Penderels Trust

A Guide to using the **My View** Mobile Phone App for Employers

Welcome to the '**My View**' Mobile Phone App User Guide for direct payment employers. It provides a step-by-step guide to using the My View system.

We have written a separate guide for people using a desktop device (computer/laptop) as the screens look different.

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 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 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.

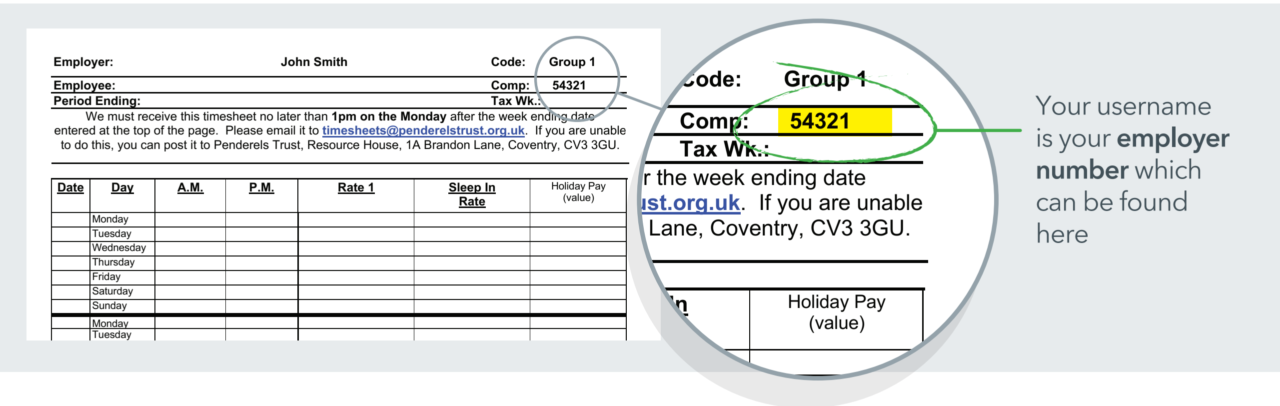
Before you start

We need to set you up on the My View system before you can use it.
To do this, we need your employer number and email address. We also need the names, employee numbers and the email addresses of all your PAs. If you have not done so already, please email these details to **myview@penderelstrust.org.uk** and ask us to set you up.

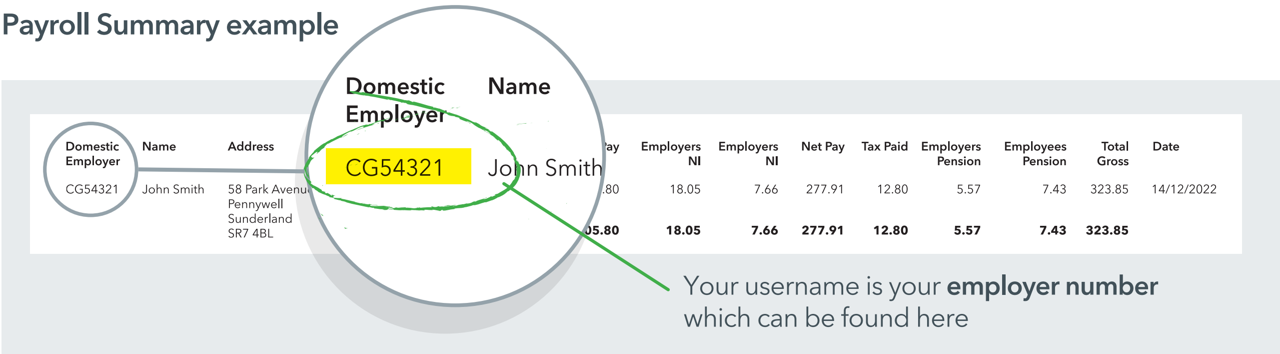
The instructions in this guide won't work unless we have set you up on My View first.

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

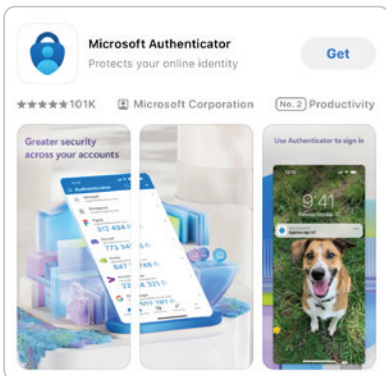


- **You will need to download an Authenticator App** on a mobile device to get the code you will need later in the set up process. This adds an extra level of security for your account. Please see Step 7 on Page 6 for more information on this.

  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.



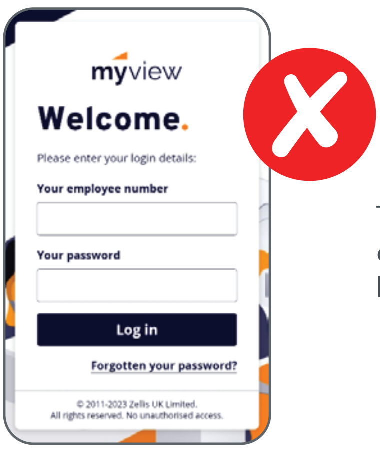
Section One: Getting Started

Step 1

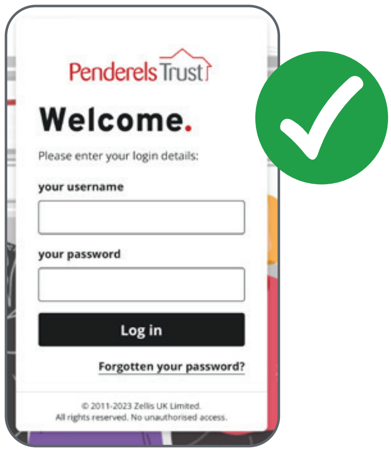
The first time you use My View, you will need to register. You only have to do this once.

Click the blue underlined website address below to access **My View**.
https://tinyurl.com/My-View-Home-Page

This is the incorrect website. **Please do not use this.**



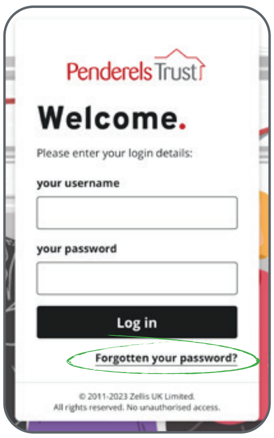
This is the correct website. **Please use this.**



Step 2

You will need to set your password the first time you use My View.

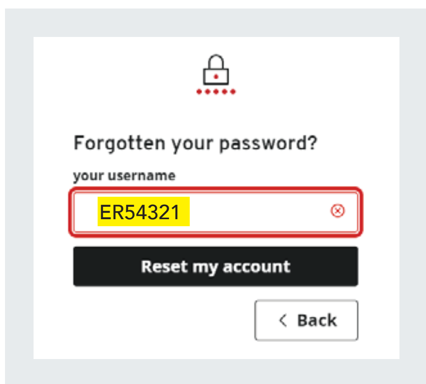
To do this, click **'Forgotten your password?'**



Step 3

In the 'Forgotten your password?' section, enter your username. Your username will always be the same and is the letters **ER** followed by your **employer number**.

Then click the '**Reset my account**' button.



Step 4

Once you have reset your account, you will receive an email with a temporary password, as shown below. Please check your junk folder as well as your inbox.

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 Administrator

Step 5

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

Top Tip

To copy and paste the temporary password emailed to you:

- Place your finger over the password until you get two grab points, click copy.
- Go back to the My View website and keep your finger on the password box until the options menu appears.
- From the options menu, select "Paste" or the clipboard icon to paste the copied password.

Step 6

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

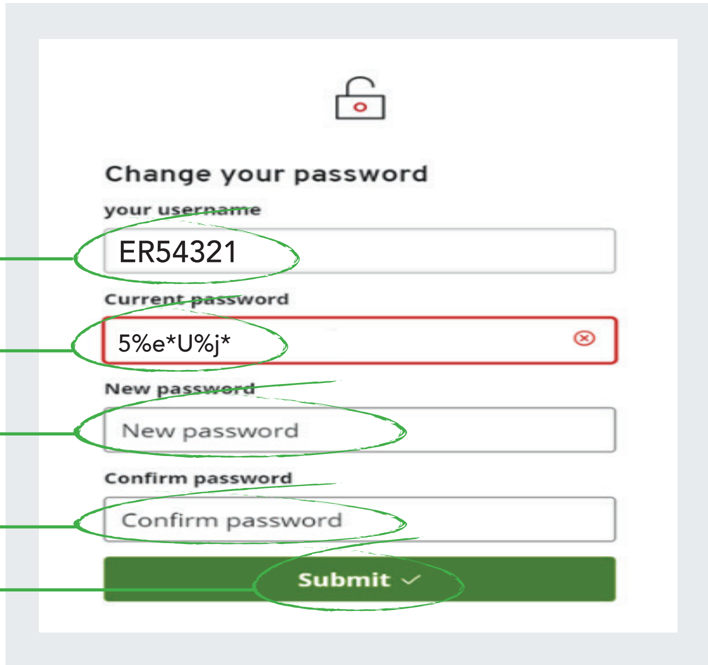
Your new password must be 8 characters long and must include:

1 upper case letter
1 lower case letter
1 number *and*
1 special character (such as an exclamation point, question mark or pound symbol).

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**

Click on '**Submit**'.

You will need to stay logged into the website to register for the app. You only need to do this once. You can stay logged in whilst you download the app.

Step 7 Setting Up Multi-Factor Authentication

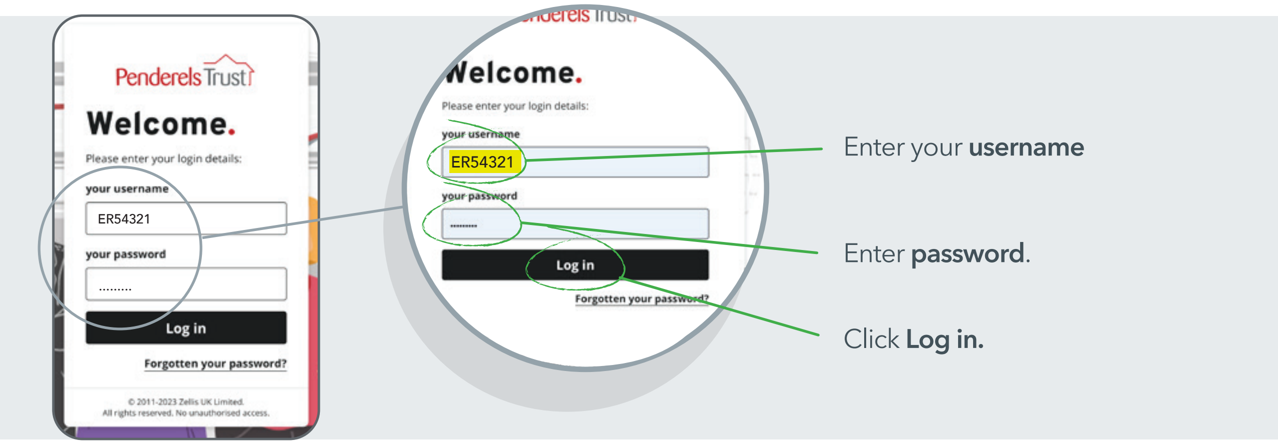
My View includes a multi-factor authentication (MFA) which provides enhanced security. As My View holds personal data on you and your pay information, we want it to be as secure as possible.

With the mobile phone app version of My View, you will only need to use MFA the first time you log in. After this, you do not need to use MFA if your phone has face recognition/thumb print recognition as this provides an equivalent level of security.

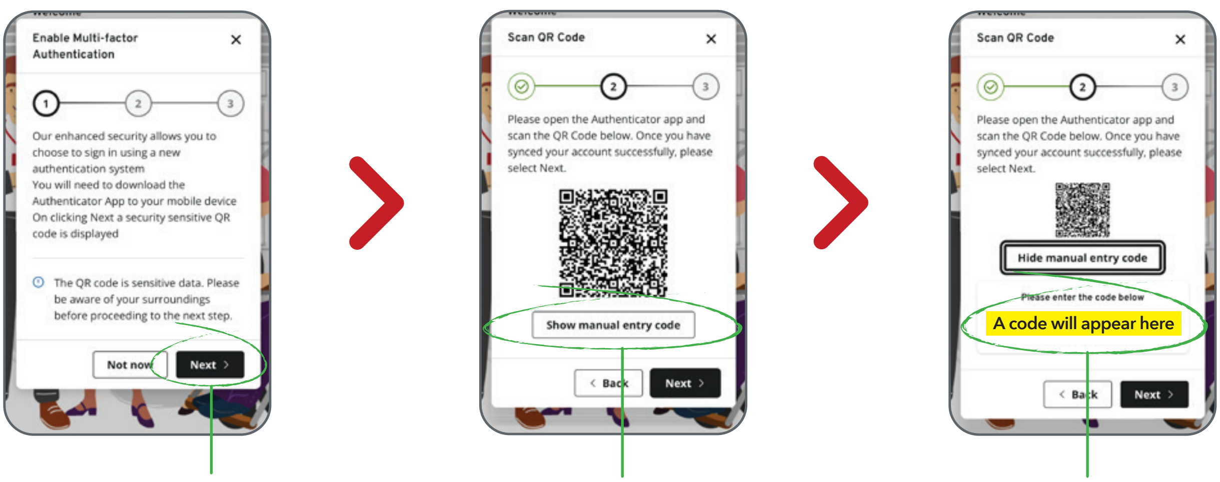
The following section gives instructions on how to access MFA via your mobile phone. If you prefer, you can use a computer/laptop to obtain the QR code which you can then scan with your phone. If you would prefer to do this, please see our MFA Factsheet at **www.penderelstrust.org.uk/myview.php** for instructions.

Click the blue underlined website address below to access **My View**:
https://tinyurl.com/My-View-Home-Page

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



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



Click '**Next**'

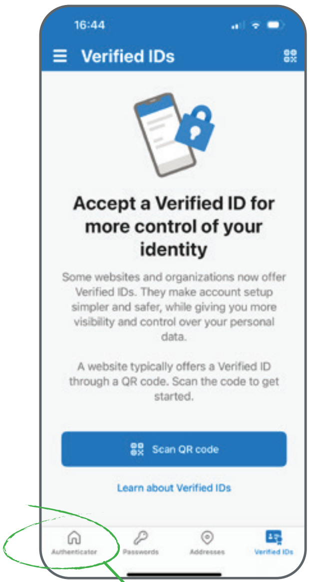
Click '**Show manual entry code**'

Copy the code to use in the Microsoft Authenticator App

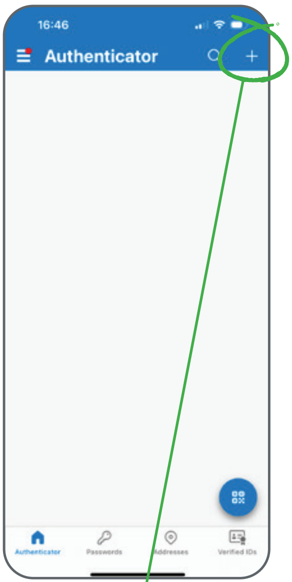
Step 9

Now open the Microsoft Authenticator App.

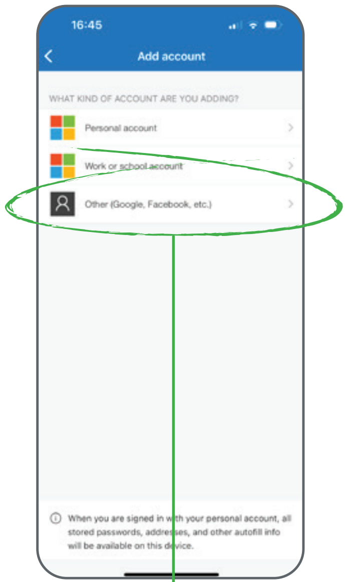
Follow the instructions on your app to obtain the verification, this is what it looks like on the Microsoft Authenticator app.



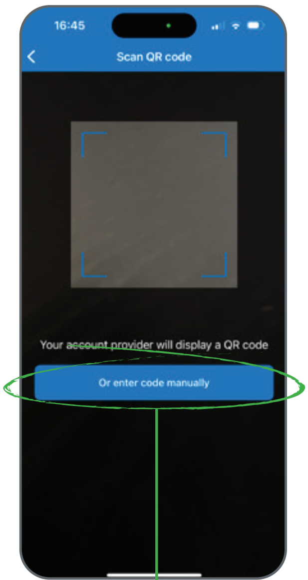
Click 'Authenticator''



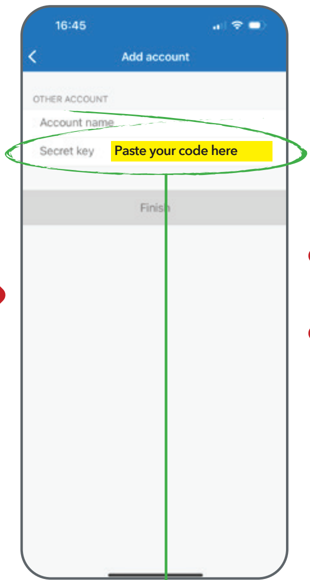
Click the '+' icon



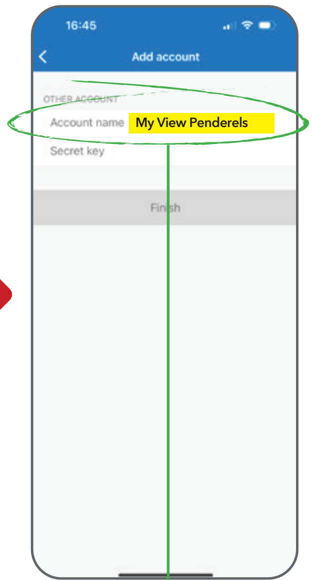
Click on '**Other**'



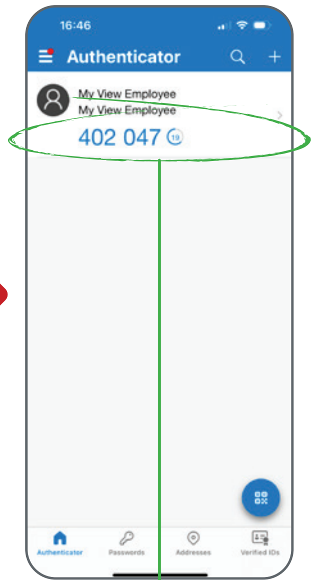
Click on '**Or enter code manually**'



Paste the code from the **My View** website here



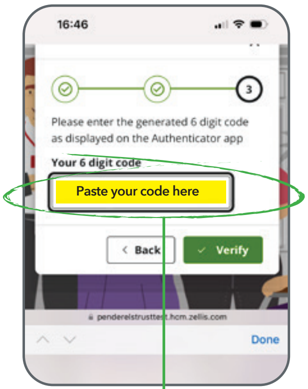
Enter an account name for your My View account (this can be whatever you choose).
Then click '**Finish**'



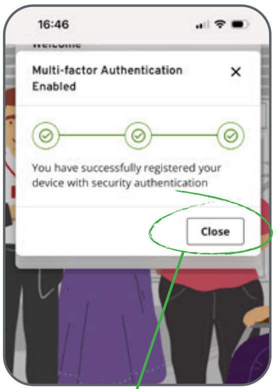
A six digit code will be generated. Copy the code

Step 10

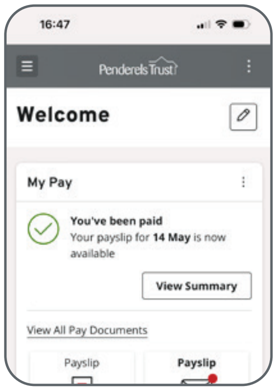
Now return to the **My View** website.



Paste the six digit code from the **Authenticator** app here. Then click '**Verify**'



This will confirm you have enabled multi-factor authentication. Click '**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 won't need to complete Steps 7 or 8 again.

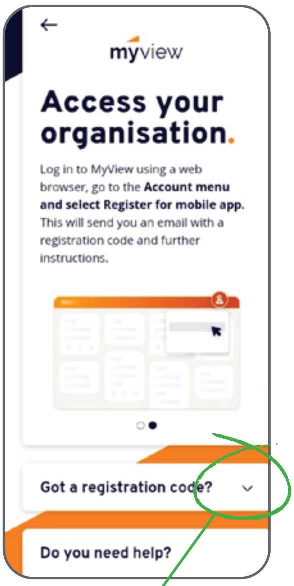
If you are using the **My View** app on a smartphone with thumb print/facial recognition feature, you won't need to use your authenticator app again once your account is set up.

Step 11 Downloading the My View App

To download the app, go to your Apple or Android app store and search '**My View**'.

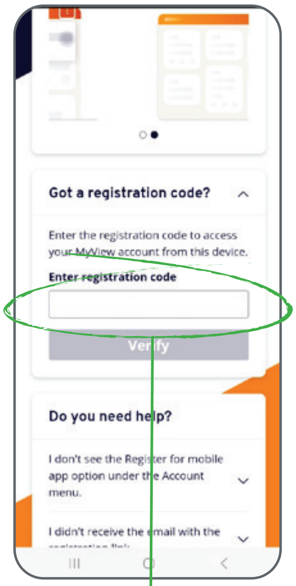
It will be the generic '**My View**' app at this stage, it will not have Penderels Trust branding on it.

Click '**Get**' to download it onto your phone.

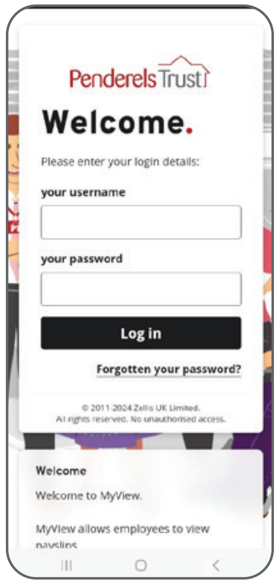


The first time you use your app, it will ask you for a registration code

Click on the down arrow to reveal the box



Type in **penderelstrust** here then click '**Verify**'



Once you have clicked on Verify, it should open your account up to sign in

You will need to sign in when you use the app but if you have the facial recognition or thumb print function on your phone, you will be asked if you want to use that to sign in in future. This does make it much easier to use the app as you don't have to remember a password.

Section Two: Using My View on the App

Click on the '**My View**' app icon on your phone. If you have set up facial recognition or thumbprint access, it should open straight away. If not, you will need to log in.

You can use the app to:

- Input timesheet claims for each employee
- View payslips for each employee
- Authorise sickness leave

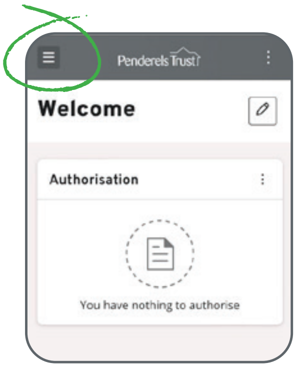
To submit a timesheet claim for your employee(s)

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 '**Authorising Timesheets**' section.

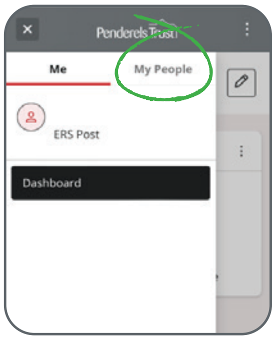
Step 1

Click on the three white lines to the top left of your screen

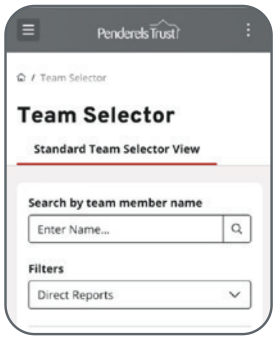


Step 2

Click on '**My People**'



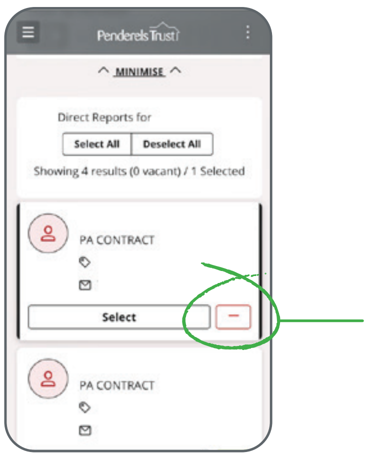
This will bring up the '**Team Selector**' screen.



Step 3

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

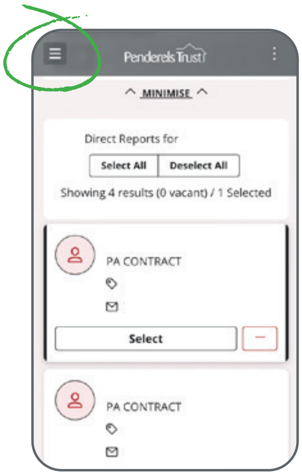
To submit a timesheet claim for an employee, click on '**Select**' under their name so the green plus turns to a red minus. The other employee names should have a green plus under their name.



Click here.

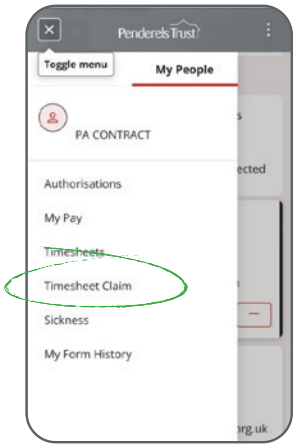
The box should show a red minus by the person you want to look at.

Click on the three white lines at the top left of your screen which will bring up the menu options for the selected employee.



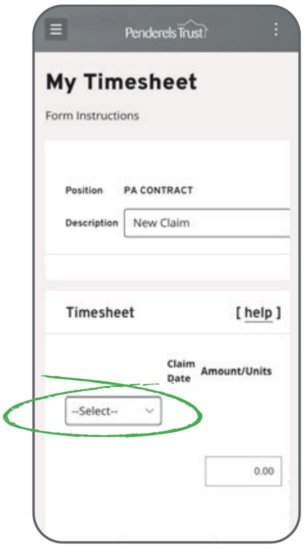
Step 4

Select 'Timesheet Claim'



Step 5

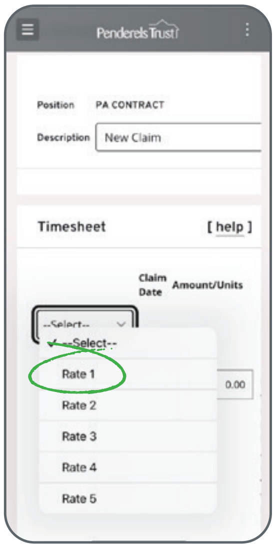
Click on '**Select**' to bring up the rate list.



Step 6

You can enter a number of different pay rates on the same timesheet (up to 5).

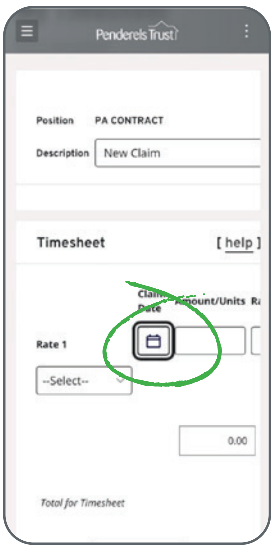
Choose **Rate 1 first**.



Step 7

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.



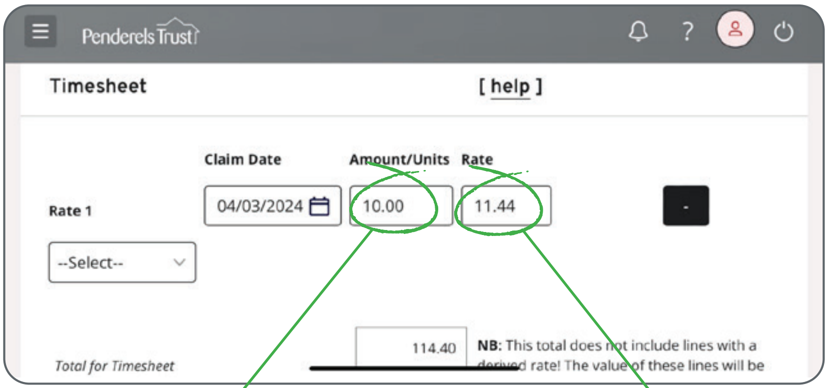
Step 8

Click on the **Start Date** of the pay period.

Top Tip: You might find this next step easier if you turn your phone to a landscape orientation.

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.

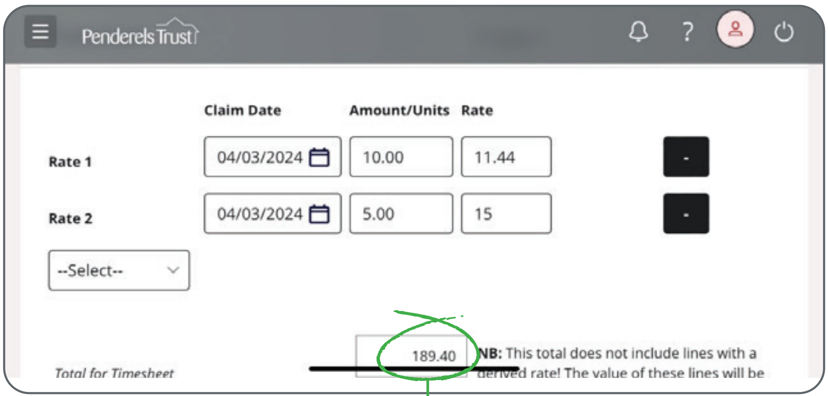


Add in number of hours worked.

Add the hourly rate of pay in pounds and pence.

If a different rate of pay is needed for some of the hours worked e.g. weekend, bank holiday hours, click on Select and choose '**Rate 2**'. This adds a new line.

Complete this in the same way you did for Rate 1. When you hit 'done' on your phone, it will calculate the amount to be paid in the '**Total**' box.

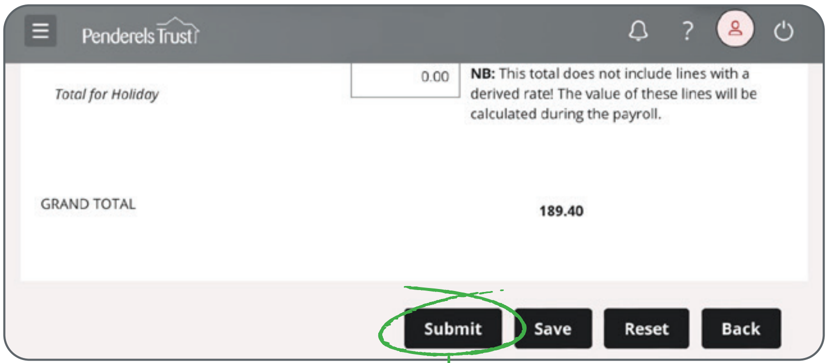


This shows your total pay for the period.

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

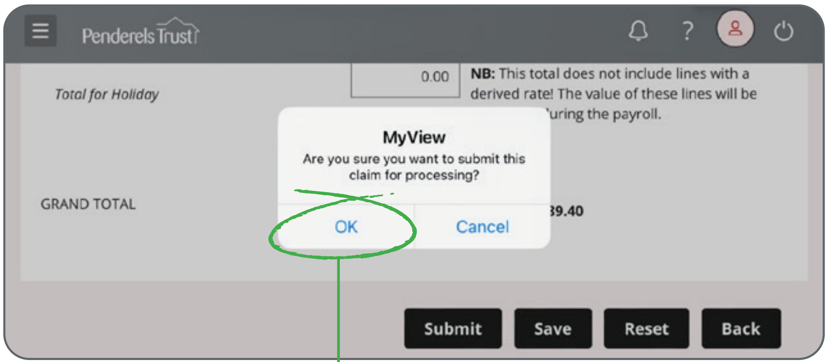
You can add up to 6 different rates on one timesheet claim, plus bank holidays and weekend rates.

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



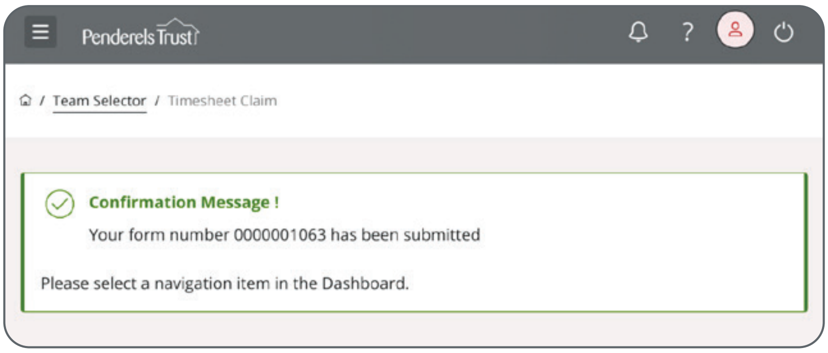
Click '**Submit**'

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



Click '**OK**'

Once the timesheet claim has been successfully submitted, a summary page will appear.

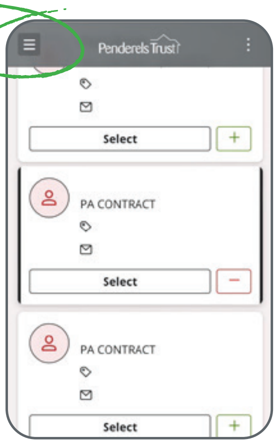


If you want to submit a timesheet claim for another PA, click on '**Team Selector**' at the top left-hand corner.

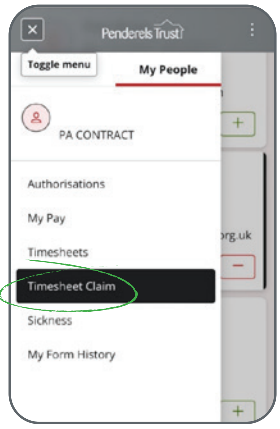
This will bring up your list of PAs. Scroll down to the one you want to submit a timesheet claim for. Make sure they have a red minus next to 'select' and all other PAs have a green plus.

Click on the three white lines in the top left-hand corner.

Click here to bring up the main menu for the employee.



Click here to start a new timesheet claim.



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.

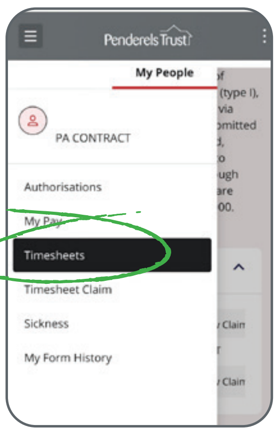
The timesheet claims have now been submitted and will arrive directly into our payroll system for processing.

Checking previous timesheet claims

If you want to see what timesheet claims you have already made for an employee, click on the three white lines at the top left-hand corner.

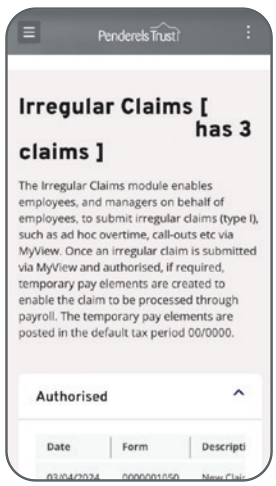
Click on '**Timesheets**'.

Click here to view submitted timesheets.

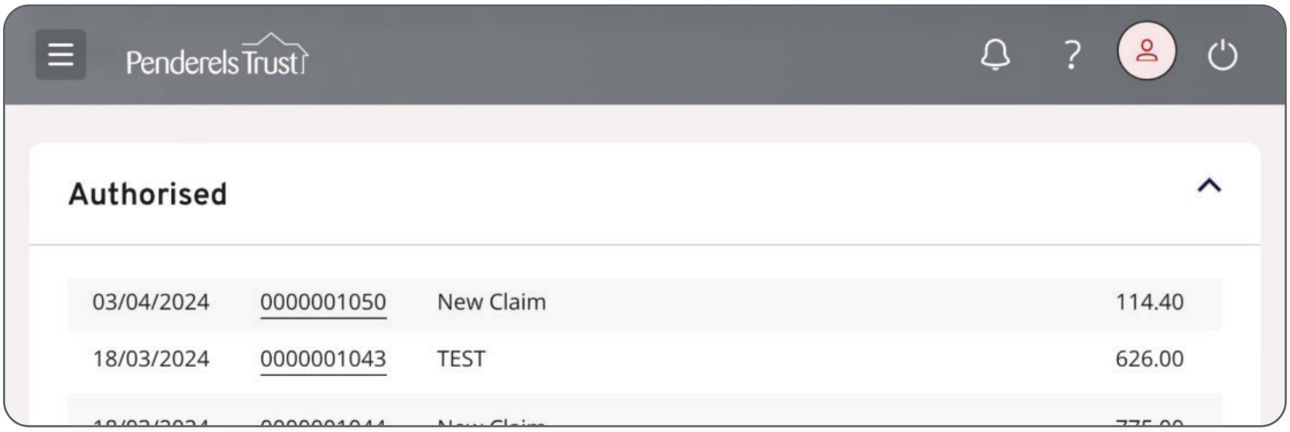


This will bring up a list of timesheets already submitted.

These are considered '**Irregular Claims**' by the system but don't worry about that.



Top Tip: Turn your phone to landscape orientation to see the information more clearly.



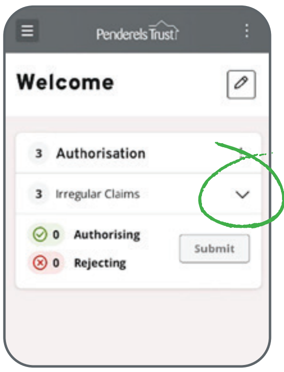
Authorising Timesheets

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.

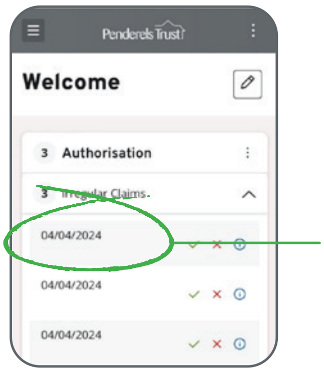
It is important to remember that only timesheet claims that you have authorised will be entered on to our system and processed. If you reject a claim, it will not submit to our payroll department. It is important that you authorise all timesheet claims by their usual deadline date/time or we might not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

Step 1



Click here to open the list of timesheet claims.



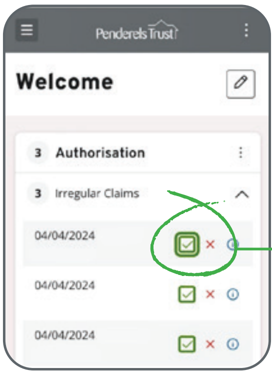
Click on the date/name to view the actual timesheet.

If you wish to view the timesheet before you authorise it, click on the date/employee name which will bring you to the timesheet screen.

To come out of that screen, click on the three white lines and click on '**Authorisations**' which will take you back to the screen above.

Step 2

If you wish to authorise a timesheet, click on the green tick to highlight it.

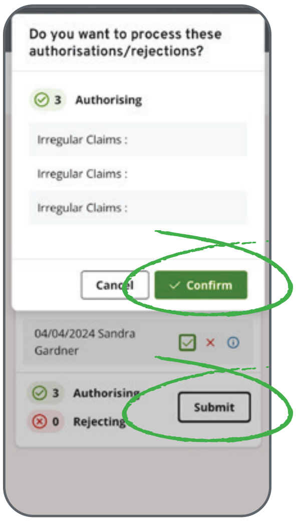


Click to authorise.

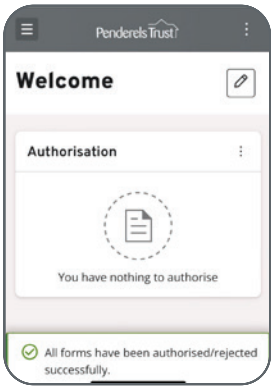
You will be asked if you want to process these claims.

Click on '**Confirm**'.

You will then be able to click on '**Submit**'. This means all timesheets have now been sent to our payroll department for processing.

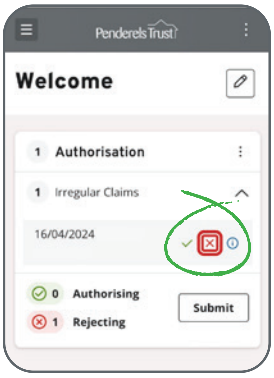


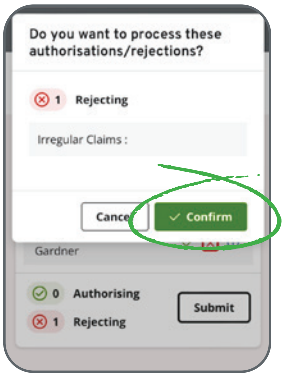
It will confirm that all outstanding timesheet claims have been completed.



If you wish to reject a timesheet claim, click on the red cross to highlight it.

Then click on '**Submit**'.

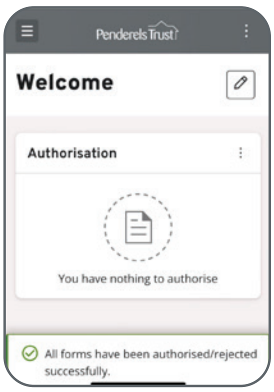




It will ask you to confirm this, click on '**Confirm**'.

The system will confirm you have actioned all outstanding timesheet claims.

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



Holiday Claims

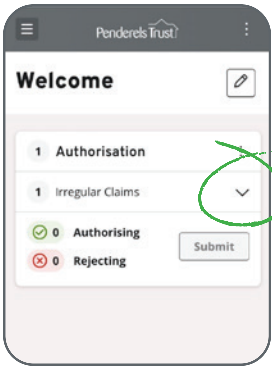
This process is for submitting claims for holiday pay only. It does not remove the need for your employee to request annual leave. You also need to keep an annual leave record for each employee.

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.

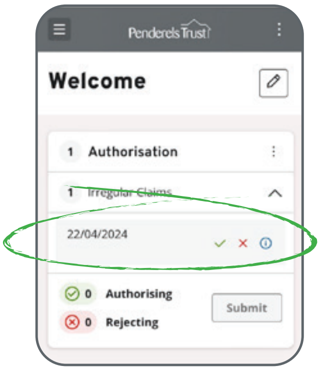
If your employee has completed a claim, when you log in, you will see an authorisation notice on your home screen.

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

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

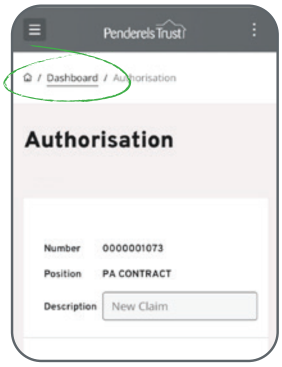


To check the details of the claim, click on the date/name.

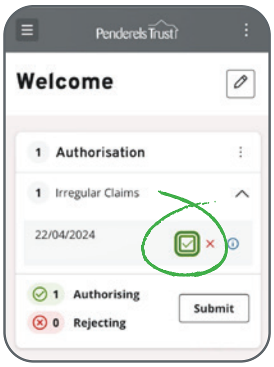


Scroll down to the holiday section that has been completed.

Once you have checked it, go back to the authorisation screen by clicking on '**Dashboard**' at the top.

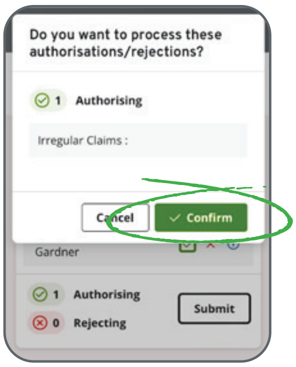


Open up the claim again and click on the green tick if you are happy to authorise the claim (you can click on the red cross if you wish to reject the claim).

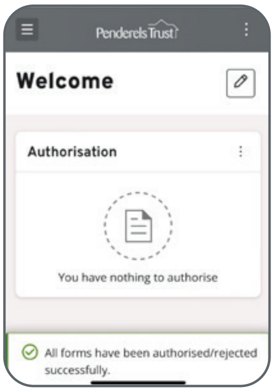


You will be asked to confirm you wish to process the authorisation/ rejection.

Click on '**Confirm**'.



You will receive a confirmation message that all forms have been authorised or rejected.



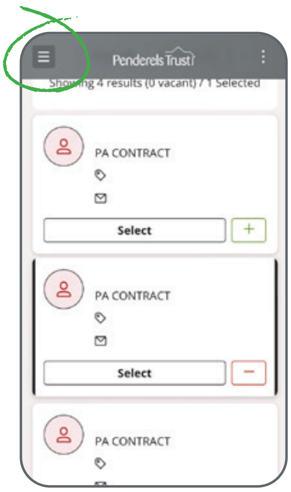
To View and Download Payslips

Go back to '**Team Selector**'.

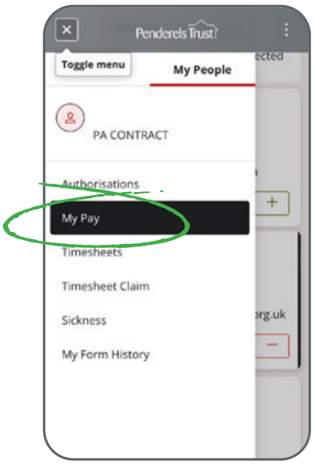
Select the employee you want to view the payslip for.

Make sure the box next to '**Select**' has a red minus and the other ones have a green plus.

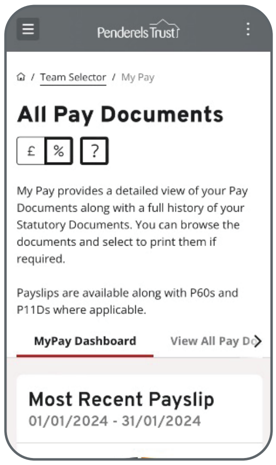
The red minus figure shows you have chosen this employee.



Click on the three white lines in the top left hand corner.



Click on '**My Pay**'.



This will bring up the '**All Pay Documents**' screen.

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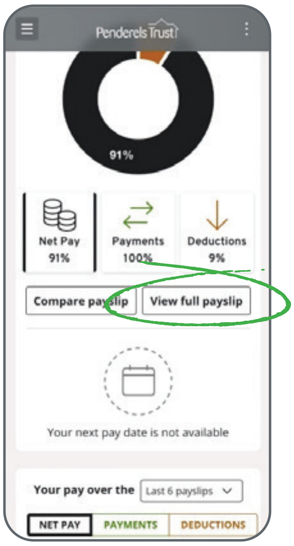
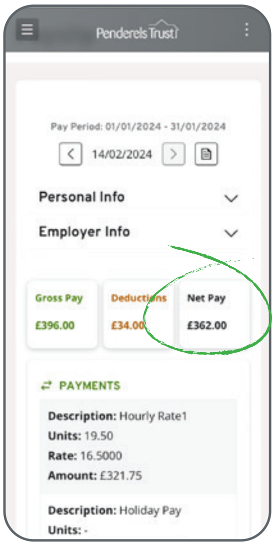
Scroll down and click on '**View full payslip**'.

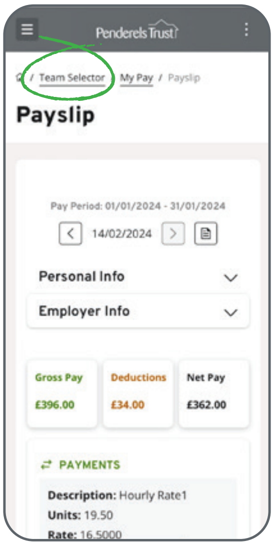


This will bring up the latest payslip, showing the net amount that needs to be paid to the PA.

If you scroll down, you can see other information about payments and year-to-date payments.

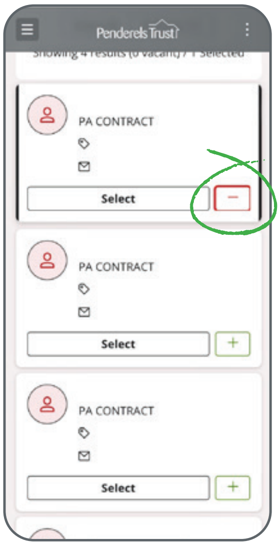


To view the payslip for another employee, click on '**Team Selector**' at the top of the screen.

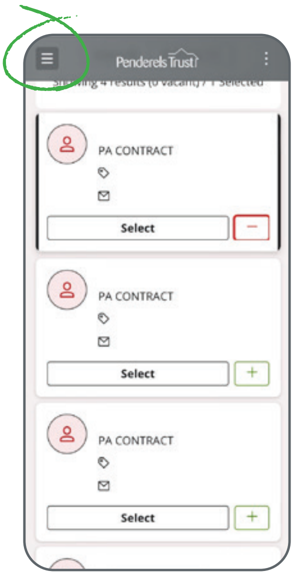


Scroll down to pick the employee you want to look at.

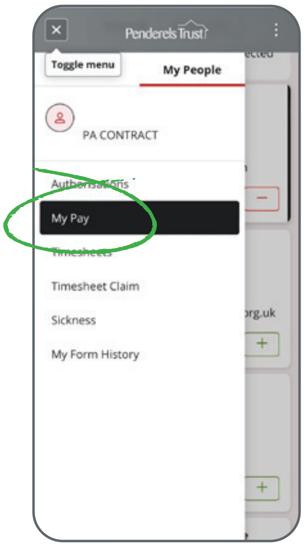
Remember to make sure there is a red minus next to '**Select**' for their name and a green plus for the other employees.



Click on the three white lines at the top left hand corner of your screen



Choose '**My Pay**' and repeat the process again.



Authorising Sickness Leave

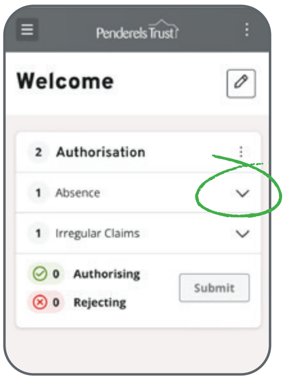
If an employee is off sick, they should submit a sickness claim.

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

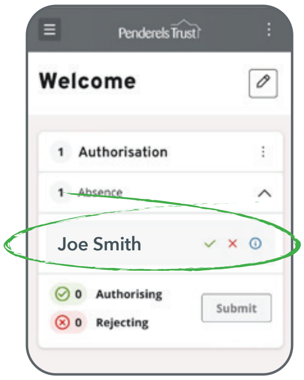
If an employee has submitted a sickness claim, you will receive a notification to authorise it.

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

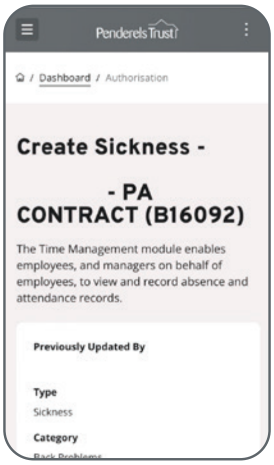
Press the down arrow next to '**Absence**' to open up the list of claims.



To view the PA's claim, click on their name/date.

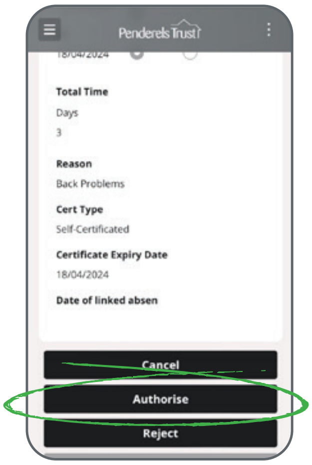


You can scroll down to view the information.



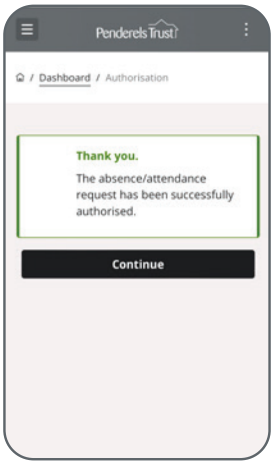
The authorisation button is at the bottom of the screen.

Click on '**Authorise**' if you are happy with the information provided.

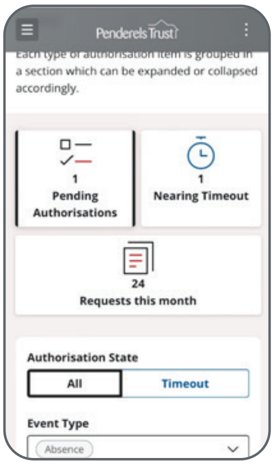


You will receive a confirmation that the request has been authorised.

Press '**Continue**'.

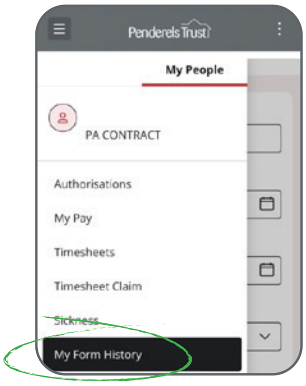


This will take you to a summary page.

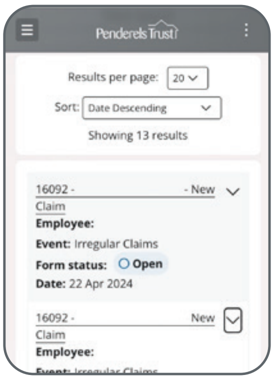


Reviewing Authorisations

If you want to check what you have authorised or rejected for each employee, click on the three white lines at the top left hand side of the screen and select '**My Form History**'.



That will then open up a list of authorisations for that employee that you can look through.



Frequently Asked Questions

Q: I don't have a smartphone, what shall I do?

A: You can still use My View via the website on a desktop computer, laptop or tablet. 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: How do I access My View?

A: Please follow the steps in this guide. If you have already registered and downloaded the app, go to Section 2: Using My View on the App.

If you have set up face/thumbprint recognition, the app will automatically open and log you in. If you don't have this feature, you will need to log in. Click on 'My View' on the home page. Input your username and password that you used when you registered.

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

A: If you log in using your username and password rather than facial/thumbprint recognition and you forget your password, 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.

Please also note that if you try to enter the wrong password too many times, your account will get locked. Unfortunately, this means the 'Forgotten your password' option will no longer work. You can get it reset by emailing us at myview@penderelstrust.org.uk but it is easier and quicker to use the 'Forgotten your password' if you are not sure. As a handy reminder, your password will be at least 8 characters long and include one uppercase letter, one lowercase letter, one number, and one special character.

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 offers the best security level. Once you are registered on the app and have facial/thumbprint recognition set up, you will no longer need to use MFA as these features provide the same level of security.

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.

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 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 for PAs who have left, please email payroll@penderelstrust.org.uk to request them.