Payroll & Employee Services - Onboarding Manager Guidance

Please think before printing this document.

Where printing is necessary, please ensure that it is printed double sided and in greyscale.

Contents

1 - Introduction

1.1 - MyView Onboarding Module – What is Onboarding?

Onboarding is a term referring to the process of introducing a newly hired employee into an organisation. Onboarding is an important part of helping employees understand their new position and job requirements, as well as allowing them to complete certain tasks which are required before commencing their role.

MyView has been enhanced with new Onboarding functionality, which means that as a Manager / Onboarder, when you access MyView you will see displayed a set of activities to perform based on tasks allocated. Dependant on the nature of the post, different onboarding tasks will be made available for you.

The majority of tasks are mandatory tasks. However, there are some optional onboarding tasks which the relevant Business Services will allocate based on the specific role.

The types of onboarding tasks available are:

- **watching videos** i.e., corporate induction
- **reading documents**
- **uploading documents**
- **completing forms (both MyForms and MyTeam processes)** – this may include:
    - Employee Personal Data Collection and Bank Details
    - Employee Photo Upload - for security/ID purposes
    - HMRC checklist
    - Sickness Absence History
    - *DBS Consent* ***(dependant on nature of post)***
    - *Criminal Conviction Declaration* ***(dependant on nature of post)***
    - *Recruitment Allowance* ***(dependant on nature of post)***
    - *Driving License Requirements* ***(dependant on nature of post)***
    - *Professional Registration* ***(dependant on nature of post)***

As an onboarder to Durham County Council, using the Onboarding module within MyView will allow you to:

- Easily communicate with your new employer throughout the pre-employment process through to you starting – this includes receiving your Conditional Offer of Appointment and the Statement of Particulars.

- Ensure a consistent and transparent onboarding process for all new starters - reducing time on administration of pre-employment checks.

- Access to the Durham Learning & Development System to undertake induction and mandatory training **14 days** prior to start date.

- Feel a part of Durham Council Council from the moment you receive your offer of employment, not just when you start work

The MyView Onboarding module enables a truly online experience for new employees and managers. A successful onboarding process is proven to reduce new hire attrition and turn new hires into productive, long-term employees.

The new Onboarding functionality allows prospective employees and their line managers to log in to MyView Dashboard, view information regarding their future start and complete a number of pre-employment checks prior to confirmation of start date and to undertake a number of induction related tasks. Dependant on the nature of the post, different onboarding tasks will be made available for completion by the onboarder. Tasks which are not mandatory to the role may also be required and will be arranged PES and management including Lifeguard Competency Assessments or Driving Assessments.

Documentation to support the use of MyView including Frequently Asked Questions are available via the MyView internet page.

1.2 - Further Information

If you would like any further advice or would like the document in an alternative format, please contact the MyView Team within PES using contact details:

- **MyView@durham.gov.uk**
- **03000 269 919**

If you require support with the pre-employment checks please contact Business Services on the below inboxes:

- **RecruitmentAHS@durham.gov.uk**
- **RecruitmentCYPS@durham.gov.uk**
- **RecruitmentResources@durham.gov.uk**
- **RecruitmentNCC@durham.gov.uk**
- **RecruitmentREG@durham.gov.uk**
- **RecruitmentCorporateAffairs@durham.gov.uk**

2 - Onboarding Campaign Initiation

Business Services will initiate the onboarding campaign. As part of this process, Business Services will identify the appropriate tasks that need to be completed.

The onboarding employee will receive an email notification that they can now access the MyView Onboarding hub. This email specifically tells the onboarder that a Conditional Offer of Appointment letter is now available to view as well as specific requirements of the onboarder to progress the pre-employment and induction process.

As manager on the onboarder you will also receive a notification which should look like the example shown below:

*Email Subject: **1 MANAGER - New Onboarding Campaign Initiated***

Dear (Manager Forename)

Please note that Employee Onboarding (pre-employment checks and induction activity) has been initiated for prospective employees listed in the attached file.

*Please log in to MyView via the intranet and select the **Onboarding View** Team Selector to view the list of onboarding employees who are recorded as currently reporting to you.*

*From the **MyPeople Onboarding Module** option on the left-hand navigation panel you can access the **MyPeople Onboarding Module Hub** to review the following details:*

- *Countdown of days until the Onboarder's first day**
- *Onboarder progress of their onboarding tasks including summary of the onboarding tasks still to be completed by the Onboarder along with the current completion status of each task. You will have access to view onboarding tasks previously completed by the onboarding employee.*
- *The Employee Number and Onboarding Start (Initiation) Date for the Onboarder*
- *The assigned Manager and Buddy for the Onboarder (you can update the selected buddy)*
- *Onboarding employee 'My First Day' information including:*
    - *Arrival Time*
    - *Location Address*
    - *Dress Code information (if/when applicable)*
    - *First Day Contact*
    - *What to Bring*
    - *Additional information*

**The 'Start Date' of 31/12/2099 is only a notional start date until all the pre-employment checks have been successfully completed. Payroll and Employee Services will update the employee record once a start date has been agreed with the lead officer at the appropriate time.*

*As the employee onboarding tasks are progressed you will be prompted by additional email alert notifications containing details of which pre-employment forms you are required to complete. From the **MyPeople MyForms Onboarding** option on the left-hand navigation panel you will be able to access the pre-employment forms you have been prompted to complete.*

*You are encouraged to submit the **ICT New Starter Set-up MyForm** as soon as possible so that you can ensure that all IT arrangements are in place prior to start date. However, ICT will not be notified of your request until pre-employment checks are completed.*

You, and the onboarder, will receive regular updates (via automated email alerts) outlining the pre-employment tasks which are outstanding for the whole pre-employment process.

*You can review pre-employment and induction progress of current onboarding employees via the **MyOnboarding checklist** reporting services widget accessible from your MyView dashboard.*

Should you have any further queries please contact Business Services according to service grouping below:

- **RecruitmentAHS@durham.gov.uk**
- **RecruitmentCYPS@durham.gov.uk**
- **RecruitmentResources@durham.gov.uk**
- **RecruitmentNCC@durham.gov.uk**
- **RecruitmentREG@durham.gov.uk**
- **RecruitmentCorporateAffairs@durham.gov.uk**

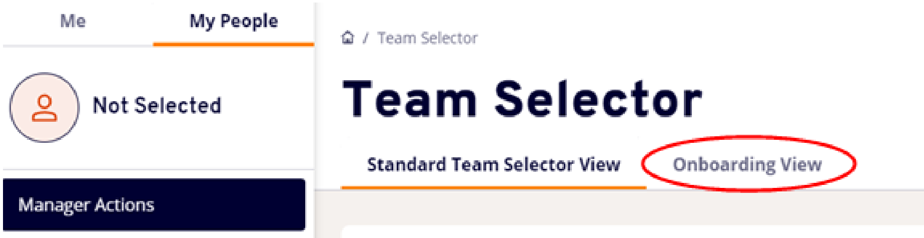
Onboarding Manager guidance is available via MyView.

Many Thanks
Payroll and Employee Services

You, and the onboarder, will also receive regular updates (via automated email alerts) outlining the pre-employment tasks which are outstanding across the whole pre-employment process.

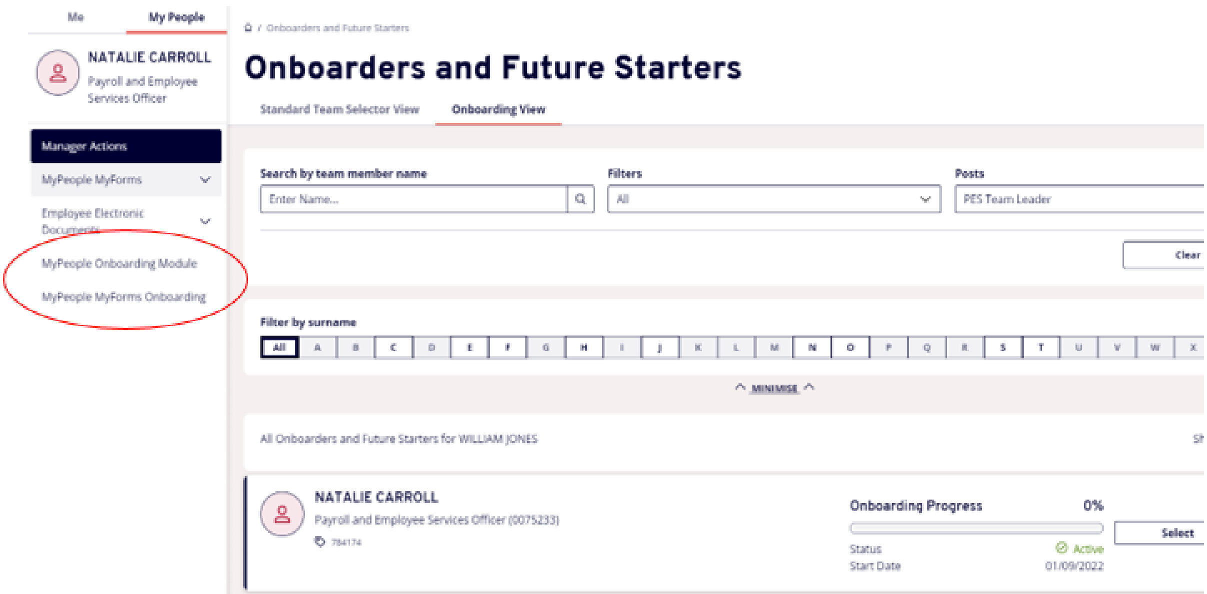
3 - Manager access to Onboarding in MyView

You can access the onboarding module via **[My People Team Selector]** selecting **[Onboarding View]** which will allow you to view the list of current onboarding employees who are recorded as currently reporting to you.



The Onboarding View will display the onboarder(s) currently in progress, with an onboarding progress percentage visible and the option to select to enter the onboarding profile.

Please note: the onboarding team selector view does not show personal or appointment details about the onboarder.



Upon selecting an onboarder, the navigation panel located at the left-hand side will provide managers with access to the **[MyPeople Onboarding Module]** hub and the **[MyPeople MyForms Onboarding]** sections.

4 - MyPeople Onboarding Module Hub

The MyPeople Onboarding hub contains the following details:

- Countdown of days until the Onboarder's first day.

  Please note: the 'start date' of 31/12/2099 is only a notional start date until all the pre-employment checks have been successfully completed. PES will update the employee record once a start date has been agreed with the lead officer at the appropriate time.

- Onboarder progress of their onboarding tasks.

  Please note: this only relates to the tasks for which the onboarder is responsible.

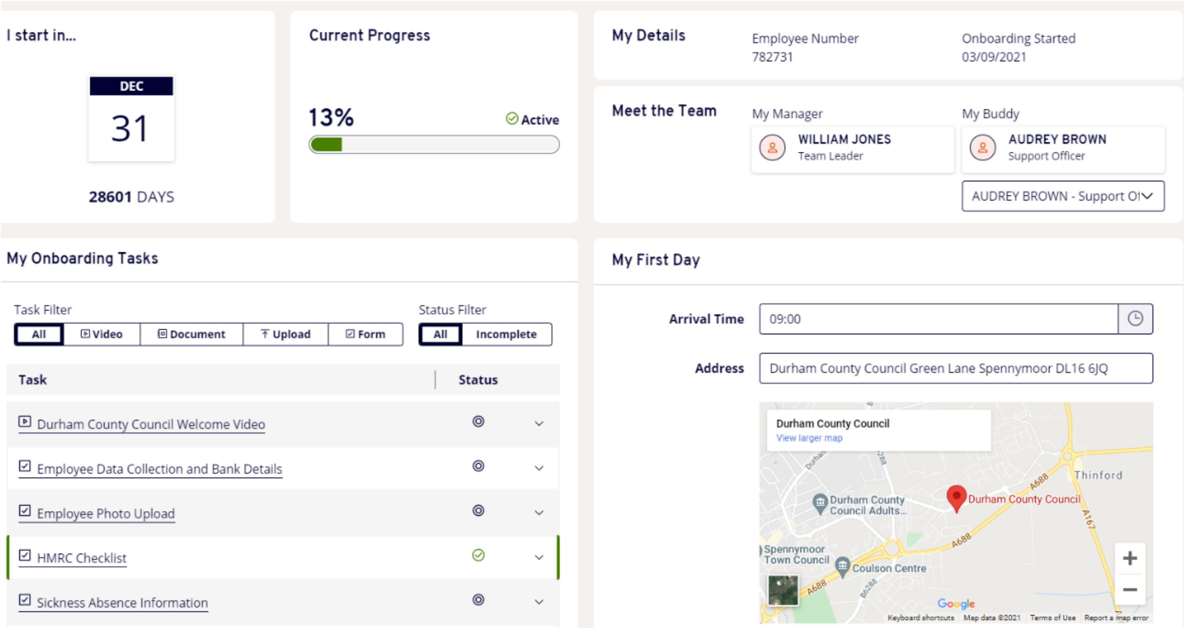
- The Employee Number and Onboarding Start Date for the Onboarder (*the date from which the onboarder has access to complete the onboarding tasks*).

- The assigned Manager and Buddy for the Onboarder *(manager can update the selected buddy)*

- A summary of the onboarding tasks expected to be completed by the Onboarder, along with the current completion status of each task. Once complete the onboarder should mark the task as 'completed'. PES will be notified each time an onboarding task is completed, if the task has not been completed correctly, PES will notify the onboarder that the task has been re-assigned to begin again. Managers can review overall pre-employment and induction progress via the ***MyOnboarding*** Checklist reporting services widget.
- 'My First Day' information including:
  - Arrival Time
  - Location Address
  - Dress Code information (if/when applicable)
  - First Day Contact
  - What to Bring
  - Additional information

As the manager of the onboarder you will be alerted when the onboarding campaign has been initiated so that you can review the information in the 'My First Day' section before the onboarder takes up employment.

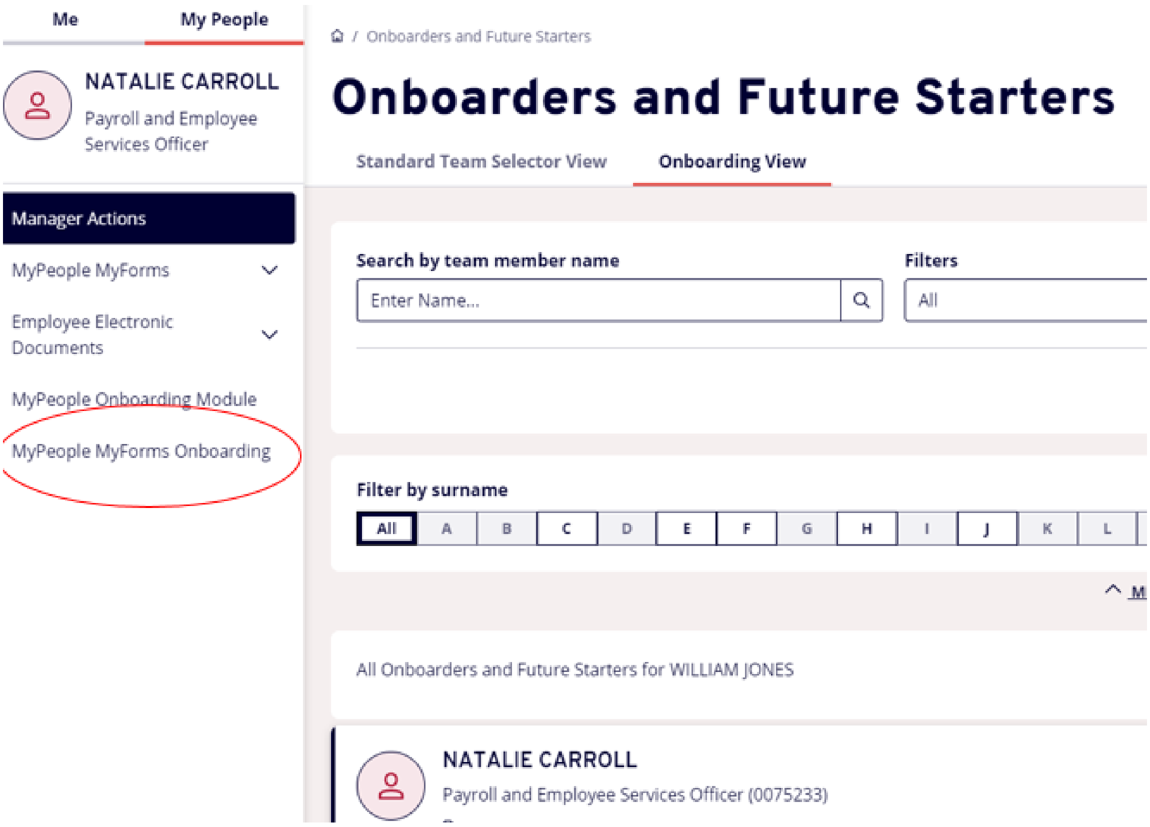
Please note: 'Dress code' has been added to first day information for specific roles requiring a certain uniform / PPE. Standard text can be applied (if required): '*Where a uniform and/or PPE is a requirement of the post this must be reiterated to the employee during the onboarding process.'*


I start in...
DEC
31
28601 DAYS
Current Progress
13%
Active
My Details
Employee Number
782731
Onboarding Started
03/09/2021
Meet the Team
My Manager
WILLIAM JONES
Team Leader
My Buddy
AUDREY BROWN
Support Officer
AUDREY BROWN - Support O
My Onboarding Tasks
Task Filter
All
Video
Document
Upload
Form
Status Filter
All
Incomplete
Task
Status
Durham County Council Welcome Video
Employee Data Collection and Bank Details
Employee Photo Upload
HMRC Checklist
Sickness Absence Information
My First Day
Arrival Time
09:00
Address
Durham County Council Green Lane Spennymoor DL16 6JQ
Durham County Council
View larger map
Thinford
Durham County Council Adults...
Durham County Council
Spennymoor Town Council
Coulson Centre
A688
A167
Google

5 - MyPeople Onboarding MyForms

As the employee onboarding tasks are progressing you will be prompted by email alert notifications containing details of which pre-employment forms you are required to complete to verify the details behind the tasks.

Upon logging into MyView select **[MyPeople]** and **[Onboarding View]** select the onboarder required from the list. Select **[MyPeople MyForms Onboarding]** option on the left- hand navigation panel you will be able to access the pre-employment forms you have been prompted to complete.

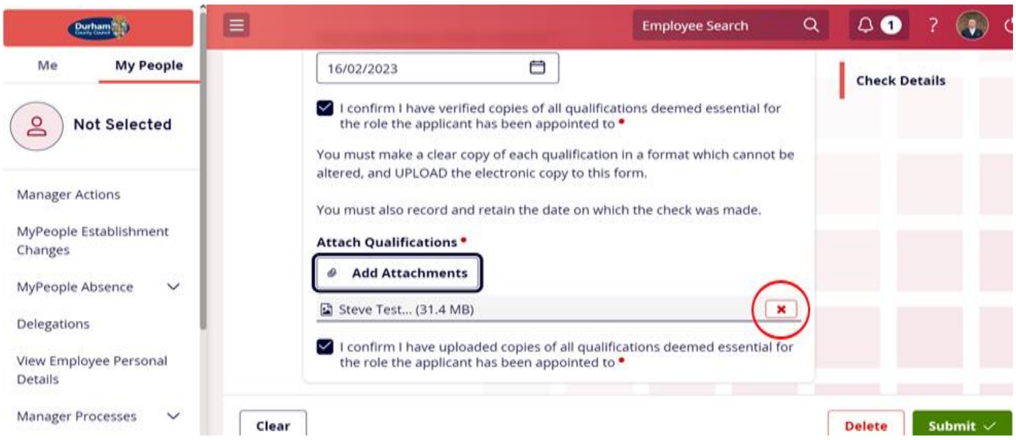


The manager verification forms will display:

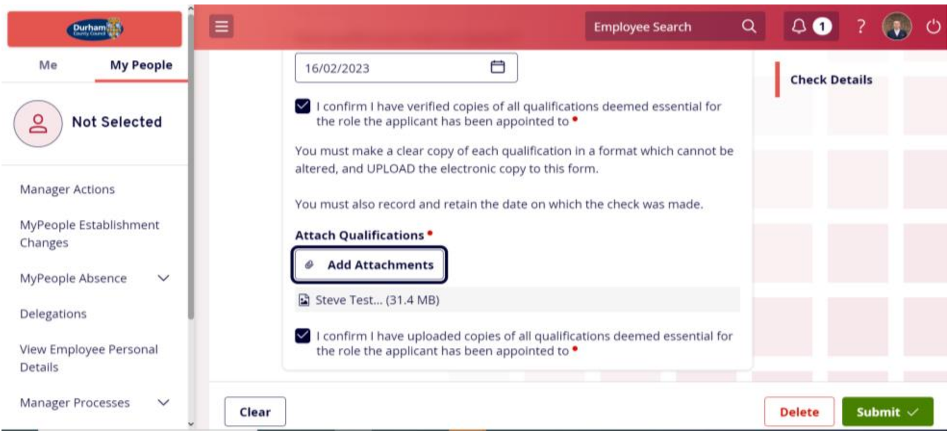
1. Lifeguard (Pool Water) Competency Assessment
2. Manager Checks – Prior to Employee Starting
3. New Starter ICT Set-up
4. Occupational Health Report Verification
5. Onboarding Employee Start Date Confirmation
6. Qualification Verification
7. Reference Verification
8. Right to Work Checklist
9. Sickness Absence Verification
10. Schedule 2 Manager Verification

Select **[start]** to commence and submit a required form. Each form will contain a red dot (asterix) next to the mandatory field required for completion before the form is submitted. The forms will vary in terms of dates to be confirmed of verification, fields to be answered via multi selection from a drop-down menu or text input by the manager. Some forms may also require mandatory attachments to be added before submission e.g., Qualification Verification. Where an attachment is required, please ensure the file has uploaded successfully before submission as it may take a few minutes to effectively load.

The below picture displays the form with an attachment upload in progress, the highlighted '**X**' is visible to demonstrate the file path is still loading, and gives the manager an option to cancel the upload at this stage:



Once the file has successfully uploaded the form will display the below:



5.1 Lifeguard (Pool Water) Competency Assessment

The manager will be required to attach copy of completed Lifeguard Competency Assessment Form and submit the required form when prompted to do so, after an assessment has taken place (where applicable).

Lifeguard Competency Assessment Details

Lifeguard Competency Assessment Form Completion Date *

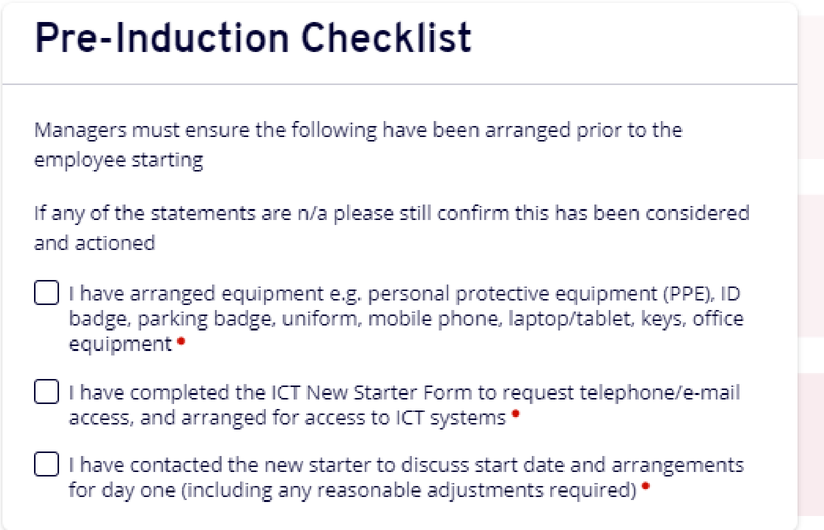
dd/mm/yyyy

Please attach completed assessment form. *

Add Attachments

5.2 Manager Checks

A pre-induction checklist prior to the employee commencing the role must be submitted by the manager. Manager checks will confirm that the necessary equipment has been arranged and communication has taken place between the manager and onboarder discussing start date arrangements for the first day. **Please note:** if any of the below statements are not applicable for the role, the manager must still tick the box to demonstrate consideration for the action has been applied.



Pre-Induction Checklist

Managers must ensure the following have been arranged prior to the employee starting

If any of the statements are n/a please still confirm this has been considered and actioned

- [ ] I have arranged equipment e.g. personal protective equipment (PPE), ID badge, parking badge, uniform, mobile phone, laptop/tablet, keys, office equipment *
- [ ] I have completed the ICT New Starter Form to request telephone/e-mail access, and arranged for access to ICT systems *
- [ ] I have contacted the new starter to discuss start date and arrangements for day one (including any reasonable adjustments required) *

5.3 Occupational Health Report Verification

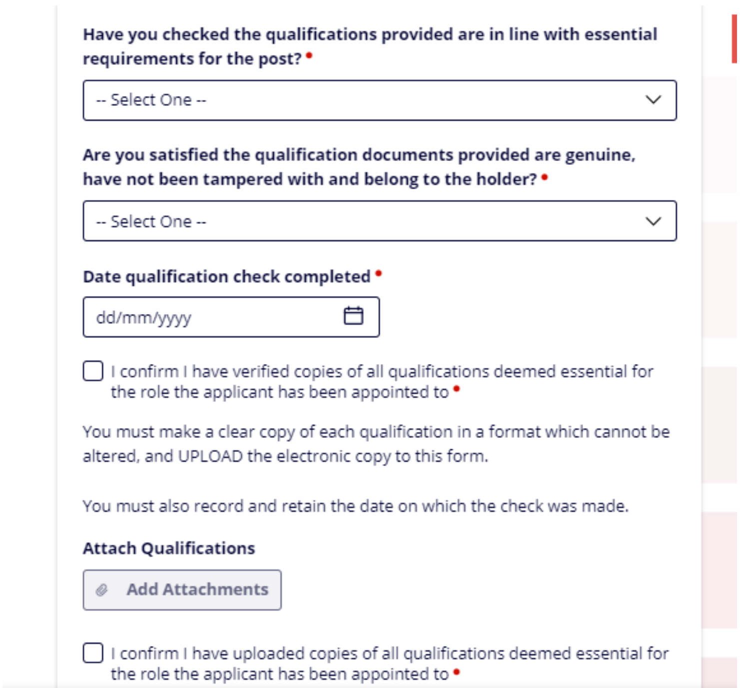
All onboarders will be required to declare whether they require any reasonable adjustments for the role they have been successful in appointing, dependant on the answer provided, an Occupational Health Report may be generated. The manager will be prompted via an alert if a report has been generated, and when they are required to verify. The report can be located by selecting the onboarder within ‘Onboarding View’ and ‘Employee Electronic Documents’ – ‘Occupational Health Report’. The form will require confirmation from the manager that any relevant action has been taken/planned before commencement of the first day.

Occupational Health Report - Manager Declaration

☐ I confirm I have verified the Occupational Health Report and any relevant action has been taken/planned •

5.4 Qualification Verification

The manager will receive an alert the following day after being notified that an onboarder has initiated into the process to verify the qualification certificates. The alert will prompt the manager to contact the onboarder and arrange the above. The manager will be required to upload copies of all qualifications and provide verification for certificates deemed essential for the role the applicant has been appointed to. **Please note:** the manager **must** sight the original documents before completing the form and uploading the certificate via ‘Employee Electronic Documents’.



Have you checked the qualifications provided are in line with essential requirements for the post? •

-- Select One --

Are you satisfied the qualification documents provided are genuine, have not been tampered with and belong to the holder? •

-- Select One --

Date qualification check completed •

dd/mm/yyyy

☐ I confirm I have verified copies of all qualifications deemed essential for the role the applicant has been appointed to •

You must make a clear copy of each qualification in a format which cannot be altered, and UPLOAD the electronic copy to this form.

You must also record and retain the date on which the check was made.

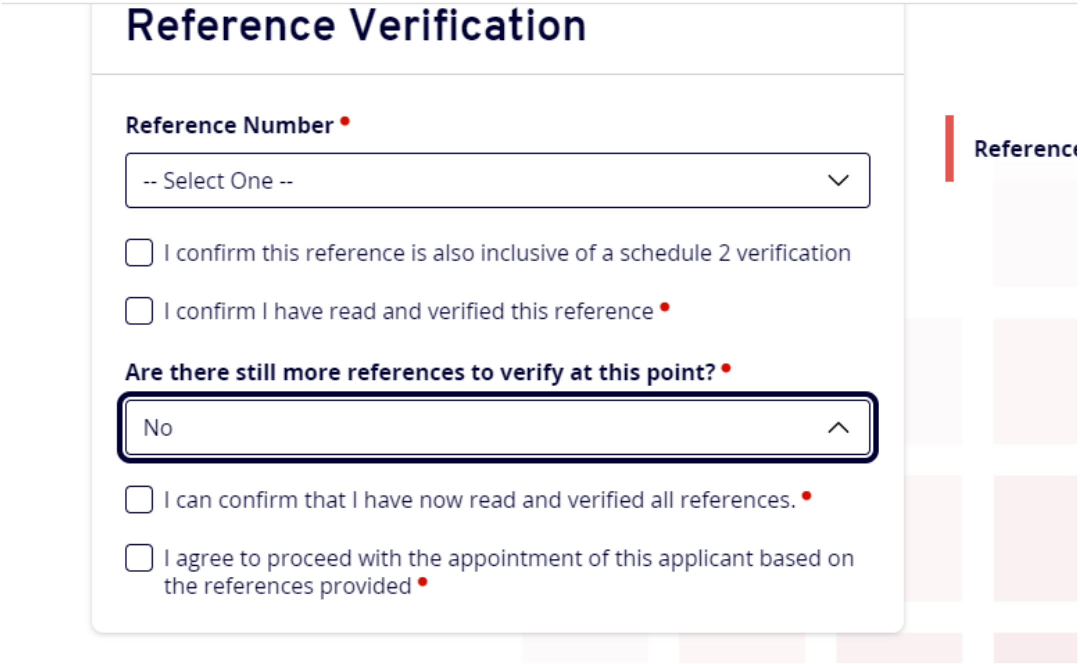
Attach Qualifications

Add Attachments

☐ I confirm I have uploaded copies of all qualifications deemed essential for the role the applicant has been appointed to •

5.5 Reference Verification

The manager will be notified as and when a reference has been returned via an alert to verify they are happy to proceed. The manager will be required to confirm references have been reviewed, references returned can be located within ‘Employee Electronic Documents’ – ‘References’:



Reference Verification

Reference Number •

-- Select One --

- [ ] I confirm this reference is also inclusive of a schedule 2 verification
- [ ] I confirm I have read and verified this reference •

Are there still more references to verify at this point? •

No

- [ ] I can confirm that I have now read and verified all references. •
- [ ] I agree to proceed with the appointment of this applicant based on the references provided •

Referenc

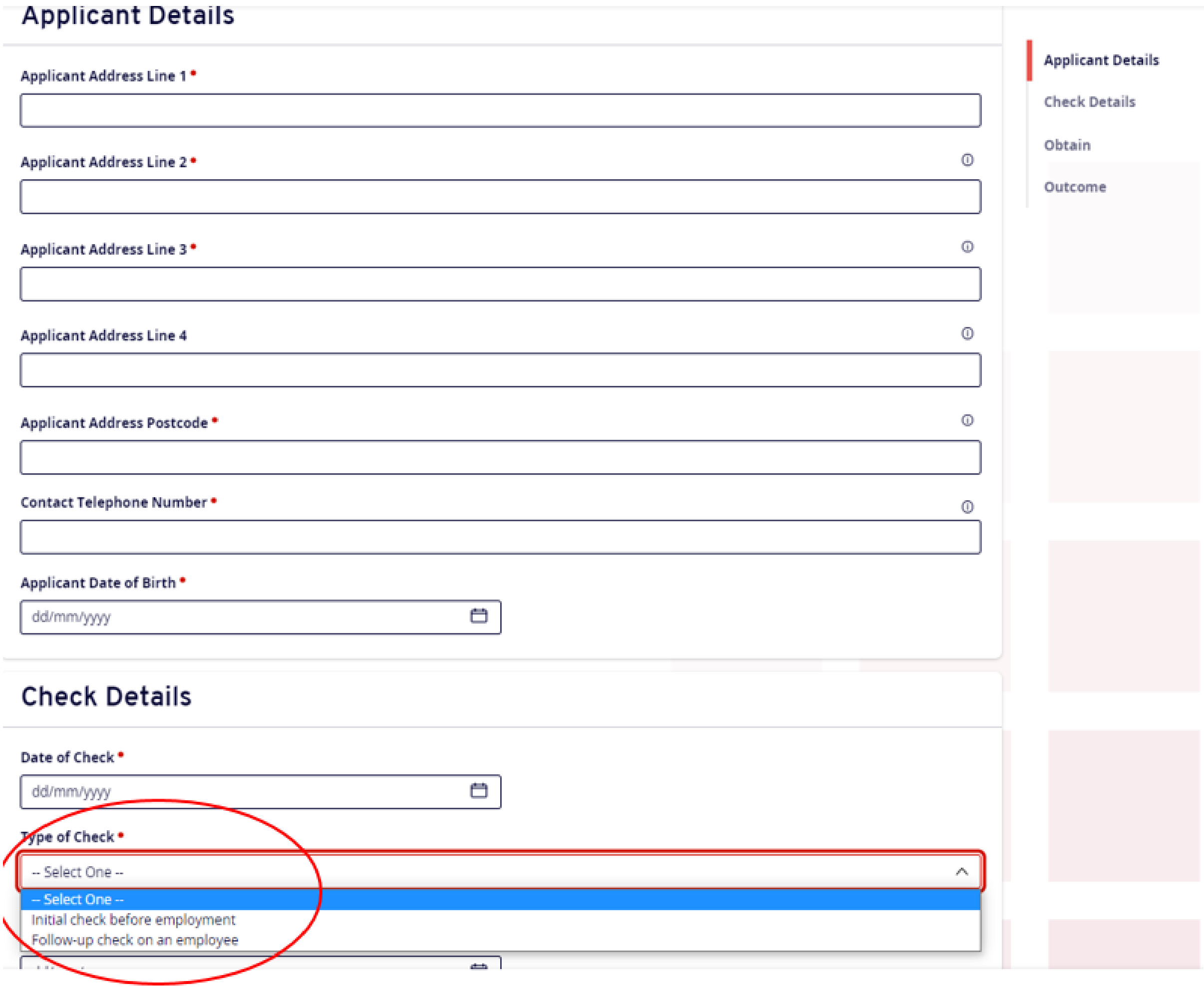
This manager form can be submitted as many times as required depending on the number of references required for the checks.

Please note if the reference is inclusive of a schedule 2 verification the manager will be able to confirm this within the reference verification form.

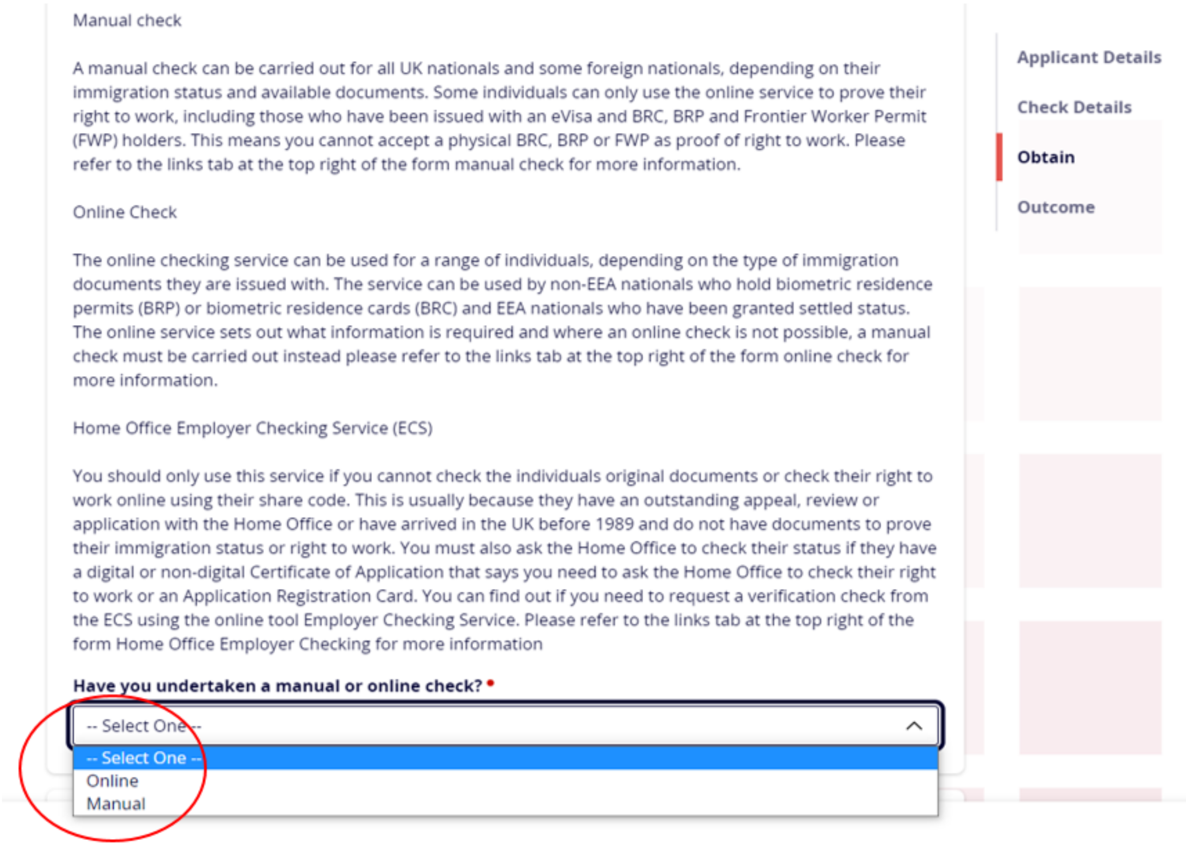
5.6 Right to Work Checklist

The manager will be alerted to submit the Right to Work checklist the following day after the onboarder initiation alert has been received. The alert will prompt the manager within early stages of pre-employment checks to contact the onboarder and arrange a meeting for the above. The manager **must** sight and verify by completing the form that the onboarder has the Right to Work in the UK.

The form will require the manager to confirm the applicants' details, address, home contact number and date of birth. Along with the date of the check and type (initial check before employment / follow-up check on an employee).



The manager will need to specify within the form if a manual check has been carried out, or an online check:


Manual check

A manual check can be carried out for all UK nationals and some foreign nationals, depending on their immigration status and available documents. Some individuals can only use the online service to prove their right to work, including those who have been issued with an eVisa and BRC, BRP and Frontier Worker Permit (FWP) holders. This means you cannot accept a physical BRC, BRP or FWP as proof of right to work. Please refer to the links tab at the top right of the form manual check for more information.

Online Check

The online checking service can be used for a range of individuals, depending on the type of immigration documents they are issued with. The service can be used by non-EEA nationals who hold biometric residence permits (BRP) or biometric residence cards (BRC) and EEA nationals who have been granted settled status. The online service sets out what information is required and where an online check is not possible, a manual check must be carried out instead please refer to the links tab at the top right of the form online check for more information.

Home Office Employer Checking Service (ECS)

You should only use this service if you cannot check the individuals original documents or check their right to work online using their share code. This is usually because they have an outstanding appeal, review or application with the Home Office or have arrived in the UK before 1989 and do not have documents to prove their immigration status or right to work. You must also ask the Home Office to check their status if they have a digital or non-digital Certificate of Application that says you need to ask the Home Office to check their right to work or an Application Registration Card. You can find out if you need to request a verification check from the ECS using the online tool Employer Checking Service. Please refer to the links tab at the top right of the form Home Office Employer Checking for more information

Have you undertaken a manual or online check? •

-- Select One --

-- Select One --
Online
Manual

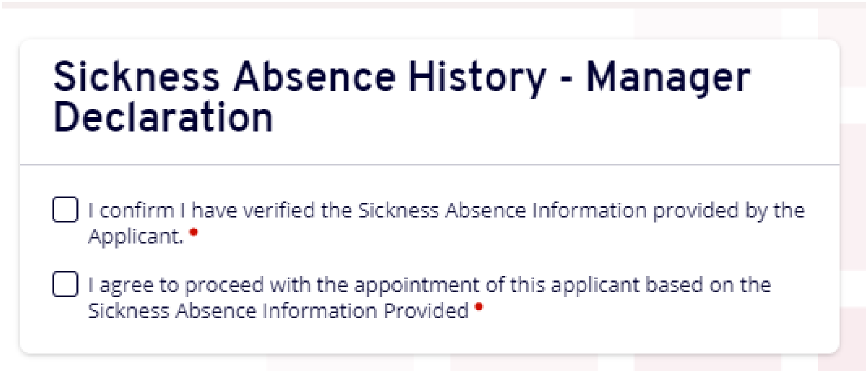
Applicant Details
Check Details
Obtain
Outcome

Dependant on the type of check, the form will display the relevant fields the manager will be required to complete. All checks will require an 'Outcome' response confirming the manager is satisfied any photography on the documents is of the correct individual presenting themselves, along with a outcome of 'Permanent Right to Work in UK – no further checks required', or 'Temporary Right to Work in UK – review date entered)'. The manager will need to ensure they have also retained copies of ID to attach to the form before submitting.

5.7 Sickness Absence Verification

The manager will be prompted via an alert to verify the sickness history once the onboarder has completed the form, and business support have subsequently updated the checklist. Sickness absence information completed by the onboarder is located within the 'MyPeople Onboarding Module'. Please select the onboarder the alert relates to and select into the form 'Sickness Absence Information' within onboarding tasks to view the underlying data.

Please note in the event an applicant states 'No' to having absence history an alert will not be generated to the manager in this instance as there will be nothing to verify. Managers are reminded that they are able to see details of the sickness absence information provided by the onboarder via Onboarding Module.



5.8 Schedule 2 Manager Verification

In line with Schedule 2 of the Children's Homes Regulations 2015, Durham County Council are required to obtain verification so far as reasonably practicable of the reason why the employment ended, if a person has previously worked in a position involving work with children or vulnerable adults. All employees appointed to a position working within a Children's Home are subject to a Schedule 2 verification check process.

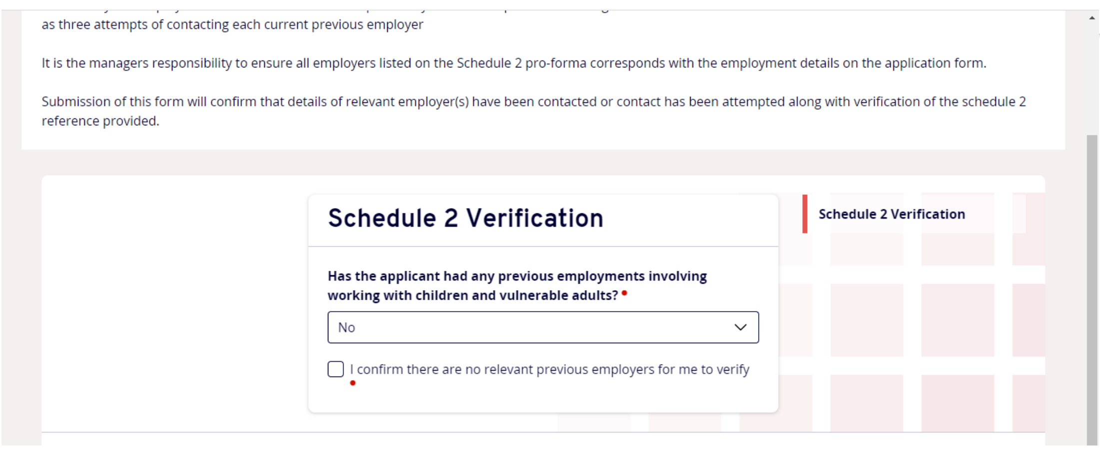
It is the managers responsibility to ensure that contact details have been provided for all relevant employers and correspond with employment history on the onboarder application form, and to confirm that the Schedule 2 information is satisfactory. This will ensure that a Schedule 2 verification process is conducted for all relevant employments in positions working with children or vulnerable adults.

If the employer no longer holds employment information on the candidate, the manager should establish the employee records retention policy with the organisation.

This verification is required for all current and previous employment in positions involving work with children or vulnerable adults.

Once informed via email alert the manager will be required to review the onboarder task to view previous employers listed (‘***Onboarding View’*** - select the onboarder - ‘***MyPeople Onboarding Module’***) and subsequently contact (or attempt contact) with each previous employer and complete the form for each individual previous employer, e.g., 15 previous employers will result in 15 separate verification forms submitted.

In the first instance the manager will be asked ‘*Has the applicant had any previous employments involving working with children and vulnerable adults*?



If the answer is ‘no’ the manager must confirm there are no relevant previous employers to verify.

If ‘yes’, the manager will be asked to provide the below information from contact with the previous employer:

- *Employer Name*
- *Contact name and details, including a telephone number and email address*
- *Reason for employment ending*
- *Any disciplinary action whilst employed*
- *Any safeguarding concerns whilst employed*
- *If there is any reason why the applicant cannot work with children or vulnerable adults*
- *Start and End date of employment – please note if the employer is the applicants most current the information button will ask for todays date to be entered for the end date*

Please note management are required to obtain and submit verification so far reasonably practicable, ‘reasonable’ has been defined as three attempts of contact to each previous employer. If contact has not been successful the form will ask the manager to confirm as well as detailing the person contacted, and dates of attempted contact.

In the event the employer no longer holds information, the manager must specify the employer’s retention policy time periods.

The manager will be asked if further schedule 2 verifications are due, or if the form submitted will be the last form Business Services expect to receive, if so, the checklist field will then be updated to confirm the manager verification of Schedule 2 is now complete.

Managers are reminded that Proxy Forms (see section 6 for further details) is available to keep track of what forms have been submitted so far.

Please note if the contact with the previous employer is inclusive of a reference verification, the manager will be able to confirm within the Reference verification form (please see section 5.5 for further details).

5.9 Start Date Confirmed

Once informed by email alert the manager will be required to submit the following form to declare the agreed start date. **Please note:** if a manager submitted the form without an alert received in the first instance, business support will reject the form until the pre-employment checks are at the appropriate stage of arranging a start date.

If the email alert has been received, please contact the onboarder to arrange a start date and confirm so by completing the form. Please allow sufficient time for Payroll & Employee Services to create and issue the contract to the onboarder within the required legal parameters.

Onboarding Employee Start Date Confirmation

Agreed Start Date *

dd/mm/yyyy

You should only complete this form at the point you have been notified that all pre-employment checks have been completed and a start date has been agreed. If Payroll & Employee Services have not notified you (via automated email alert) that the pre - employment checks are complete no action is required until this stage.

If you have been allocated Lead Officer for the purpose of pre-employment checks only, at this stage the form will also ask if the reporting lines are to remain the same or if an adjustment is required to the correct employee who will be line managing the onboarder once in posting.

Post Reporting Lines

Will you be the line manager of the onboarder after pre-employment checks have completed? *

No

If you have answered no to the above, please confirm the correct line manager details

Does this person currently undertake work for DCC via an agency (e.g. Student Social Worker)? *

-- Select One --

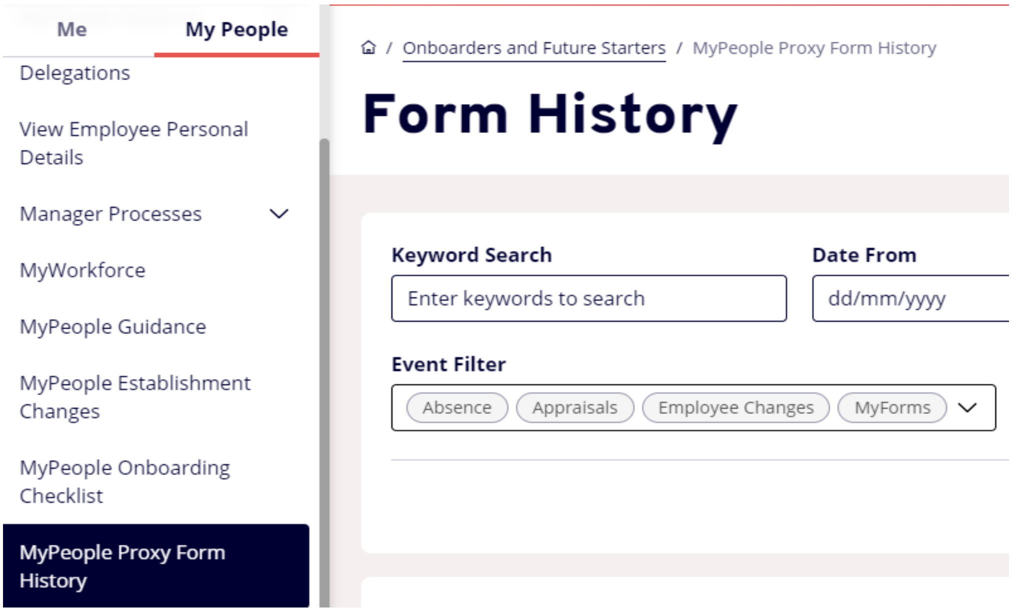
The form will also want the manager to confirm if the onboarder is currently with Durham County Council as an agency worker, e.g., Student Social Worker. By answering yes to the above Business Services will know to end the current record we have for agency purposes only.

Once all required forms have been submitted, business support will receive an email notification to authorise your submitted form(s). Once the completed form(s) are authorised, you will receive an email notification informing you if the submitted form has been authorised or rejected, in the event a form may need rejecting business support will add a rejection note for further clarity.

6 - My People Proxy Form History

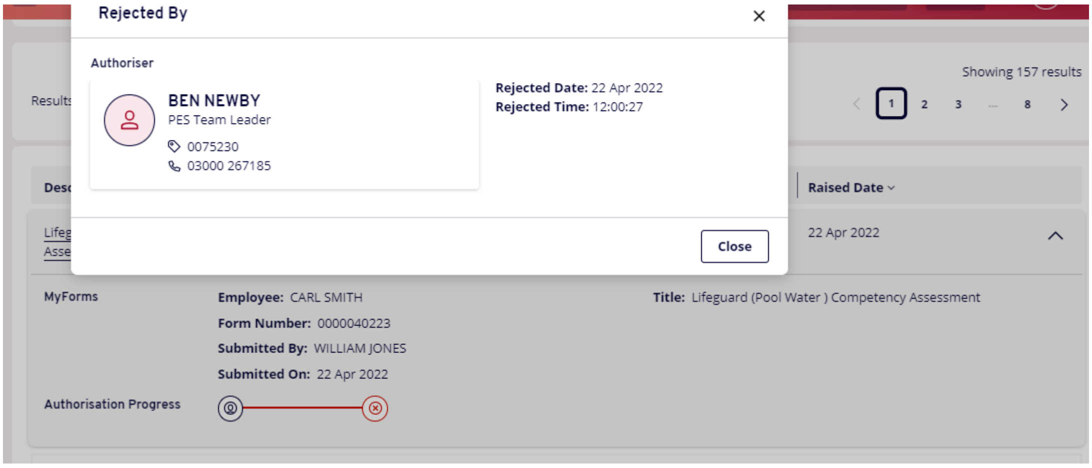
If a form has been rejected by PES, the email notification will direct you to **[MyPeople Proxy Form History]** on the left-hand navigation panel where you can locate the rejected form prior to amending and resubmitting.

Select **[MyPeople]** and **[Onboarding View]** via Team Selector. The left-hand menu options will display **[MyPeople Proxy Form History].**



The page will display the list of forms submitted with a status displaying if the form has been authorised / rejected or submitted and awaiting review by PES.

Selecting the arrow on the right will drop down further information relating to the submission and approval / rejection of the form. Clicking on the authorisation progress cross or tick (depending on the status of the form) will display the details of the employee in PES who has acted as authoriser.

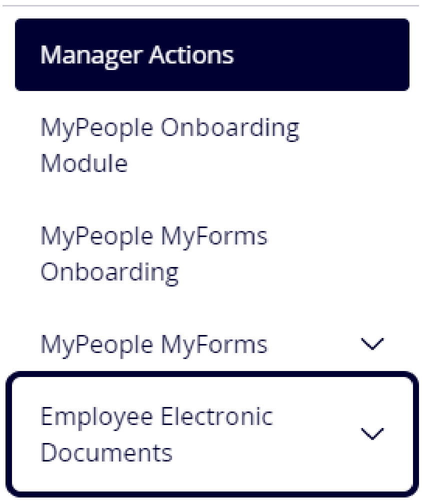


Managers are reminded to utilise Proxy Forms to display all forms previously submitted if they require to refer to. Please note forms displayed are by proxy only, therefore will only display information submitted by the individual, in the event the lead officer is swapped half way through the checks the lead officer taking over will not be able to see previously submitted forms, this must be communicated at the point of a handover.

7- DBS Certificate Verification (Update Service)

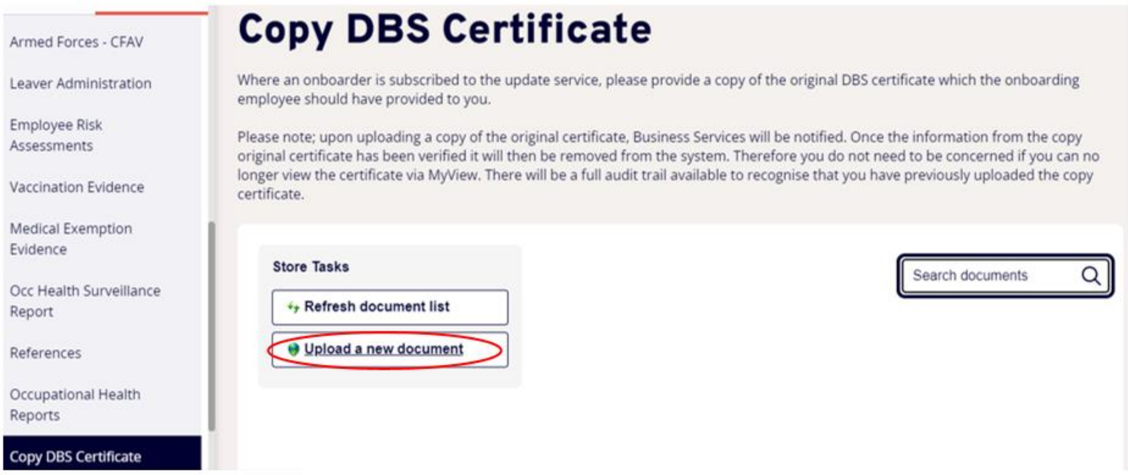
Where an onboarder is subscribed to the DBS Update Service the manager must sight the original DBS certificate that has been used for the subscription (where applicable). Once the onboarder has completed their task to declare they are part of the update service, Business Support will review and update the checklist fields, prompting an alert for the manager to arrange to meet with the onboarding employee and view the original certificate and take a copy. If the name on the certificate does not match that of the employee, please provide a copy of supporting documentation used to verify the employee's name change. For example, supporting documentation may include a marriage certificate.
When a copy has been obtained the manager will be required to upload to MyView.

Select **[MyPeople]** and **[Onboarding View]** via Team Selector, select the onboarding employee. The left-hand menu options will display **'Employee Electronic Documents'**



Expand the menu to display the headings of document categories available. Select '**Copy DBS Certificate'**

Select **'Copy DBS Certificate'** and **'Upload a new document'** to attach a copy of the DBS, along with any required supporting documentation.



8 - New Starter Set-up ICT Form

The manager will be required to submit a form detailing what IT requirements are needed for the role. The manager will receive an alert the day after the initiation email informing to submit the form with the required ICT information (see section 5 for further information on how to locate the form). This will ensure all IT arrangements are in place prior to the start date. **Please note:** ICT will **not** be notified of this request until all pre-employment checks are complete and the employees record has been updated with the confirmed start date by Payroll and Employee Services.

Once the form has been submitted you will receive a further alert to inform submission has been successful, please see section 6 for further information on viewing a form previously submitted.

As a manager you will receive notification from IT with the username and password for the onboarder once the above process has successfully completed. Please submit this form **only** and not any additional via the ICT portal.

Note: IT have removed the option for the manager to request a copy of an associated network ID due to security reasonings.

When completing the form the manager will need to declare the type of account the onboarder requires; 'Permanent' or 'Temporary' staff member, along with the requirement of an email address, and if the new role will be connected to children in education:


Account Type

What type of account do you require?

DCC Staff Permanent

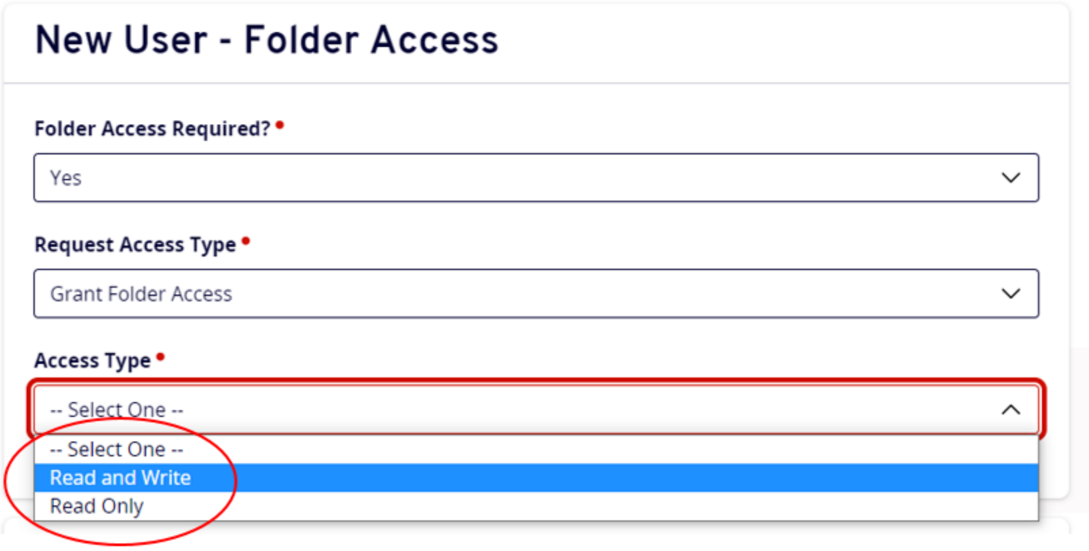
New User Education Support

-- Select One --

Email required?

-- Select One --

Folder access information will need to be provided by the manager, dependant on if folder access if required, the form will require the manager to declare the type of access the onboarder will require:



New User - Folder Access

Folder Access Required? *

Yes

Request Access Type *

Grant Folder Access

Access Type *

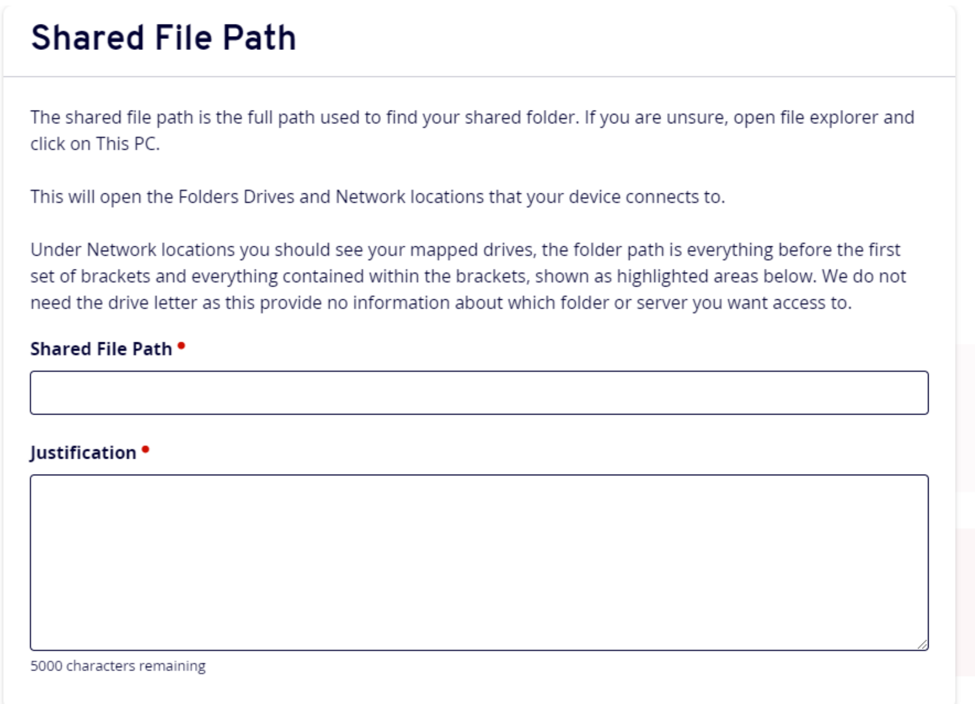
-- Select One --

-- Select One --

Read and Write

Read Only

The manager will be required to add the required shared file path, along with justification of access:



Shared File Path

The shared file path is the full path used to find your shared folder. If you are unsure, open file explorer and click on This PC.

This will open the Folders Drives and Network locations that your device connects to.

Under Network locations you should see your mapped drives, the folder path is everything before the first set of brackets and everything contained within the brackets, shown as highlighted areas below. We do not need the drive letter as this provide no information about which folder or server you want access to.

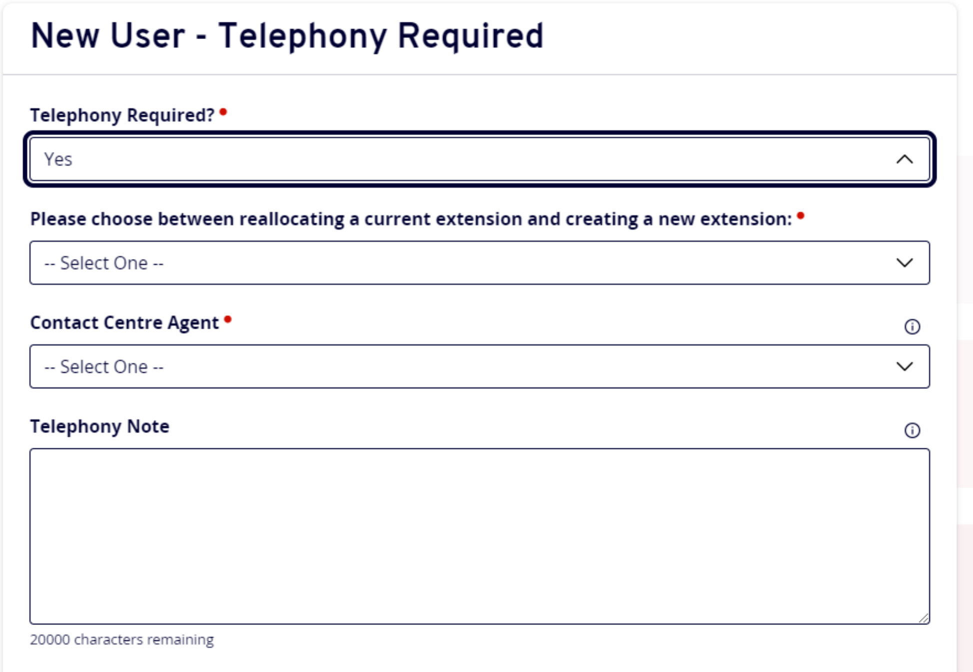
Shared File Path *

Justification *

5000 characters remaining

If a shared mailbox access is required for the onboarder role, the manager will need to specify this with the ICT starter form, and type the name of the required email address:

Any telephony requirements can be requested (if applicable), the manager will need to declare if a new extension is required, or re-allocation of an existing and declaration of contact centre agent:



To avoid duplication of forms received by IT the most recent submitted will be actioned upon the onboarder receiving their start date confirmation. Managers are reminded to utilise Proxy Forms History (please see section 6 for further details) to avoid duplication. In the event the manager is absent and the lead officer changes through the course of the pre-employment checks it must be communicated at the point of handover the ICT form has been submitted previously, it must also be noted that the IT log in information will be sent to the manager who has submitted the New Starter ICT Set-up form if the lead officer does change half way through.

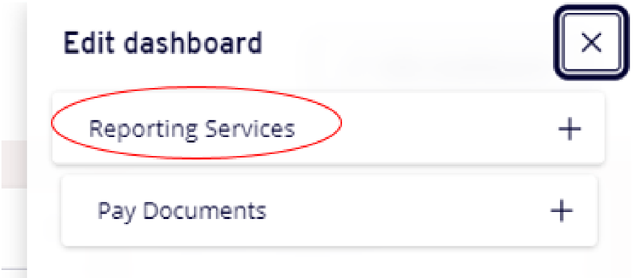
8 - MyOnboarding Checklist Widget

The onboarding process isn't solely about tasks completed by the onboarder – it is about the whole pre-employment and induction process which involves tasks undertaken by PES, Onboarder, Manager and other parties collectively.

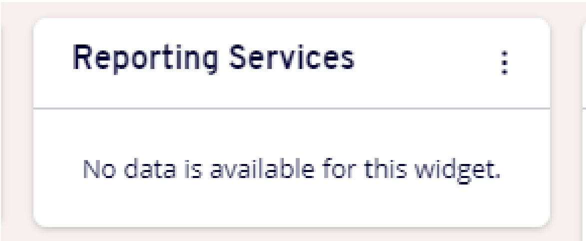
The **[MyOnboarding Checklist]** reporting widget is available to allow managers the opportunity to monitor the overall progress of PES, manager and onboarder related tasks. The MyOnboarding

Checklist, which will be updated by PES on a daily basis, (and the associated automated email alerts) will help to co-ordinate the pre-employment and induction process more efficiently.

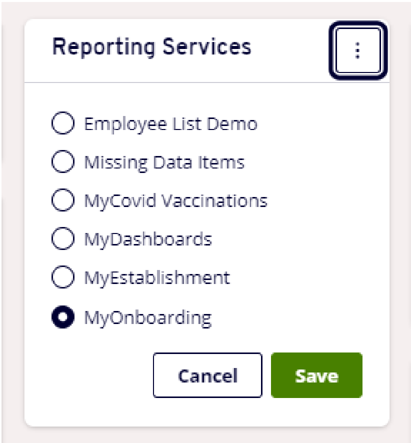
To access the checklist widget from the MyView dashboard select **[Edit Dashboard]**. From the list of options select **[Reporting Services].**



Once selected, click the cross in the top right corner to close the 'Edit Dashboard' option. By Selecting Reporting Services, a widget will appear on the dashboard, displaying 'Reporting Services' with 'No data available for this widget'. The widget will need the manager to select from the multiple reports available the **[My Onboarding Report]** to display the information.



To open the **[My Onboarding Report]** please select the three dots in the top right-hand corner and select 'settings'. The settings cog will display the multiple lists of reports available via Reporting Services, please select the radio button for **[My Onboarding]**.



The widget will display in a visual display the report. You will see an initial long list of current onboarding employees. Information relating to onboarding employees will only display in this widget until the required pre-employment checks are completed or if the onboarding has been cancelled.

The initial list displayed in the widget will provide you with summary onboarder details including:

- Employee Forename and Surname
- Employee Number

- Direct Reportee Flag
- Post Number
- Post Title
- Post Start Date
- Onboarding Phase Start Date
- Organisation Hierarchy Details

MyOnboarding Data refreshed 2022-04-21 at 17:56:55

80% search report

Employee Number	Forename	Surname	Direct Reportee	Post Number	Post Title	Onboard Phase Start Date	Onboard Phase Status	Level2	Level3	Level4
784170	JASON	HALL	Y	0075233	Payroll and Employee Services Officer	28/01/2022	OPEN	Resources	Transactional Services	Payroll & Employee Services
784172	KAREN	SMITH	Y	0075233	Payroll and Employee Services Officer	31/01/2022	OPEN	Resources	Transactional Services	Payroll & Employee Services
784173	ANGELA	JONES	Y	0075233	Payroll and Employee Services Officer	31/01/2022	OPEN	Resources	Transactional Services	Payroll & Employee Services
784174	NATALIE	CARROLL	Y	0075233	Payroll and Employee Services Officer	31/01/2022	OPEN	Resources	Transactional Services	Payroll & Employee Services
784175	DANIEL	SMITH	Y	0075233	Payroll and Employee Services Officer	31/01/2022	OPEN	Resources	Transactional Services	Payroll & Employee Services
784186	JAMES	HALL	Y	0075233	Payroll and Employee Services Officer	04/04/2022	OPEN	Resources	Transactional Services	Payroll & Employee Services
784188	CARL	SMITH	Y	0075233	Payroll and Employee Services Officer	21/04/2022	OPEN	Resources	Transactional Services	Payroll & Employee Services

You can access the underlying onboarding checklist information via either of the Employee Forename and Surname fields which would then display all of the user fields relating to that onboarder.

MyOnboarding Checklist Data refreshed 2022-04-21 at 18:04:54

110% search report

Onboarding Checklist

Employee	784188	SMITH	CARL
Post	0075233	Payroll and Employee Services Officer	
Post Start Date	31/12/2099		

Onboarding Summary	
Start Date Requested From Manager by PES	
Date Start Date Confirmed To PES by Manager	
Date All Pre-Employment Tasks Completed	
Onboarding Cancelled by PES	
Onboarding Cancellation Reason	
CYPS Senior Manager Approval	

References and General Onboarding	
Date References Requested by PES	
Name Of Referee 1	Will Jones
Reference 1 Return Date	
Name Of Referee 2	Bill Smith

9 – Manager Automated Email Alerts

Throughout the onboarding process you will be prompted by automated email (BAM) alerts for any outstanding tasks you are required to complete to progress the pre-employment checks.

Onboarding progress update alerts have also been designed to generate to the manager and onboarder every Thursday and Sunday until all pre-employment checks have been completed.

9.1 - BAM 1 – Manager New Onboarding Campaign Initiated

Once PES have initiated an onboarder the manager will receive BAM 1 the following day to inform them the process has begun. The BAM will contain information to inform the manager to log into MyView to view the 'Onboarding View' now visible in team selector. The BAM will contain information of the onboarder' s notional start date, 'first day' information and will encourage the manager to submit a New Starter ICT Form as soon as possible. Every BAM alert will also contain PES contact information for each service area applicable to contact if required.

9.2 – Bam 30 – Manager ICT New Starter Form Submission Required

The following day after an onboarder has been initiated the manager will receive BAM 30 requesting a MyForm (see section.5) is submitted for ICT requirements, the manager who submits the form will be the one who receives the log in information from ICT.

9.3 – BAM 31 – Manager ICT New Starter Form

After the ICT new starter form has been submitted the manager will receive a BAM to confirm submission.

9.4 - BAM 5 – Manager Onboarding Update

BAM 5 will generate to managers every Thursday and Sunday to provide a summary status for each onboarder aligned until the pre-employment checks have been completed and the onboarder has a start date agreed and added to the checklist prompting a stop to the BAM alert.

9.5 - BAM 7 – Manager Employee Onboarding DBS Certificate Verification

Depending on the role in question an onboarder maybe required to have a DBS as part of the pre-employment process, once the DBS consent form has been completed by the onboarder and a date has been added to the onboarder checklist by PES, an alert will be generated to the manager to now verify the information. Once notified the manager should arrange to site the original DBS certificate and upload to MyView (section.7), contact details of the relevant service area for PES will be included with the BAM alert.

9.6 - BAM 8 – Manager Employee Onboard Lifeguard (Pool Water) Competency Assessment

Depending on the role in question if a lifeguard competency assessment is required, the manager will receive a BAM alert the following day (one time only) to inform that submission of a MyForm (section.5) is now required following the assessment.

9.7 - BAM 9 – Manager Onboarding Prior to Employee Starting (Pre-Induction Checklist)

Once the onboarder has come to the end of the pre-employment checks and a start date has been notified to PES by the manager, an alert will be generated upon PES entering the start date confirmed date to the checklist. The alert will contain information prompting the manager to now submit the pre-induction checklist within MyForms (section.5).

9.8 - BAM 10 – Manager Employee Onboarding Occupational Health Report Verification

If an occupational health report is required for the role, once complete, PES will update the onboarding checklist to generate BAM 10 to the manager to submit a MyForm (section.5) to confirm they have verified the report (report can be accessed via ‘Employee Electronic Documents – Occupational Health report’) and any relevant action has been taken / planned in preparation for the employee commencing the role.

9.9 - BAM 11 – Manager Employee Onboarding Qualification Verification

The following day after an onboarder has been initiated the manager will receive BAM 11, and continue to receive daily, until a MyForm (section.5) is submitted to confirm they have verified and sighted the relevant qualifications. Once sighted the manager must upload a copy of the certificate to ‘Employee Electronic Documents’.

9.10 - BAM 12 – Manager Employee Onboarding Reference Verification

BAM 12 will be generated to the manager upon PES completing the onboarder checklist to confirm the date the references have been requested. The BAM will generate daily until the manager submits a MyForm (section.5) to confirm they have verified the references received and are happy to proceed. References returned are located within ‘Employee Electronic Documents’ – ‘References’.

9.11 - BAM 13 – Manager Employee Onboarding Right to Work Checklist

BAM 13 will be generated daily until the manager completes the relevant MyForm (section.5) to confirm they have verified the onboarder’ s relevant Right to Work information including home address details, DOB, date of check, type of check and uploaded attachments of appropriate ID documentation. Please refer to the intranet for more information on Right to Work checks.

9.12 - BAM 14 – Manager Employee Onboarding Sickness Absence Verification

Once the onboarder has completed the previous 2 years of sickness history and marked the task as complete, PES will check the task submitted and subsequently update the onboarder’ s checklist. The checklist will generate BAM 14 to the manager to submit the relevant MyForm (section.5) to confirm they have verified and are happy with the sickness history submitted. The manager can view the underlying sickness history by selecting the task within the MyPeople Onboarding Module.

Please note in the event an applicant states ‘No’ to having absence history BAM 14 will not be generated to the manager in this instance as there will be nothing to verify. Managers are reminded that they are able to see details of the sickness absence information provided by the onboarder via Onboarding Module.

9.13 - BAM 20 – Manager Onboarder Driving Assessment Passed

Once the onboarder has completed the driving assessment and passed, the manager will be notified via BAM 20 following communication from the fleet team to PES to confirm the onboarder has successfully completed the assessment.

9.14 – BAM 26 – Confirmation of Start Date Required

Upon all pre-employment checks being successfully completed, the manager will be notified via BAM 26 that a start date can now be agreed with the onboarder. Once agreed the manager will be required to submit the form (section.5) to inform PES of the date. **Please note:** this form must not be submitted until the alert has been generated by PES informing all checks have been successfully completed.

9.15 – BAM 29 – Schedule 2 Manager Verification

The manager will be notified when the onboarder has completed the schedule 2 information task. Once the manager has reviewed the form, they will be required to contact each previous employer to verify the required details for Schedule 2 regulations. The manager will then be required to submit the verification form for each individual previous employer (please see section 5.8 for further information).

10 – Durham Learning & Development Notification Email

DLDS access has been granted to the onboarder via MyView to complete any mandatory courses 14 days prior to the confirmed start date. Once the manager has submitted the confirmation of start date form, Business Services will review and arrange for the onboarder's record to be updated from the notional start date to confirmed. Within 24 hours of this process the onboarder and manager will receive information that the onboarder can now access DLDS:

This is an automatic email from the Durham Learning and Development System, Durham County Council.

Hello,

Your team member (name) has been assigned the following Corporate Mandatory Training Program: Core Employees: Corporate Mandatory Training Programme from September 2023.

They have received an automated email from the system, but this may have been sent to their personal email address, along with their login instructions with a link to manual login.

Please note: new accounts are set up as manual login accounts. Therefore, the single sign in link from the intranet homepage will not work.

This program should be completed as part of their induction and within 3 months of their employment.

Their Learning and Development record is available via the Durham Learning and Development System (DLDs).

If you wish to check their program status go to: Core Employees: Corporate Mandatory Training Programme from September 2023. (You will have to sign into the DLDs in your usual way.)

If they complete their corporate mandatory training via workbook, or a toolbox talk, please arrange completion of these courses with your employee.

If they have any difficulties, they should email: corporateE-Learning@durham.gov.uk

Kind regards

The Corporate DLDs Admin Team

CorporateE-Learning@durham.gov.uk