOS			



1. Enter the filter criteria in the required field
2. Click **Search**

**HR: LM Competencies held by competence type**

⤴ Selection criteria

Competence like: HEALTH

Line Manager like: 203346

as of date: [dropdown] Today's date: [dropdown]

Company like: SC

---

**Results**

Search | Detail level: All levels | Copy to clipboard

#	Line Manager	ResID	Competence	Competence value	Heading 1	Heading 2	Heading 3
		203632					
1	203346	203632	HEALTH	HE0001	Asbestos Awareness	HSASBESTO...	
2	203346	203632	HEALTH	HE0007	Fire Warden	HSFIREWARD	
3	203346	203632	HEALTH	HE0010	Emergency First Aid	HSFAEMER1...	
4	203346	203632	HEALTH	HE0016	Ladder Safety	HSLADDER	
5	203346	203632	HEALTH	HE0035	Facilities Practical Manual Handling	SSPRMANHA...	

The results now only include those that match the filter criteria.

Filter criteria may be entered before the report is run to produce pre-filtered results.