MyView Guidance Documentation

Onboarding Managers Guidance

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Contents

Introduction

This document is intended to explain the onboarding process and the role of the Manager within the process.

What is onboarding and what are its benefits?

Onboarding is the term used to describe the process where future employees can access the "My View" Dashboard (the system that we use to manage our personnel and payroll functions) before they start work. This allows us to provide new starters with information pertinent to their first day in work and a selection of tasks to perform prior to the start date. The intention is to help improve a new starter's experience thereby enhancing their engagement, familiarising them with the organisation and make the preparations for the first day to go as smoothly as possible.

We have developed a standard set of tasks that will act as the default onboarding screen. However, it is possible to create additional post specific tasks should they be needed. For example, a task to request information pertaining to uniform requirements could be included. If you have identified additional post specific tasks that you require, please inform the People Management Team as soon as possible in the recruitment process as once onboarding has been initiated, we are unable to amend the screens.

Some of these tasks, as explained later, may also extend past the initial start date, and will lead into the induction process. We hope that the system will remove some of the anxiety people often experience when starting a new job with a new employer.

The benefit to you as a manager is that your new employee should be more likely to "hit the ground running" and have a clearer idea as to what to expect on their first day. This document also provides a useful checklist that should help you ensure that all the necessary logistics are in place.

Who is covered by Onboarding?

Currently we only offer this facility to **new starters and re-joiners**. It does not cover employees who transfer between posts or who commence additional jobs. This may be reviewed in the future.

How will your recruit access the Onboarding Hub and other My View modules?

The initial recruitment process will remain as it is currently. You will still receive instruction from the Recruitment Team until all pre-employment checks are complete and the references are satisfactory.

Prior to sending a completed commencement form to the People Management Team (e-Form). You will be expected to contact your recruit to arrange a mutually suitable commencement date.

Upon receipt of the Commencement e-Form, an employee number will be generated by the People Management Team, and the onboarding process will be initiated. An email will be sent to the recruit giving them instructions on how to access the "My View" portal and you will receive an email notification that this has happened.

Manager Onboarding Guidance Flowchart

The Recruitment Team advise all checks completed and satisfactory.

The **Manager** will contact the new starter or re-joiner to arrange a mutually suitable commencement date before completing the Commencement e-form and emailing it to the Authorised Signatory. **\\ntcarmcc\cfp\Finance\Authorised Signatories.** Contact the People Management Team now if you wish to adjust the task schedule that your recruit should complete. HR People Management

HR People Management will then create the new employee account, adjust the task schedule if this is requested and initiate the Onboarding Process. **Note: Only forms from Authorised Signatories will be accepted by HR People Management.**

Resource Link will then send an automated email to the recruit giving them login instructions and notify the manager via email that this part of the process is complete.

The **Manager** once this email is received should check and update if necessary, the first day details on their Onboarding tab for your recruit.

The Manager, using the MyView Onboarding screen, will need to monitor and encourage their recruit's progress with the tasks. Support them with any queries about their work details, escalate any issues with their login to ResourceLink or issues with their employment details to HR People Management.

Getting Ready for The Start Date

- Once the recruit has uploaded a photograph download it and request an ID card.
- Order IT Equipment if this is a new post.
- Request a new user account from IT Helpdesk.
- Order any PPE required by the recruit.
- Contact your recruit and encourage them to complete their tasks particularly the bank details for Payroll to have the information in advance of the departmental pay run.

The First Day

Induction

- Complete any remaining induction from the task list.

- Complete the department specific induction programme to orientate the recruit within the department.

The role of the Onboarder

The recruit will be asked to complete a series of tasks (which can be tailored by the manager) via the "My View" portal which will include: -

- Personal Details
- Bank Details
- Contact Details
- Emergency Contact
- Photo ID Load
- Qualification Certificates Document Load
- Pension Forms
- Declaration of Personal Interest
- Induction

They will also be given links to the following documents:

- The Onboarding Manual,
- Employee Guide,
- Welsh Language Information Booklet
- Code of Conduct

They will have to confirm that they have read these documents.

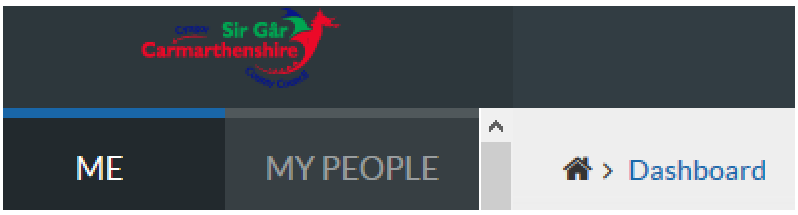
Your Role as a Manager

As a Manager you will receive an email notifying you that the onboarding process has been initiated, which will include the employee's basic details and employee number. You will then be able to log in to your My View account and view your Onboarder' s progress via the My People tab.

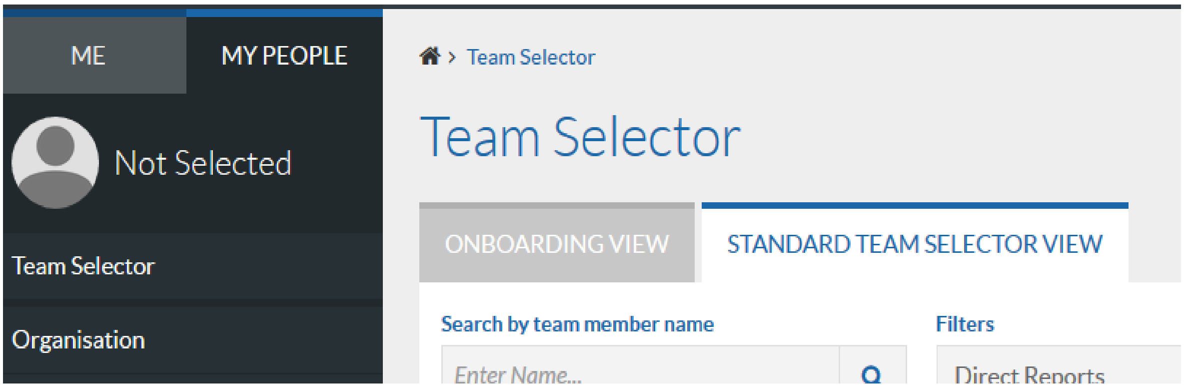
Please note we recommend you use one of the following internet browsers rather than internet explorer. This will ensure all data is displayed correctly on screen. Both browsers are supported by IT and should be available to you. If you experience any difficulty accessing Microsoft Edge or Google Chrome, please contact IT Helpdesk.

Microsoft Edge (Office 365 only). Google Chrome

Step 1 – **Select My People:**



Step 2 - **Select** the “ONBOARDING VIEW” tab



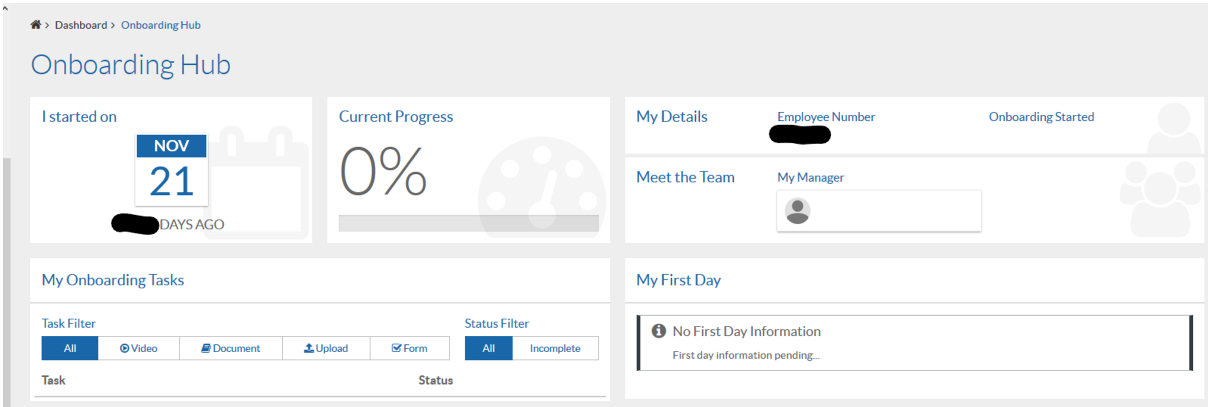
Step 3 – **Scroll** down and select the new on boarder from the displayed list in the same way as you would usually view an employee record.

Step 4 - **Select** the Onboarding option from the available functions on the left-hand side of the dashboard. The onboarding manager screen will then appear.

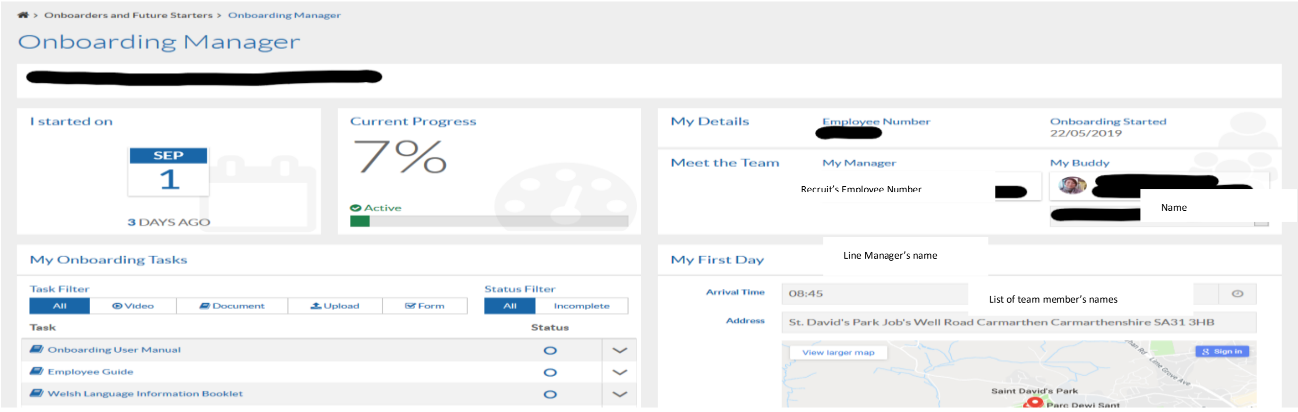
NB if you select the Onboarding task from the list on the left-hand side of the screen before you have selected the new on boarder then you will be accessing your personal on boarding screen.

If this happens then simply go back to select the recruit via the “My People” tab as described above.

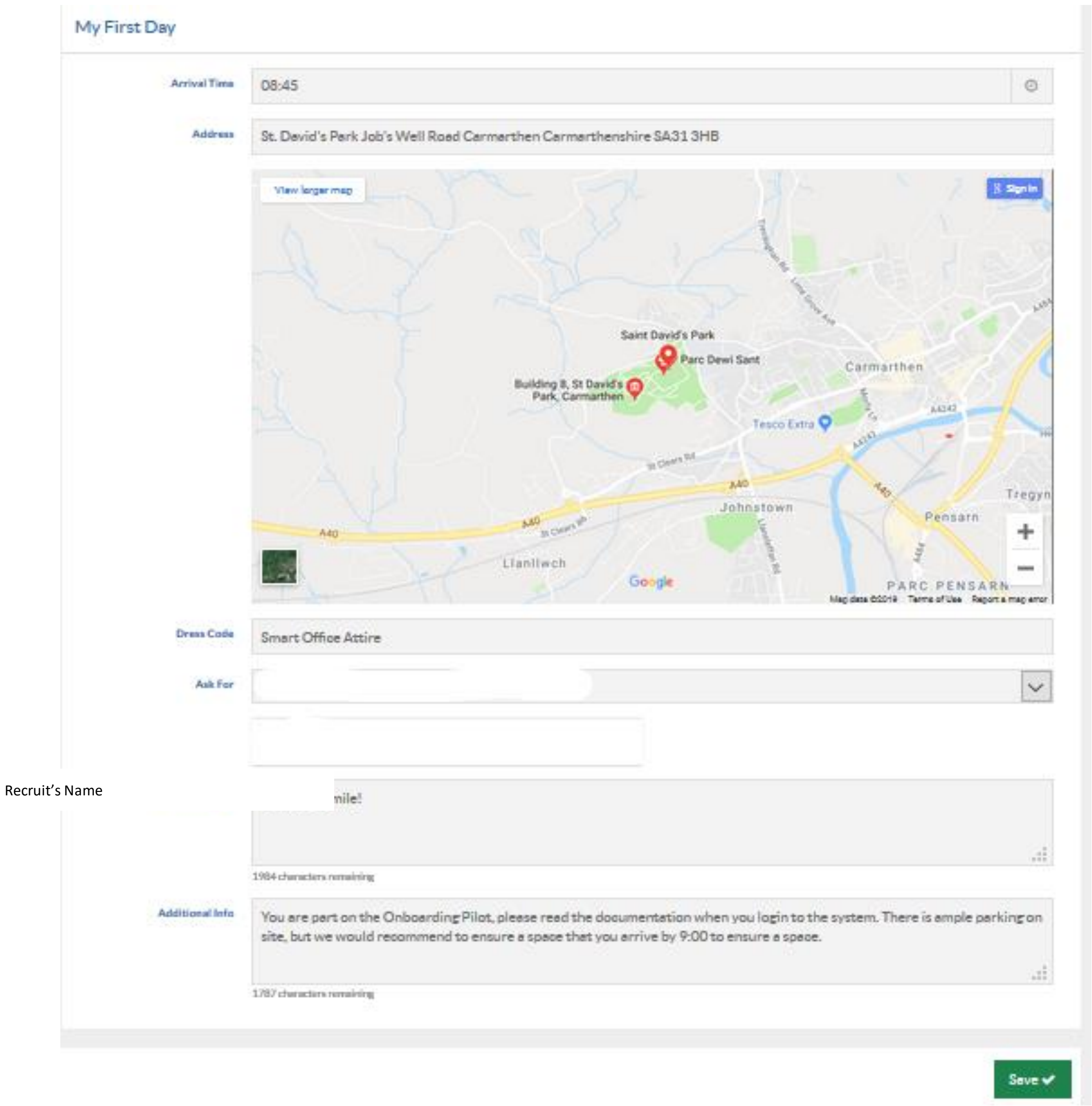
Anyone who did not complete the onboarding process when they joined, a screen that looks like the one shown below will appear.



The Onboarding screen will look something like this:



My First Day



As managers, you should review and update the information held against the following fields as appropriate to your recruit: -

Buddy
It is recommended you assign your recruit a 'Buddy', someone they can contact in addition to yourself should they need support during their induction and probationary periods.

Arrival Time
Work Location Address – by populating the postcode it will bring up a location map.

Dress Code
Advise your recruit what attire will be appropriate for their first day at work. For example, the office attire is smart casual or please wear your overalls and safety boots.

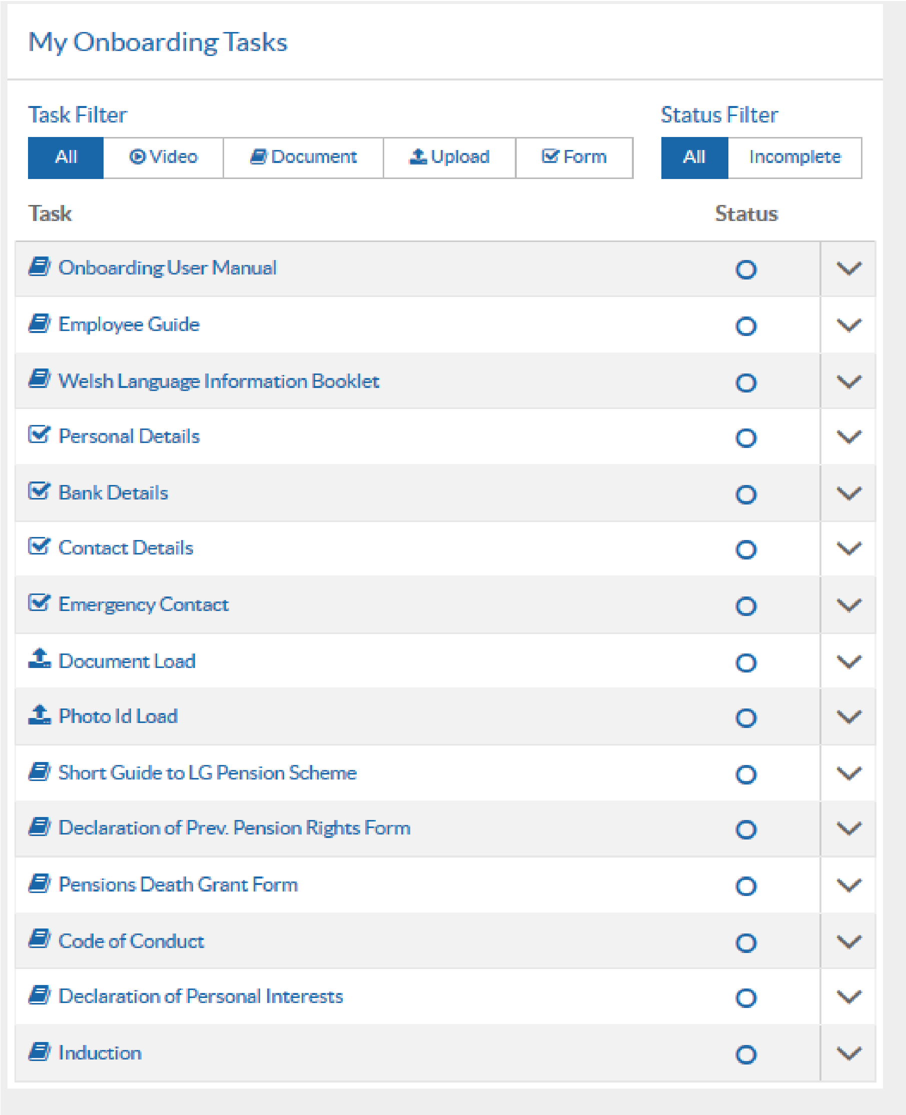
Ask For - This is a drop-down menu of direct reports in your team. If you wish to use an alternative person, please leave this field blank and use the additional information box to specify to whom they should report.

What to Bring
For example, a packed lunch, equipment, change of clothes and Wellingtons for a site visit or any additional documentation you might need to see from your recruit.

Additional Information
To amend any details simply **overtype** and **Click save** – the green box on the bottom right hand side of the screen (apart from the "Ask For" box as explained above). The screen that your Onboarder can see will be amended once **save** has been selected.

Note: When completing these fields please ensure that you use appropriate language and only information that is pertinent to the role.

My Onboarding Tasks



The information your recruit will need to review/complete is listed as a series of tasks. Once they have completed a task and ticked it as complete the current progress indicator will change.

Onboarders can choose which order to complete the tasks and don't have to complete all tasks in one go. However, please would you encourage them to complete the personal and bank details promptly, so Payroll have access to their details before the next pay run. Should you identify that your recruit is not making any progress in completing the tasks then you could encourage them to complete them as soon as is reasonably possible.

The detailed information contained under the following tasks: Personal Details, Contact Details, Emergency Contact and Bank Details will not be visible to you as the line manager in line with data protection regulations. However, you will be able to view whether your recruit has completed the task or not

Personal Details/ Contact Details and Emergency Details:

When your Onboarder completes these details, this information will feed directly into our Payroll/Personnel system. It is important that this has completed accurately and in a timely manner.

Bank Details:

Salaries and wages are paid directly into individual employees' nominated Bank or Building Society Account and failure to supply this information may result in a delay in them receiving their pay. It is essential that your Onboarder has completed this accurately and promptly. Please encourage them to complete them as soon as possible so Payroll can access the details before your next pay run.

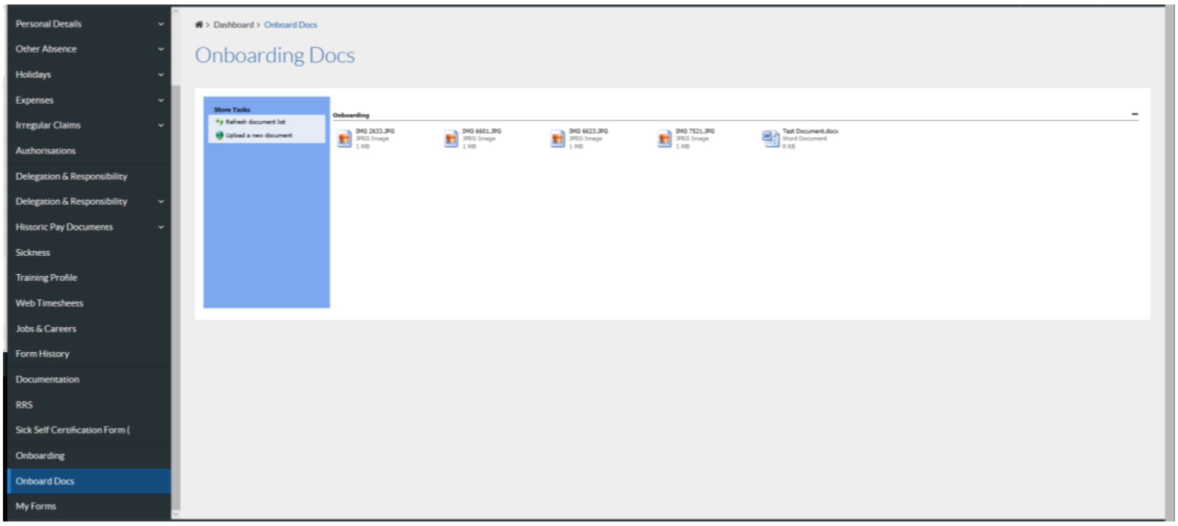
Document Load:

This function allows your recruit to upload the following documents:

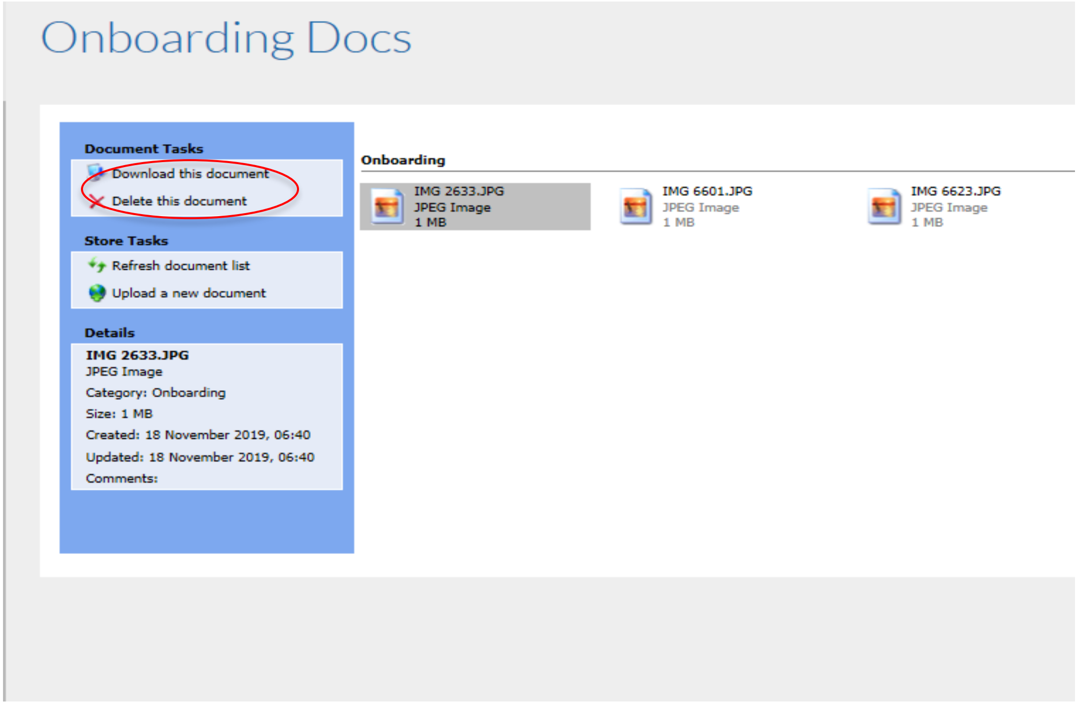
- Copies of their qualification certificates & professional registration,
- A photograph to be used on their Identity card (This has its own task line on the Onboarding screen)
- The completed declaration of Personal Interests Form.
- If the recruit has passed their driving test a copy of the Driving licence verification document. This can be obtained via the following link to the website. https://www.gov.uk/view-driving-licence
- P46 form – this is only required if the recruit is not able to provide or have lost their P45 form.

Once the Onboarder has indicated that they have completed this task (status changed to complete) then you will be able to download and use the files to complete several processes that need to be put in place as part of the recruitment process (see notes in next section).

To download a document, **go to the Onboarding Docs tab** on the left-hand side.

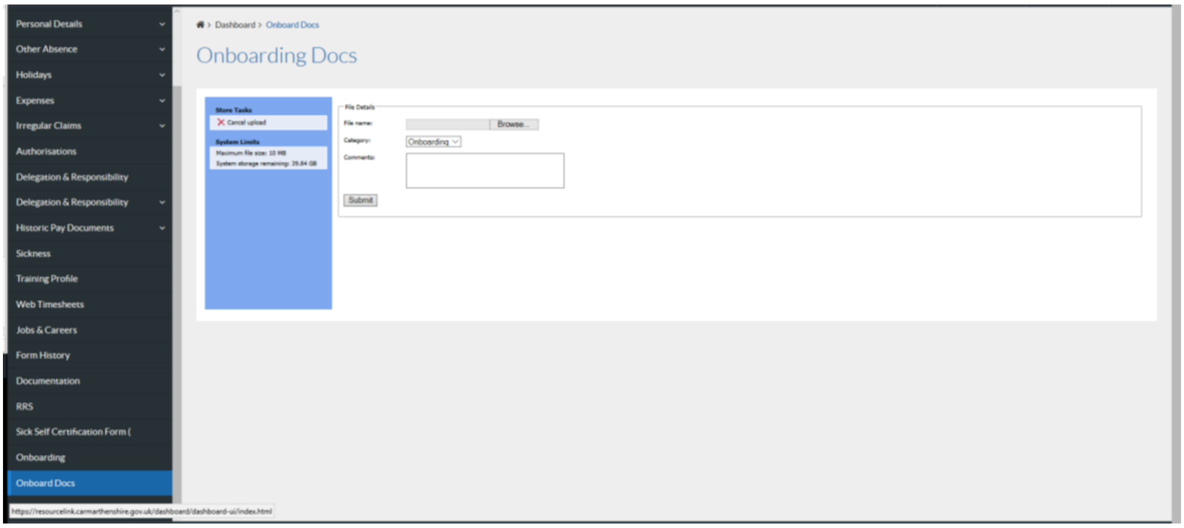


select the document and then **click** on "Download this document". Then follow the instructions to save it in your desired folder.



It is also possible for you to upload any documents that you wish to share with the recruit via the upload document in this function.

Click on "Upload a new document" and follow the instructions to select the file to be uploaded. **Click Submit**



Short Guide to the Pension Schemes
LG Pension – For Authority employees, Teaching Assistants and Delta employees

Previous Pension Rights Form

Dyfed Pension Fund - Death Grant Expression of Wish

The above tasks link to Pension related information.

http://www.dyfedpensionfund.org.uk/

Teacher's Pension – For Teachers only

New Joiner Questionnaire V11

https://www.teacherspensions.co.uk/

Code of Conduct
All employees are bound by the Code of Conduct and as part of the conditions of employment it's important that your recruit has read and understood the contents of this document.

Declaration of Personal Interests
Once the onboarder has read the Code of Conduct they will need to decide if they need to complete the Declaration of Personal Interests form. If so, they will need to complete the My Form. You will then be able to access this form and process it accordingly.

Welsh Language Information Booklet
A reference document to outline the requirements and commitment to deliver a bilingual service to our customers and promote the language in our county. It also gives you useful information on how to participate in the bilingual community in Carmarthenshire.

http://intranet/our-people/working-for-us/working-bilingually/

Induction
As their manager, you will be responsible for structuring an appropriate induction relevant to their post. You are expected to lead, and actively participate in that induction with the Onboarder.

Staff Induction Guidance   Employee Induction Handbook   Probationary Guidance

What else is expected of you?
Onboarding places the onus on the recruit to complete the tasks before commencing employment. As their manager it is strongly recommended that you monitor their progress and encourage completion of the tasks. In addition, the Onboarding tasks will also help you to complete other tasks to prepare for the start of the new employee:

ID Card
Once the recruit has indicated they have uploaded a suitable photo by marking the "Load Photo ID" task as complete you may need to arrange their ID card with the department or person responsible for their creation.

Checklist

A basic checklist for onboarding leading up to the Induction on the first day has been included below. This can be edited to suit your area of the Authority. Also included are links to the induction and probation information for managers and new starters on the intranet to help you tailor your induction to your recruit.

Basic Checklist For Onboarding leading up to the Induction		
Onboarding	Y/N	Comments
Have you updated the first day details for the onboarder?		
Have you kept in touch since the interview? Do they have a contact email or number for you for queries?		
Have the bank details been updated?		
Have all personal details and contact details been updated?		
Has the pension information been sent off?		
Have all the documents you need been uploaded		
Is a declaration of personal interest required?		
Equipment		
Has the IT equipment been ordered?		
Has the photo Id been completed?		
Has the new user account been requested and details been returned from IT ?		
Induction		
Have you planned your induction? Staff Induction Guidance Employee Induction Handbook Probationary Guidance		

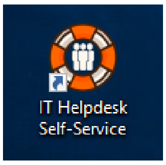
Carmarthenshire IT Access Setup Only
To set up IT access you must complete the online "New Employee E-Form" – please note that the person who makes this request must be an Authorized Signatory. To check whether you are an authorised signatory or to find out who is on the list please check with your Departmental Representative as listed below: -

Chief Executives, Regeneration & Policy	Nicola J Evans
Communities	Kerry Halpin
Corporate Services	Hayley John
Education & Children's Services	Nicola Hoare

Environment | Alan Howells

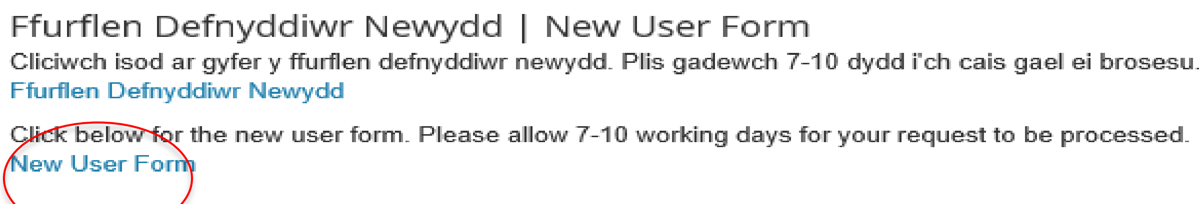
If you are an Authorised Signatory, you can request IT access for the recruit using the following steps:

Click on the IT Helpdesk Self-Service Icon on your desktop



Select Helpu Eich Hun/Help Yourself

Select the New User Form from the list of options and click on the shortcut options



1. Complete the New User Form and **click Submit**

Useful Contacts

If you find that you require further assistance some useful contacts are:

ResourceLink

Recruitment Team

ID Cards

L&D

HR People Management

Absence Team

Pensions

Cyngor Sir Gâr
Carmarthenshire County Council