Payroll and Employee Services MyWorkforce - Manager Guidance

Contents

1 – Introduction

This document is a guide to using the new **MyWorkforce** system to process the following establishment changes:

- Create and advertise a new post
- Fill a vacant post
- Make changes to an existing post/post holder including:
    - Change of location
    - Change of Post Title
    - Obsolete Vacant Post
    - Change Post Cost Centre
    - Post – Structure Change
    - Change Temporary or Permanent Posting
    - Return of Substantive Postholder
- Make a team structure change
- Request the job evaluation of a new post

The new MyWorkforce system can be accessed when connected to the DCC Network at https://myworkforcerequests.durham.gov.uk/.

Please note: Salary related establishment changes for current posts should be submitted via the ***MyPeople Establishment Changes*** section with MyView. This includes:

- Notify leaver to the council
- Extend an employee's temporary contract
- Change an employee's hours (permanent or temporary)
- Arrange an honoraria payment
- Change an employee's grade (permanent or temporary)
- Change the number of weeks per year (permanent or temporary)

Guidance on ***MyPeople Establishment Changes*** is available at www.durham.gov.uk/myview.

If an external worker requires access to MyView, this will need to be input on MyView under **Record an External Worker**. Guidance is available in MyPeople for Managers under General guidance available at www.durham.gov.uk/myview.

Please note: If changes need to be made to reporting lines, this should be requested on MyView **not** MyWorkforce. Changes to reporting lines can be submitted on the ***MyPeople Changes*** section on MyView.

If you require any further assistance with MyWorkforce, please contact the MyView Helpdesk via email MyView@durham.gov.uk or telephone 03000 269919.

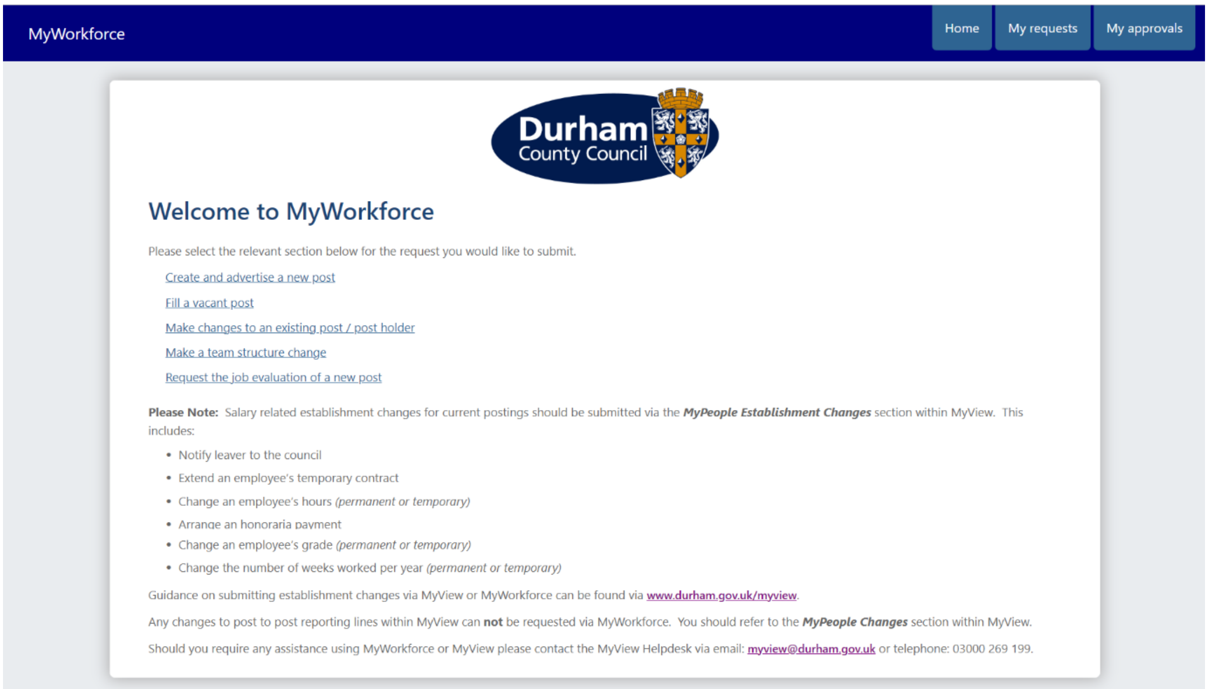
1.1 – MyWorkforce Dashboard

MyWorkforce allows managers to submit establishment changes efficiently, improve management information reporting and monitor establishment changes.

The MyWorkforce Dashboard can be accessed via the Intranet. You should select the relevant request type from the links available on the MyWorkforce Dashboard landing page:

- Create and advertise a new post

- Fill a vacant post
- Make changes to an exist post/post holder
- Make a team structure change
- Request the job evaluation of a new post



Across the main banner on the MyWorkforce Dashboard, you will find additonal links to:

- **Home** - will return you to the MyWorkforce landing page.
- **My requests** – will provide you with a list of requests that you have previously requested. This will include any requests that may have been subsequently cancelled.
- **My approvals –** will hold any requests submitted by other managers that are currently pending your approval (as an authorising manager).

2 – My requests

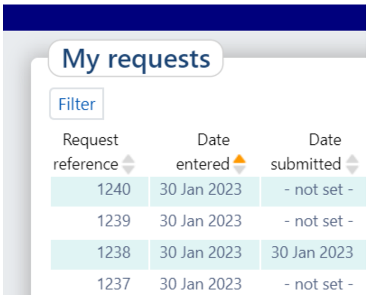
My requests allows you to monitor the progress of your requests including any pending authorisation. This will include any requests that may have been subsequently cancelled.

To review requests that you have previously submitted (or saved as a draft to be submitted later), select **My requests** tab on the MyWorkforce Dashboard landing page.

My requests will provide a summary of your requests detailing:

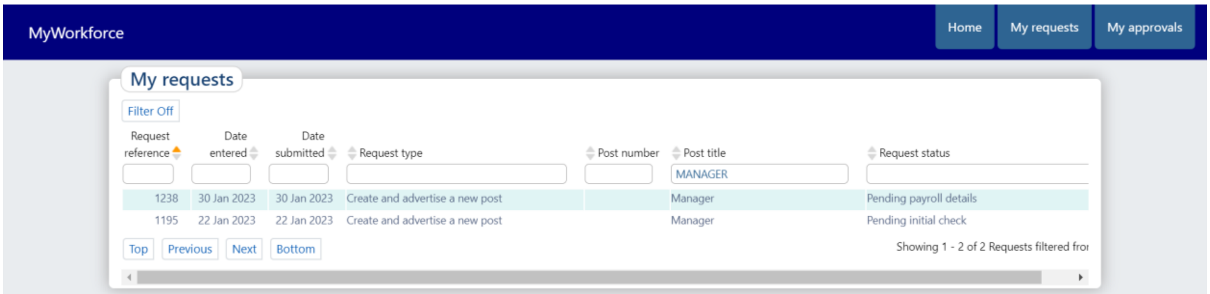
- **Request reference** - please quote this reference number in all correspondence with Payroll and Employee Services (PES).
- **Date entered**
- **Data submitted**
- **Request type**
- **Post number**
- **Post title**
- **Request status** - will indicate the current status of your request.

Requests can be sorted by clicking on the arrows beside the title of the column you want to use as a sort order. You can also use the Filter option to search more specifically. To make changes to the Filter, select the option for **Filter** above the **Request reference** column.



You will then be able to enter text at the top of the columns to filter the requests. For example, you may wish search for a specific post using the **Post title** filter box. You would then click **Enter** so that all your relevant requests can be returned.

To remove the filter, select **Filter Off** above **Request reference**.



To open a request, click the relevant **Request reference** number.

The **Request details** section will provide summary information on the pending and completed authorisations for this request – allowing you chance to easily track the progress of your request.

Request details

Reference number	1127
Request type	Create and advertise a new post
Requested by	Natalie
Email address	
Date & time entered	03 Jan 2023 15:05
Date & time submitted	04 Jan 2023 11:17
Initial check status	Completed on 04 Jan 2023 11:19 by Natalie
Authorising manager status	Pending
Advice and support status	Pending
Finance status	Pending
Advertising status	Not started
SAT status	Not started
Payroll details status	Not started
Payroll input status	Not started
Payroll processing status	Not started
Pensions status	Not started

Please allow sufficient time for PES to process your request in accordance with payroll deadlines.

If you are concerned that your request has not been progressed, you should email PES according to your service grouping.

- PESAHS@durham.gov.uk
- PESCorporateAffairs@durham.gov.uk
- PESCYPS@durham.gov.uk
- PESNCC@durham.gov.uk
- PESREG@durham.gov.uk
- PESRESOURCES@durham.gov.uk

Please quote the relevant reference number when contacting PES.

Please Note: If a request is cancelled, the request status will change to cancelled and the request details summary will also confirm cancellation.

My requests

Filter Off

Request reference	Date entered	Date submitted	Request type	Post number	Post title	Request status
						CANCELLED
1125	23 Dec 2022	23 Dec 2022	Create and advertise a new post		TTTTTTTT	Cancelled

Top Previous Next Bottom

Showing 1 Request filtered fro

Request details

Reference number	1125
Request type	Create and advertise a new post
Requested by	Natalie
Email address	
Date & time entered	23 Dec 2022 12:14
Date & time submitted	23 Dec 2022 12:15
Initial check status	Completed on 23 Dec 2022 12:16 by Natalie
Authorising manager status	Not started
Advice and support status	Completed on 23 Dec 2022 12:17 by Natalie
Finance status	Not started
Advertising status	Not started
SAT status	Not started
SAT status	Not started
Payroll details status	Not started
Payroll input status	Not started
Payroll processing status	Not started
Pensions status	Not started
	This request is currently cancelled

2.1 – MyWorkforce Notifications

As your request progresses through the various authorisation stages and subsequent action by PES, you will receive several email notifications from MyWorkforce@durham.gov.uk.

Please ensure that all emails received from MyWorkforce@durham.gov.uk are acknowledged and have not been moved into junk mail folders.

When a request is submitted to PES, you will receive an email notification to confirm this has been received – like the example shown below:

TEST MyWorkforce request reference 1706

M MyWorkforce@durham.gov.uk
To

Thu 11:45

Thank you

Your request for changes to a post / post holder has been submitted to Payroll and Employee Services.

You can use the MyWorkforce application to monitor the progress of your requests by selecting 'My requests' from the menu.

Please quote request reference **1706** in any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

This email notification will provide summary details of the request including the Request reference number (for example, 1127). The Request reference number should be used when contacting PES and to locate your request via the **My requests** section in MyWorkforce.

If your request is rejected, you will receive an email notification like the example shown below to advise that the request has been rejected. This will indicate which approver group rejected your request. The request will include any rejection comments supplied.

MyWorkforce request reference 1351

M MyWorkforce@durham.gov.uk
To

MyWorkforce request reference 1351

Your request to fill post 0075255 has been rejected by Finance.

Reason for not authorising: *This reject has now been rejected*

If you need any further information, please email the Payroll and Employee Services Team according to service grouping below:

- PESAHS@durham.gov.uk
- PESCYPS@durham.gov.uk
- PESNCC@durham.go.uk
- PESREG@durham.gov.uk
- PESRESOURCES@durham.gov.uk

Please quote request reference 1351 on any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

Request details will provide further information on the stage that the form has been rejected. To review the comments in relation to the request rejection, navigate to the bottom of the request form.

Request details

Reference number	1312
Request type	Make changes to an existing post/post holder
Requested by	Natalie
Email address	
Date & time entered	02 Feb 2023 12:18
Date & time submitted	02 Feb 2023 12:21
Initial check status	Completed on 02 Feb 2023 12:21 by Natalie
Authorising manager status	Completed on 02 Feb 2023 12:35 by Ben
Advice and support status	Completed on 02 Feb 2023 12:33 by Natalie
Finance status	Rejected on 02 Feb 2023 15:02 by Natalie
SAT status	Not started
Payroll details status	Not started
Payroll input status	Not started
Payroll processing status	Not started

Authorisation

Authorising manager	Ben
Advice and support comments	This request has been rejected due to...
Finance comments	This approval stage has been rejected due to....

If your request has been cancelled, you will receive an email notification like the example shown below to advise that the request has been cancelled.

MyWorkforce request reference 1463

M MyWorkforce@durham.gov.uk
To

MyWorkforce request reference 1463

Your request for changes to a post / post holder has been cancelled.

If you need any further information, please email the Payroll and Employee Services Team according to service grouping below:

- PESAHS@durham.gov.uk
- PESCYPS@durham.gov.uk
- PESNCC@durham.go.uk
- PESREG@durham.gov.uk
- PESRESOURCES@durham.gov.uk

Please quote request reference 1463 on any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

3 – My approvals

If you have been selected as an authorising manager, you will have received an email notification from MyWorkforce@durham.gov.uk. The approval request can be accessed directly from the email notification received. To open the request directly from the email notification, select **click here** to be directed to the approval.

TEST MyWorkforce request reference 1704

MyWorkforce@durham.gov.uk
To
Thu 11:50

MyWorkforce request reference 1704

A request for a new 'TEST' post has been submitted by in Resources / HR & Employee Services / Payroll & Employee Services and has been assigned to you for authorisation.

Please click here to view and complete the form. Please ensure you are logged onto the DCC network before clicking.

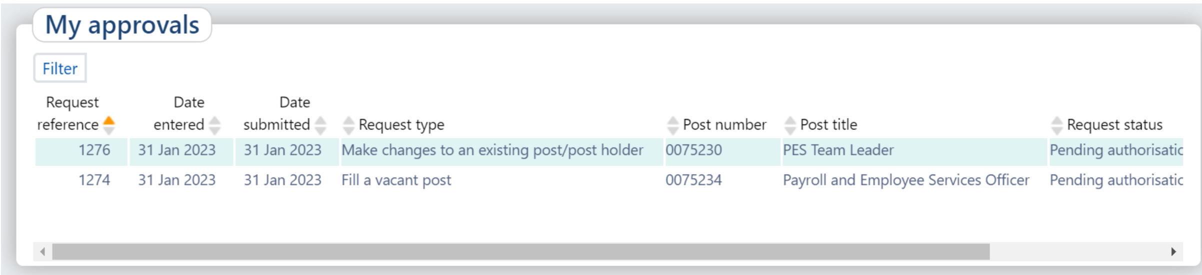
You can also access this request by selecting 'My Approvals' in the MyWorkforce application.

PLEASE DO NOT REPLY THIS EMAIL.

Alternatively, you can review all outstanding approval requests that need to be actioned via the **My approvals** node on the MyWorkforce Dashboard landing page.

My approvals will open a summary of the requests that have been submitted requiring your approval. Requests can be filtered by:

- **Request reference**
- **Date entered**
- **Data submitted**
- **Request type**
- **Post number**
- **Post title**
- **Request status**



My approvals

Filter

Request reference	Date entered	Date submitted	Request type	Post number	Post title	Request status
1276	31 Jan 2023	31 Jan 2023	Make changes to an existing post/post holder	0075230	PES Team Leader	Pending authorisatic
1274	31 Jan 2023	31 Jan 2023	Fill a vacant post	0075234	Payroll and Employee Services Officer	Pending authorisatic

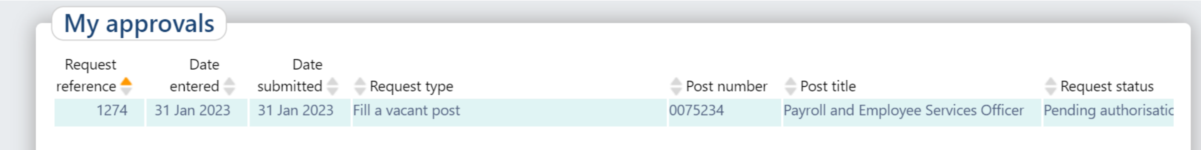
Requests can be sorted by clicking on the arrows beside the title of the column you want to use as a sort order. You can also use the Filter option to search more specifically. To make changes to the Filter, select the option for **Filter** above the **Request reference** column.

You will then be able to enter text at the top of the columns to filter the requests. For example, you may wish search for a specific post using the **Post title** filter box. You would then click **Enter** so that all your relevant requests can be returned.

To remove the filter, select **Filter Off** above **Request reference**.

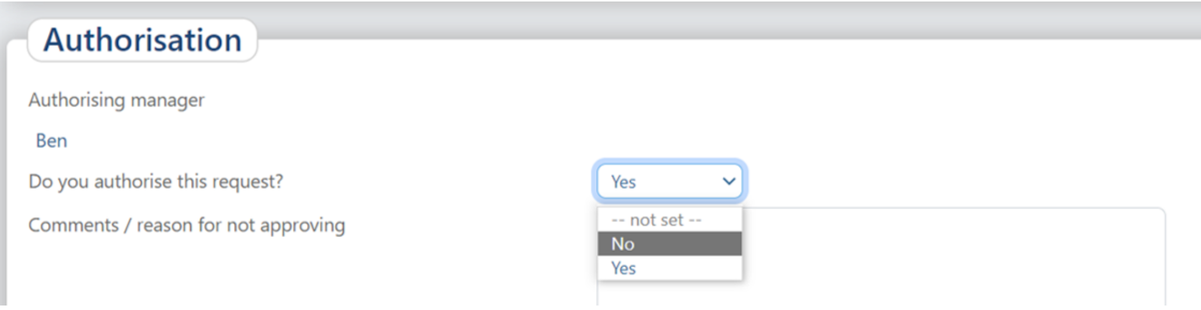
3.1 – Approving/Rejecting a MyWorkforce Request

To open a request, click the relevant **Request reference** number.

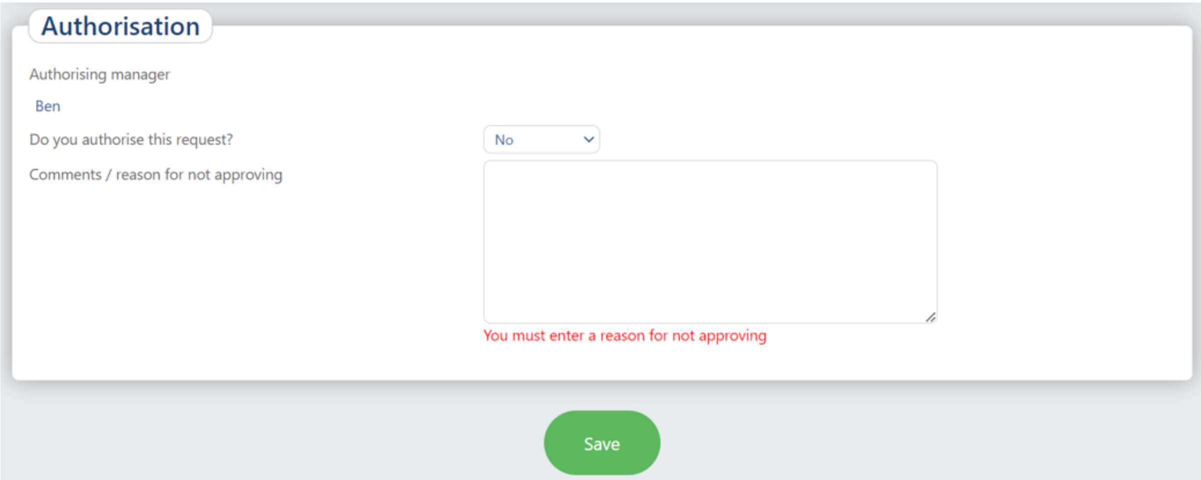


You will then be able to review details of the request. Dependant on the request type you will be presented with differing information.

The final section of the form is labelled **Authorisation.** You are required to confirm if your approval of the request by answering Yes or No to the first question.



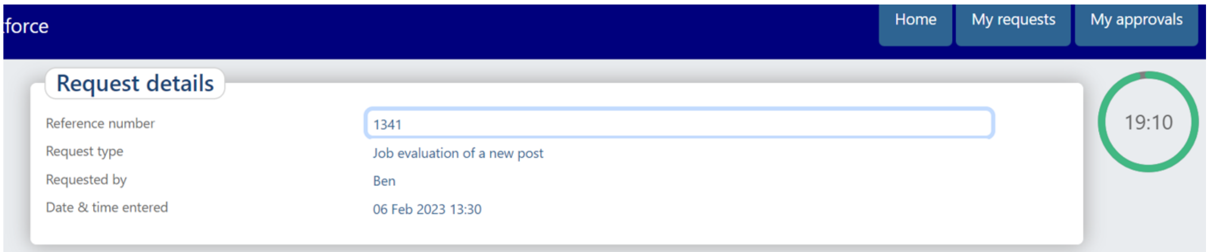
If you are rejecting the request (by answering No to the first question) you will be mandated to provide an appropriate rejection comment to explain why the request has been rejected.



Once this section has been completed, click **Save** to process the authorisation or rejection.

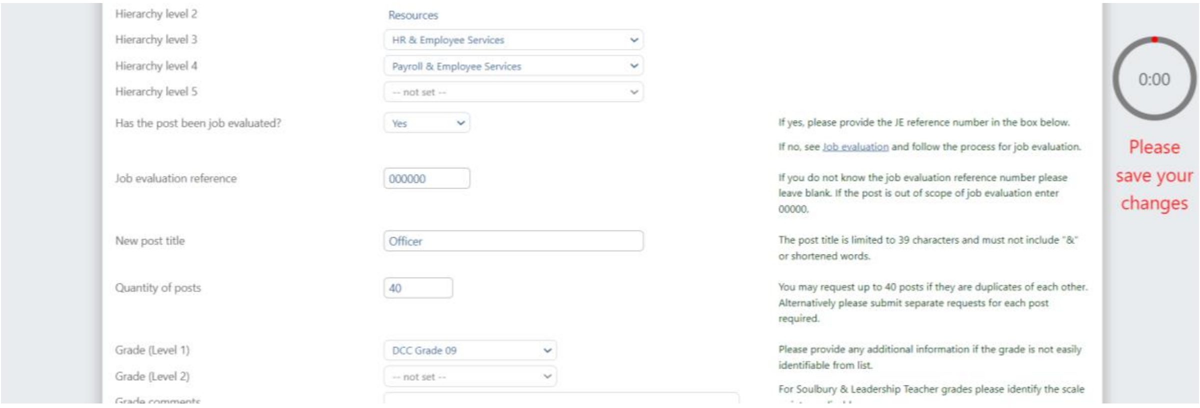
4 – Session Timeout

When a request is initiated, it will be stamped with the **Date & time entered.**

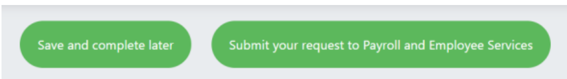


A session timer is included on the page as a prompt to remind you to regularly **save** your progress so that it isn't lost. The timer is placed in the top right-hand corner of your screen and counts down from twenty minutes. This timer will change from green, to amber, to red as the time runs down.

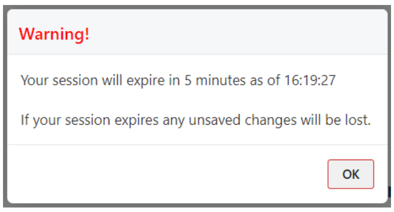
When the twenty minutes timer has run down, you will be prompted to save the changes on the request form.



The changes on the request can be saved by selecting **Save and complete later** at the bottom on the form. This will restart the countdown from twenty minutes.

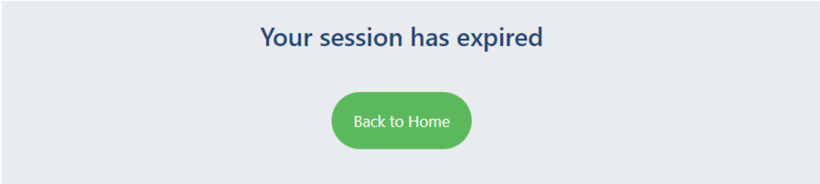


If you do not save the form within twenty-five minutes, you will receive a pop-up warning to advise you to save your progress.



4.1 – Inactive Session

If you create (or edit) a request but move away from your device so that you are inactive for 30 minutes, the session will expire. You will then need to reopen the request via **My requests** (or restart the form if you have not previously saved any changes).

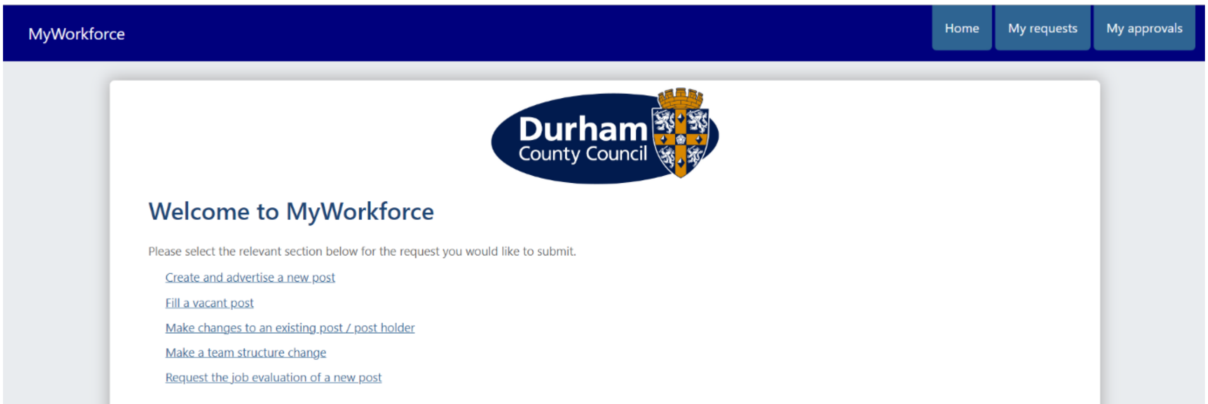


4.2 – System Cleaner

If you create a request but it is not submitted the request will be deleted 14 days after the request was initially created.

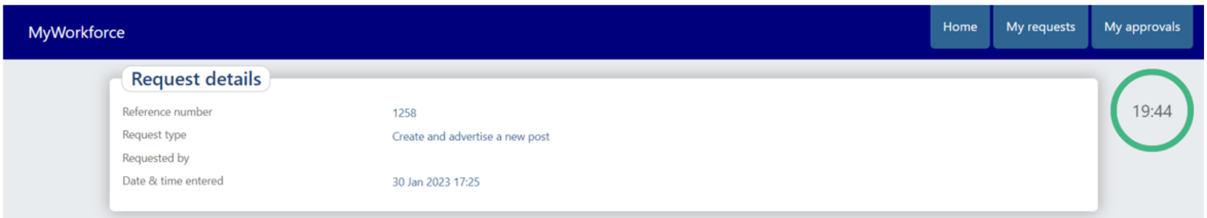
5 – Create and advertise a new post

To submit a request to create and advertise a new post, select the relevant option from the MyWorkforce landing page.



Once the ***Create and advertise a new post*** form has been selected, you will be required to submit post details, advert information (including supporting documentation) as well as identifying who is responsible for approving your request.

The draft form will show summary **Request details** which include **Reference number**, **Request type**, **Requested by** and **Date & time entered**. Once your request has been submitted for authorisation and processing you will see a summary of the completed and outstanding milestones of the request.



5.1 – Create and Advertise a new post – Post Details

The ***Post details*** is the main section of the form which will provide PES with the information required for the post to be created.

The form is designed to restrict managers to only create posts in their own service grouping. It therefore will automatically pull through **Hierarchy level 2** based on the service that your post resides.

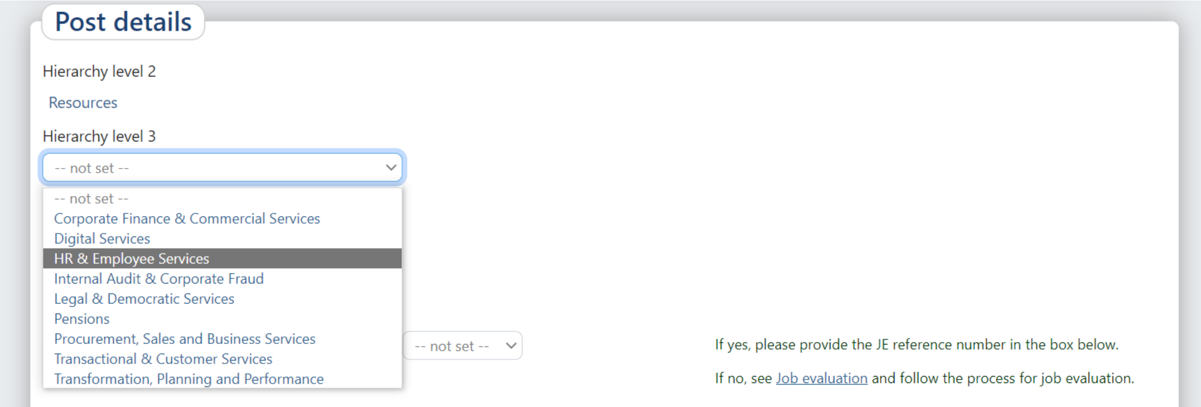
Using the drop-down menu, you will then need to select the appropriate hierarchy levels until you correctly identify the part of the organisation structure to which the new post should be attached.

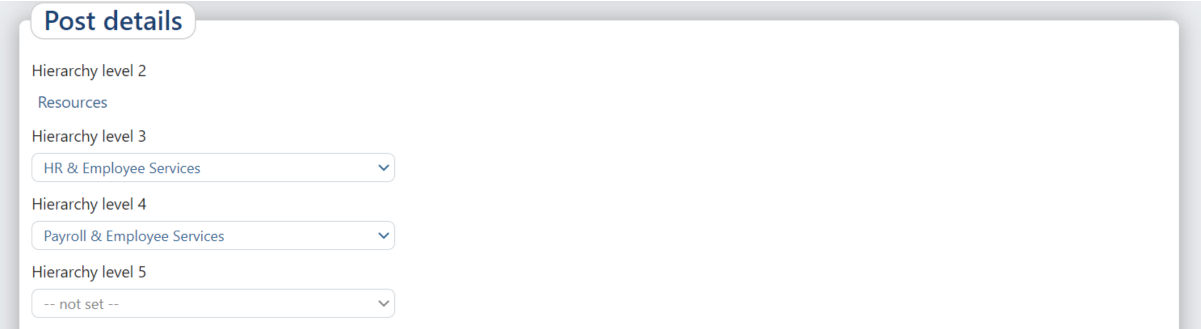
Please Note: If you cannot identify the correct part of the hierarchy (or that you think a new hierarchy/structure needs to be created to reflect the organisation structure) please contact PES according to your service grouping.

- PESAHS@durham.gov.uk
- PESCorporateAffairs@durham.gov.uk
- PESCYPS@durham.gov.uk
- PESNCC@durham.gov.uk
- PESREG@durham.gov.uk

- PESRESOURCES@durham.gov.uk

It is important that you select the correct part of the hierarchy as other fields within the request will be pre-populated with information relevant to the area of the organisation structure (hierarchy) selected.

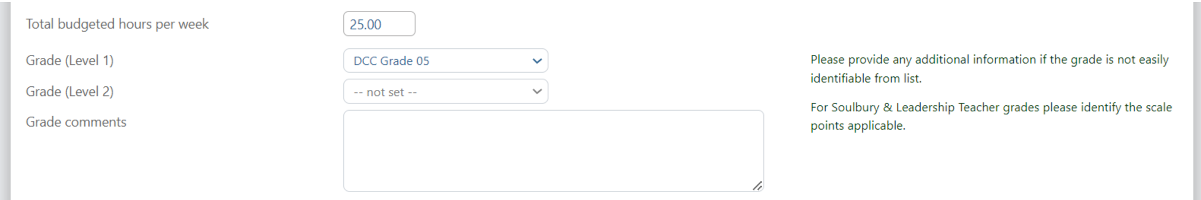




You must advise whether the post has been job evaluated. If **Yes** is selected from the drop-down menu, you will need to enter the relevant **Job evaluation reference**. If you do not know the job evaluation reference number, please leave this field blank. If the post is out of scope for job evaluation enter 00000.

The **Proposed post title** and **Quantity of posts** will then need to be entered. The post title is limited to 39 characters and must not include “&” or shortened words. You may request up to 40 posts on the same request if they are duplicates of each other. Alternatively, please submit separated request for each post that is required if the post details are not all the same.

The **Total budgeted hours per week** for the new post must be completed. Please contact Finance if you are unsure. The relevant **Grade (Level 1)** should be selected from the pre-populated drop-down menu. If Soulbury or Leadership Teacher is selected, you will then need to complete **Grade (Level 2)** with the relevant grade range. There is opportunity to provide **Grade comments** if applicable.



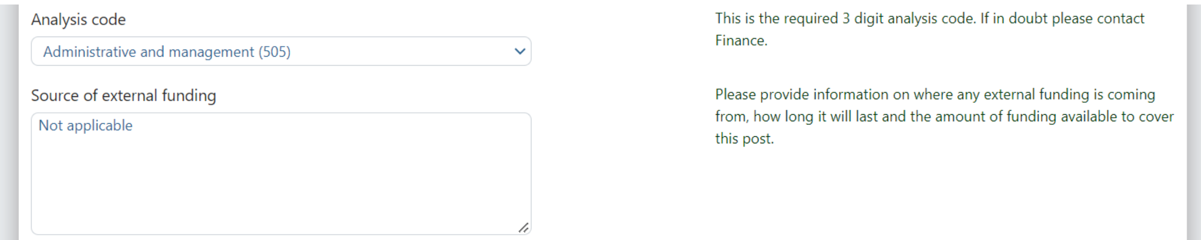
You should select the 6-digit cost centre that the post should be costed to.

If you have provided the correct amount of digits for the cost centre, there will be a green tick displayed. If you have not provided enough digits for the cost centre, there will be a red cross displayed to advise you to enter further digits and you will not be able to submit the form.

If the post is to be costed across multiple cost centres, you will need to advise the percentage split against each cost centre listed. A subsequent box will be provided to add further cost centres until the percentage adds up to 100%.

Up to five cost centres can be entered on the request. Should the costing need to be split any further please attach relevant details as supporting documentation.

Analysis code should be selected from the pre-populated drop-down menu. If applicable, the **Source of external funding** should be completed to advise where the external funding is coming from, how long it will last and the amount of funding which is available for the post.



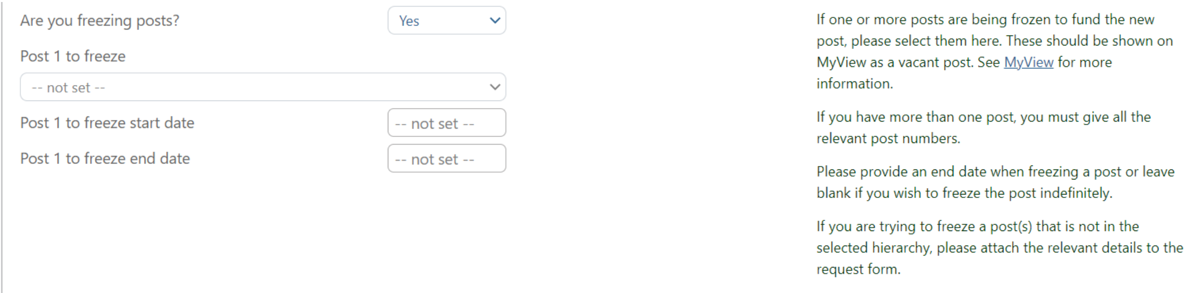
Please contact Finance if you are unsure on the cost centre(s) and/or analysis code that should be used.

- NCC - resourcesfinance-ncc@durham.gov.uk
- REG - resourcesfinance-reg@durham.gov.uk
- Resources - resourcesfinancerestp@durham.gov.uk
- AHS - resourcesfinanceahs@durham.gov.uk

- CYPS - resourcesfinancecypsschools@durham.gov.uk

It is important that you provide details of any posts that are to be frozen or obsoleted to fund this new post. The posts available for you to freeze or obsolete is linked to the posts attached to the selected hierarchy.

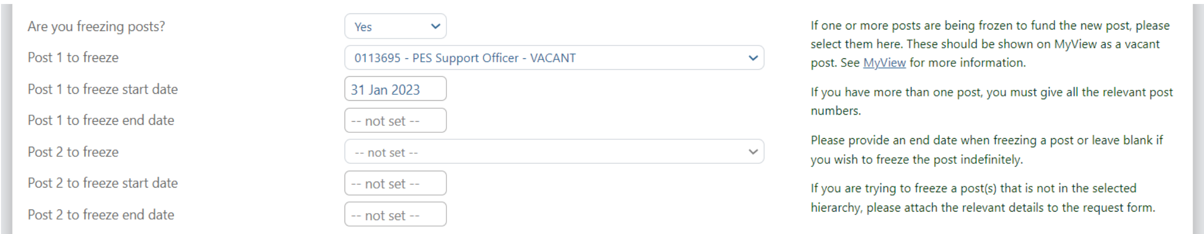
To ***freeze*** a post, you must first acknowledge that you wish to freeze posts.



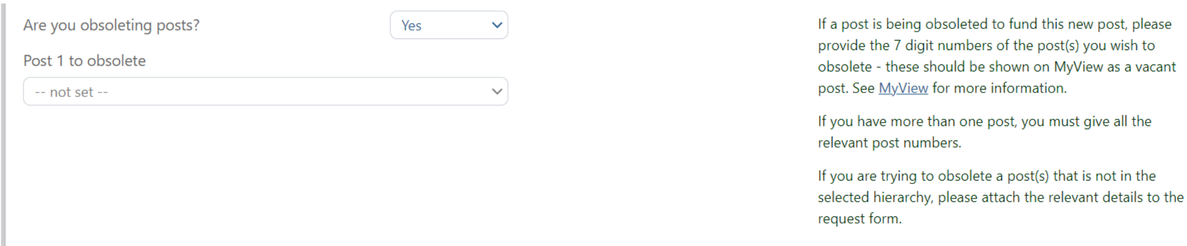
You will then be able to select the first post you wish to freeze. You will need to advise the **freeze start date** and the **freeze end date** (where applicable). If you wish the freeze the post indefinitely, please leave the freeze end date field blank.

The freeze start date cannot be retrospective and the freeze end date must be greater than the freeze start date. If you are trying to freeze a post(s) that is not in the selected hierarchy, please attached the relevant details in the final stages of the form.

After selecting the first post to freeze you will then be able to identify a further post from the list of available posts (if applicable).



To ***obsolete*** a post, you must first acknowledge that you wish to obsolete posts.

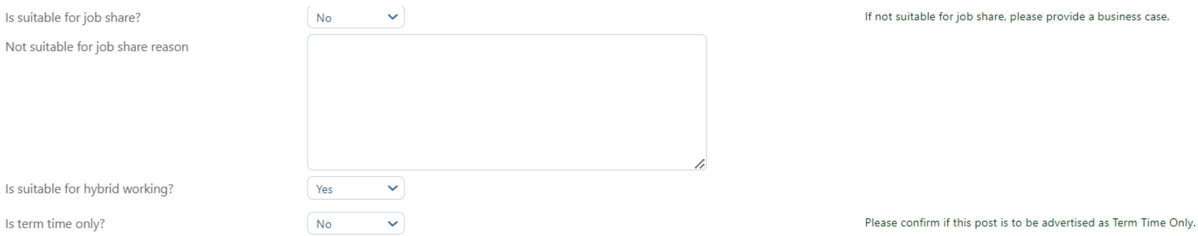


You can then select from a list of vacant posts within the selected hierarchy. More than one vacant post can be selected to be obsoleted to fund the new post. After selecting the first post to obsolete you will then be able to identify a further post from the list of available posts (if applicable).

Please Note: If you need to freeze or obsolete post(s) that are not attached to the selected hierarchy of the new post, please attach relevant details as supporting documentation.

Select a **Location** for the new post from the drop-down list. If the relevant location is not listed, please contact ResourceLink@durham.gov.uk.

You will need to state whether the new post is **suitable for job share** and **hybrid working**. You will be required to enter a business case if the new post is not suitable for job share. Please also advise if this post will be advertised as **Term Time Only**.



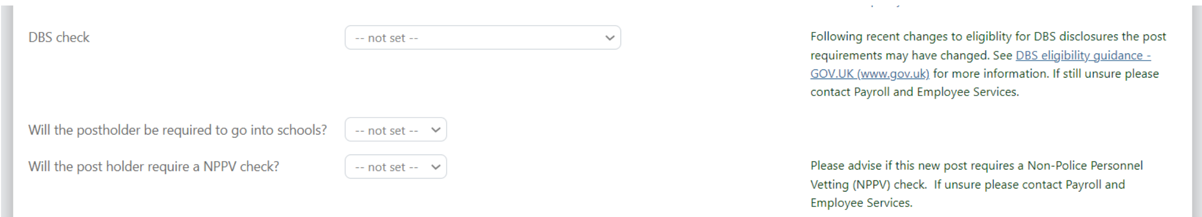
If you state the post **Is difficult to recruit to**, the advert for the post will contain information to applicants the relocation policy applies, and they will be able to access relocation costs incurred because of moving house to take up the post.

You **must** attach evidence to support a hard to recruit post within the Supporting Documentation section, which should be approved by Head of Service. If you are unsure, please contact PES for assistance and refer to the *Relocation Policy* available on the Intranet for further information.

To advise on the relevant **DBS Check** required, please refer to DBS eligibility guidance available at https://www.gov.uk/government/collections/dbs-eligibility-guidance. If you are unsure, please contact PES.

You should confirm if the **postholder will be required to go into schools**.

You will also need to advise if the new post requires **Non-Police Personnel Vetting (NPPV) check**. If you are unsure, please contact PES.



To advise if the **post holder requires a pre-defined health intervention**, please refer to the *Pre-Employment/Pre-Placement Occupational Health Assessment information* available on the Intranet.

You will advise if the **post holder requires a food handler medical questionnaire**. The definition of a food handler is:

- employed directly in the production and preparation of foodstuffs including manufacturing, catering, and retail,
- undertaking maintenance work or repairing equipment in food handling areas,
- enforcement officers and visitors to food handling areas.

Employees who handle pre-wrapped, canned or bottled food are **not** considered food handlers. If you are unsure, please contact Occupational Health by telephone on 03000 268999 or email via: occhealth@durham.gov.uk.

You should indicate if the **post holder will require a driving assessment**. Please Note: this does not include pool cars. For further guidance, please prefer to the *Driver and Operators Handbook* available on the Intranet.

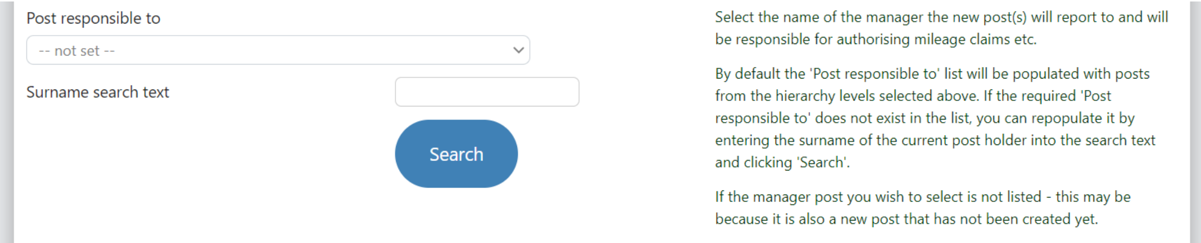
Please advise if the new **post will attract a recruitment allowance. Please Note**: Recruitment allowance may apply to Social Worker/Social Work Consultant/Enhanced Social Work Practitioner posts. However, you may wish to seek advice from PES.

You will need to indicate if the prospective post holder requires a **Social Work England professional registration** and if the post holder will be **responsible for authorising expenses** in their role.

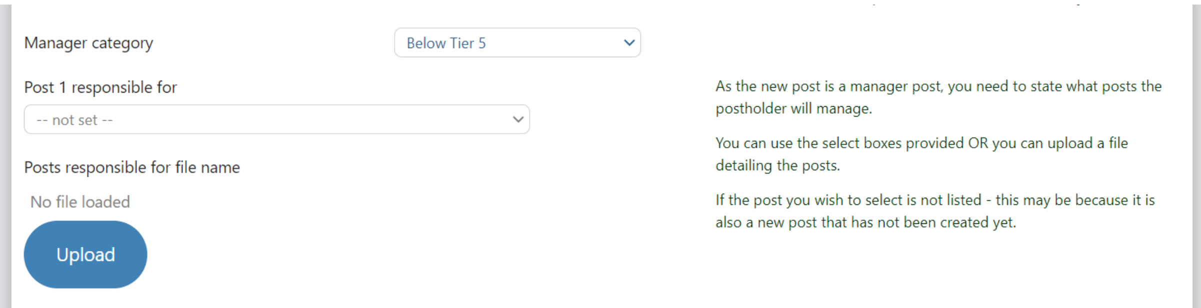
You will need to identify who the new post will be directly **responsible to**. This manager post can be selected from the drop-down list of current posts attached to the hierarchy selected.

If the manager post to be selected is not available in the drop-down list, you should enter the surname of the manager in the Surname search text field before you click **Search**. This should then allow you to identify the correct manager to which the new post will report to. By searching for a manager, this is restricted to current posts within the same service area.

If the manager post is still not listed after using the search function, this could be that this is a new post that has not yet been created. You may need to list an interim reporting arrangement until the manager post has been created.



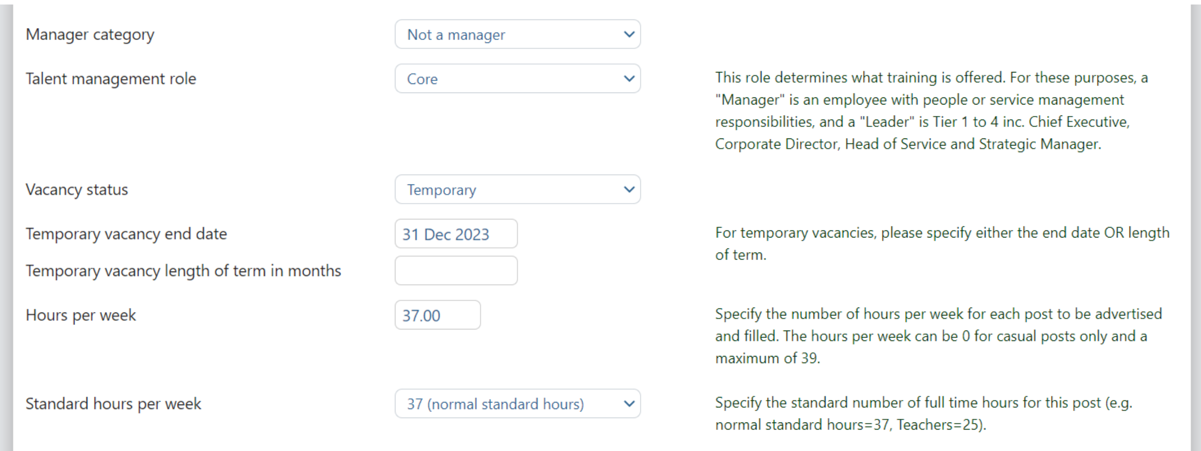
If the **Manager category** is completed to advise that the post is a manager, you will need to advise which posts will report to the new post. You can use the **Post responsible for** select boxes to identify each direct reporting post. The post selection list is again based on the hierarchy level that has been selected. Alternatively, you can upload a document to advise the post numbers that need to be aligned to the new post.



You will need to identify the relevant **Talent management role** from the drop-down list. This role determines the training requirements of the post holder. For example, a "Manager" is an employee with people or service management responsibilities, and a "Leader" is a Tier 1 to 4 post including Chief Executive, Corporate Directors, Heads of Service and Strategic Manager posts.

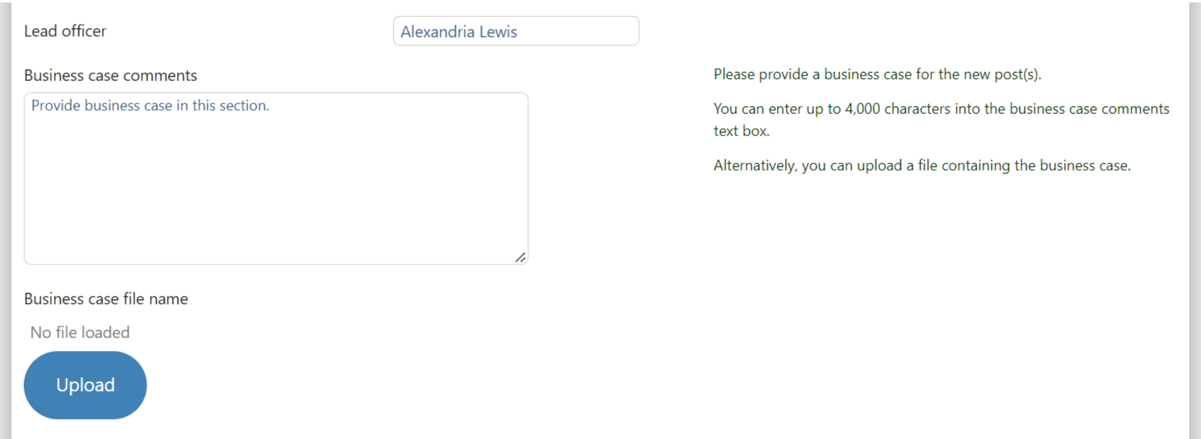
If the **Vacancy status** is set to 'Temporary', you will be required to provide a **Temporary vacancy end date** or **Temporary vacancy length of term in months**. You must complete one of these boxes to submit the form.

You will need to specify the **Hours per week** for each post to be advertised and the standard number of full-time **hours per week** for the new post.



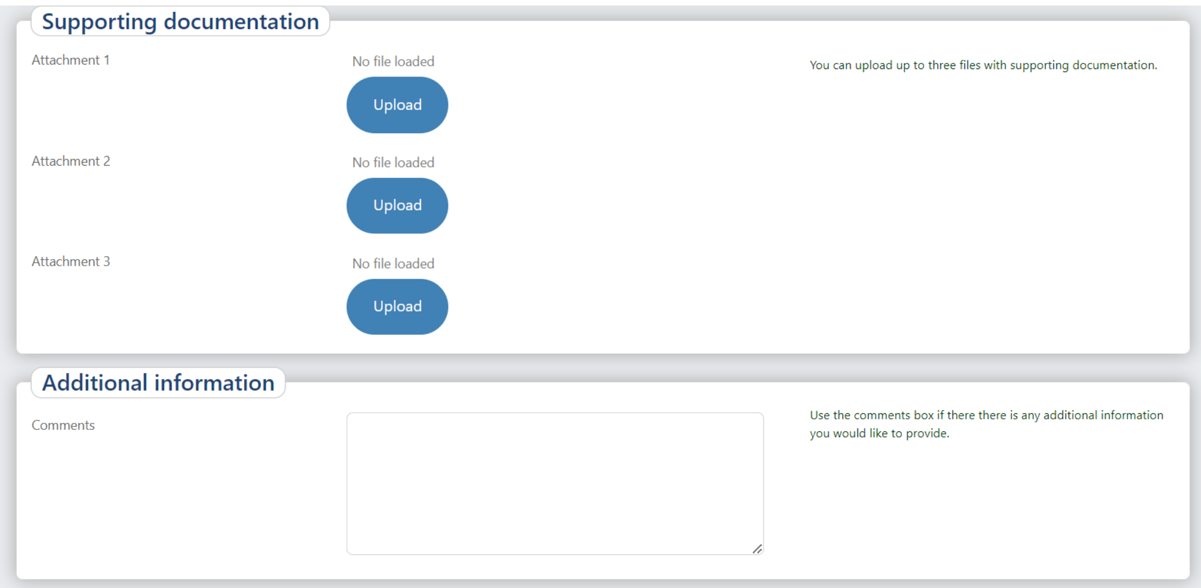
5.2 – Create and Advertise a new post – Advert Information, Supporting Documentation and Additional Information

You will need to advise on the relevant **Lead officer** and provide relevant **Business case comments** on the form. If required, you will be able to upload a document for the business case below the **Business case comments** section.



You will also be able to provide further **Supporting documentation** if applicable. Up to three files can be uploaded.

Please use the **Comments** field in the **Additional information** section if there is any additional information you would like the provide to support the request.

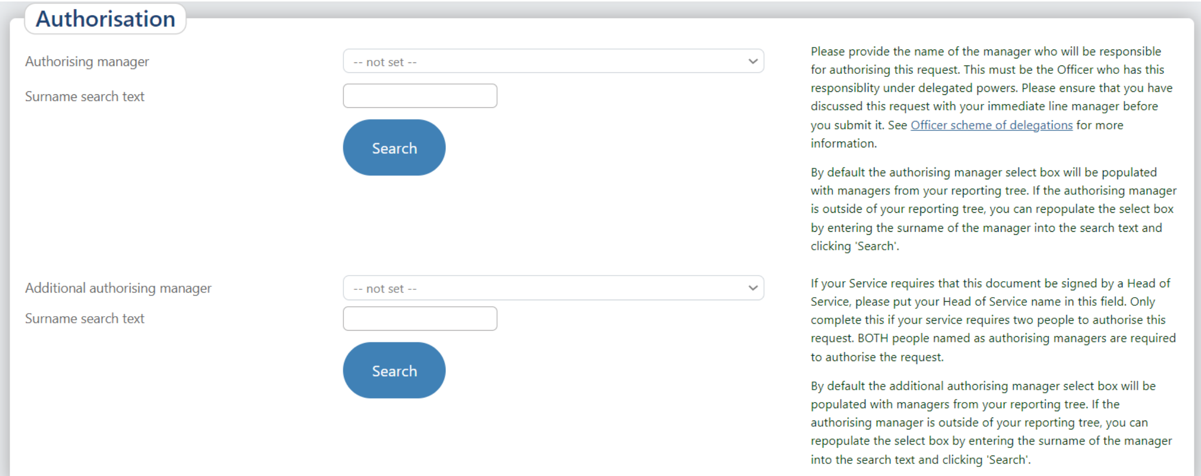


5.3 – Create and Advertise a new post – Authorisation

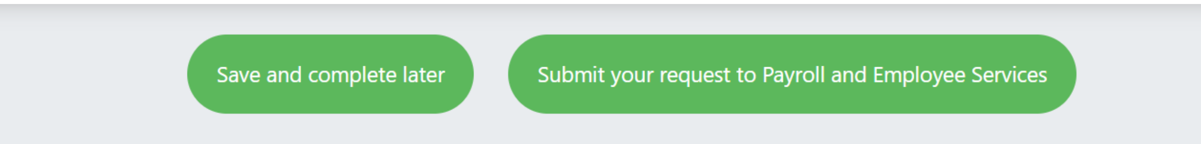
You will need to provide the name of the senior **Authorising manager** who will be responsible for authorising your request. The drop-down list will be pre-populated with the managers directly above you in your reporting hierarchy. However, if the authorising manager is outside of your reporting tree, you can repopulate the selection box by entering the surname of the manager into the **Surname Search text** field and clicking **Search**.

If you require additional authorisation from another senior manager for this request, you can use the **Additional authorising manager** selection which will work in the same way as the Authorising manager selection.

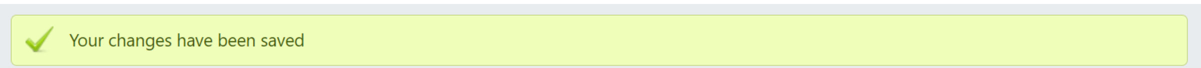
Please Note: If an authorising manager and an additional authorising manager are provided, the request will need to be authorised by both managers to progress.



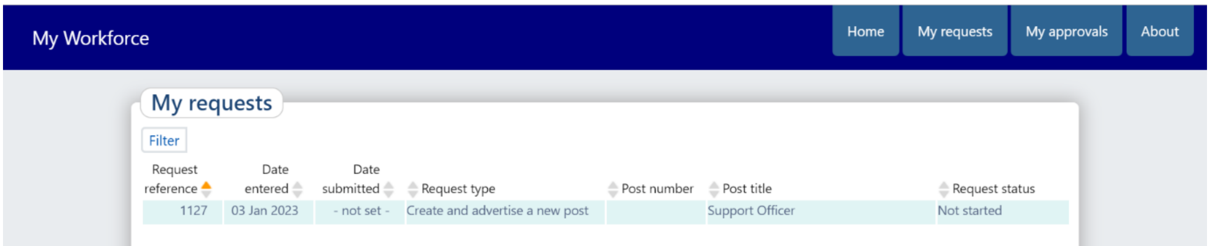
If you need to return to your request at a later date before it can be submitted, you should use the **Save and complete later** option.



Upon saving your request you will receive a notification at the top of the page to confirm.

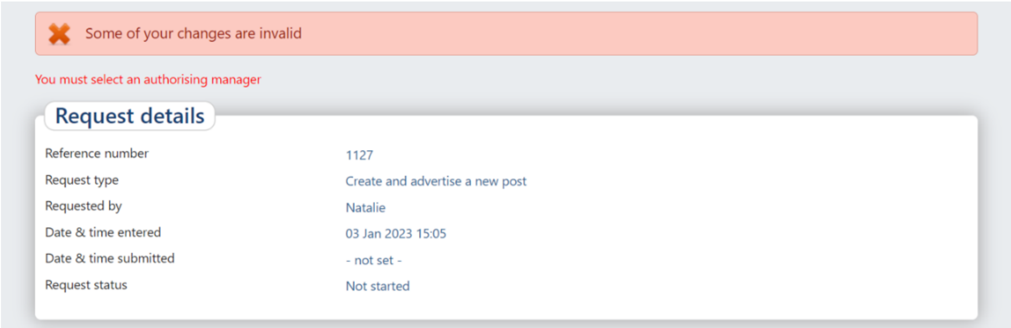


To return to the request that has been saved, navigate to **My requests** on the MyWorkforce landing page.



If you are ready to submit your request to PES for authorisation and processing, you should select the **Submit your request to Payroll and Employee Services** option.

When you submit the form, you will be advised if any mandatory fields have not been completed. There will be an alert at the top of the form to advise which fields need to be completed before the form can be submitted. The relevant field will also be highlighted on the form itself.

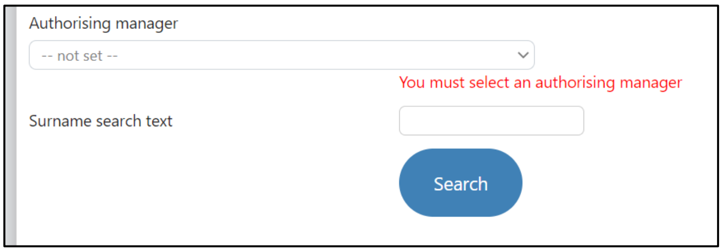


Some of your changes are invalid

You must select an authorising manager

Request details

Reference number	1127
Request type	Create and advertise a new post
Requested by	Natalie
Date & time entered	03 Jan 2023 15:05
Date & time submitted	- not set -
Request status	Not started



Authorising manager

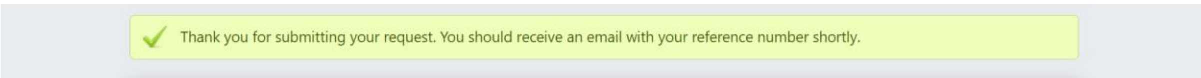
-- not set --

You must select an authorising manager

Surname search text

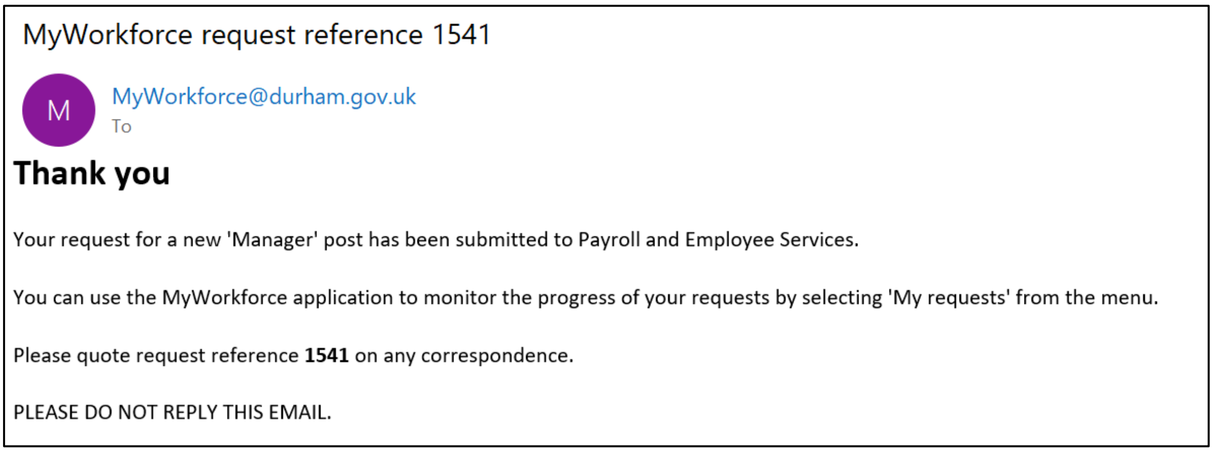
Search

Once the form has been successfully submitted, a confirmation message will be displayed on screen.



Thank you for submitting your request. You should receive an email with your reference number shortly.

You should receive an email confirmation that your request has been submitted. The confirmation will provide a summary on the request that has been submitted, which includes the **post title** and **request reference** number. You should quote the request reference number if you have any future queries on the form to raise with PES.



MyWorkforce request reference 1541

M MyWorkforce@durham.gov.uk

To

Thank you

Your request for a new 'Manager' post has been submitted to Payroll and Employee Services.

You can use the MyWorkforce application to monitor the progress of your requests by selecting 'My requests' from the menu.

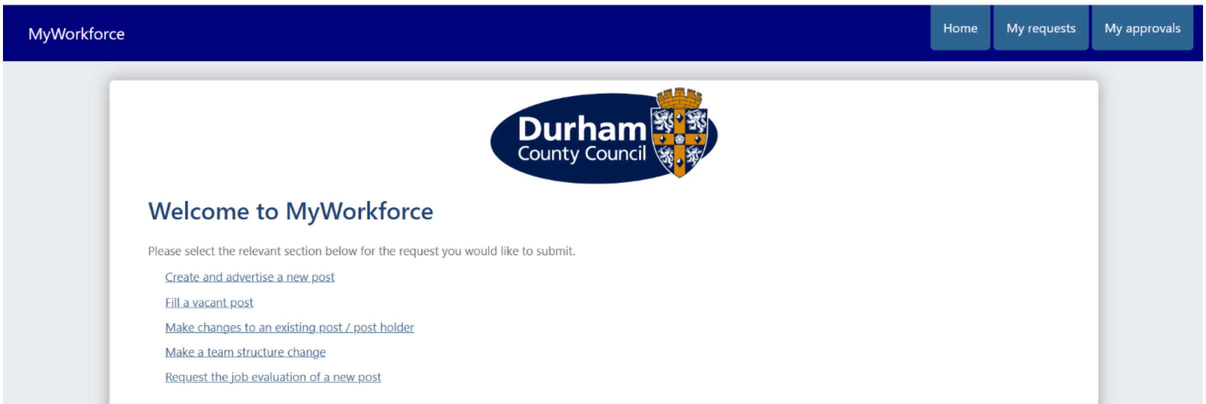
Please quote request reference **1541** on any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

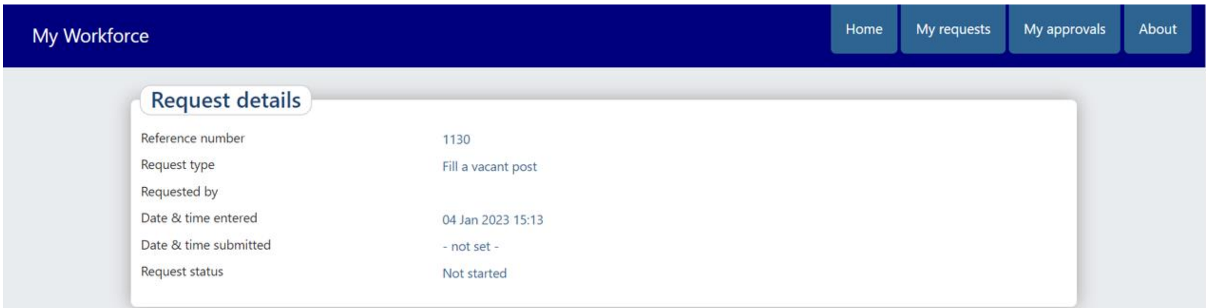
You can refer to **My Requests** (see section 2 of this guidance document) to monitor the progress of your submitted request.

6 – Fill a vacant post

To submit a request to **Fill a vacant post**, select the relevant option from the MyWorkforce landing page.



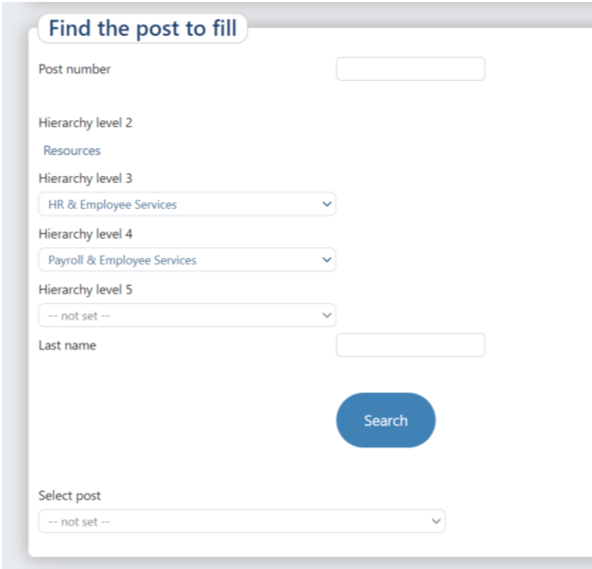
When **Fill a vacant post** has been selected, the draft form will show summary **Request details** which include **Reference number**, **Request type**, **Requested by** and **Date & time entered**. Once your request has been submitted for authorisation and processing you will see a summary of the completed and outstanding milestones of the request.



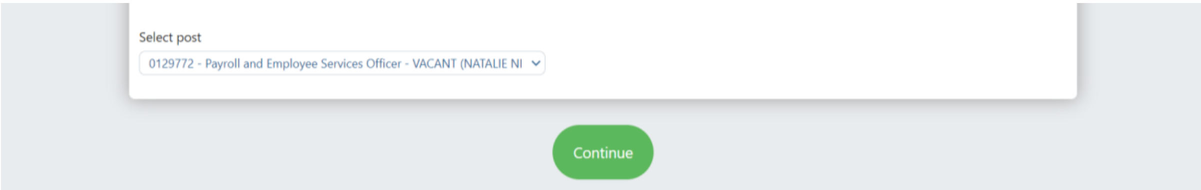
6.1 – Fill a vacant Post – Find Post to Fill

The first task is to identify the post to be filled. The post can be found using one of the following three options:

- **Post number** – if the post number is known, enter this into the **Post number** textbox and click **Search**. If there is a match, the post will be added to the **Select post** drop-down selection.
- **Hierarchy** – if the specific post number is not known, you can navigate the organisation structure to identify posts. Depending on the hierarchy level selected you can then pick out the relevant post from the **Select post** drop-down selection.
- **Last name** – enter the **Last name** of the current or most recent postholder then click **Search**. If there is a match, the post will be added to the **Select post** drop-down selection.



The relevant post should then be selected from **Select post** drop-down menu and then select **Continue**.



You will then be able to view summary details of the post selected via the **Post to fill** section. This section will display **Post number**, **Post title**, **Hierarchy**, **Grade**, **Budgeted hours**, **Current post holder**, **Post responsible to**, **Post GDPR retention period (years)**.

6.2 – Fill a vacant Post – Find Post to Fill – Vacancy Details

The ***Vacancy details*** is the main section of the form which will provide PES with the information required for the post to be advertised.

You will need to answer **Have there been any previous/recent unsuccessful recruitment episodes relating to this post**. If you answer **Yes** to this question, please advise **How many unsuccessful recruitment episodes have occurred prior to this new request**.

Please also advise **Are the job description and person specification still relevant to the post being advertised**. If you answer **No** to this question and the job description or person specification requires significant change you are advised to submit a request for the post to be re-evaluated.

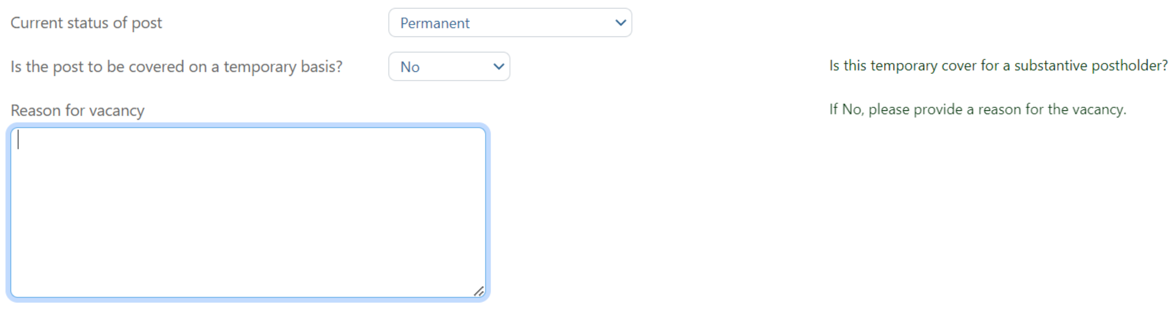
If you need any assistance with job re-evaluation, please contact Payroll and Employee Services according to your service grouping.

- PESAHS@durham.gov.uk
- PESCorporateAffairs@durham.gov.uk
- PESCYPS@durham.gov.uk
- PESNCC@durham.gov.uk
- PESREG@durham.gov.uk
- PESRESOURCES@durham.gov.uk

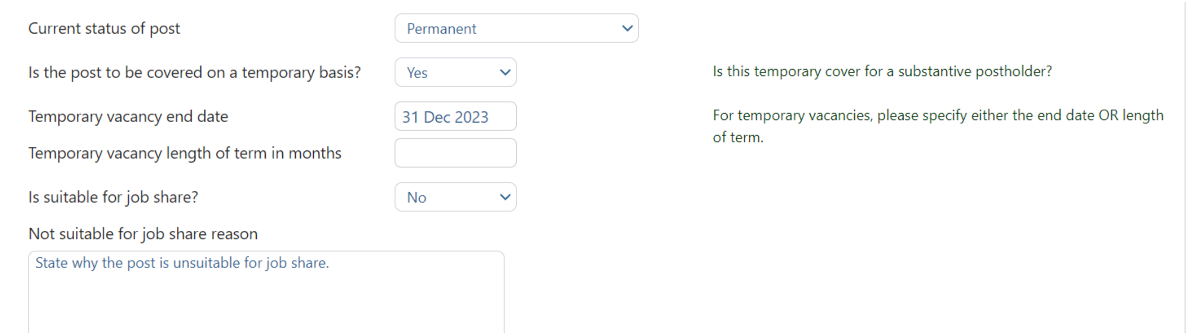
You will need to complete the fields **Number of hours to recruit/advertise** and **Job evaluation reference** for the vacant post in the relevant fields. If the post is out of scope of job evaluation, please enter 00000.

If the **Current status of post** is set to Permanent, you will be asked to confirm **if the post is to be covered on a temporary basis**. If you state that the post is to be covered on a temporary basis you are required to provide a **Temporary vacancy end date** or **Temporary vacancy length of term in months**. You must complete one of these boxes to submit the form.

If you state that the post is permanent and is not going to be covered on a temporary basis, you will be required to provide a **reason for vacancy**.



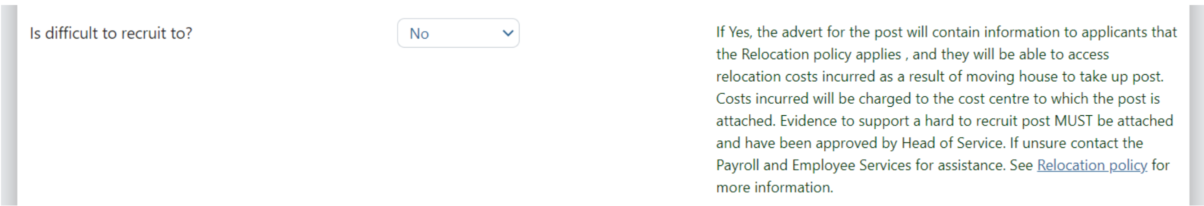
You will need to state whether the new post is **suitable for job share** and **hybrid working**. You will be required to enter a business case if the new post is not suitable for job share.



You will need to confirm if the post is to be advertised as **term time only**.

If you state the post **Is difficult to recruit to**, the advert for the post will contain information to applicants the relocation policy applies, and they will be able to access relocation costs incurred because of moving house to take up the post.

You **must** attach evidence to support a hard to recruit post within the Supporting Documentation section, which should be approved by Head of Service. If you are unsure, please contact PES for assistance and refer to the *Relocation Policy* available on the Intranet for further information.



You should confirm if the **postholder will be required to go into schools**.

To advise if the **post holder requires a pre-defined health intervention**, please refer to the *Pre-Employment/Pre-Placement Occupational Health Assessment* information available on the Intranet.

You will advise if the **post holder requires a food handler medical questionnaire**. The definition of a food handler is:

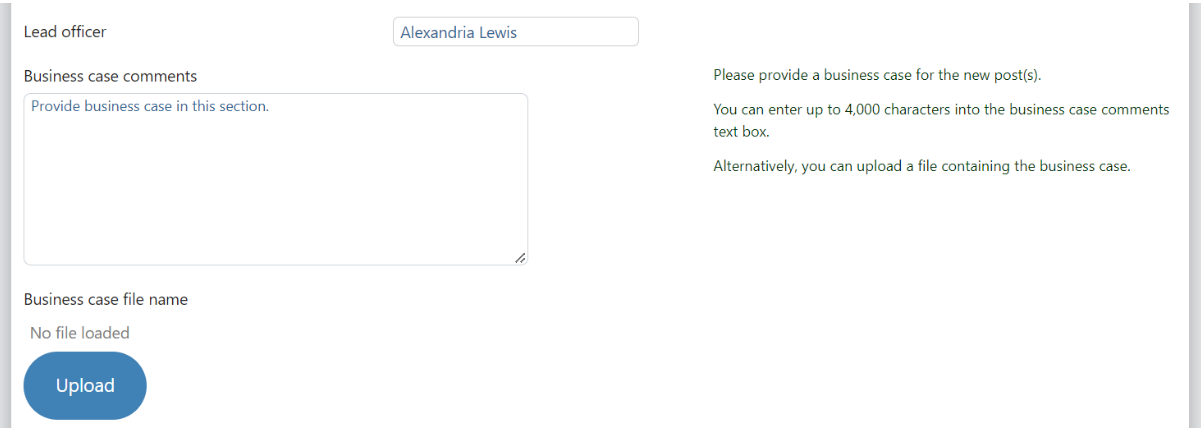
- employed directly in the production and preparation of foodstuffs including manufacturing, catering, and retail,
- undertaking maintenance work or repairing equipment in food handling areas,
- enforcement officers and visitors to food handling areas.

Employees who handle pre-wrapped, canned or bottled food are **not** considered food handlers. If you are unsure, please contact Occupational Health by telephone on 03000 268999 or email via: occhealth@durham.gov.uk.

You should indicate if the **post holder will require a driving assessment**, this does not include pool cars. For further guidance, please prefer to the *Driver and Operators Handbook* available on the Intranet for further information.

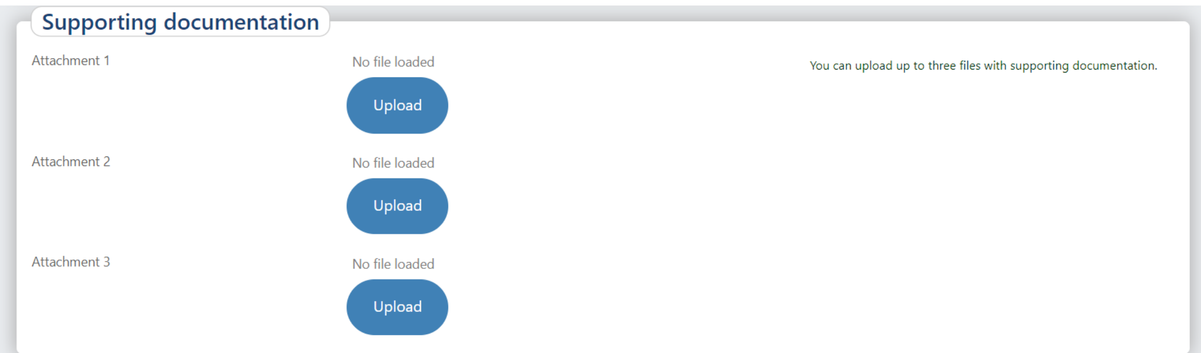
6.3 – Fill a vacant post – Advert Information, Supporting Documentation and Additional Information

You will need to advise on the relevant **Lead officer** and provide relevant **Business case comments** on the form. If required, you will be able to upload a document for the business case below the **Business case comments** section.



You will also be able to provide further **Supporting documentation** if applicable. Up to three files can be uploaded.

Please use the **Comments** field in the **Additional information** section if there is any additional information you would like the provide to support the request.

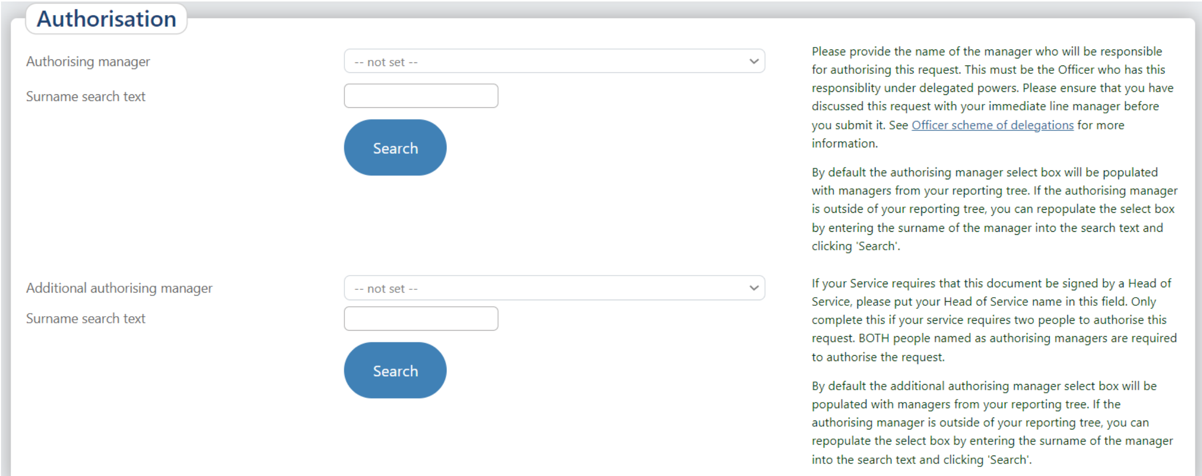


6.4 – Fill a vacant post – Authorisation

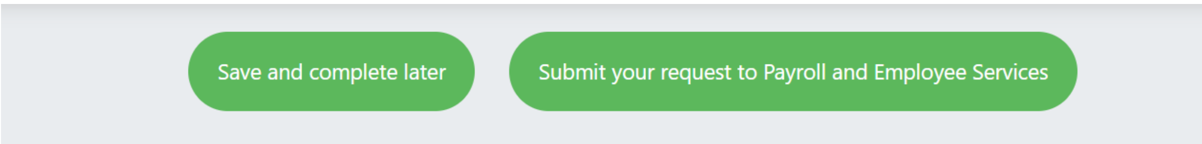
You will need to provide the name of the senior **Authorising manager** who will be responsible for authorising your request. The drop-down list will be pre-populated with the managers directly above you in your reporting hierarchy. However, if the authorising manager is outside of your reporting tree, you can repopulate the selection box by entering the surname of the manager into the **Surname Search text** field and clicking **Search**.

If you require additional authorisation from another senior manager for this request, you can use the **Additional authorising manager** selection which will work in the same way as the Authorising manager selection.

Please Note: If an authorising manager and an additional authorising manager are provided, the request will need to be authorised by both managers to progress.

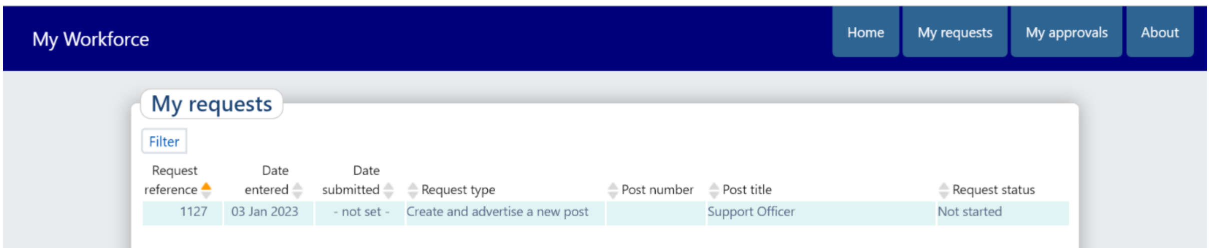


If you need to return to your request at a later date before it can be submitted, you should use the **Save and complete later** option.



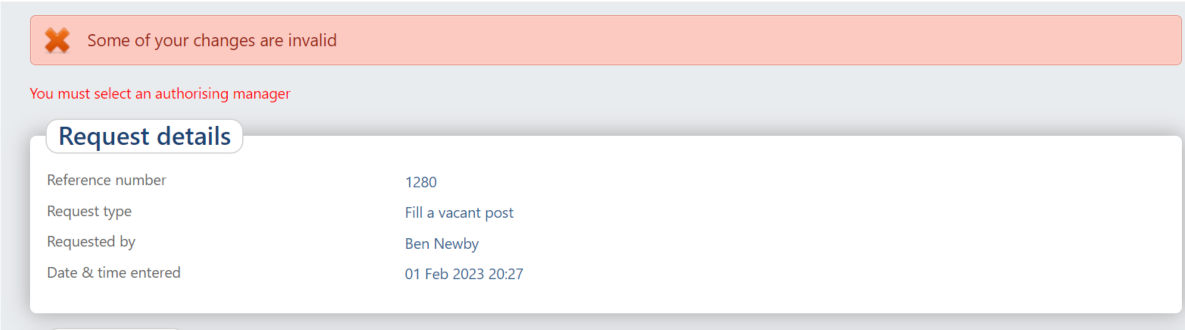
Upon saving your request you will receive a notification at the top of the page to confirm.

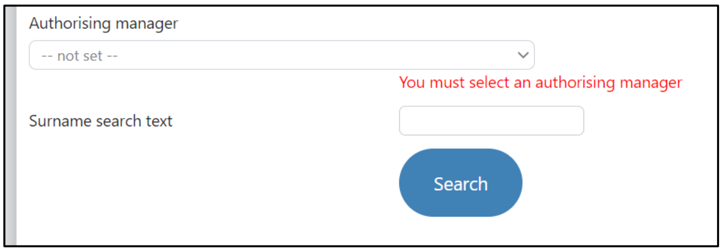
To return to the request that has been saved, navigate to **My requests** on the MyWorkforce landing page.



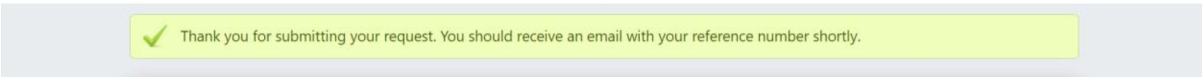
If you are ready to submit your request to PES for authorisation and processing, you should select the **Submit your request to Payroll and Employee Services** option.

When you submit the form, you will be advised if any mandatory fields have not been completed. There will be an alert at the top of the form to advise which fields need to be completed before the form can be submitted. The relevant field will also be highlighted on the form itself.

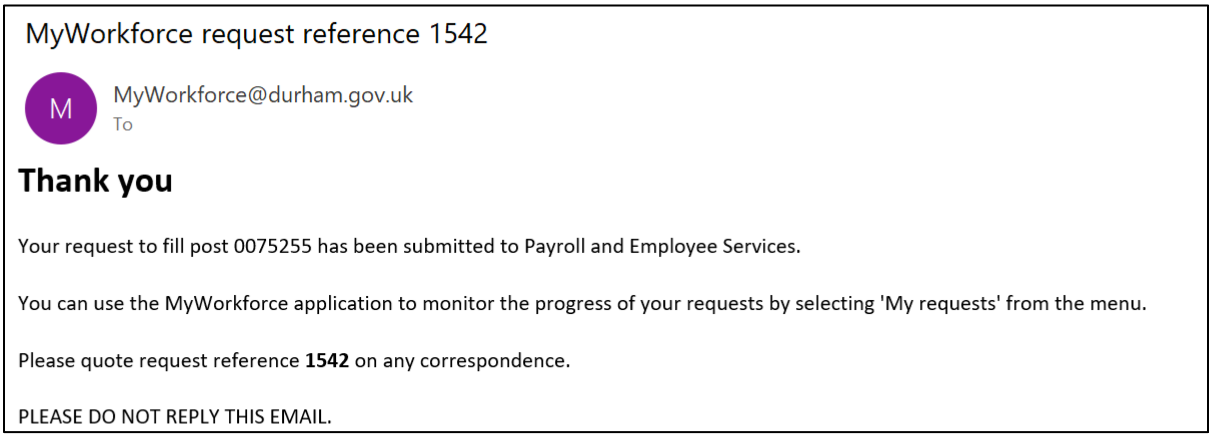




Once the form has been successfully submitted, a confirmation message will be displayed on screen.



You should receive an email confirmation that your request has been submitted. The confirmation will provide a summary on the request that has been submitted, which includes the **post title** and **request reference** number. You should quote the request reference number if you have any future queries on the form to raise with PES.


MyWorkforce request reference 1542

M MyWorkforce@durham.gov.uk
To

Thank you

Your request to fill post 0075255 has been submitted to Payroll and Employee Services.

You can use the MyWorkforce application to monitor the progress of your requests by selecting 'My requests' from the menu.

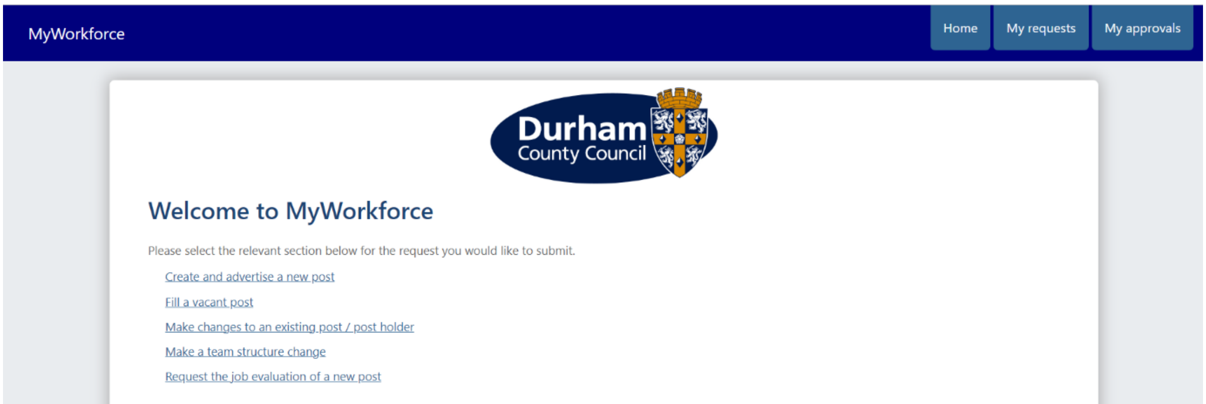
Please quote request reference **1542** on any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

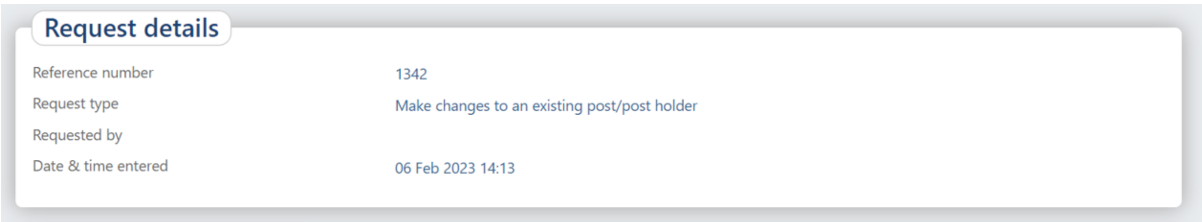
You can refer to **My Requests** (see section 2 of this guidance document) to monitor the progress of your submitted request.

7 – Make amendments to an existing post/post holder

To submit a request to **make changes to an existing post/post holder**, select the relevant option from the MyWorkforce landing page.



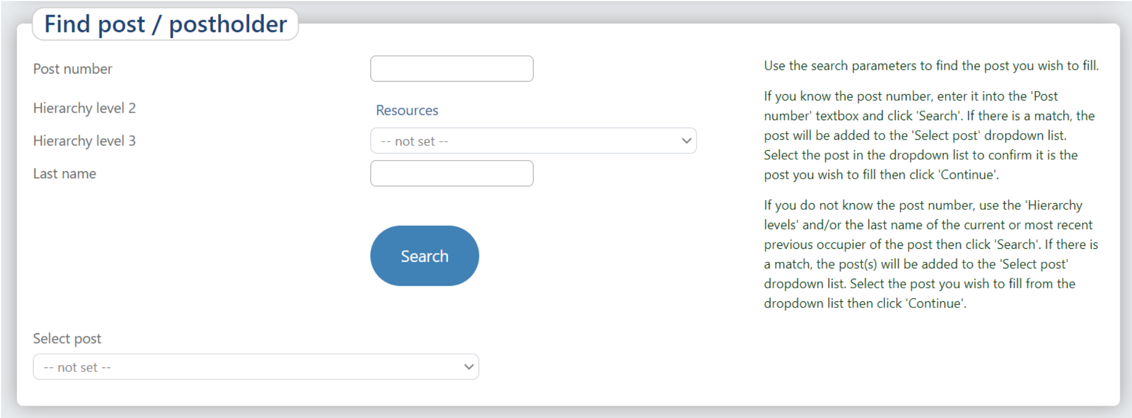
When the **make changes to an existing post/post holder** form has been selected, the draft form will show summary **Request details** which include **Reference number**, **Request type**, **Requested by** and **Date & time entered**. Once your request has been submitted for authorisation and processing you will see a summary of the completed and outstanding milestones of the request.



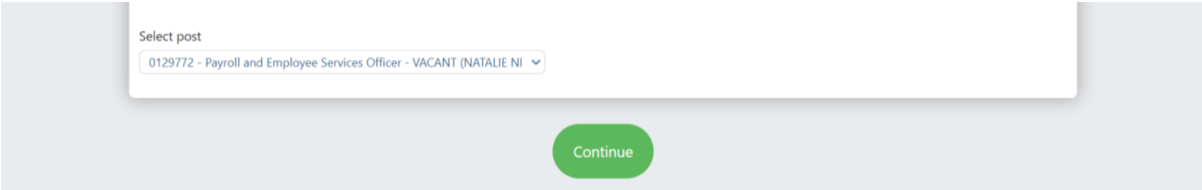
7.1 – Make amendments to an existing post/post holder – Find post / postholder

The first task is to identify the post/postholder. The post/postholder can be found using one of the following three options:

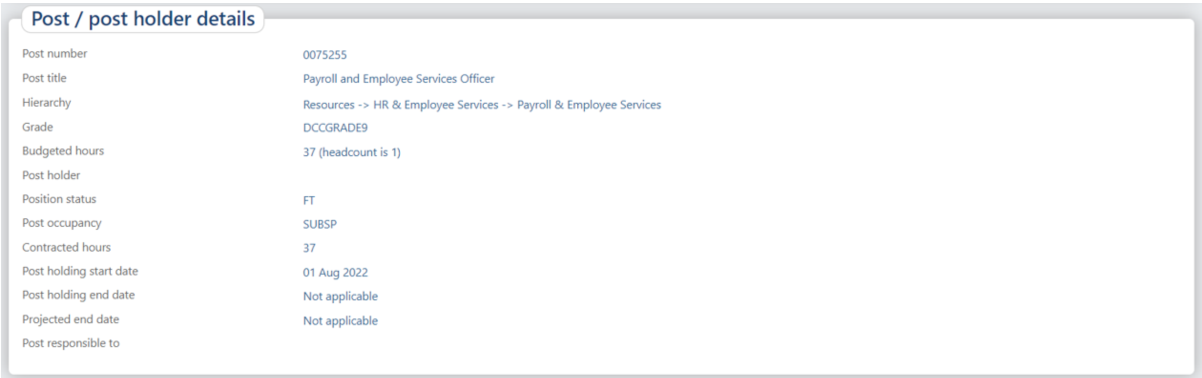
- **Post number** – if the post number is known, enter this into the **Post number** textbox and click **Search**. If there is a match, the post will be added to the **Select post** drop-down selection.
- **Hierarchy** – if the specific post number is not known, you can navigate the organisation structure to identify posts. Depending on the hierarchy level selected you can then pick out the relevant post from the **Select post** drop-down selection.
- **Last name** – enter the **Last name** of the current or most recent postholder then click **Search**. If there is a match, the post will be added to the **Select post** drop-down selection.



The relevant post should then be selected from **Select post** drop-down menu and then select **Continue**.

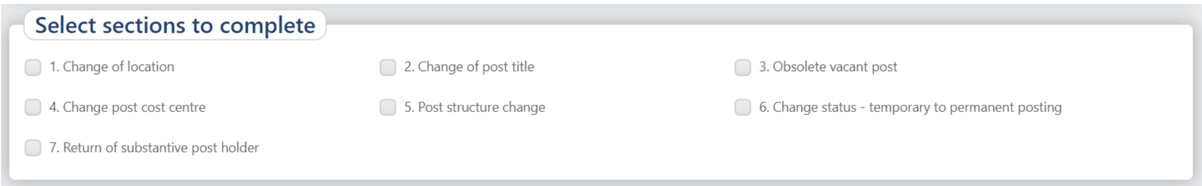


You will then be able to view summary details of the post selected via the **Post/post holder details** section. This section will display **Post number**, **Post title**, **Hierarchy**, **Grade**, **Budgeted hours**, **Current post holder, Position Status**, **Post occupancy**, **Contracted hours**, **Post holding start date, Post holding end date** (*if applicable*), **Projected end date** (*if applicable*) and **Post responsible to**.



7.2 – Make amendments to an existing post/post holder – Select sections to complete

Once the ***post/post holder*** details has been selected, you will be required to confirm the amendments you wish to make to the post/postholder.



- Change of location – this can include changes to post, postholder or post and postholder.
- Change of post title
- Obsolete vacant post

- Change post cost centre
- Post structure change
- Change temporary to permanent posting
- Return of substantive post holder

7.3 - Make amendments to an existing post / postholder – Change of location

When the **Change of location** option is selected, this will display the current post location and current employee location for the post/post holder than has been selected.

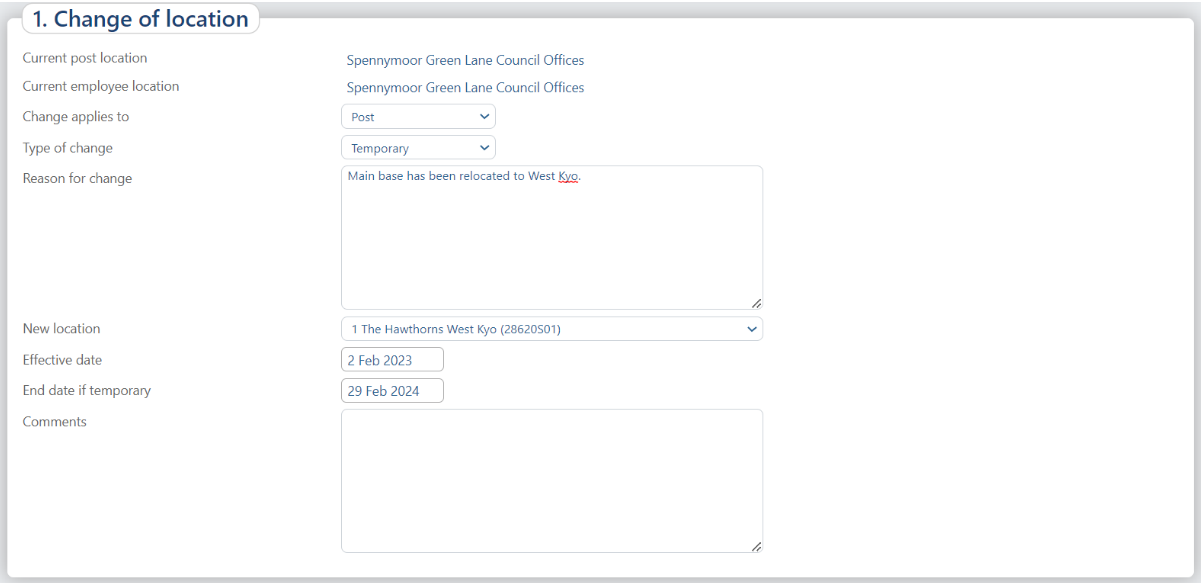
You must advise if the **Change applies to** the Post, Postholder or Post and Postholder.

If the **Type of change** is temporary, you will be mandated to complete the **End date if temporary** field.

The **Reason for change** must be completed.

Select a **Location** for the new post from the drop-down list. If the relevant location is not listed, please contact ResourceLink@durham.gov.uk.

Please complete the **Effective date** for the change and add any relevant **Comments** for this request.

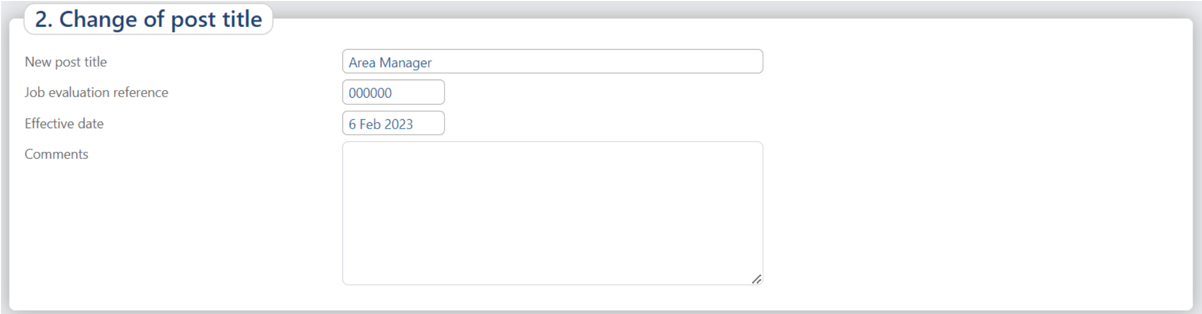


7.4 - Make amendments to an existing post / postholder – Change of post title

For the **Change of post title** option, you will need to complete **New post title** field. The post title is limited to 39 characters and must not include "&" or shortened words.

You should add in the **Job evaluation reference** if it known. If you do not know the job evaluation reference number, please leave this field blank. If the post is out of scope for job evaluation enter 00000.

Please complete the **Effective date** for the change and add any relevant **Comments** for this request.

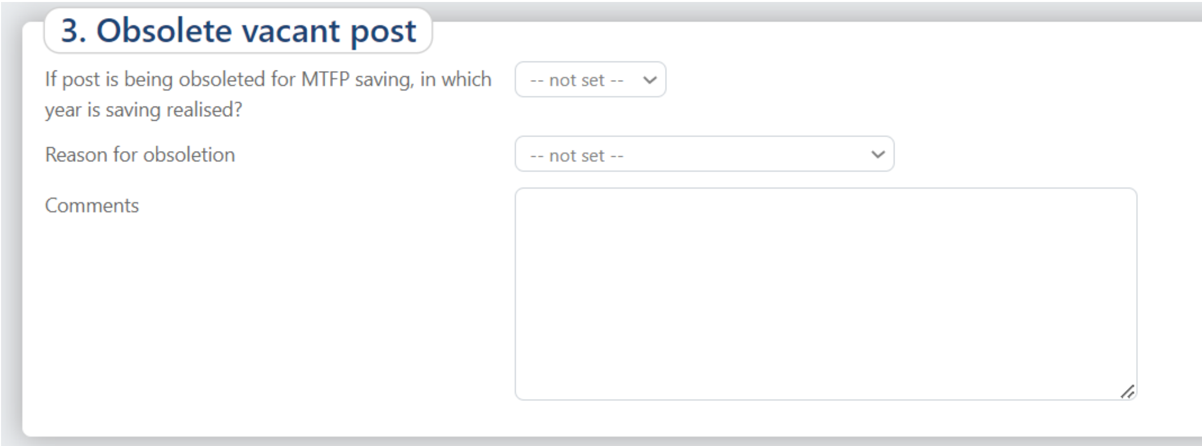


7.5 - Make amendments to an existing post / postholder – Obsolete vacant post

If the post is being obsoleted for **MTFP savings** you will need to state the financial year in which the savings are realised. If this is not relevant, please leave blank.

You must select a **Reason for obsoletion.**

Please provide any additional **Comments** (if applicable).

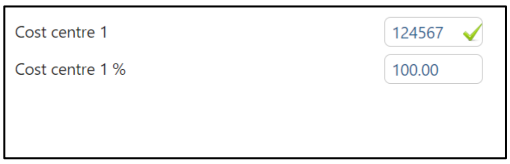


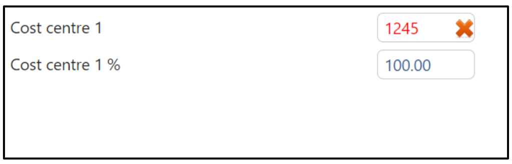
7.6 – Make amendments to an existing post / postholder – Change post cost centre

When the **Change post cost centre** option is selected, this will display the current cost centre(s) recorded against the post selected.

You should select the new 6-digit cost centre that the post should be costed to.

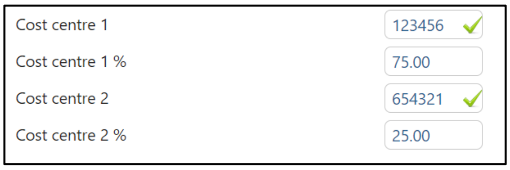
If you have provided the correct amount of digits for the cost centre, there will be a green tick displayed. If you have not provided enough digits for the cost centre, there will be a red cross displayed to advise you to enter further digits and you will not be able to submit the form.





If the post is to be costed across multiple cost centres, you will need to advise the percentage split against each cost centre listed. A subsequent box will be provided to add further cost centres until the percentage adds up to 100%.

Up to five cost centres can be entered on the request. Should the costing need to be split any further please attach relevant details as supporting documentation.



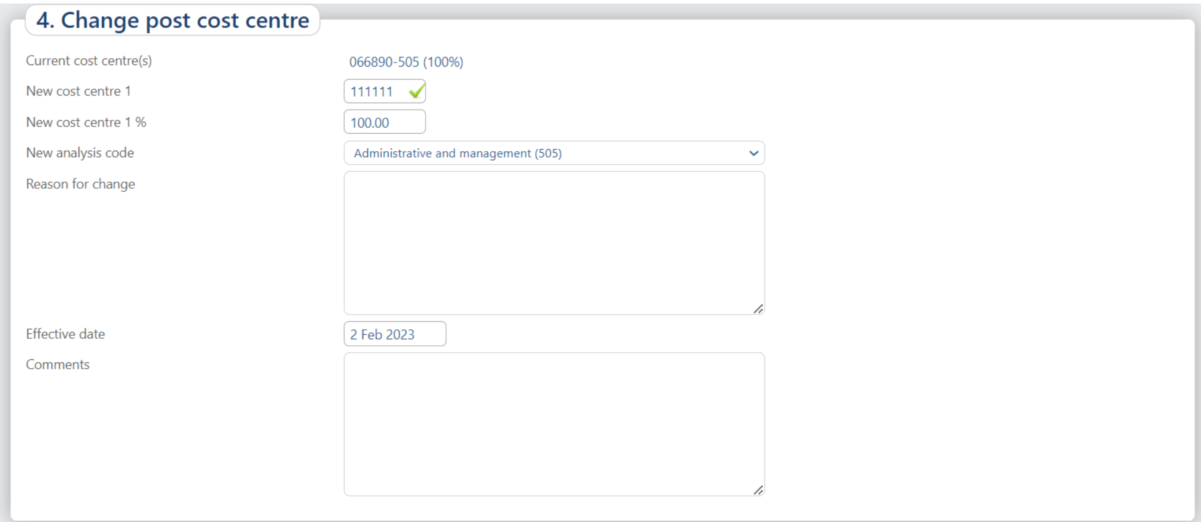
The **New Analysis code** should also be selected from the pre-populated drop-down menu.

Please contact Finance if you are unsure on the cost centre(s) and/or analysis code that should be used.

- NCC - resourcesfinance-ncc@durham.gov.uk
- REG - resourcesfinance-reg@durham.gov.uk
- Resources - resourcesfinancerestp@durham.gov.uk
- AHS - resourcesfinanceahs@durham.gov.uk
- CYPS - resourcesfinancecypsschools@durham.gov.uk

The **Reason for change** must be completed in the free text field.

Please complete the **Effective date** for the change and add any relevant **Comments** for this request.



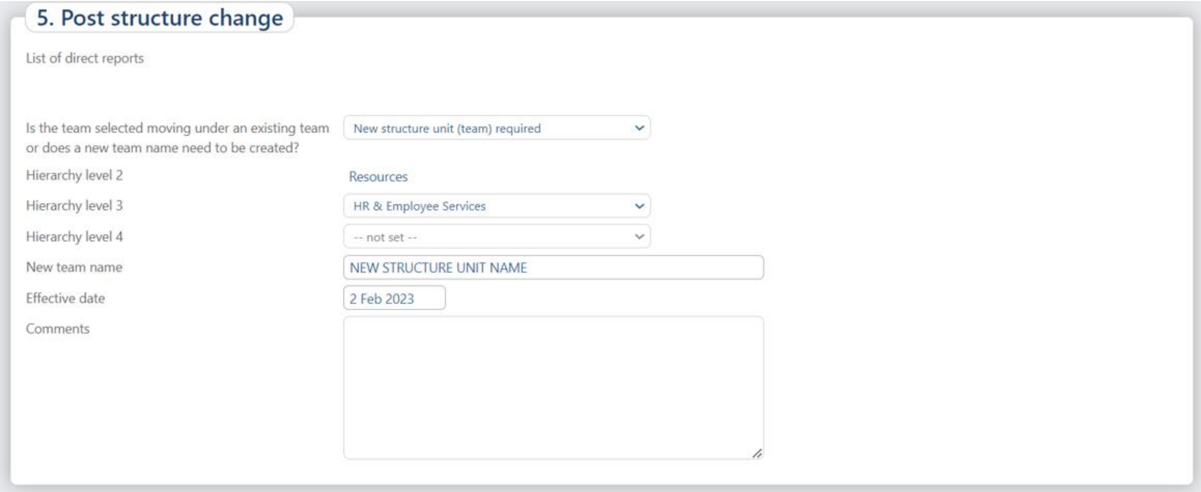
7.7 - Make amendments to an existing post / postholder – Post structure change

When the **Post structure change** option is selected, this will display the **List of direct reports** for the on the post that has been selected.

You will need to advise if the selected post will be moving under an existing team or if a new team needs to be created. If the post selected will be **moving to an existing team**, you should locate the new team using the **Hierarchy** drop-down menus.
Using the drop-down menu, you can select the appropriate hierarchy levels until you correctly identify the part of the organisation structure to which the post should be attached.

If the post selected also requires **a new structure unit (team)** to be created, please completed the **New team name** field which will be available when this option is selected. You should still locate hierarchy level to which the new structure unit (team) would be attached.

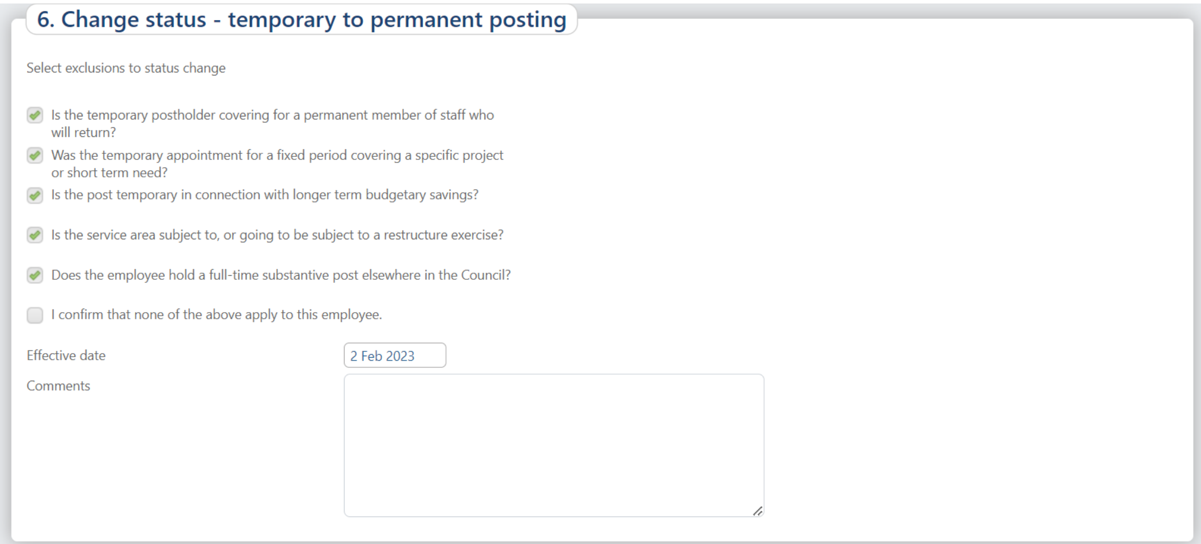
Please complete the **Effective date** for the change and add any relevant **Comments** for this request.



7.8 - Make amendments to an existing post / postholder – Change temporary to permanent posting

To change the status of a temporary posting to permanent, you must confirm that none of the exclusions to the status change apply. If any of the exclusion reasons are selected, you will not be able to submit the form.

Please complete the **Effective date** for the change and add any relevant **Comments** for this request.



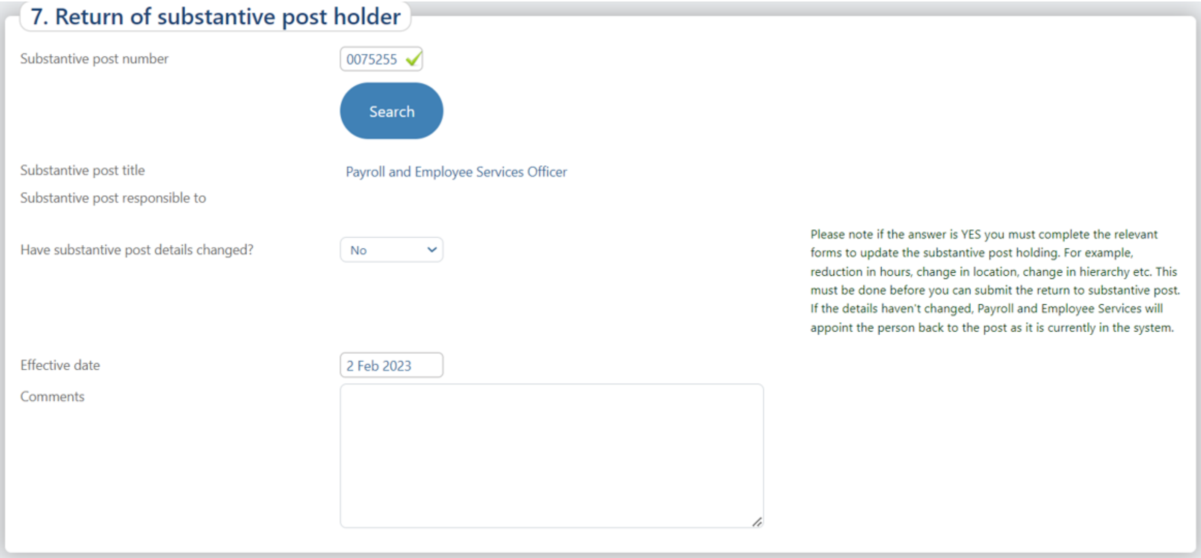
7.9 – Make amendments to an existing post / postholder – Return of substantive post holder

Once you have selected the relevant post / post holder, you must then select the **Substantive post number** relating to the post to which they are returning (within the request form). You should be able to locate this post number via MyView > MyPeople Team Selector View. Enter the Substantive **post number** into the textbox and click **Search**. If there is a match, the **Substantive post title** and **Substantive post responsible to** (manager of the substantive post) will be displayed.

Please advise if the substantive post details have changed. If the answer to this question is **Yes,** you will not be able to submit this request and must complete the relevant forms to update the substantive post holding before completing this request. For example, reduction in hours, change in location, change in hierarchy etc. This must be done before you can submit the return to substantive post request.

If the posting details have not changed, PES will appoint the employee back to the post as it is currently in the system.

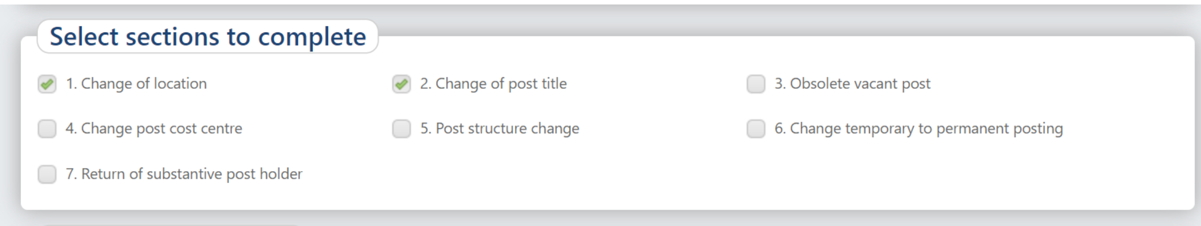
Please complete the **Effective date** for the change and add any relevant **Comments** for this request.



7.10 - Make amendments to an existing post / postholder – Inputting multiple requests

If there are multiple changes to be made to the existing post/postholder, it is possible to input multiple requests on one amendments form.

To do this, please select the relevant sections that you would like to submit**.** For example, change the location and title of a post.



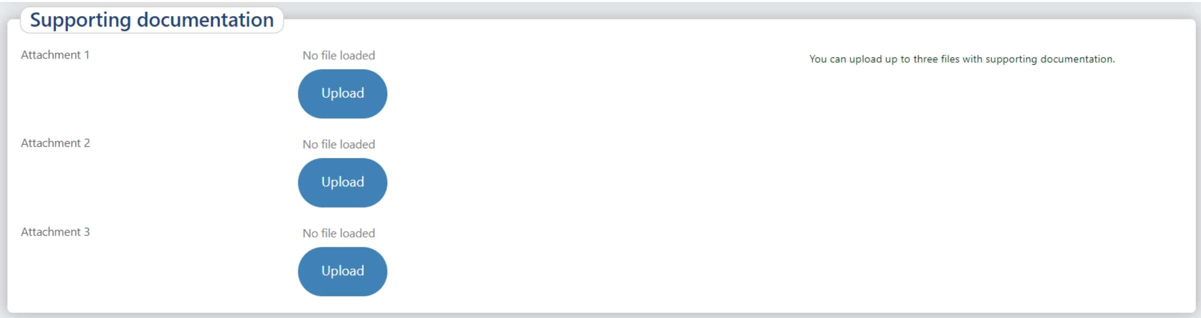
Once the relevant sections to complete have been selected, the form sub-sections will appear in the order that they have been selected on the request form.

Please Note: Different amendments require approval by different groups – but if selecting multiple form sub-sections with different approval routes would mean that all approvals will be needed for the request to be progressed.

For example, if a location change is input alongside a post structure change, the location section of the request will need to be approved by Finance, but the post structure change does not need to be approved by Finance. The post structure change will not progress quicker than the location change as the request form must move through all approval stages together.

7.11 – Make amendments to an existing post / postholder – Supporting documentation

You will also be able to provide further **Supporting documentation** if applicable. Up to three files can be uploaded.

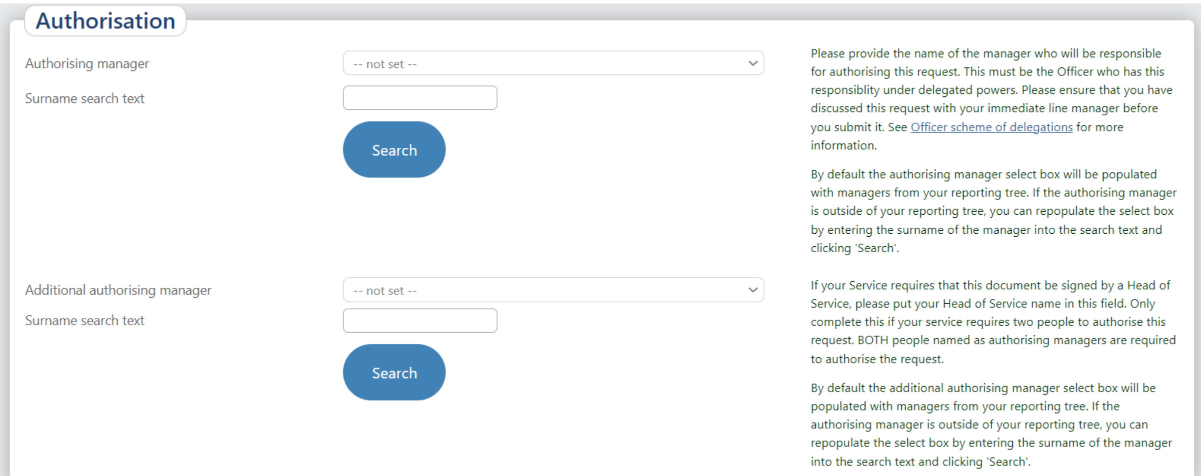


7.12 – Make amendments to an existing post / postholder – Authorisation

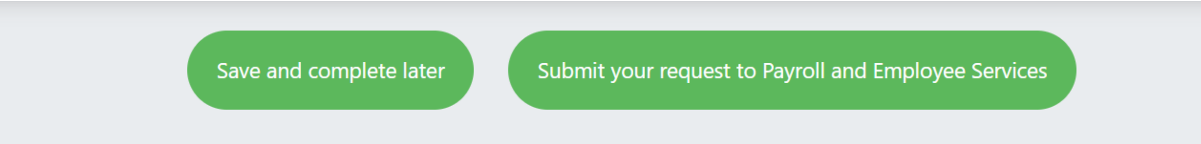
You will need to provide the name of the senior **Authorising manager** who will be responsible for authorising your request. The drop-down list will be pre-populated with the managers directly above you in your reporting hierarchy. However, if the authorising manager is outside of your reporting tree, you can repopulate the selection box by entering the surname of the manager into the **Surname Search text** field and clicking **Search**.

If you require additional authorisation from another senior manager for this request, you can use the **Additional authorising manager** selection which will work in the same way as the Authorising manager selection.

Please Note: If an authorising manager and an additional authorising manager are provided, the request will need to be authorised by both managers to progress.

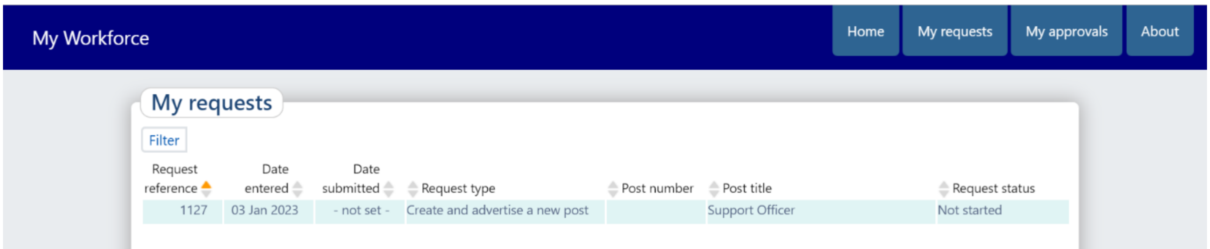


If you need to return to your request at a later date before it can be submitted, you should use the **Save and complete later** option.



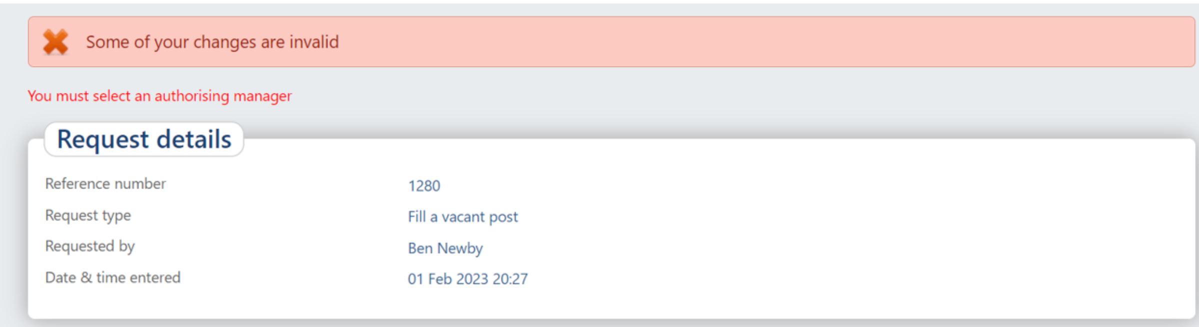
Upon saving your request you will receive a notification at the top of the page to confirm.

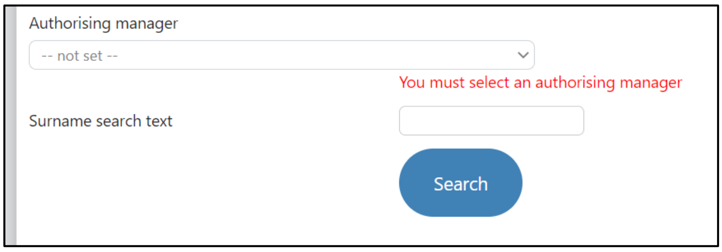
To return to the request that has been saved, navigate to **My requests** on the MyWorkforce landing page.



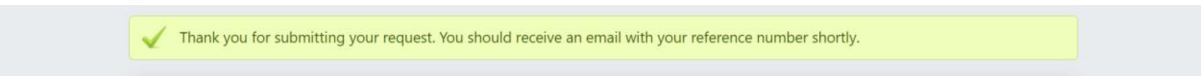
If you are ready to submit your request to PES for authorisation and processing, you should select the **Submit your request to Payroll and Employee Services** option.

When you submit the form, you will be advised if any mandatory fields have not been completed. There will be an alert at the top of the form to advise which fields need to be completed before the form can be submitted. The relevant field will also be highlighted on the form itself.





Once the form has been successfully submitted, a confirmation message will be displayed on screen.



You should receive an email confirmation that your request has been submitted. The confirmation will provide a summary on the request that has been submitted, which includes the **post title** and

request reference number. You should quote the request reference number if you have any future queries on the form to raise with PES.

MyWorkforce request reference 1463

M MyWorkforce@durham.gov.uk
To

Thank you

Your request for changes to a post / post holder has been submitted to Payroll and Employee Services.

You can use the MyWorkforce application to monitor the progress of your requests by selecting 'My requests' from the menu.

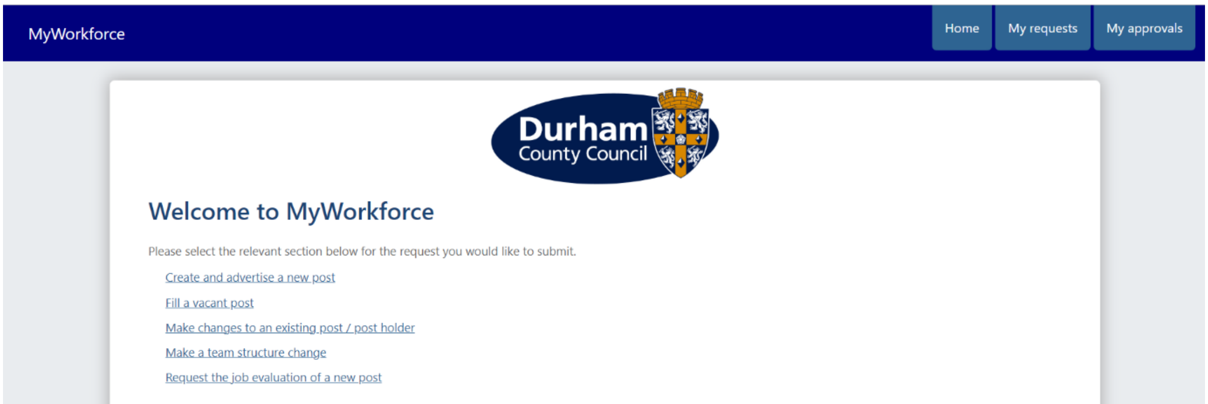
Please quote request reference **1463** on any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

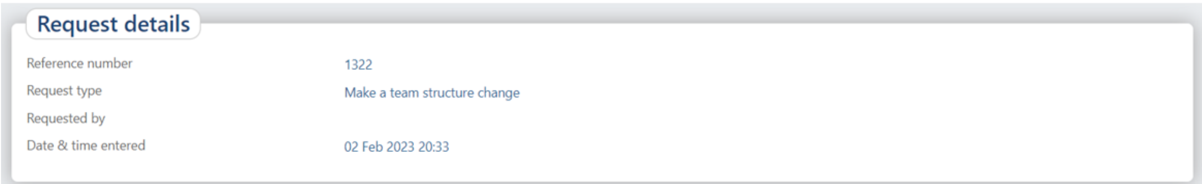
You can refer to **My Requests** (see section 2 of this guidance document) to monitor the progress of your submitted request.

8 – Make a team structure amendment

To submit a request to **Make a team structure change**, select the relevant option from the MyWorkforce landing page.



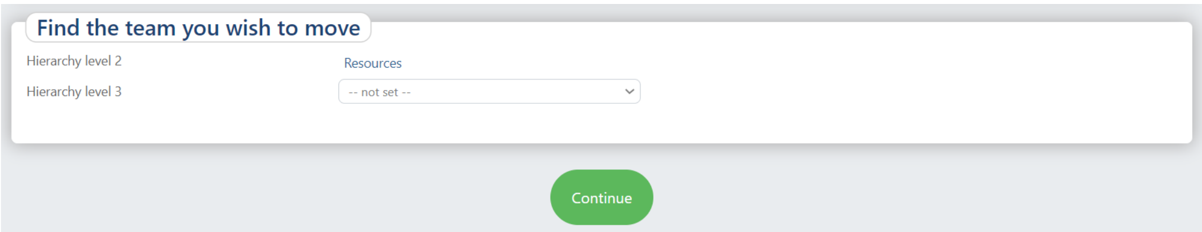
When the **Make a team structure change** form has been selected, the draft form will show summary **Request details** which include **Reference number**, **Request type**, **Requested by** and **Date & time entered**. Once your request has been submitted for authorisation and processing you will see a summary of the completed and outstanding milestones of the request.



8.1 – Make a team structure amendment – Find the team to wish to move

The first task is to identify the team you wish to move. Using the drop-down menu, you can select the appropriate hierarchy levels until you correctly identify the part of the organisation structure under which the team (structure unit) is currently located.

Click **Continue** when the relevant team has been identified.



8.2 – Make a team structure amendment – Team structure amendment

Once the team to be moved has been identified, the Team structure amendment section will display the current hierarchy level you have selected.

Please Note: be aware that moving the selected team (structure unit) will impact on the posts displayed. Please proceed with caution.

You will need to advise if the selected team will be moving under an existing team or if a new parent team (structure unit) needs to be created.

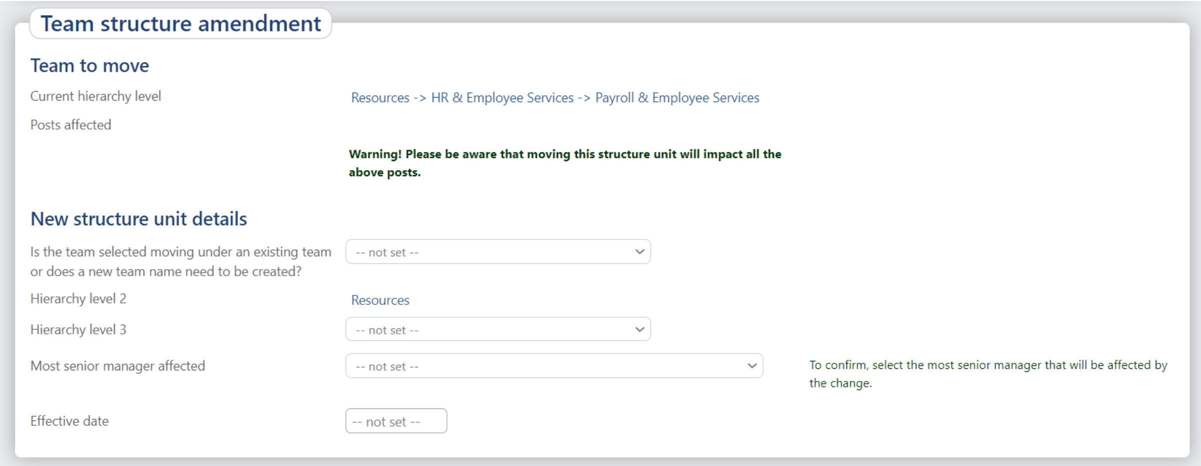
If the team (structure unit) selected will be **moving under an existing team**, you should locate the new team using the **Hierarchy** drop-down menus.

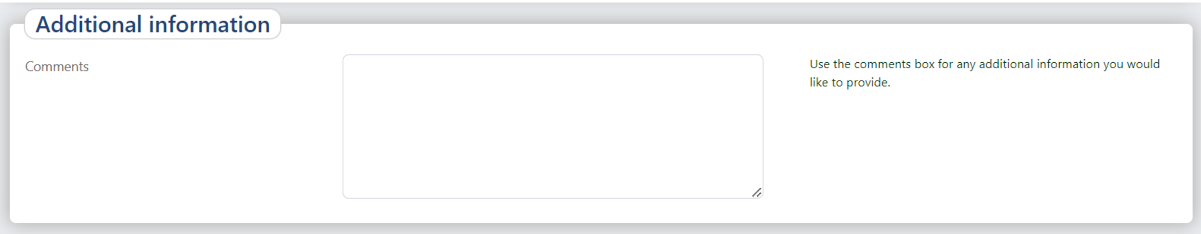
Using the drop-down menu, you can select the appropriate hierarchy levels until you correctly identify the part of the organisation structure to which the team should be attached.

If the team (structure unit) selected also requires a **new parent structure unit (team)** to be created, please complete the **New team name** field which will be available when this option is selected. You should still locate hierarchy level to which the new structure unit (team) would be attached.

To help ensure that you have selected the correct team to be moved, you can select the **Most senior manager affected** by the team (structure unit) change.

Please complete the **Effective date** for the change and add any relevant **Comments** for this request.



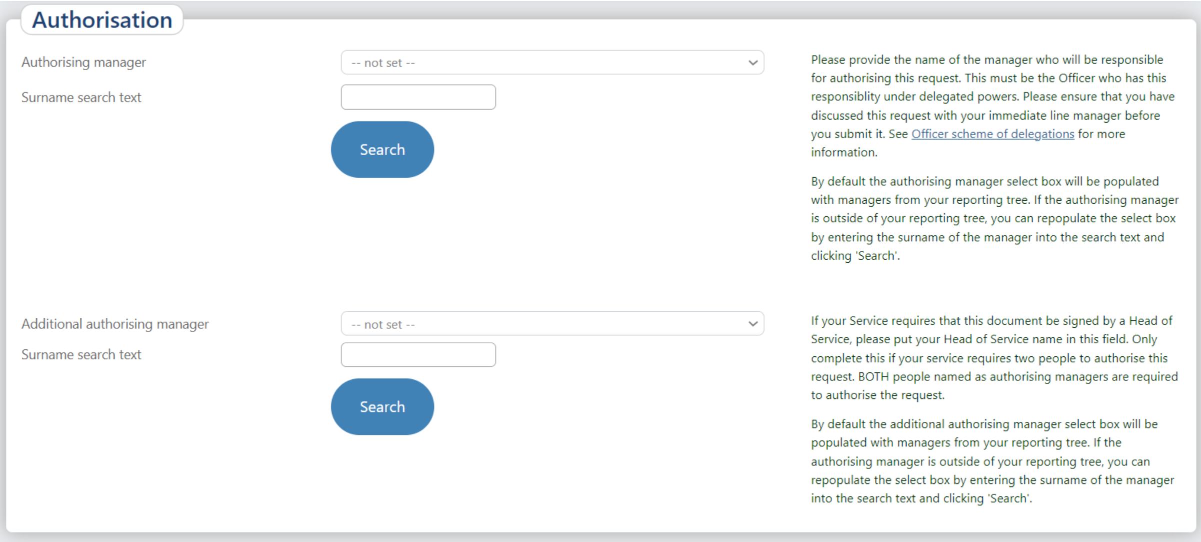


8.3 – Make a team structure amendment – Authorisation

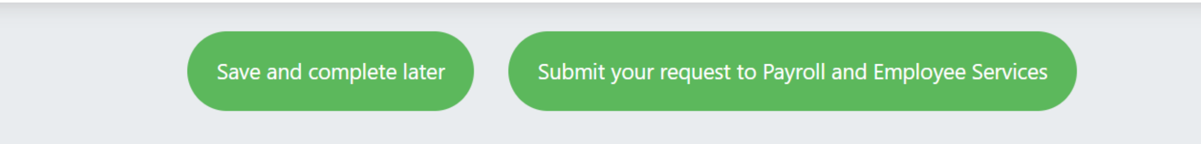
You will need to provide the name of the senior **Authorising manager** who will be responsible for authorising your request. The drop-down list will be pre-populated with the managers directly above you in your reporting hierarchy. However, if the authorising manager is outside of your reporting tree, you can repopulate the selection box by entering the surname of the manager into the **Surname Search text** field and clicking **Search**.

If you require additional authorisation from another senior manager for this request, you can use the **Additional authorising manager** selection which will work in the same way as the Authorising manager selection.

Please Note: If an authorising manager and an additional authorising manager are provided, the request will need to be authorised by both managers to progress.



If you need to return to your request at a later date before it can be submitted, you should use the **Save and complete later** option.

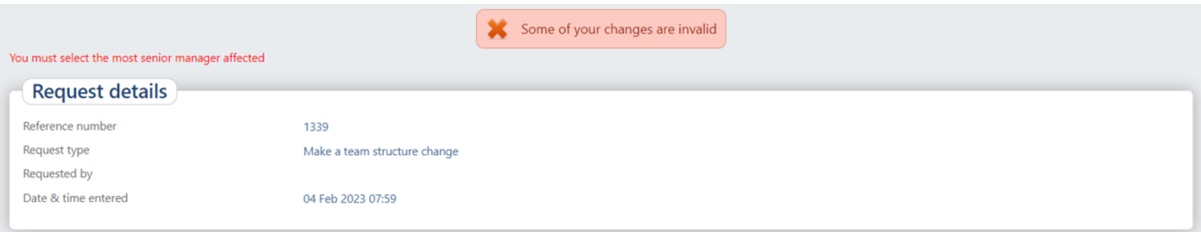


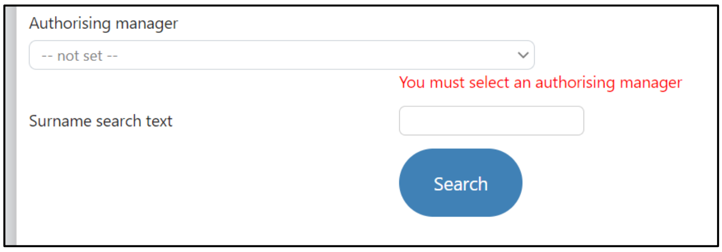
Upon saving your request you will receive a notification at the top of the page to confirm.

To return to the request that has been saved, navigate to **My requests** on the MyWorkforce landing page.

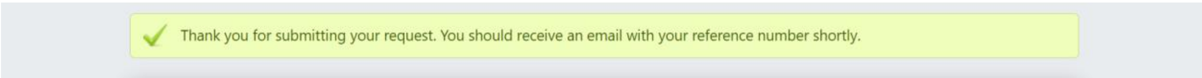
If you are ready to submit your request to PES for authorisation and processing, you should select the **Submit your request to Payroll and Employee Services** option.

When you submit the form, you will be advised if any mandatory fields have not been completed. There will be an alert at the top of the form to advise which fields need to be completed before the form can be submitted. The relevant field will also be highlighted on the form itself.





Once the form has been successfully submitted, a confirmation message will be displayed on screen.



You should receive an email confirmation that your request has been submitted. The confirmation will provide a summary on the request that has been submitted, this will include the **request reference** number. You should quote the request reference number if you have any future queries on the form to raise with PES.

MyWorkforce request reference 1544

M MyWorkforce@durham.gov.uk

To

Thank you

Your request for a team structure change has been submitted to Payroll and Employee Services.

You can use the MyWorkforce application to monitor the progress of your requests by selecting 'My requests' from the menu.

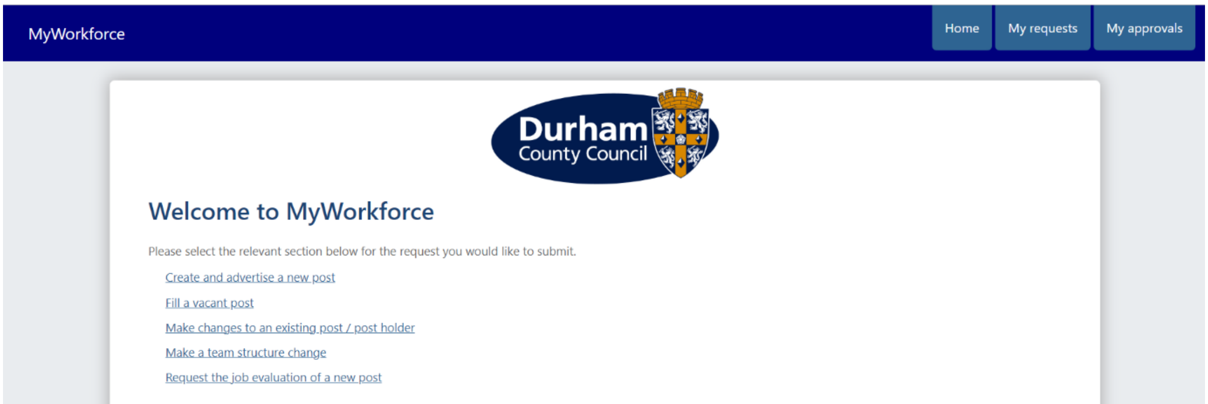
Please quote request reference **1544** on any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

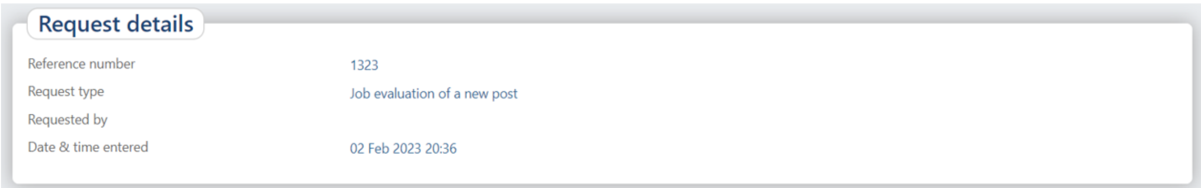
You can refer to **My Requests** (see section 2 of this guidance document) to monitor the progress of your submitted request.

9 – Request the job evaluation of a new post

To submit **Request the job evaluation of a new post** select the relevant option from the MyWorkforce landing page.



The draft form will show summary **Request details** which include **Reference number**, **Request type**, **Requested by** and **Date & time entered**. Once your request has been submitted for authorisation and processing you will see a summary of the completed and outstanding milestones of the request.

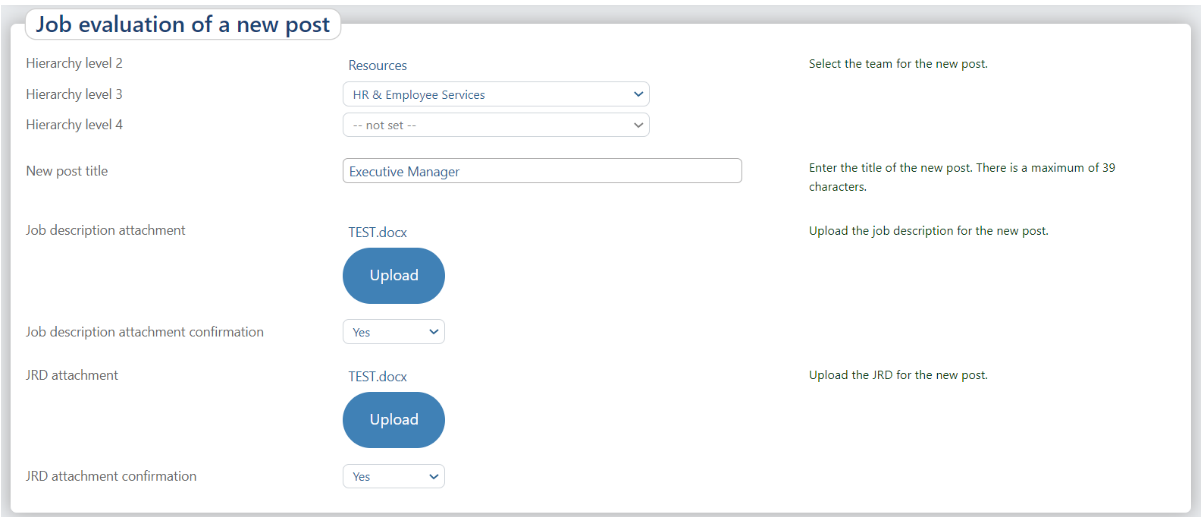


9.1 – Request the job evaluation of a new post – Job evaluation of a new post

You will need to select the relevant team for the proposed new post. Using the drop-down menu, you can select the appropriate hierarchy levels until you correctly identify the part of the organisation structure to which the proposed new post would be attached.

The **New post title** should then be completed. The post title is limited to 39 characters and must not include "&" or shortened words.

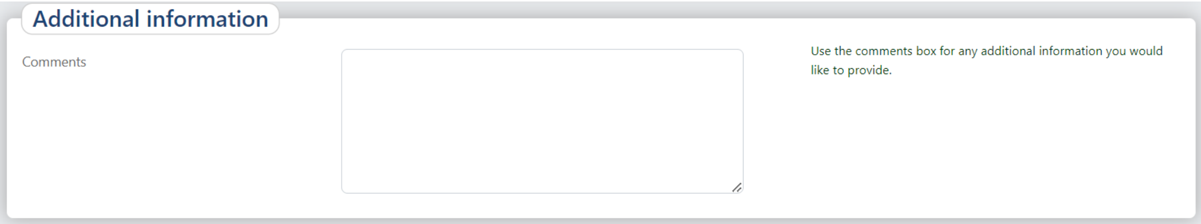
Please ensure that both **Job description** and **JRD** are attached the request. You must confirm that you have attached both the job description document and the JRD document.

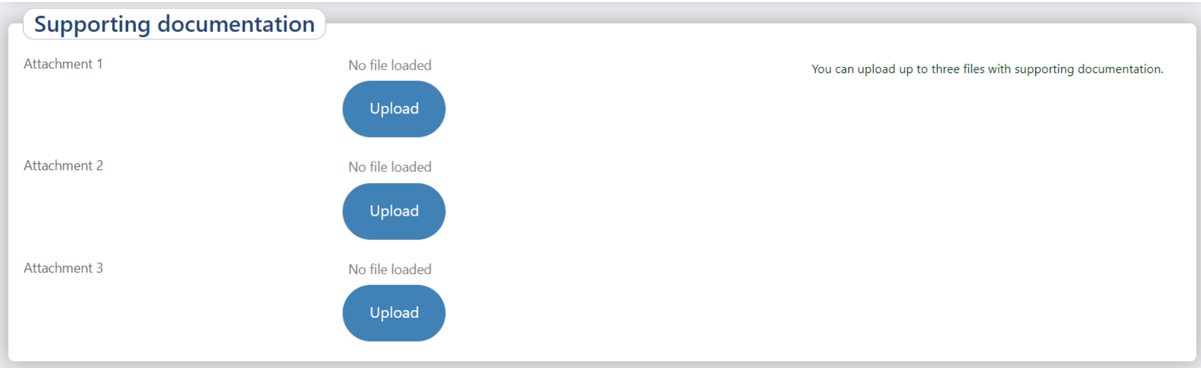


9.2 – Request the job evaluation of a new post – Additional information and Supporting documentation

Please use the **Comments** field in the **Additional information** section if there is any additional information you would like the provide to support the request.

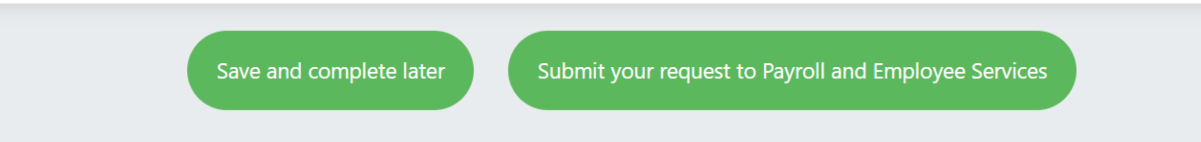
You will also be able to provide further **Supporting documentation** if applicable. Up to three files can be uploaded.



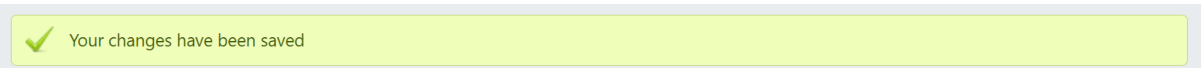


9.3 – Request the job evaluation of a new post – Authorisation

If you need to return to your request at a later date before it can be submitted, you should use the **Save and complete later** option.



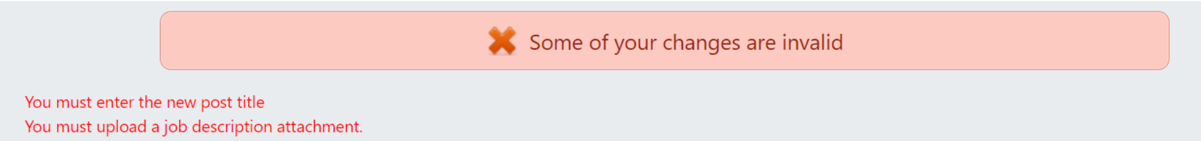
Upon saving your request you will receive a notification at the top of the page to confirm.



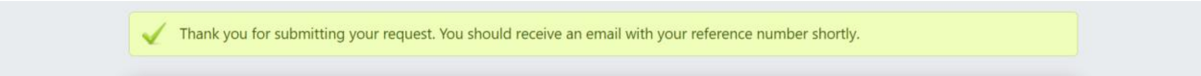
To return to the request that has been saved, navigate to **My requests** on the MyWorkforce landing page.

If you are ready to submit your request to PES for authorisation and processing, you should select the **Submit your request to Payroll and Employee Services** option.

When you submit the form, you will be advised if any mandatory fields have not been completed. There will be an alert at the top of the form to advise which fields need to be completed before the form can be submitted. The relevant field will also be highlighted on the form itself.



Once the form has been successfully submitted, a confirmation message will be displayed on screen.



You should receive an email confirmation that your request has been submitted. The confirmation will provide a summary on the request that has been submitted, this will include the **request reference** number. You should quote the request reference number if you have any future queries on the form to raise with PES.

MyWorkforce request reference 1315

M MyWorkforceRequests_Notifier@durham.gov.uk
To

Thank you

Your request for the job evaluation of a new post has been submitted to Payroll and Employee Services.

You can use the MyWorkforce application to monitor the progress of your requests by selecting 'My requests' from the menu.

Please quote request reference **1315** on any correspondence.

PLEASE DO NOT REPLY THIS EMAIL.

You can refer to **My Requests** (see section 2 of this guidance document) to monitor the progress of your submitted request.