Penderels Trust

A guide to using **My View** for Employers

Welcome to the 'My View' User Guide for direct payment employers. It provides a step-by-step guide to using the My View system on a desktop computer/laptop.

We have written a separate My View User Guide if you are using the mobile phone app. We have also written separate guides for your PAs.

What is 'My View'?

My View is an online system that provides a secure way for you to input hours worked (timesheets) and view payroll information for your PAs. Your PAs will also be able to view their own individual pay information.

What functions are available on 'My View'?

You can:

- Input and authorise hours worked and hourly rates to be paid for each PA. This is instead of sending a timesheet in for every pay cycle.
- View payslips and other pay documentation for your PAs.
- Authorise sickness leave for your PAs.

Timesheet claims should be submitted by your usual timesheet deadline at the latest.

Payslips are available to view the day before the usual pay day.

Before you start

We need to set you up on the My View system before you can use it.

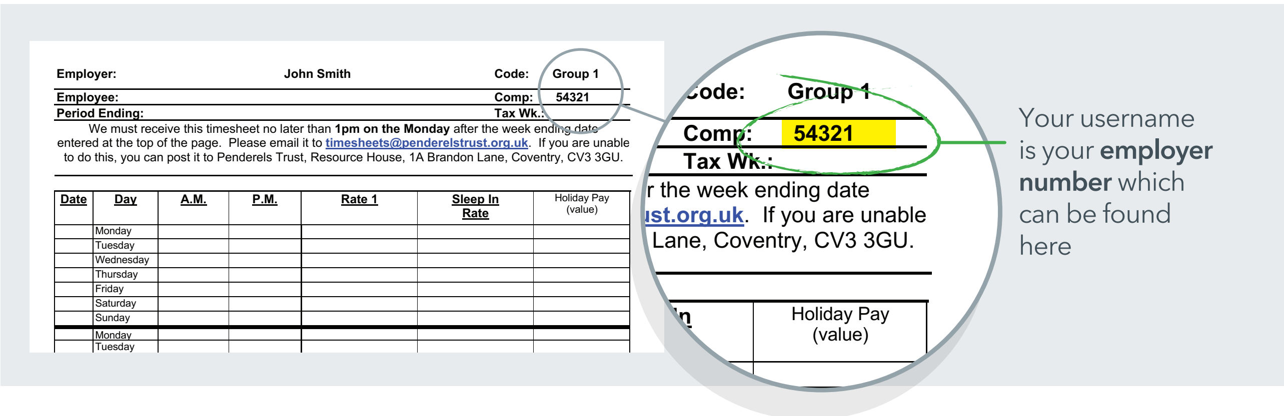
We need your email address and the email addresses of all your PAs to do this. If you are receiving this guide, you should have already supplied us with this information. If this is not the case, please email **myview@penderelstrust.org.uk** and ask us to set you up.

Section One: Getting Started

The first time you use My View, you will need to register. You only have to do this once.

Before you start, you will need your **Employer Number**. This will be a number which sometimes has 'CG' in front of it and is located in the top right hand corner of your timesheets and on your payroll summaries (see examples below).

Timesheet example



Payroll Summary example

- **You will need to download an Authenticator App** on a mobile device to get the code you will need later in the set up process. This adds an extra level of security for your account. Please see Step 7 on Page 6 for more information on this.

  Microsoft Authenticator is a well-recognised one and can be downloaded onto Apple or Android phones.

  The app is free. Other authenticator apps are available but beware of those that charge a fee or are free for a trial period only.

  This is what the Microsoft Authenticator app looks like in the App store/Google Play etc.

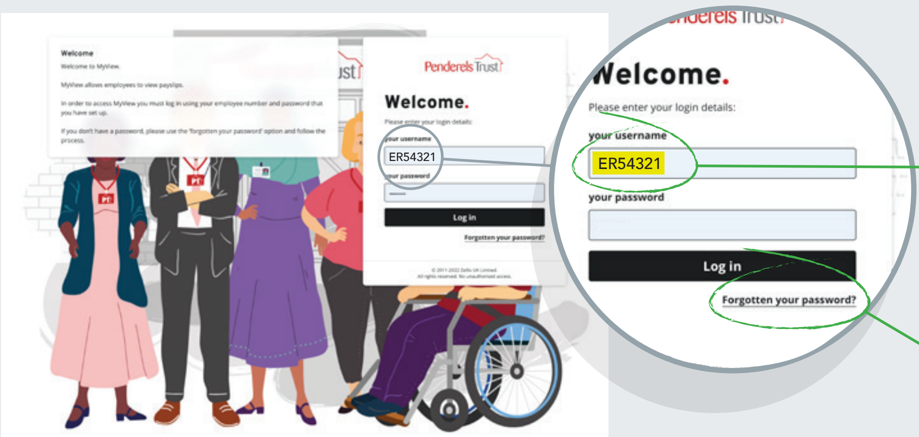
If you don't have a mobile phone that can do this, please email us at myview@penderelstrust.org.uk and we will switch off this feature on your account.

Step 1

Use this link to access My View: **https://tinyurl.com/My-View-Home-Page**

To register you must enter your **username**, which is your **employer number**, with **ER** in front of it instead of **CG**.

You then need to set up a password. To create a new password, click **Forgotten your password?** and follow the instruction in Step 2.



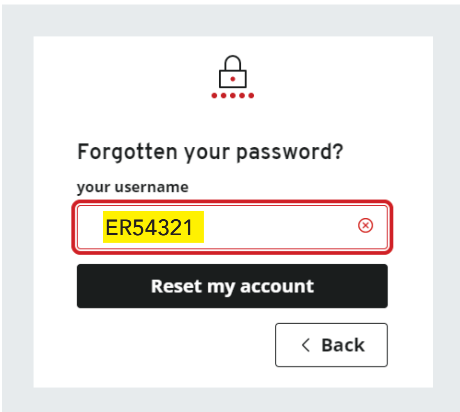
Enter the letters **ER** followed by your **employer number** (This will be your username)

Click '**Forgotten your Password?**'

Step 2

In the 'Forgotten your password?' section, enter the letters **ER** followed by your **employer number.**

Then click the '**Reset my account**' button. An email with a temporary password will automatically be sent to you, as explained in Step 3.



Step 3

Once you have reset your account, you will receive an email with a temporary password, as shown below.

noreply@myview.zellis.com

MyView Employer Self Service Forgotten Password

Dear John

Your request for a password reset has been processed, please copy and paste the password below.

5%e*U%j*

Kind Regards

System Adminisrator

Enter this temporary password into My View along with your username and click '**Reset my account**'.

Forgotten your password?

your username

ER54321

your password

5%e*U%j*

Reset my account

< Back

Step 4

You will now be asked to reset your password to one of your choice.

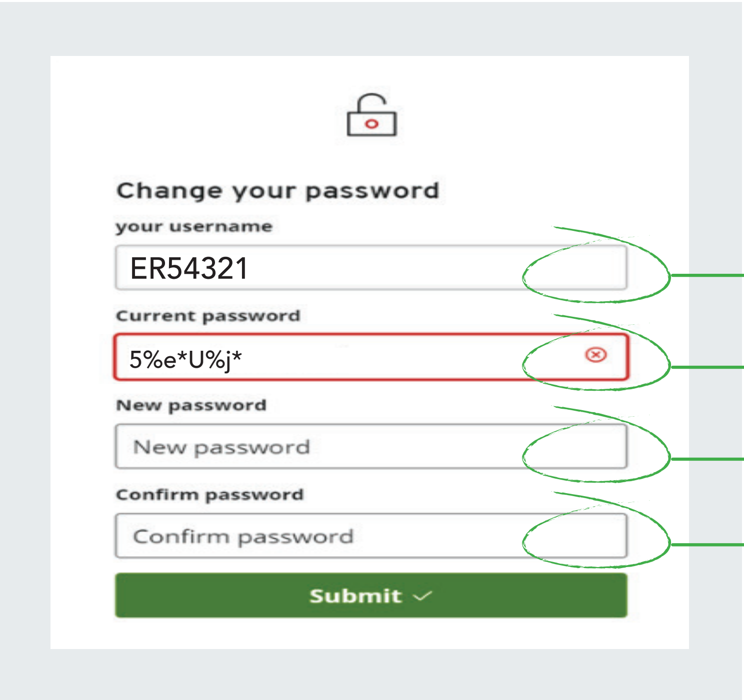
Your new password must be 8 characters long and must include:

1 upper case letter
1 lower case letter
1 number *and*
1 special character.

Top Tip

We recommend you keep your username and password details in a safe place.

Penderels Trust staff do not have access to your password. If you forget your password, you will need to click on '**Forgotten your password?**' to create a new one.



Enter the letters **ER** followed by your **employer** number which is your **username**

Enter the **temporary password**

Enter your **new chosen password**

Re-enter your **new chosen password**

Once you have entered your details, click **Submit** and you will be taken to the **My View Welcome** page, see Section Two in this guide.

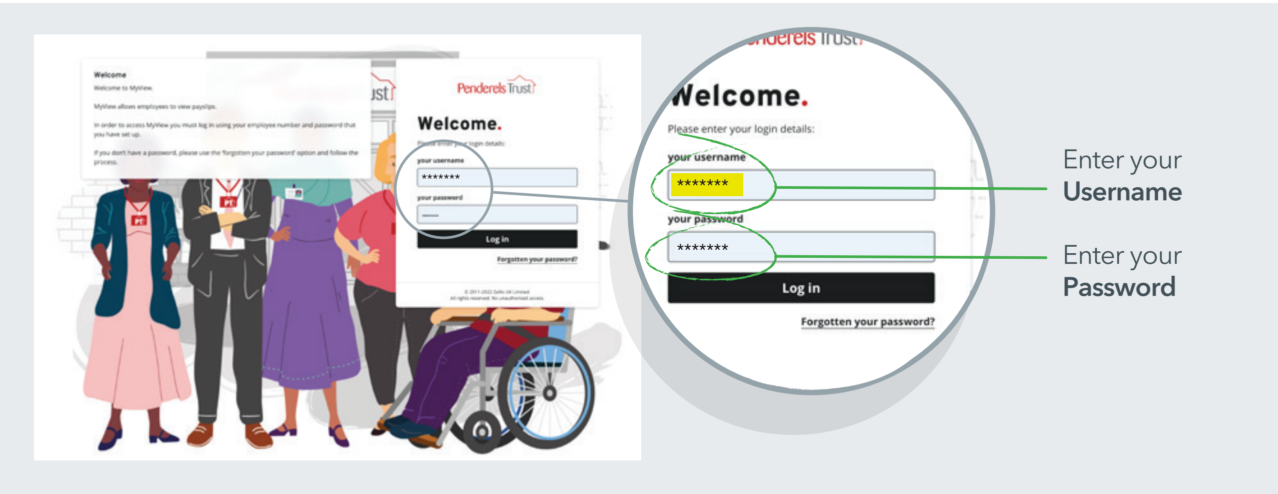
Step 5: Setting Up Multi-Factor Authentication

My View includes a **multi-factor authentication (MFA)** which provides enhanced security. As My View holds personal data on you and your pay information, we want it to be as secure as possible.

You will need a mobile phone to scan the QR code. If you don't have a mobile phone, please email us at **myview@penderelstrust.org.uk** to ask us to switch off this feature on your account.

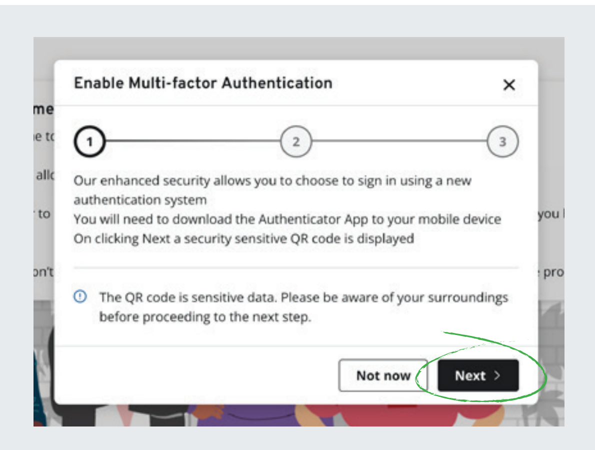
Click on the link to access My View: **https://tinyurl.com/My-View-Home-Page**

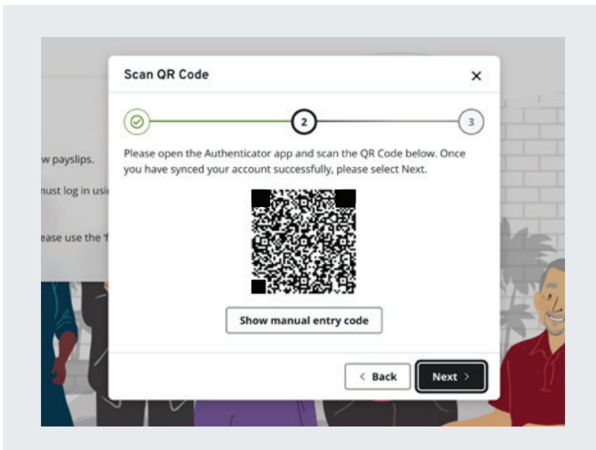
To log in, enter your **username** and **password** and click Log In.



When you log into My View, a box will appear.

Click '**Next**'.

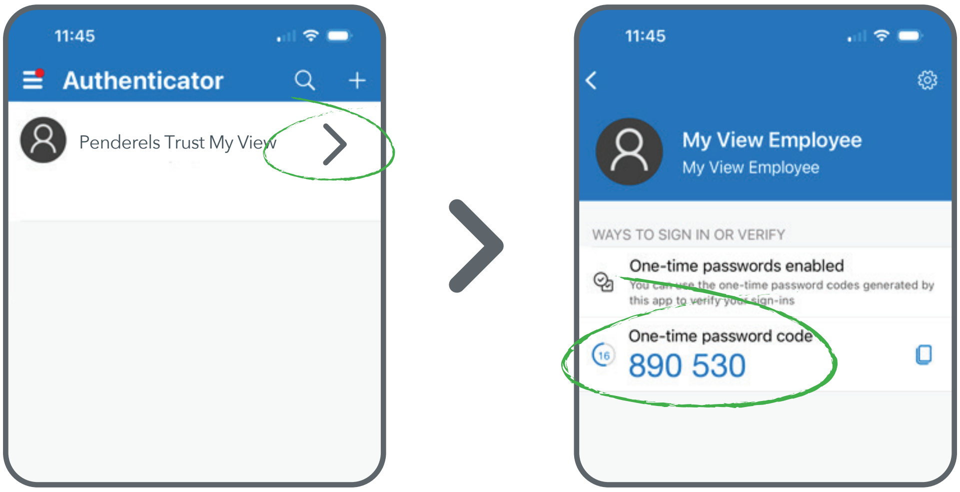




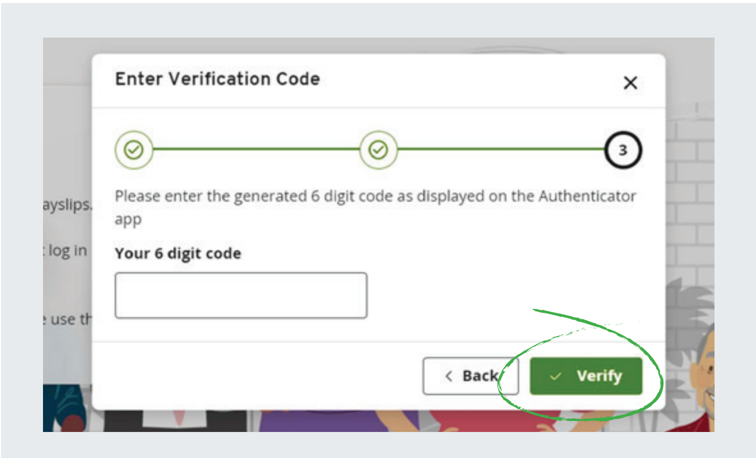
Scan the QR code with your mobile phone camera or QR scanner app. This should take you to your chosen authenticator app.

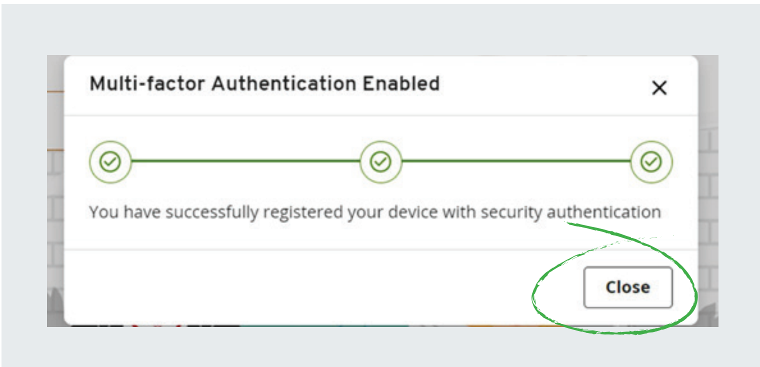
If you use the Microsoft Authenticator App, it will appear like this.

Click on the arrow which will take you to the verification code.



Enter your six-digit code in the box and click on '**Verify**'.





Click on **Close**. You will then be taken into your account.

Next time you log in, you just need to go to your authenticator app to get a new code, you shouldn't need to scan the QR code again.

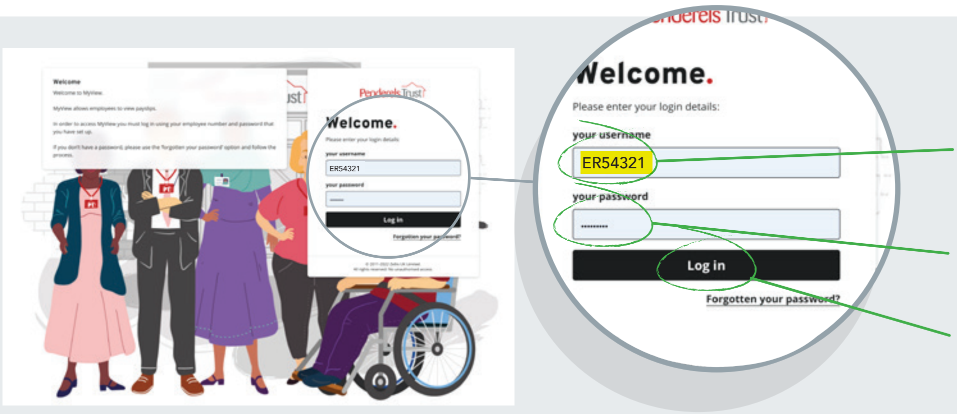
Section Two: Using My View

Step 1

Use the link below to access **My View**:
https://tinyurl.com/My-View-Home-Page

To log in, enter the letters **ER** followed by your **employer number** (which makes up your username), enter your chosen password and click Log in.

NOTE: If this is the first time you have used My View and have not registered, please go to Section One and complete the Getting Started process.



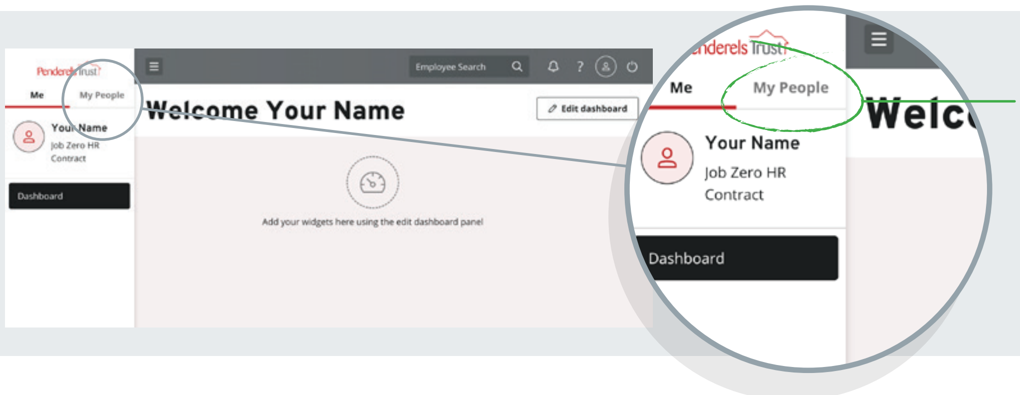
Enter the letters **ER** followed by your **employer number** (This will be your username)

Enter your chosen password

Click **Log in**

Step 2

Once logged in, you will see the Welcome page. Click on the **My People** tab which takes you to the **Team Selector** section where you can view employee details.



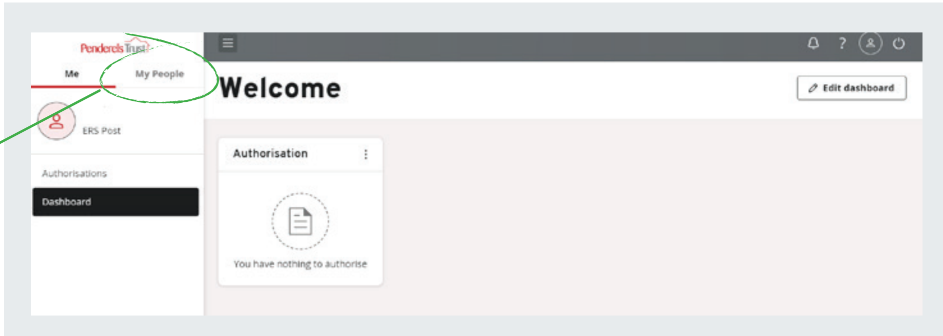
Click on the **My People** tab

To submit a timesheet claim for your employee(s)

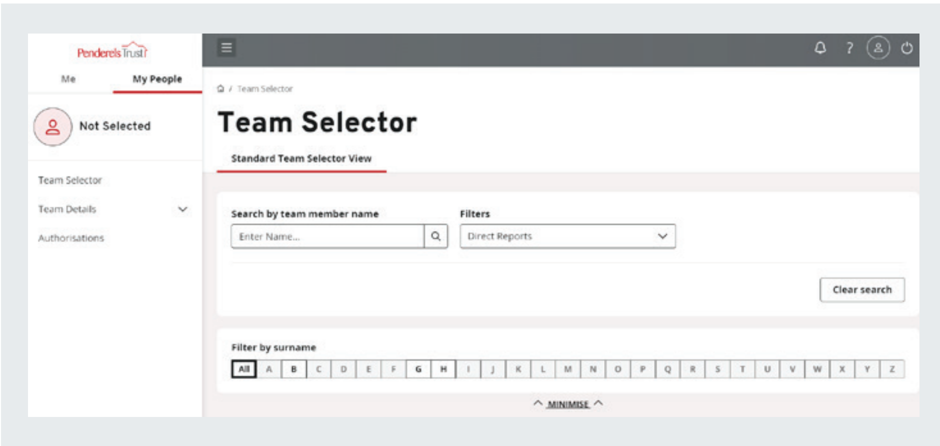
Timesheet claims can be completed by the employer or the employee. You, as the employer, will always be asked to authorise the submission if it is completed by your employee. If you would like to enter the information, please follow the instructions below.

If your employees are going to complete the timesheet claims, please go to the 'Authorise Timesheets' section.

Click on '**My People**'

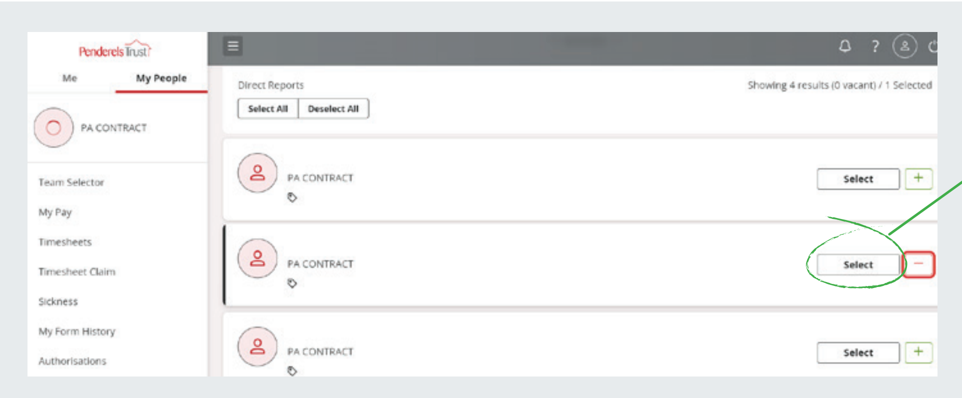


This will bring up the Team Selector page.



Scroll down and select the staff member name you want to submit a timesheet claim for.

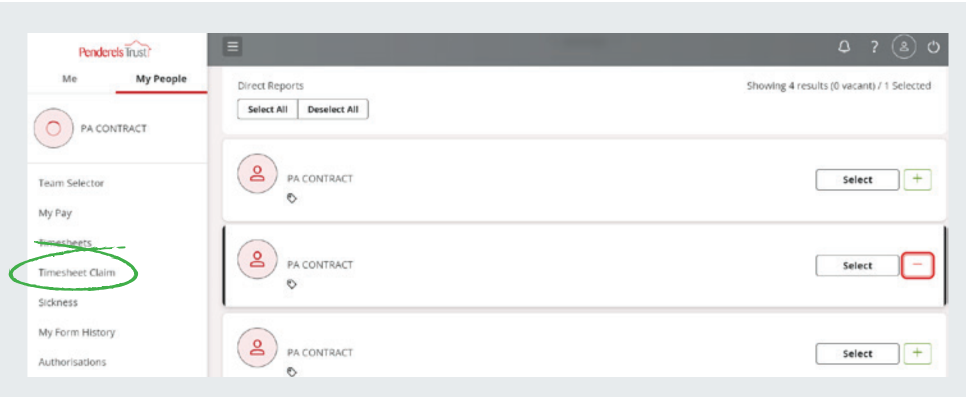
To submit a timesheet claim for an employee, click on '**Select**' under their name so the green plus turns to a red minus. The other employee names should have a green plus under their name.



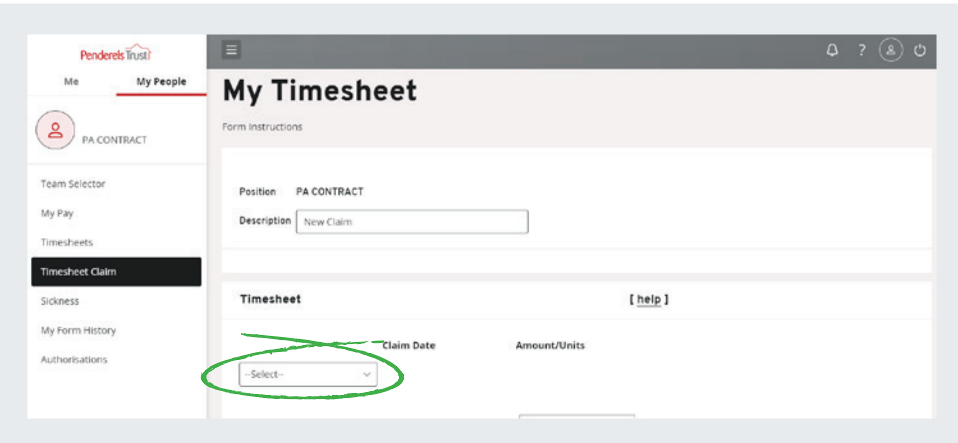
Click here to select this employee.

The box should show a red minus by the person you want to look at.

Select '**Timesheet Claim**'.

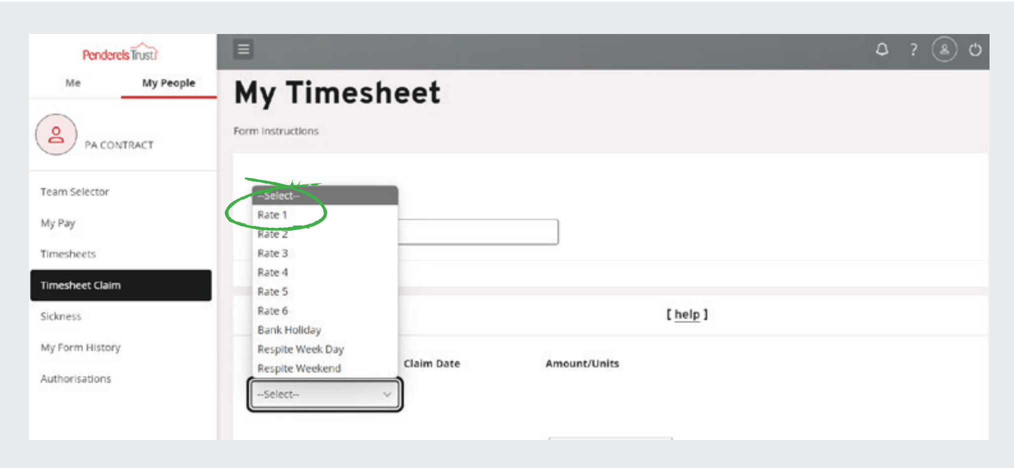


Click on '**Select**' to bring up the rate list.



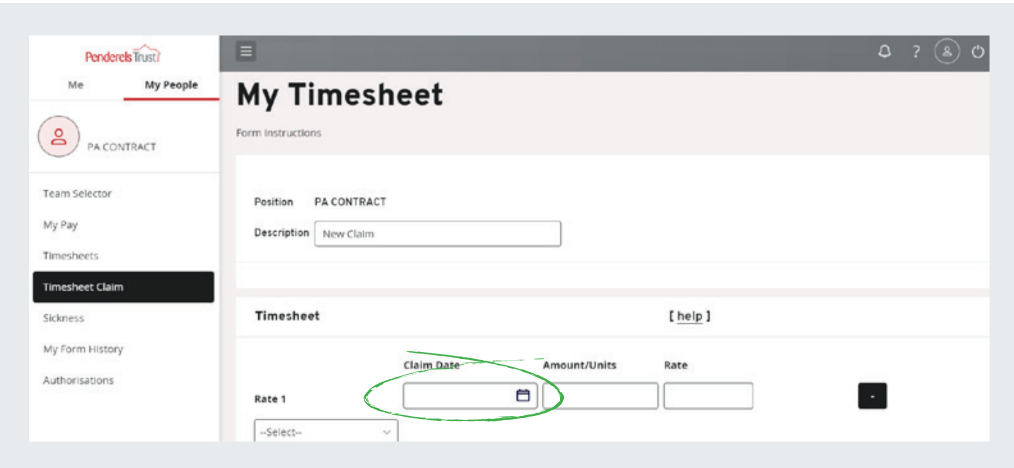
You can enter a number of different pay rates on the same timesheet (up to 6) plus bank holidays and respite rates.

Choose '**Rate 1**' first (unless it is a bank holiday, weekend etc.).

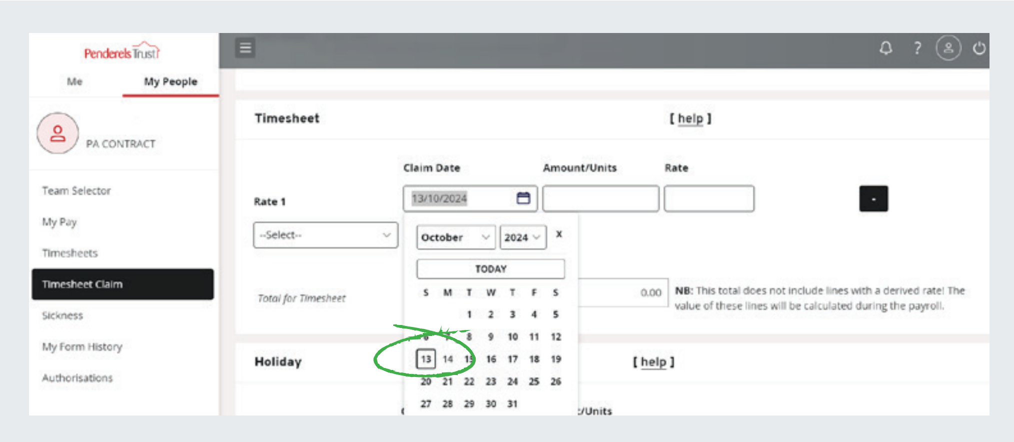


You can see '**Rate 1**' is now selected. Click on '**Claim Date**'. This will bring up a calendar to allow you to choose a date.

This should be the start date of the pay period. You cannot put a date in later than today's date.

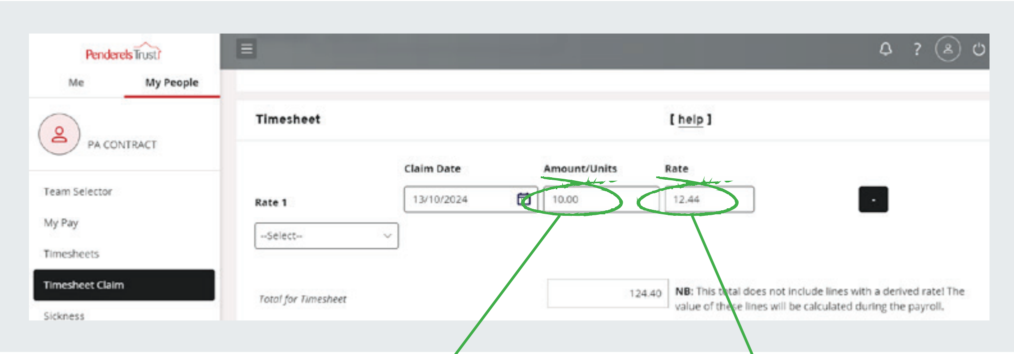


Click on the Start Date of the pay period.



Add in the '**amount/units**'. This is the number of hours worked.

Add in the '**rate**'. This is the hourly rate to be paid for Rate 1 hours.

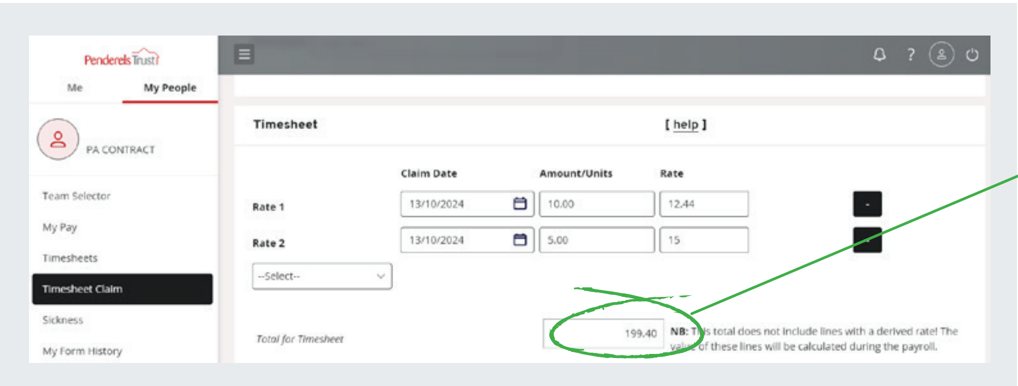


Add in the number of hours worked.

Add the hourly rate of pay in pounds and pence.

If a different rate of pay is needed for some of the hours worked, click on Select and choose '**Rate 2**' (or bank holiday/weekend if applicable). This adds a new line.

Complete this in the same way you did for Rate 1. The system will automatically calculate the amount to be paid in the '**Total**' box.

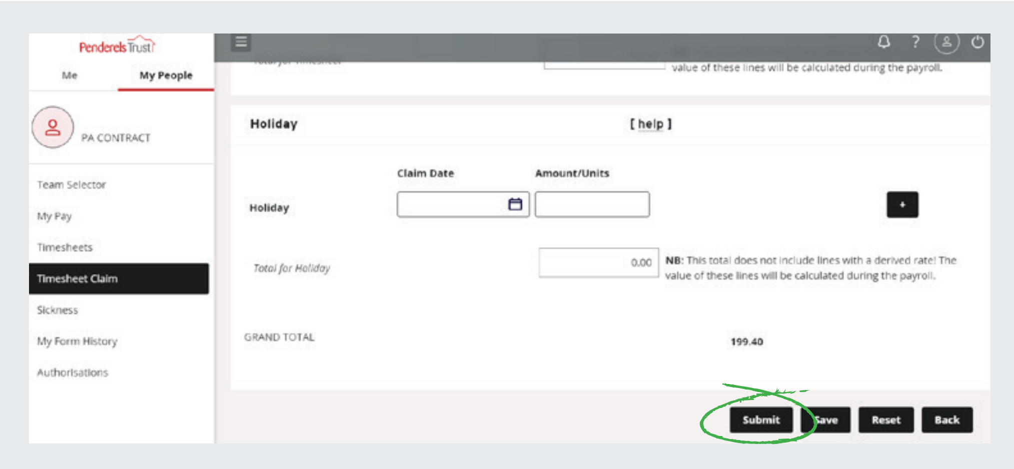


This shows your total pay for the period.

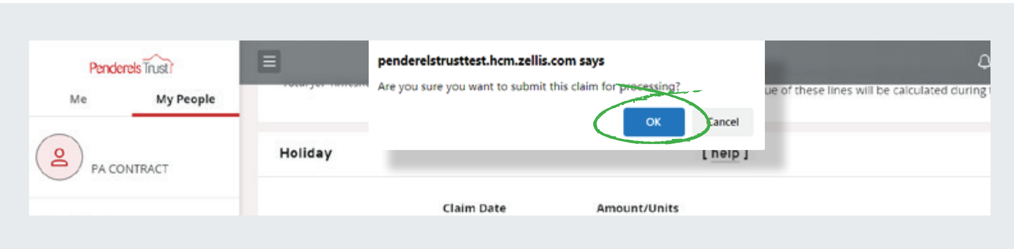
Please ignore the 'NB' sentence, this is not relevant to us.

You can add up to 6 different rates on one timesheet claim.

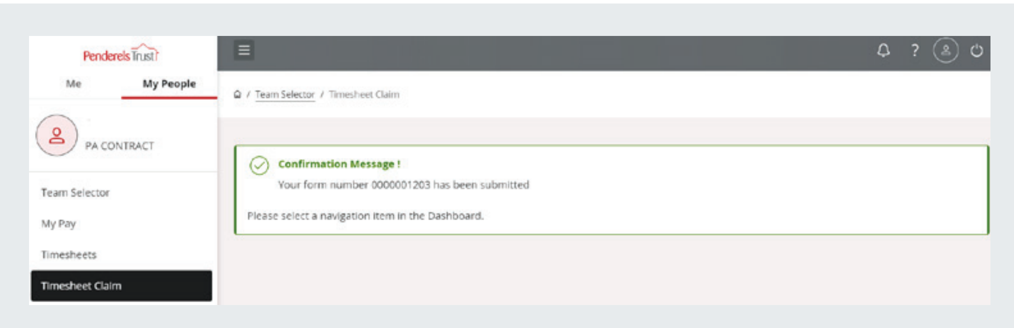
When you have added all the hours worked, scroll down to the bottom where you will see the '**Submit**' button. Click on this.



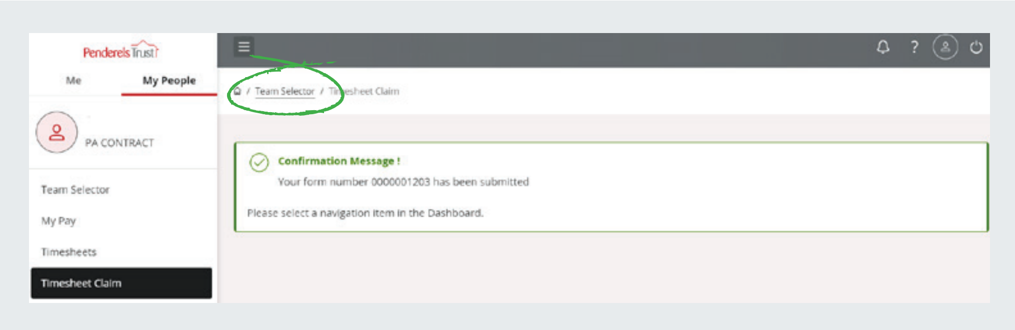
A message will appear asking if you are sure you want to submit this claim. Click on '**OK**'



Once the timesheet claim has been successfully submitted, a confirmation message will appear.



If you want to submit a timesheet claim for another PA, click on 'Team Selector' at the top of the page.



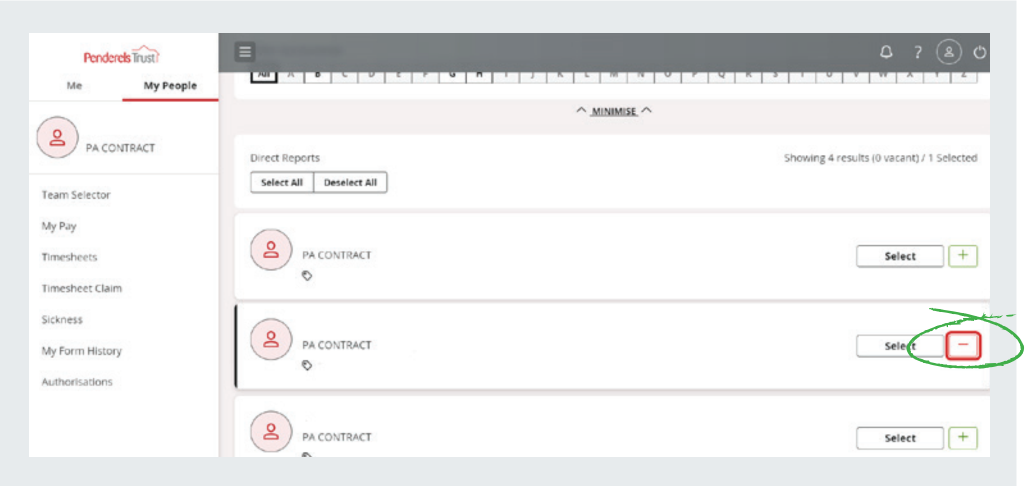
This will bring up your list of PAs. Scroll down to the one you want to submit a timesheet claim for. Click on '**select**' next to their name so they have a red minus. Click on '**select**' on any other PAs that have a red minus (e.g. the PA you previously submitted for) to make it a green plus. Make sure only the PA you want to submit a timesheet claim for has a red minus next to their name.

Click on the '**Timesheet Claim**' option. This will bring you to this screen where you complete hours worked and rates as you did for the previous employee. Remember to click on 'submit' at the end of each employee's claim.

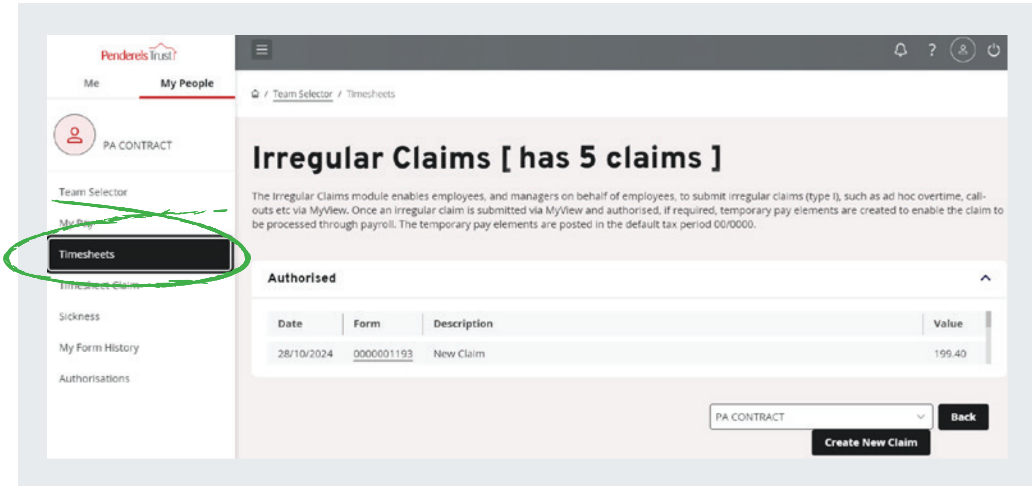
The timesheet claims have now been submitted and will arrive directly into our payroll system for processing.

Checking Previous Timesheet Claims

If you want to see what timesheet claims you have already made for an employee, go to Team Selector to see your list of employees. Make sure you have red minus next to Select for their name.



Click on the '**Timesheets**'.



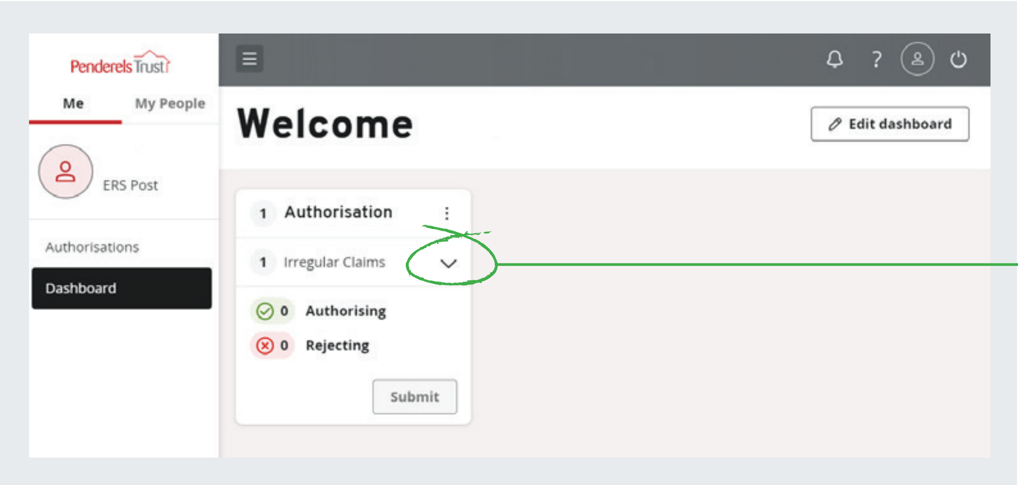
This will bring up a list of timesheets already submitted. These are considered '**irregular claims**' by the system but don't worry about that.

Authorising Timesheets

The system allows your employees to enter their own timesheet information but as their employer, you must authorise this before it will be submitted to our system. This gives you the opportunity to check the information they have entered is correct and you can reject a timesheet claim.

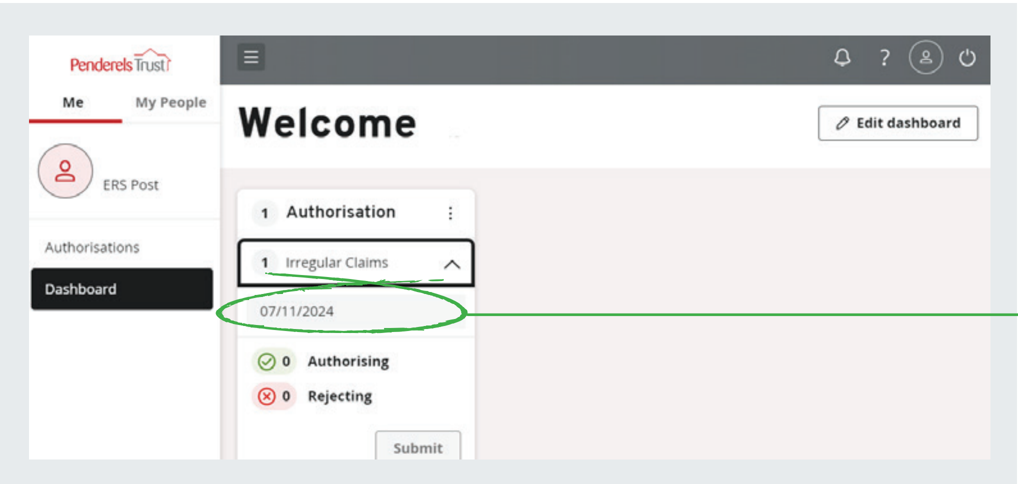
It is important to remember that only timesheet claims you have authorised will be entered on our system and processed. If you reject a claim, it will not submit to our payroll department. It is important you authorise all timesheet claims by their usual deadline date/time or we might not be able to process them.

When you login, timesheet claims awaiting authorisation will show on your home screen. Timesheets are classed on the system as '**Irregular claims**'.

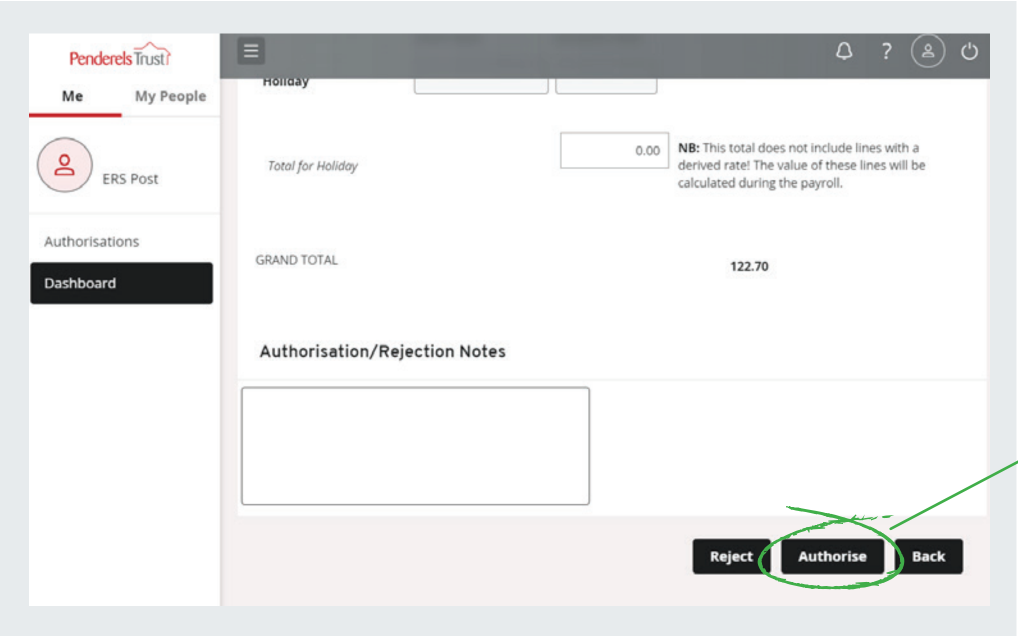


Click here to open the list of timesheet claims.

To view the timesheet before you authorise it, click on the **date/employee** name which will bring you to the timesheet screen. You can click on the '**Authorise**' or '**Reject**' button (or you can click on '**Back**' if you don't wish to take any action at that point e.g. to check something with your PA).

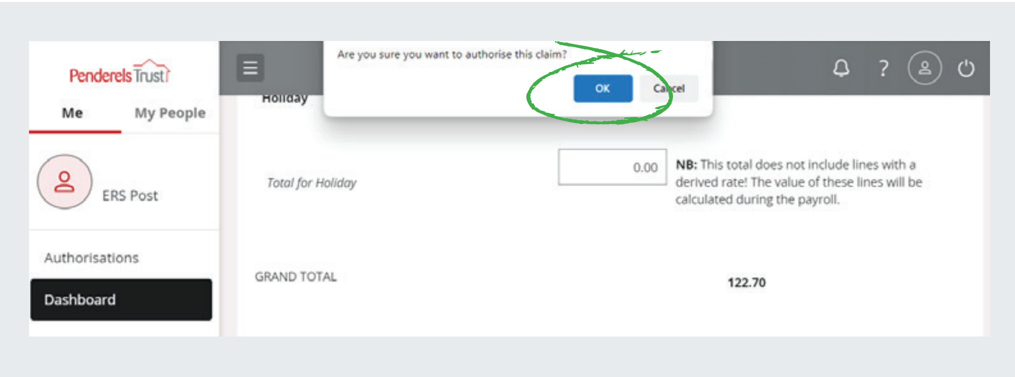


Click on the date/name to view the actual timesheet.

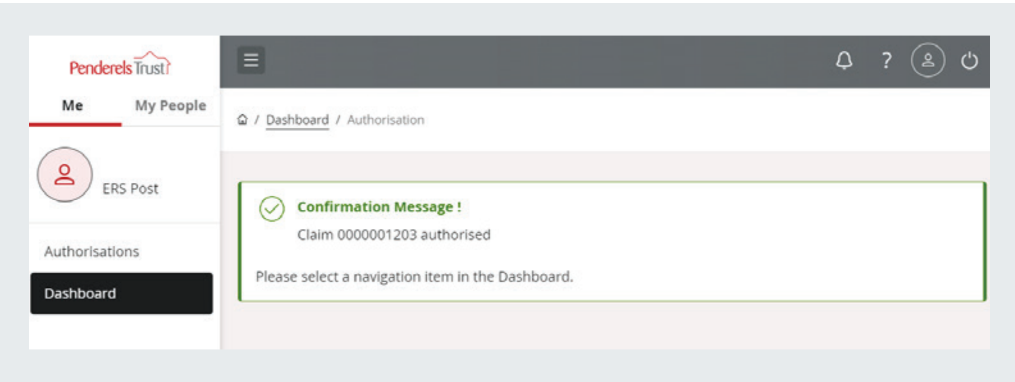


Click to authorise.

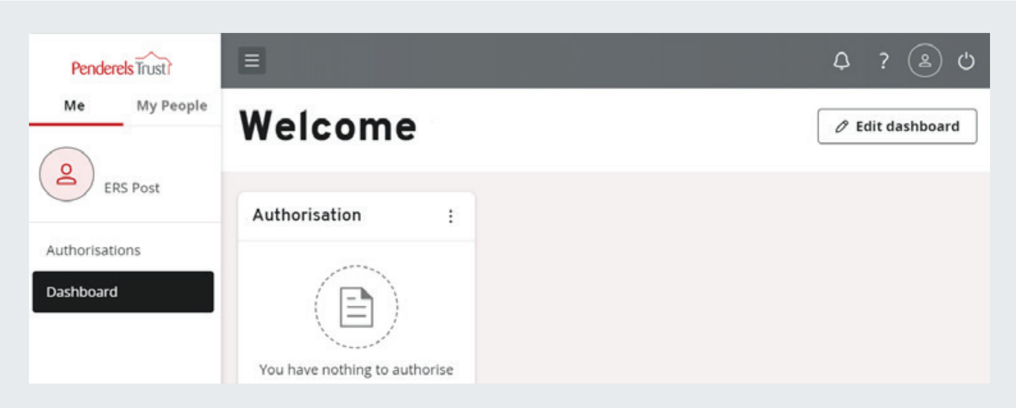
You will be asked if you want to authorise this claim. Click on '**OK**'. If you want to make a change, click on '**Cancel**'.



You will receive a confirmation message. This means the timesheet has now been sent to our payroll team.



When you return to the Dashboard screen, it will confirm that there is nothing to authorise.



If you reject a claim, you will go through the same process and the confirmation message will read '**Claim rejected**'.

Timesheet claims that have been rejected will not be processed so it is important to follow that up with your employee.

Holiday Claims

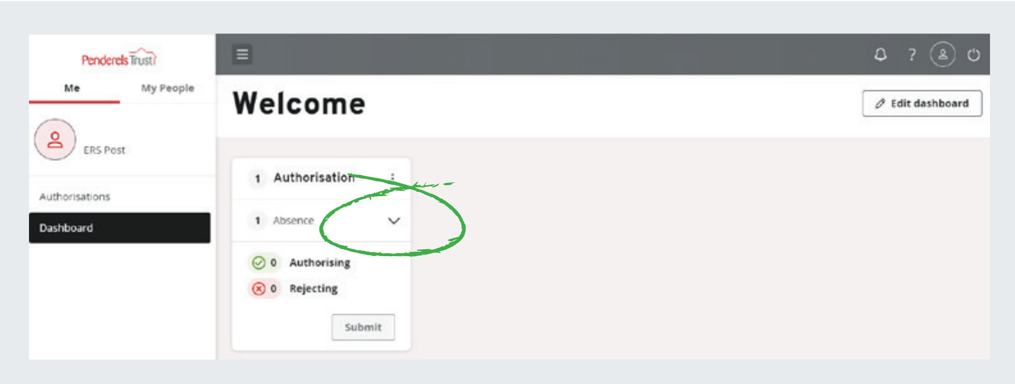
This process is for submitting claims for holiday pay only. It does not remove the need for your employee to request annual leave. You also need to keep an annual leave record for each employee.

You can submit a holiday claim for an employee or they can complete it and send it to you for authorisation. Holiday claims can be inputted alongside usual timesheet hours in one submission.

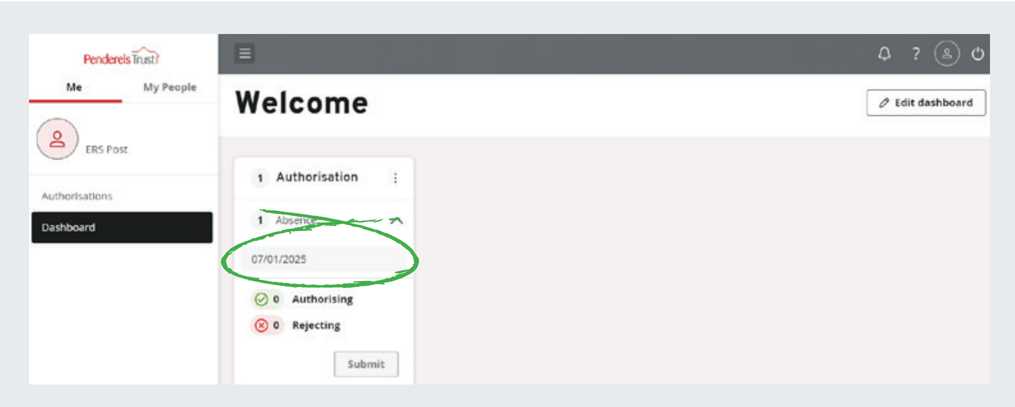
If your employee has completed a claim, when you log in, you will see an authorisation notice on your home screen.

This claim is classed as an '**Irregular Claim**'.

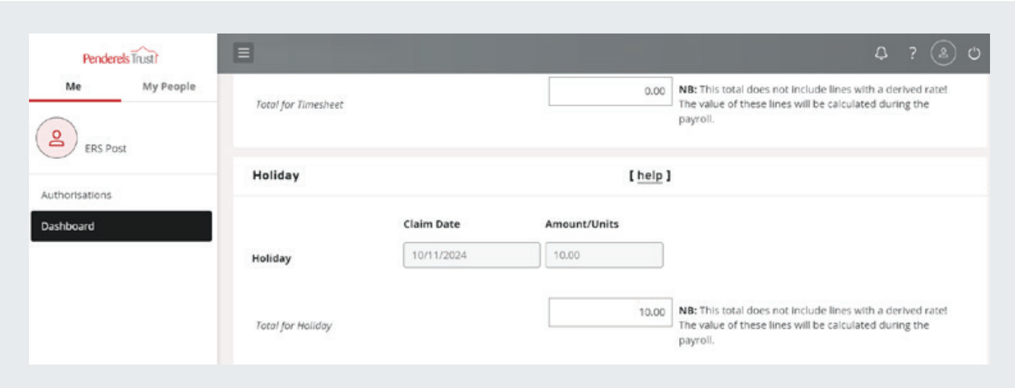
Click on the down arrow and it will show the claim name and date.



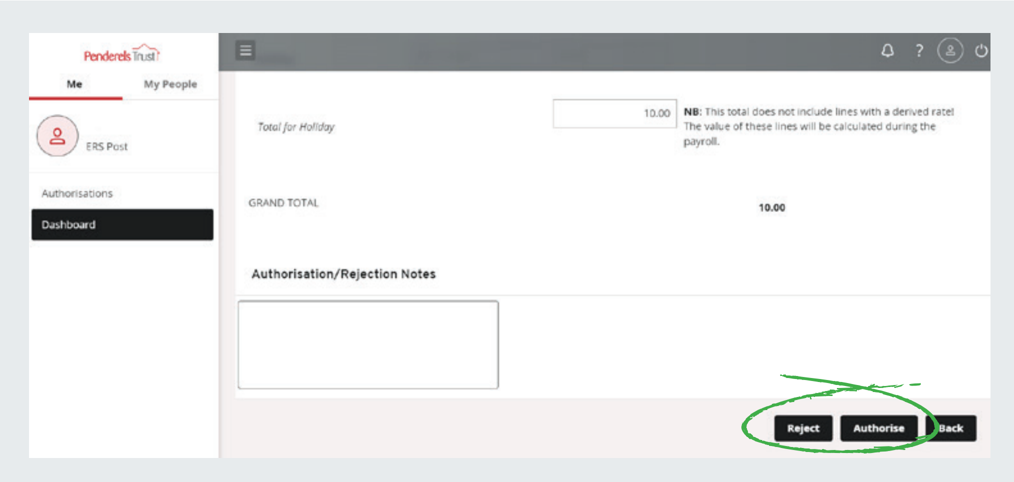
To check the details of the claim, click on the date/name.



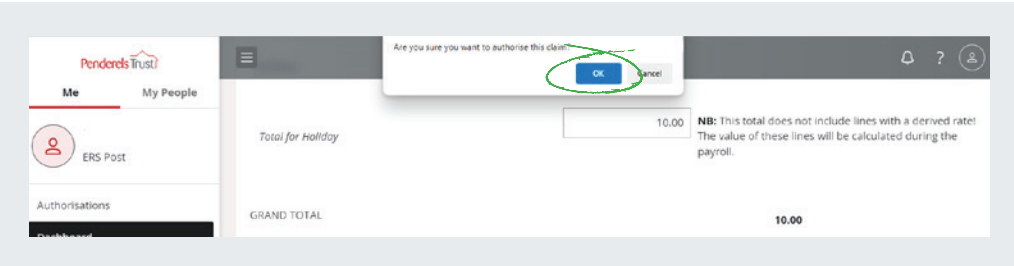
Scroll down to the holiday section that has been completed.



Once you have checked it, scroll down and you can choose to authorise or reject the claim.

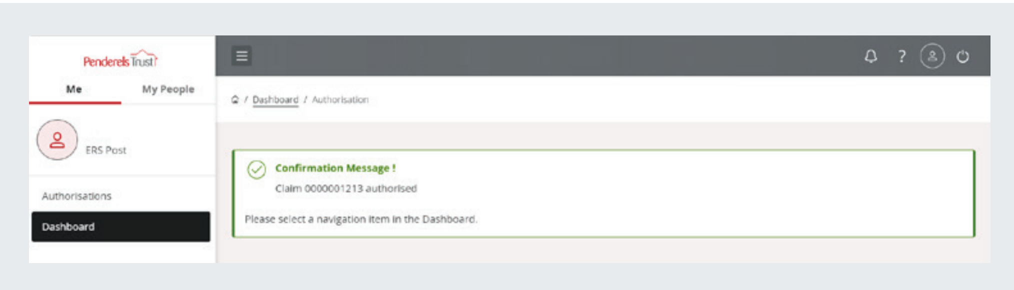


You will be asked to confirm if you wish to progress the authorisation/rejection. Click '**OK**'.



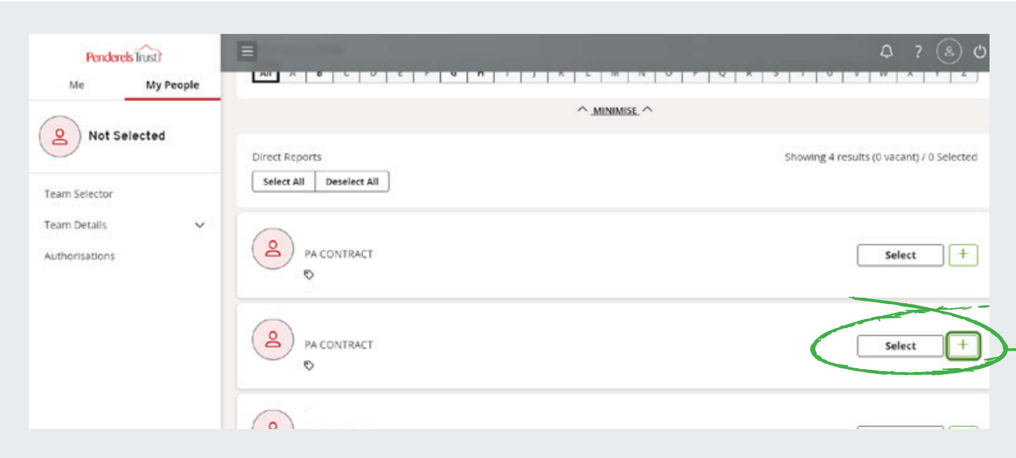
Click on '**OK**' to confirm authorisation/rejection.

You will then receive a confirmation message.



Viewing Payslips

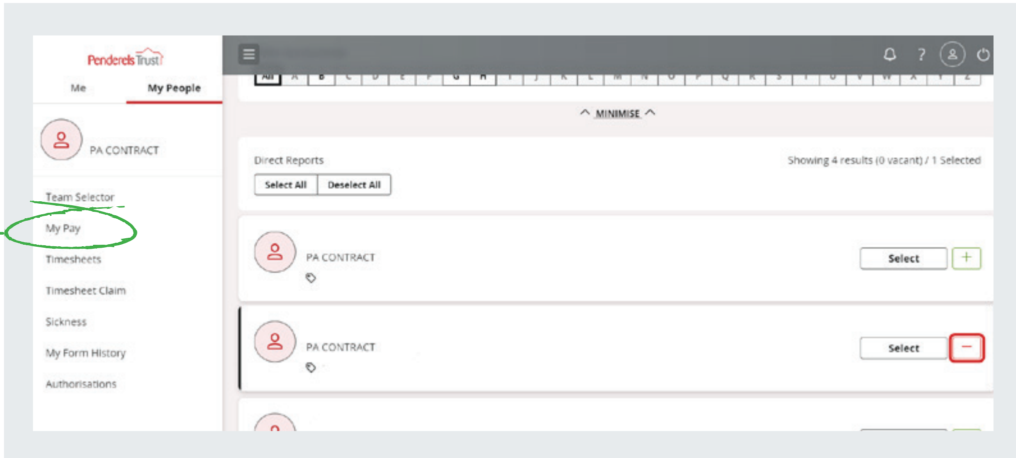
To view an employee's payment information, select the employee you wish to view.



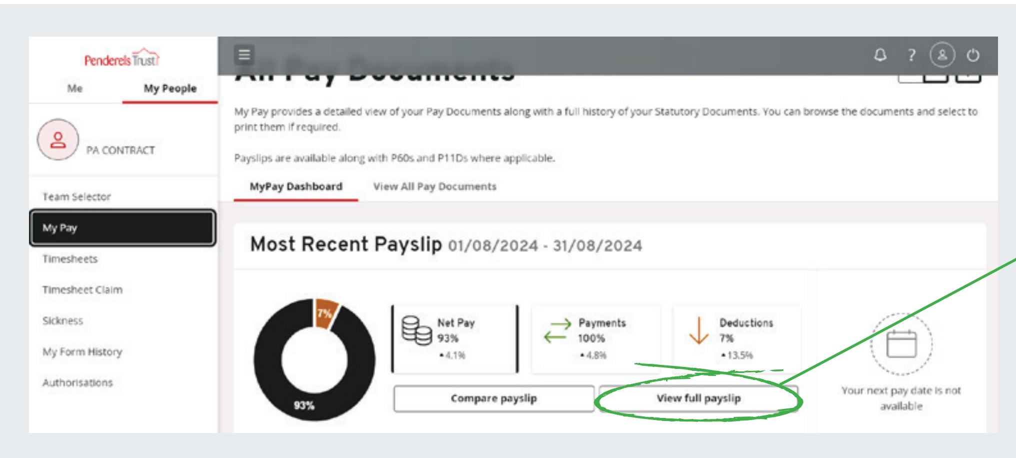
Select the employee.

Once you have selected the employee you wish to view, click the '**My Pay**' tab.

Select the employee.

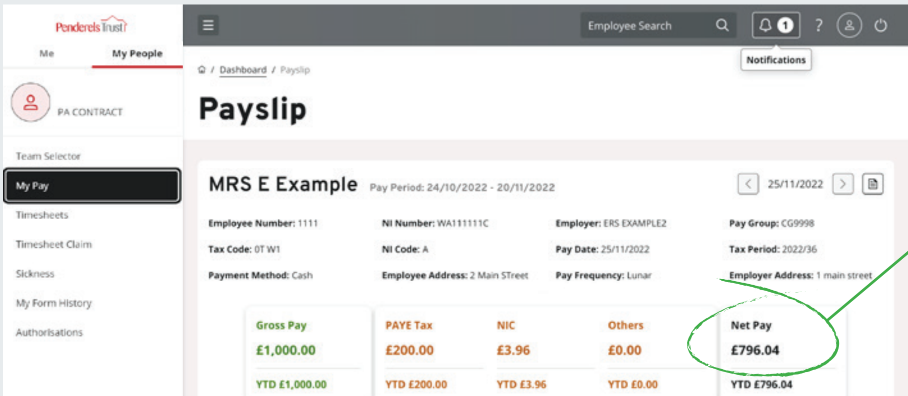


To view the most recent payslip, click the '**View Full Payslip**' tab.



Click on the View '**Full payslip**' tab

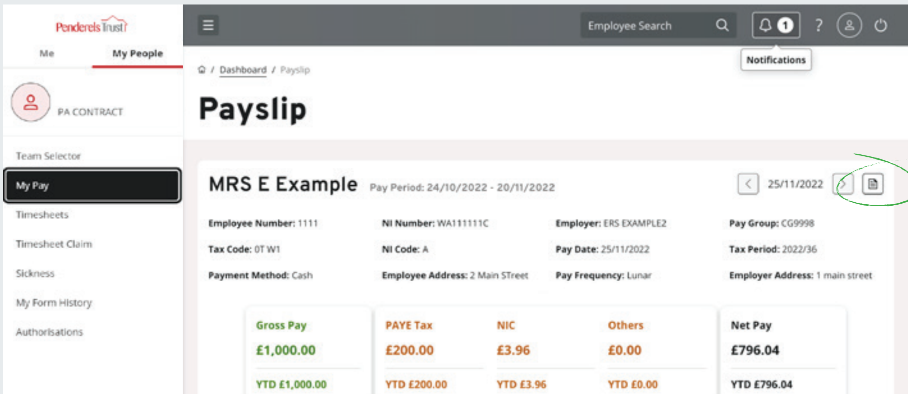
Employee payslip example



Here you can see the **Net Pay** Figure

This is the amount you need to pay your employee

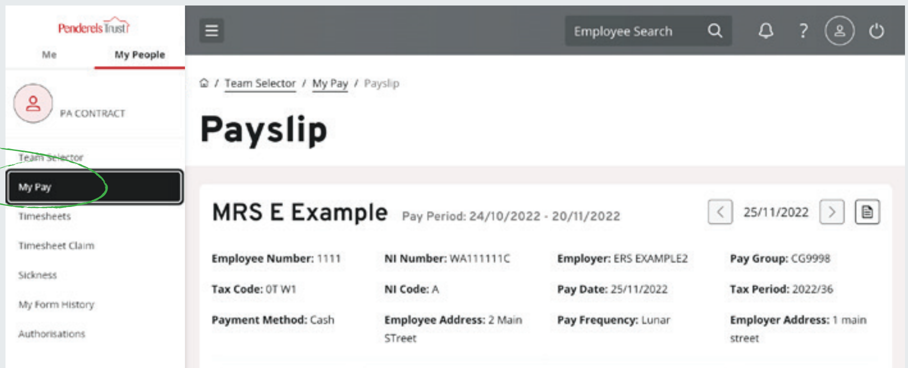
You can download the payslip to save onto your device if you wish.



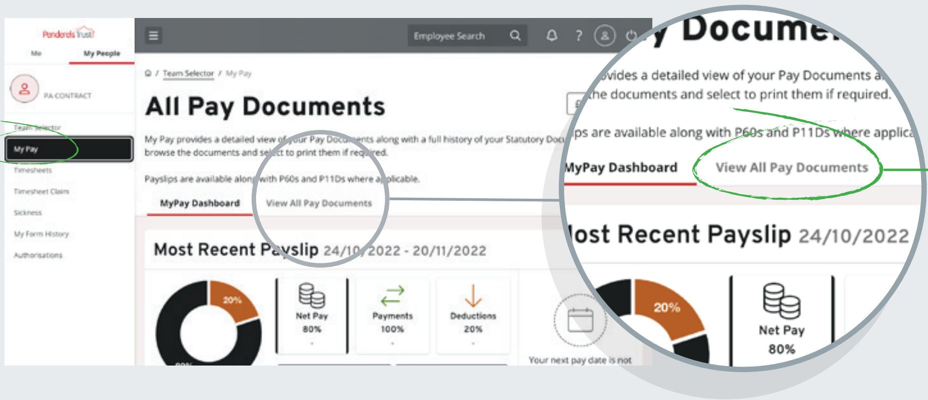
To download a copy of the payslip, click the **download** icon

To access other pay documentation for that employee e.g. previous payslips, click on the **My Pay** tab.

Click on the **My Pay** tab



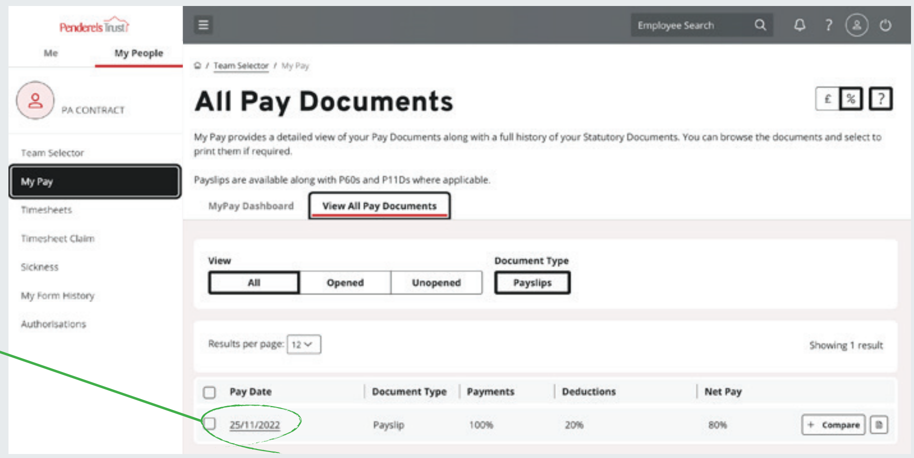
To view the employee's previous payslips, click the **View All Pay Documents** tab.



Click on the **View all Pay Documents** tab to view previous payslips

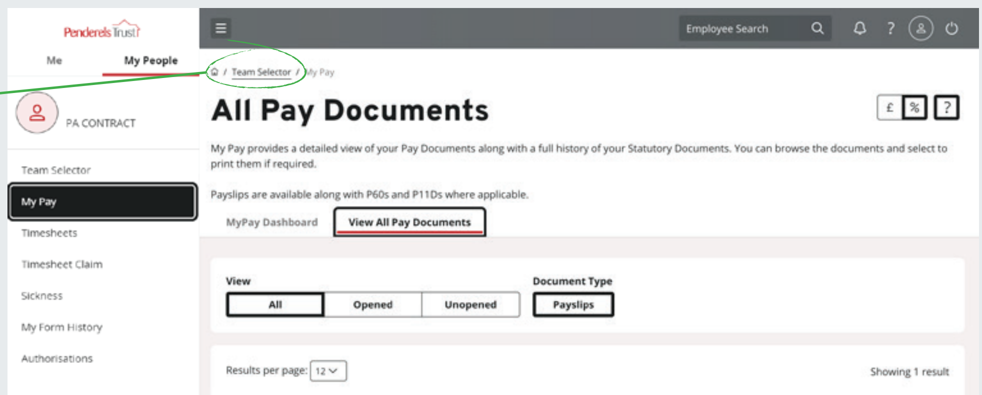
To view a specific payslip, click the payslip date you wish to view.

Click the date of the payslip you wish to view

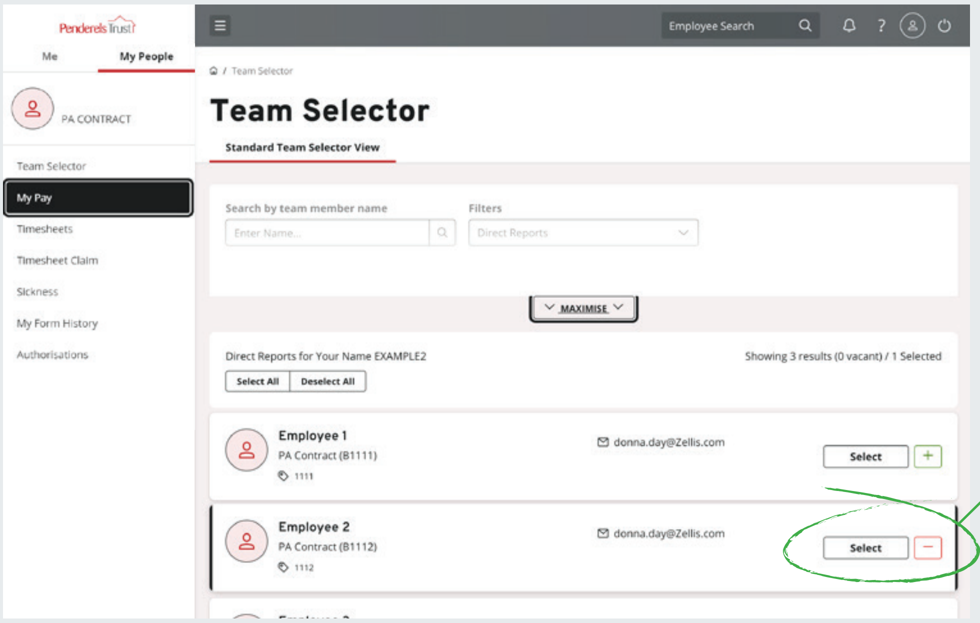


To return to the list of employees, click the **Team Selector** tab.

Click the **Team Selector** tab to return to the list of employees



You can access the pay information for your other employees from this screen.



To view another employee's payslip, click **Select** on their section and then click the **My Pay** tab as described in Steps 3 & 4

Authorising Sick Leave

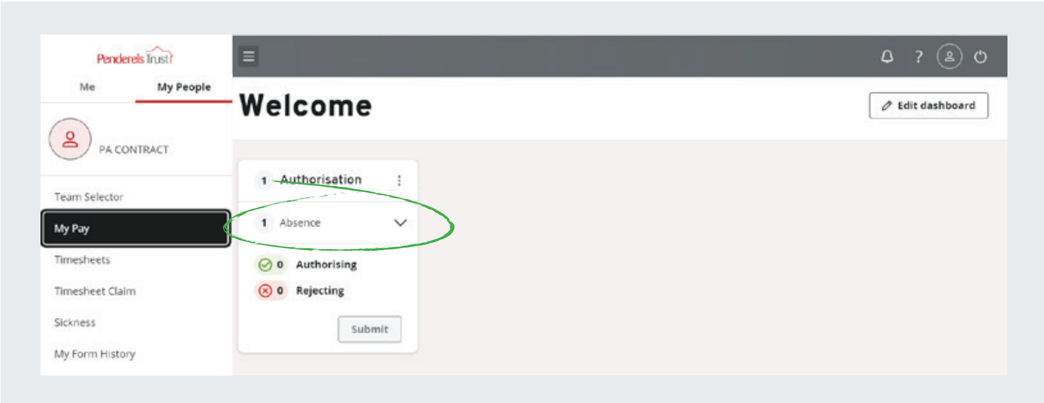
If an employee is off sick, they should submit a sickness claim.

This does not necessarily replace any sickness procedures you have in place with your employees about letting you know they are going to be off sick and cannot work.

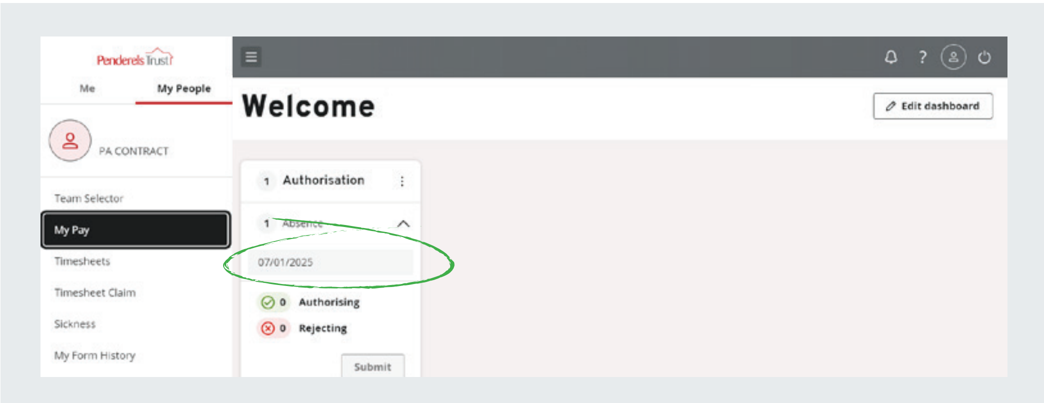
If an employee has submitted a sickness claim, you will receive a notification to authorise it.

This claim will be in the '**Absence**' folder.

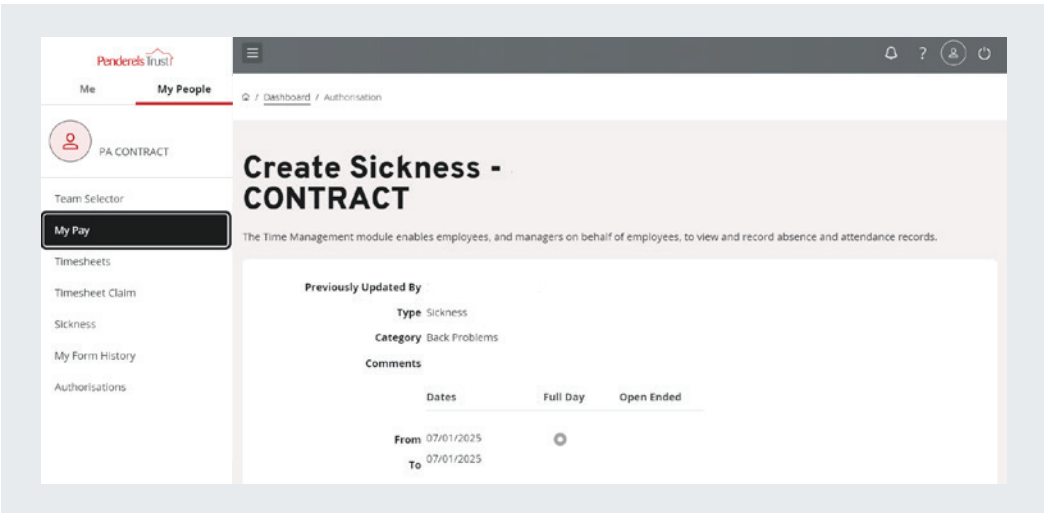
Click on the down arrow next to '**Absence**' to open up the claim.



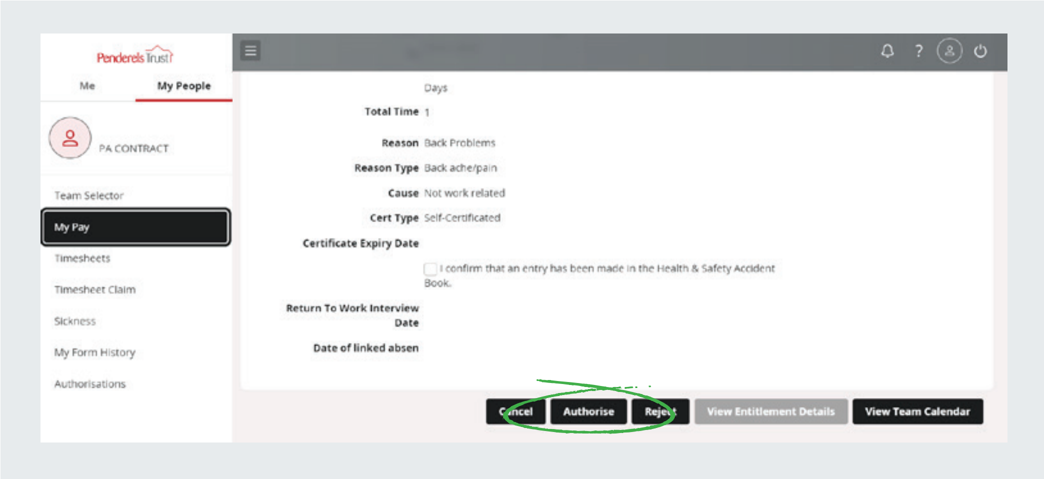
Here is one claim from the employee to check. To view the PA's claim, click on their name/date.



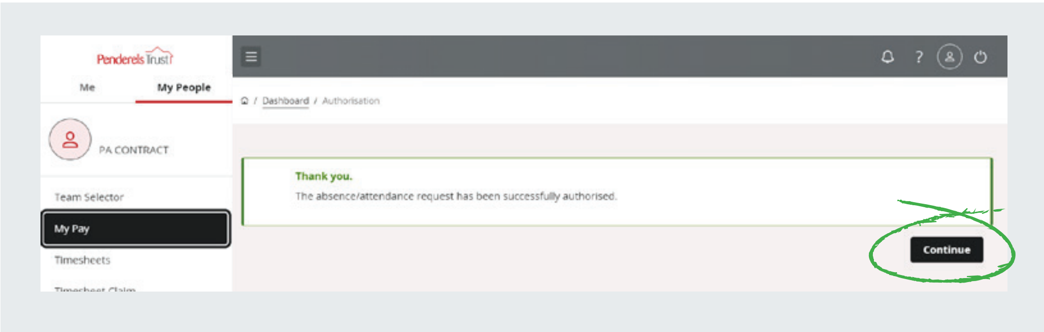
You can scroll down to view the information.



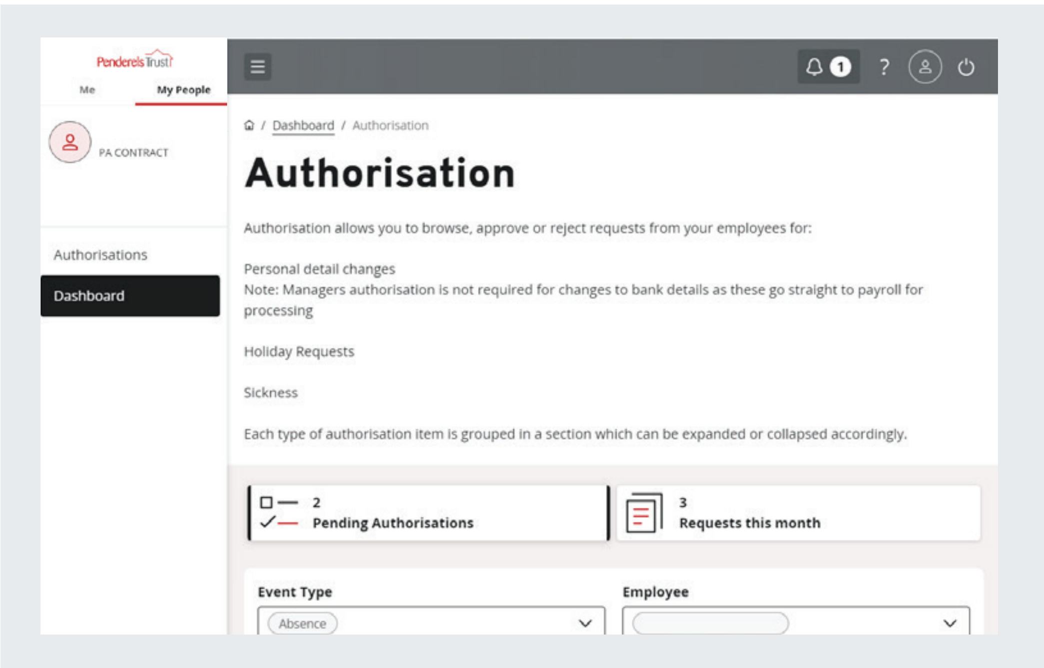
The authorisation button is at the bottom of the screen. Click on '**Authorise**' if you are happy with the information provided.



You will receive a confirmation that the request has been authorised. Press '**continue**'.

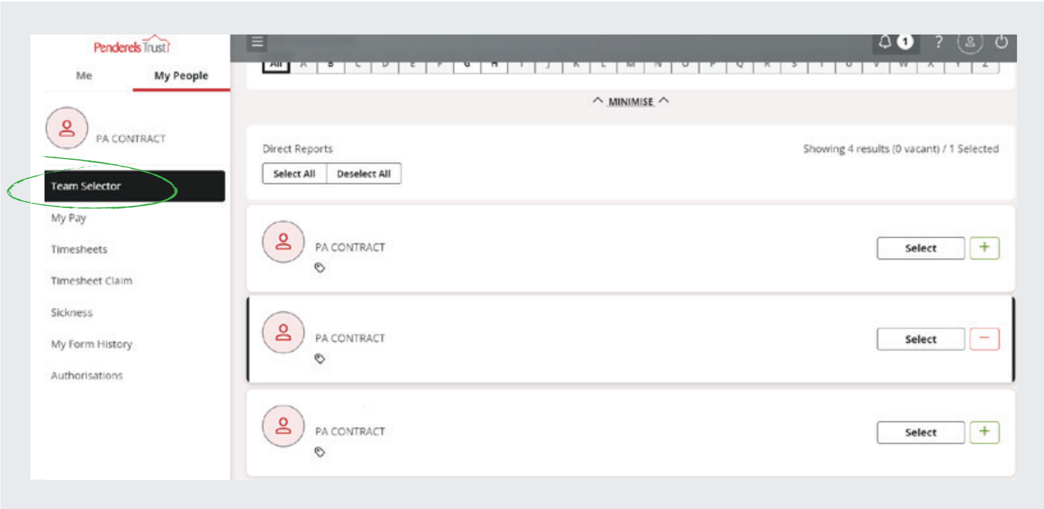


This will take you to a summary page.

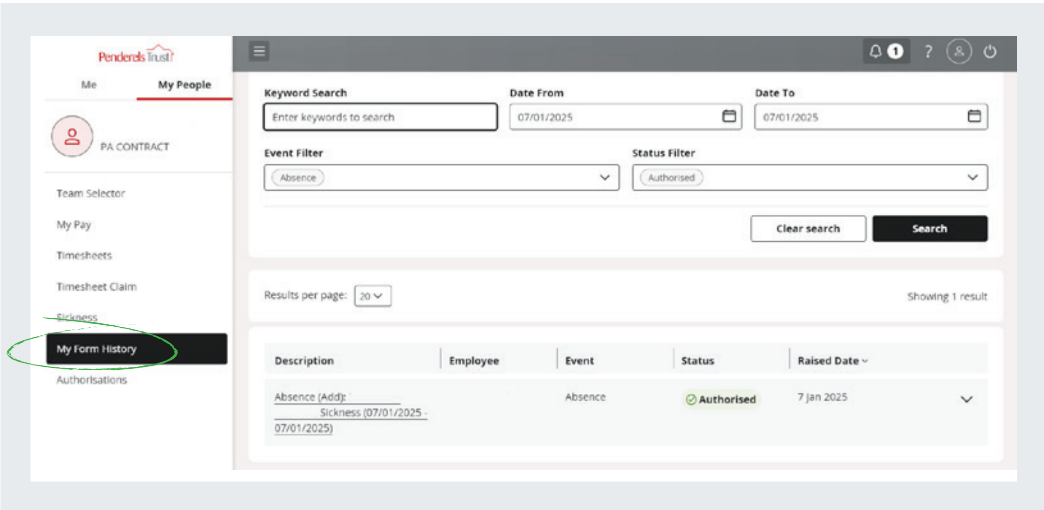


Reviewing Authorisations

If you want to check what you have authorised or rejected for each employee, click on the **Team Selector** button and select the employee you want to check.

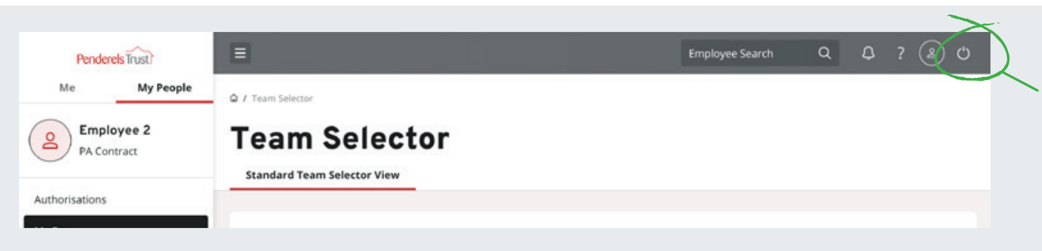


Click on '**My Form History**' and use the criteria buttons to search for authorisations as required.



Logging out

To log out, click the power icon in the grey bar at the top of the page.



To **log out**, click the power button icon

Frequently Asked Questions

Q: How do I access My View?

A: Simply click on the website **https://tinyurl.com/My-View-Home-Page**

The website should have the Penderels Trust logo on it. You can also access the My View system via our website **www.penderelstrust.org.uk** and scroll down to the red box that says '**Visit My View**'. Click on the red box to go to the My View website.

Q: I've forgotten my password, how do I reset it?

A: Simply click on 'forgotten your password' and the system will send you an email with a temporary password so you can access your account. You can change your password to something more memorable once you are logged in. Please make a note of your password as we don't have access to it.

Q: Why do I need to use Multi-Factor Authentication to use My View?

A: Multi-Factor Authentication provides an extra layer of security to your account. The type of MFA used for My View is via an authenticator app which you can download for free on a mobile phone which offers the best security level. If you don't have access to a smart phone, please email us at **myview@penderelstrust.org.uk** to let us know so we can remove that function.

Q: Can I have payslips posted as well as on My View?

A: Unfortunately, we cannot provide payslips in both ways on one account. You can download payslips from My View to print at home if you wish. Receiving payslips via My View means you can access them as soon as they are ready rather than waiting for the post which can sometimes be delayed.

Q: How can I get copies of payslips for audits?

A: You can access copies of payslips back to when you started using My View. Simply go to the 'My Pay' section in the left-hand menu and click on 'View Full Pay Documents'. You can then click on the date of any payslip and it will open up. If you want payslips from further back, please contact us on **myview@penderelstrust.org.uk** and we can publish them in your My View account.

Penderels Trust

Q: Am I able to see what I have previously submitted for audits?

A: You can see timesheet hour claims you have made in the 'My History' tab listed down the side bar.

Q: What documents can I view on My View?

A: You can view your employees' payslips from the latest one back to when you started on My View. You can also see pay documentation including P60 documents and we can upload older ones if you need them. Please send your request to **myview@penderelstrust.org.uk**

Q: Can my PA submit timesheet claims on my behalf?

A: Your PA can enter their timesheet hours via their own My View account. They cannot submit these directly to us, however, you as the employer must authorise the claim via your own My View account before it can be submitted.

Q: What are the deadlines for submitting timesheets via My View?

A: The submission deadlines for timesheets are the same as they were before. Please refer to your payroll planner which will show the deadline dates for the pay group you are in.

Q: My PA has told me they are leaving. What happens with their final payslip?

A: Please tell us as soon as you know they are leaving and on what date. As soon as we make them a leaver, you won't be able to see their record in your My View account. You will need to contact us to get a copy of your PA's final payslip so you know how much to pay them. Your PA can still log into their account and see their final payslip even after they have left (and for up to a year).

Q: My PA who recently left is no longer showing on My View, why is this?

A: As soon as a PA becomes a leaver, they will no longer show in your account as they don't work for you anymore. The PA can access their payslips via their own My View account for one year so it is important to remind them to download/print off their payslips before then if they might need them in the future.
If you need copies of payslips of PAs who have left, please email **payroll@penderelstrust.org.uk** to request them.