

A Guide to using the **My View** Mobile Phone App for Personal Assistants (PAs)

Welcome to the '**My View**' Mobile Phone App User Guide for PAs working 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 your payslips and other pay information. Your employer will also be able to view your pay information and submit timesheet hours for you.

What functions are available on 'My View'?

You can:

- Input hours worked and your hourly rates. This is instead of sending a timesheet in for every pay cycle. You can input the hours if your employer is happy for you to do this. They will need to authorise your timesheet claim before it is submitted.
- View your payslips and other pay documentation.
- Submit sickness days for authorisation by your employer.

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.
- ▶ You will need your employee reference number. This number can be found in the top right hand corner of your payslip. This number can have anything from one to several digits depending on how long you have been set up on our payroll system.

Payslip example

PRIVATE AND CONFIDENTIAL

Jane Doe
5 Lime Avenue
Pennywell
Sunderland
SR5 8MN

SEE REVERSE FOR OPENING INSTRUCTIONS

Payslip No.	Payroll	Employee Ref. No.
0		12345

Pay and Allowances		Deductions	Balances
Rate 1	72.50	Tax Paid	Earnings to Date
15/11/22-14/12/22	R 699.63	84.20	4415.58
	9.6500		Taxable Pay to Date
			4415.58
			Tax to Date
			548.20
			Pension to Date
			0.00
			Nat. Ins. Cont to Date
			0.00

NET PAY

*Non-Taxable 0.00 *Pre-Tax Deductions

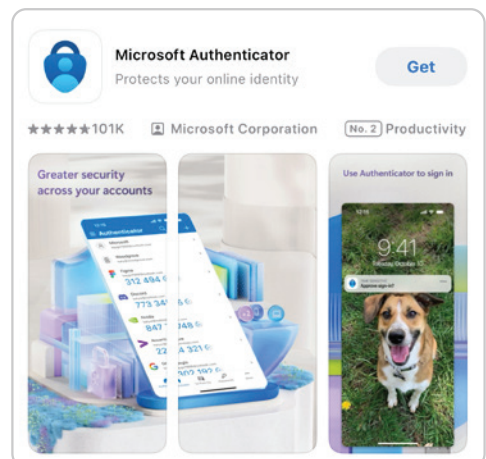
Your username is your **employee reference number** which can be found here

- ▶ 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

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

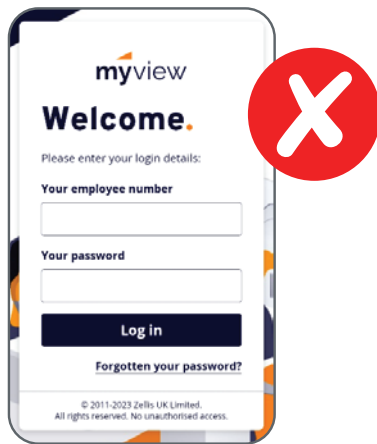
You will need to do that on the My View website. The instructions below are for using the website on a mobile device but you can do this on a laptop or computer. Please see our User Guides for Desktop Devices for instructions on doing this (this can be found on our website www.penderelstrust.org.uk/myview.php).

Step 1

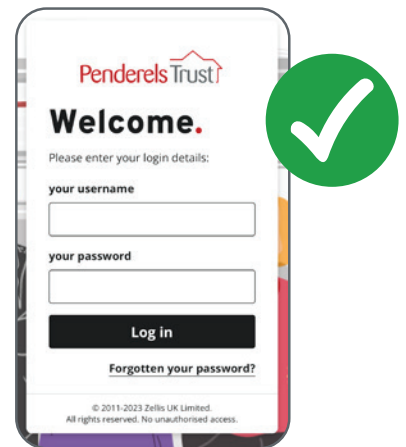
Click the blue underlined website address below to access My View.

<https://tinyurl.com/My-View-Home-Page>

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



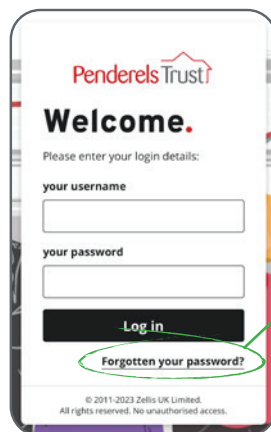
This is the correct website. Please use this.



Step 2

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

To do this, click 'Forgotten your password?'

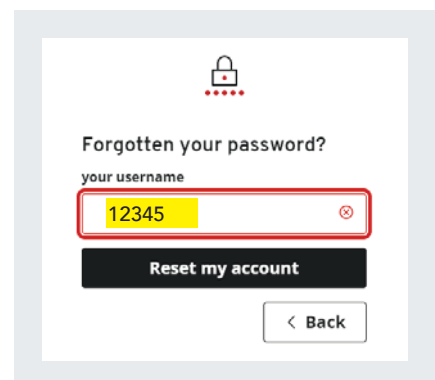


Click 'Forgotten your Password?'

Step 3

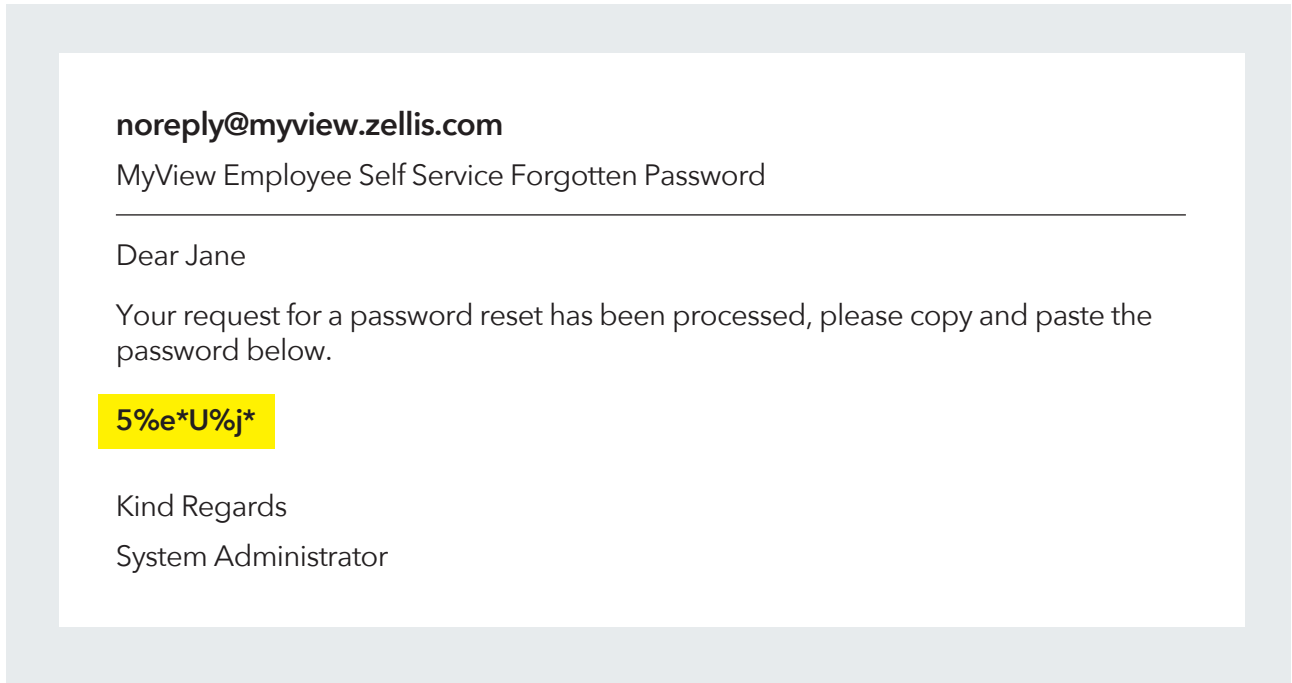
In the 'Forgotten your password?' section, enter your username. Your username will always be the same as your **employee reference number**.

Then click the 'Reset my account' button.



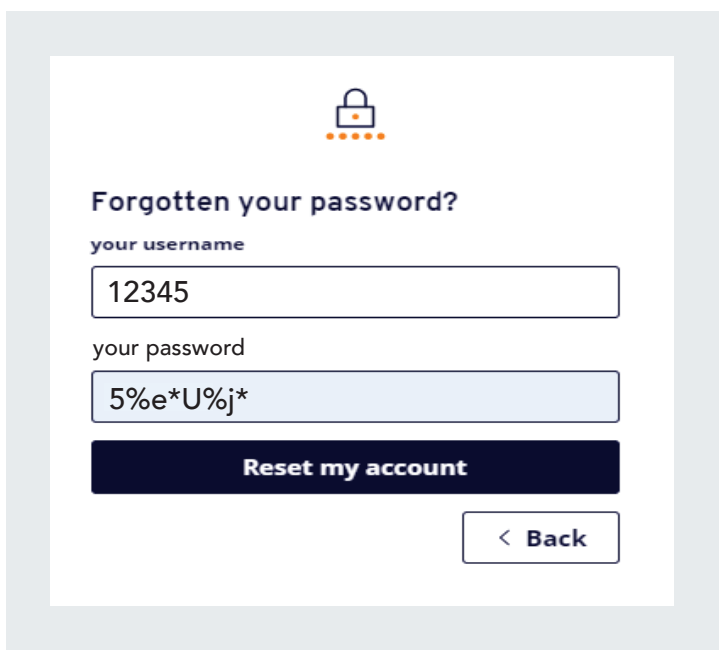
Step 4

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.



Step 5

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



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 your **employee reference number** which is your username

Enter the **temporary password**

Enter your **new chosen password**

Re-enter your **new chosen password**

Click on '**Submit**'.

The screenshot shows a 'Change your password' form with the following fields and annotations:

- your username**: Input field containing '12345', circled in green with a line pointing to the text 'Enter your employee reference number which is your username'.
- Current password**: Input field containing '5%e*U%j*', circled in green with a red border and a line pointing to the text 'Enter the temporary password'.
- New password**: Input field containing 'New password', circled in green with a line pointing to the text 'Enter your new chosen password'.
- Confirm password**: Input field containing 'Confirm password', circled in green with a line pointing to the text 'Re-enter your new chosen password'.
- Submit**: A green button with a checkmark, circled in green with a line pointing to the text 'Click on Submit'.

You will need to be logged in to 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.

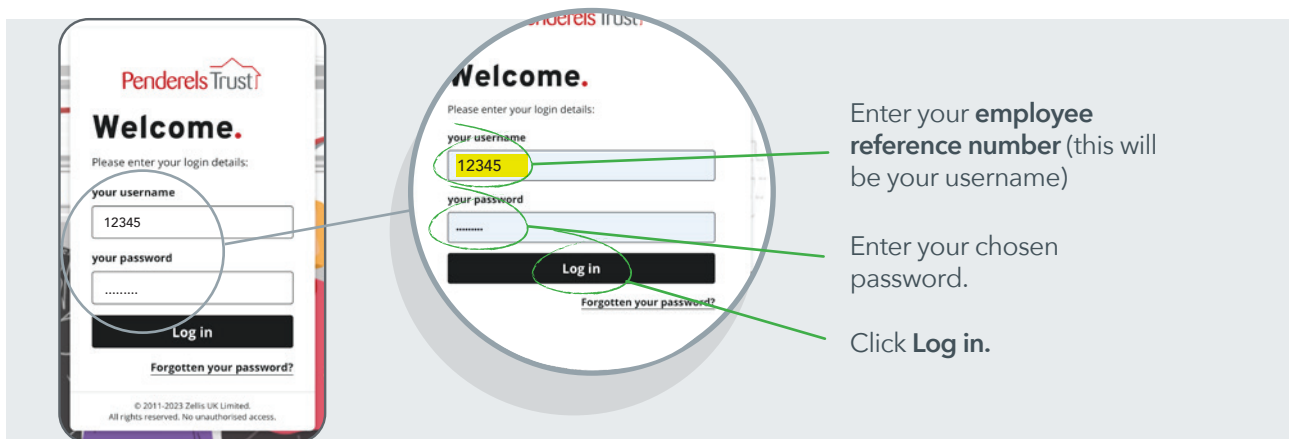
With the mobile phone app version of My View, you will only need to use MFA the first time you log in. After this, you do not need to use MFA if your phone has face recognition/thumb print recognition as this provides an equivalent level of security.

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.

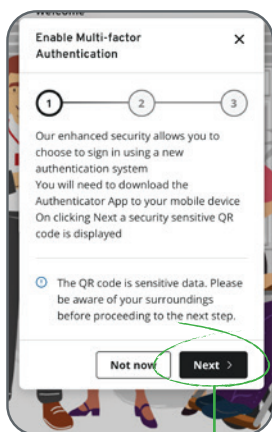
Click the blue underlined website address below to access **My View**:

<https://tinyurl.com/My-View-Home-Page>

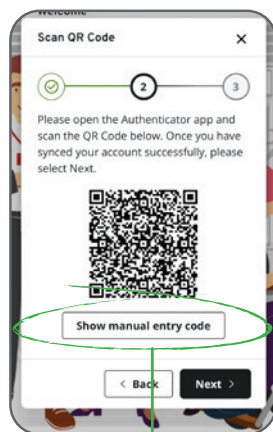
To log in, enter your **username** and chosen **password** and click **Log In**.



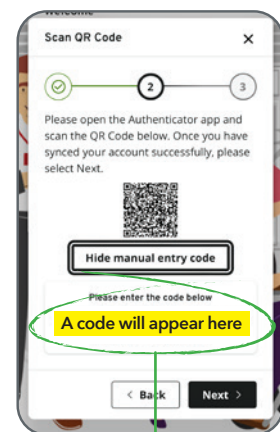
When you log into **My View**, a box will appear.



Click 'Next'



Click 'Show manual entry code'

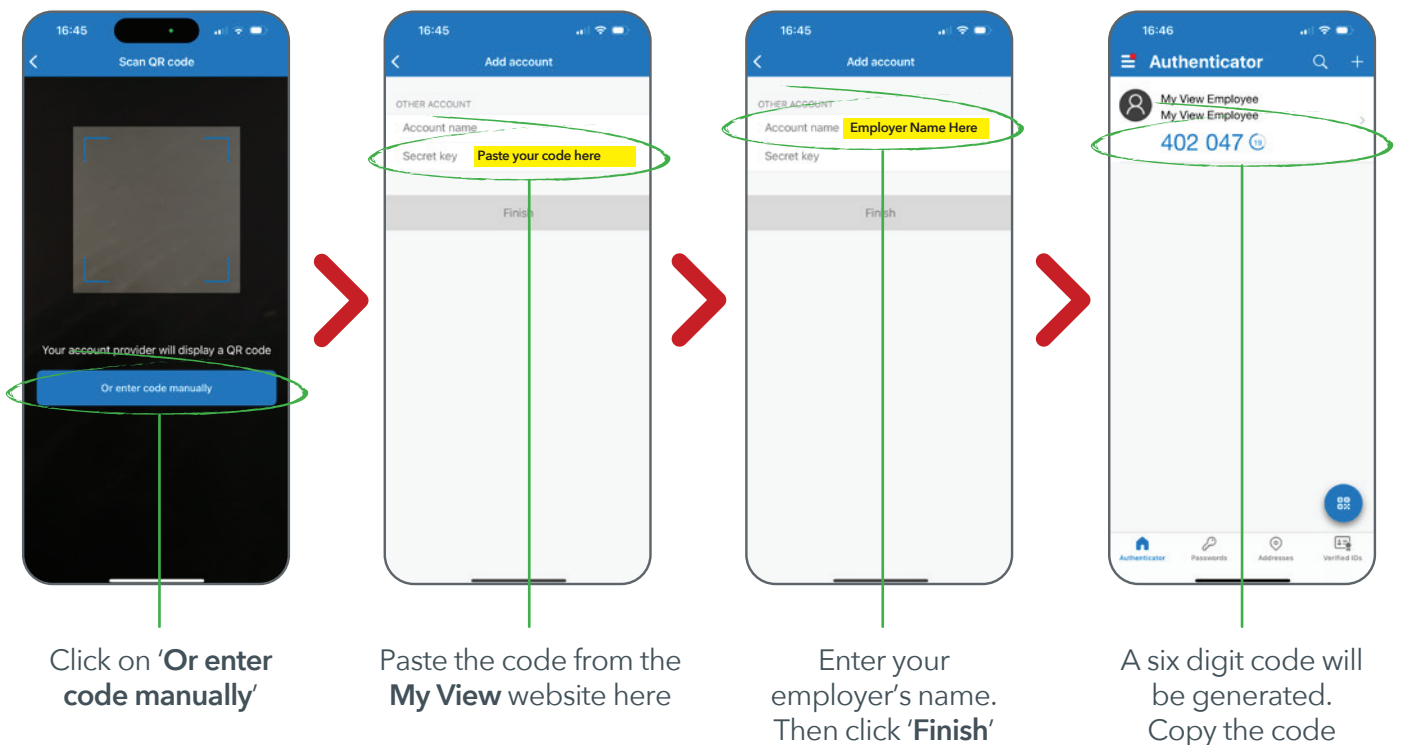
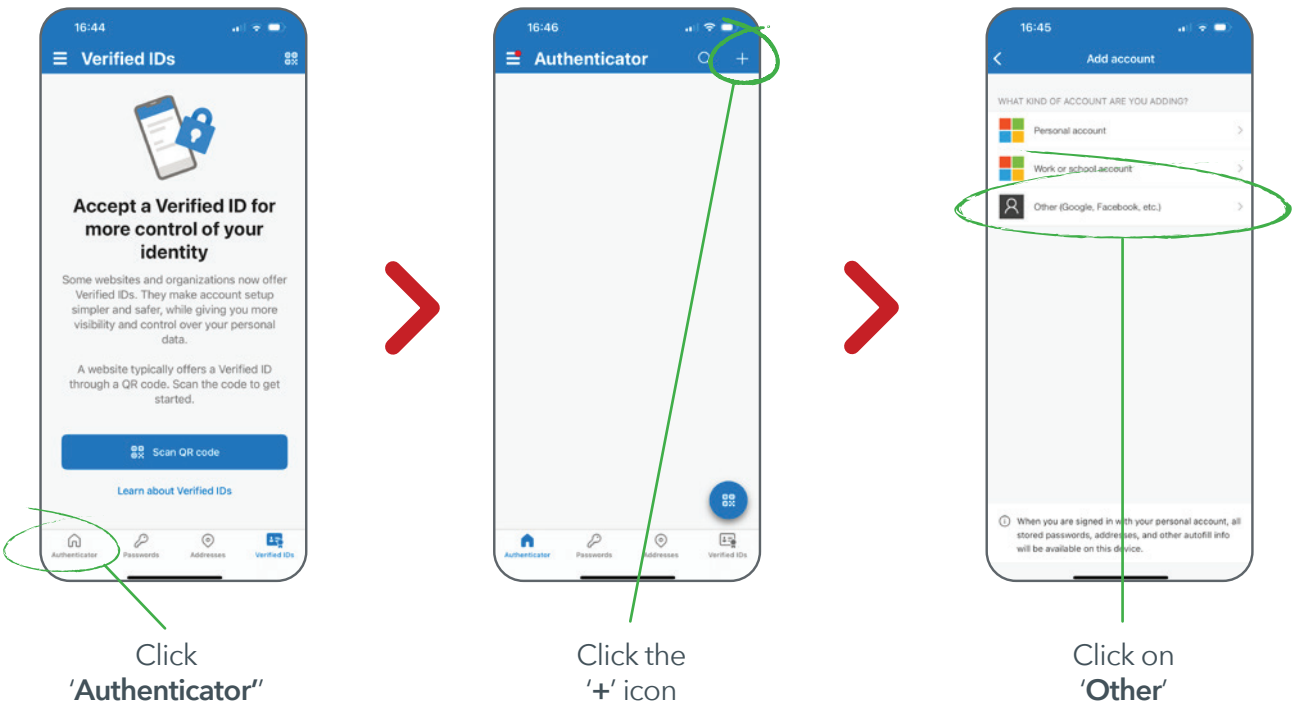


Copy the code to use in the Microsoft Authenticator App

Step 8

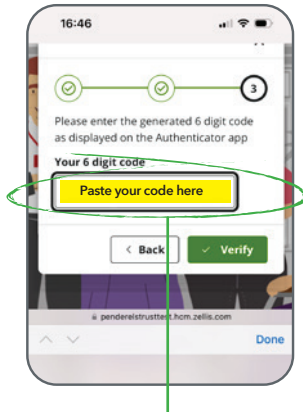
Now open the Microsoft Authenticator App.

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

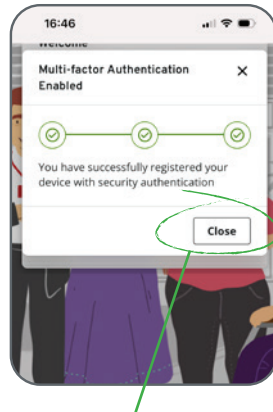


Step 9

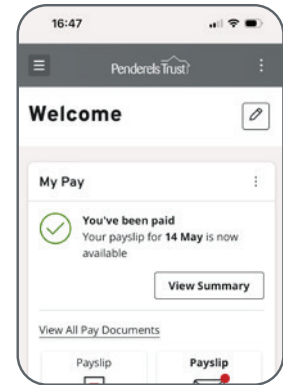
Now return to the **My View** website.



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



This will confirm you have enabled multi-factor authentication. Click **'Close'**



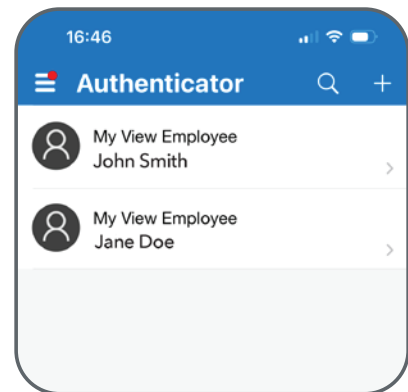
You will then be taken into your account

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 8 or 9 again.

If you work for more than one employer, you will have a different code for each account. You will need to follow the process for each one.

Once they are set up, they will be listed in your authenticator app and you just click on the name of the employer you need to get the six digit code.

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.

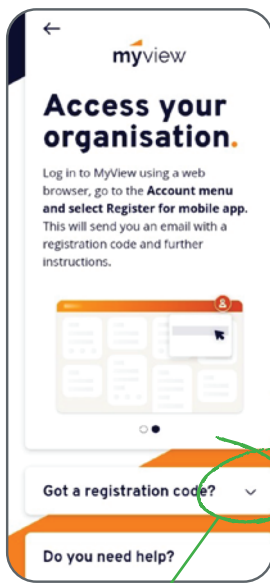


Step 10 Downloading the My View App

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

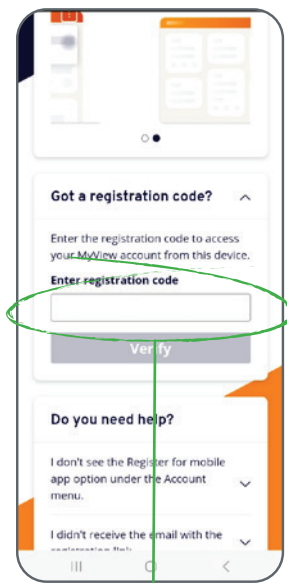
It will be the generic 'My View' app at this stage, it will not have Penderels Trust branding on it.

Click 'Get' to download it onto your phone.

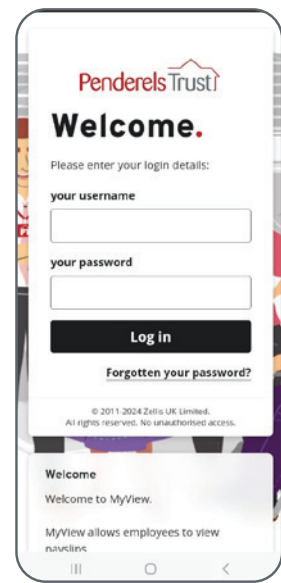


The first time you use your app, it will ask you for a registration code

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.

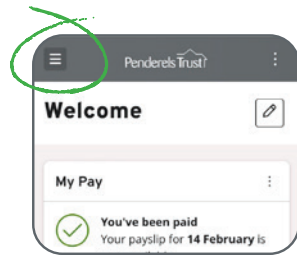
You can use the app to:

- Input timesheet claims (if your employer has agreed that you do this. They can do it themselves if they prefer.)
- View your payslips
- Input sickness leave claim

To complete a timesheet claim

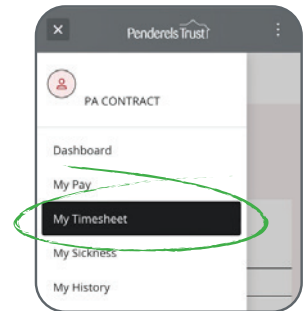
Step 1

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



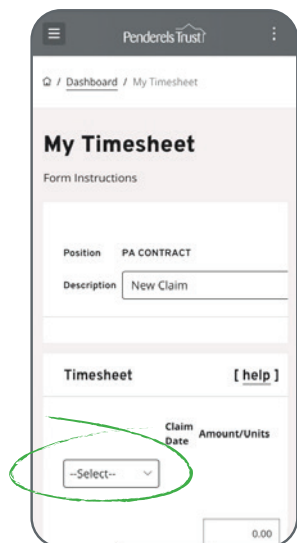
Step 2

Click on 'My Timesheet'



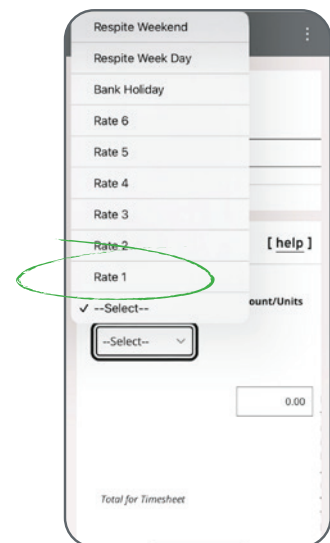
Step 3

Click on 'Select' to bring up the rate list

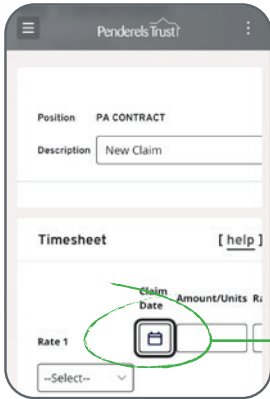


Step 4

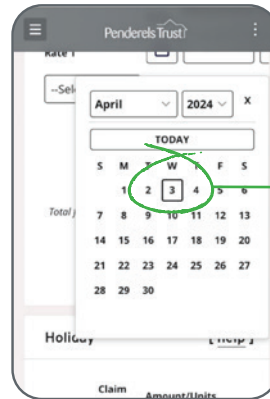
If it is your normal working day rate, choose 'Rate 1'



You can see 'Rate 1' is now selected. Click on 'Claim Date'. This should be the **start date** of the pay period. You cannot put a date in later than today's date.



Click icon to bring up the calendar.

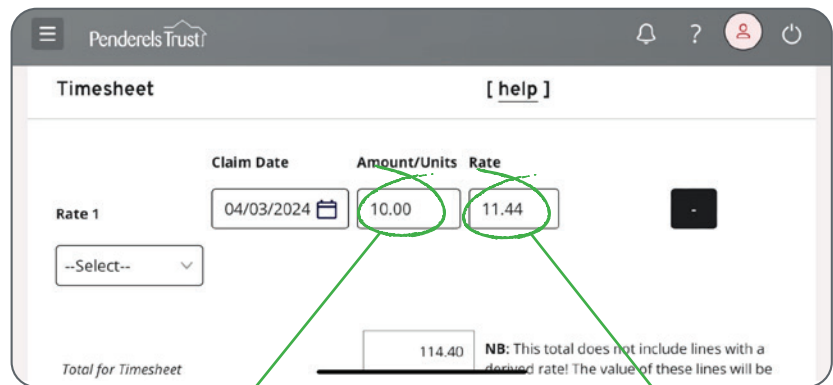


Click on the start date of your pay period.

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.

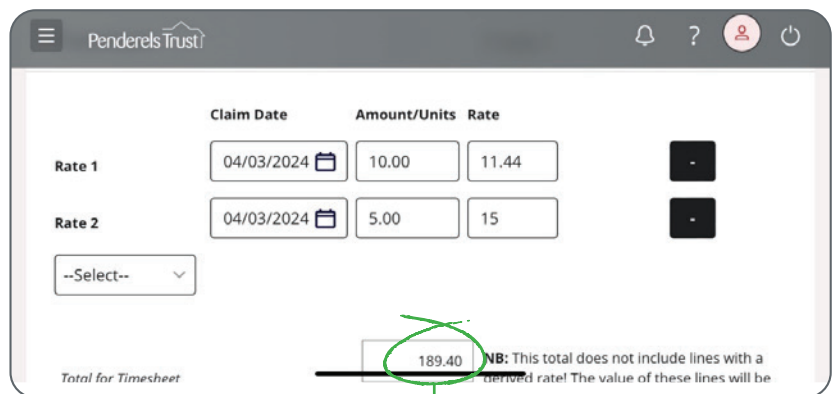


Add in number of hours worked.

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.

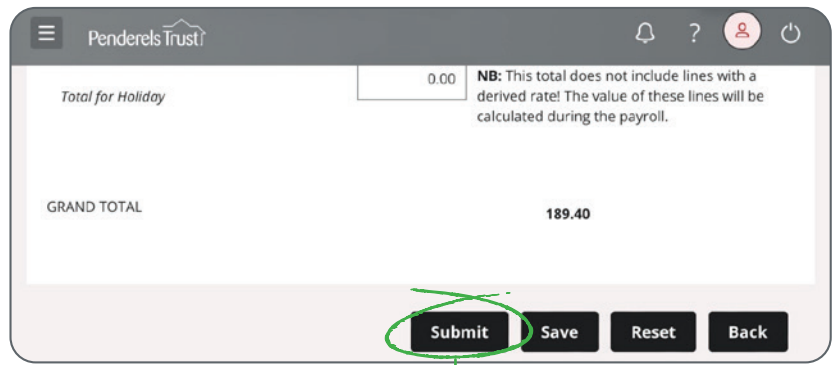


This shows your total pay for the period.

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

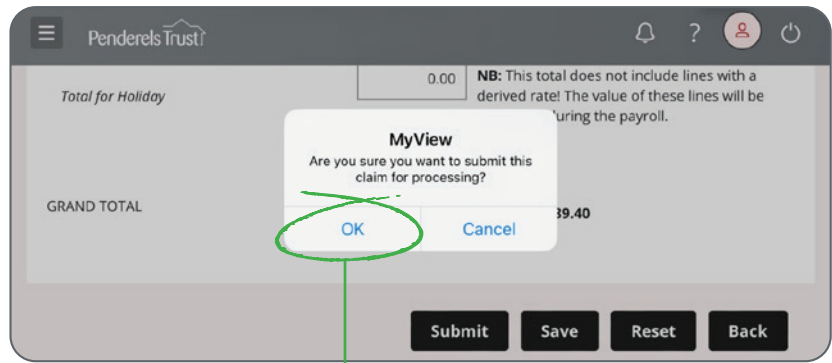
You can add up to 6 different rates on one timesheet claim, plus bank holidays and weekend rates.

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



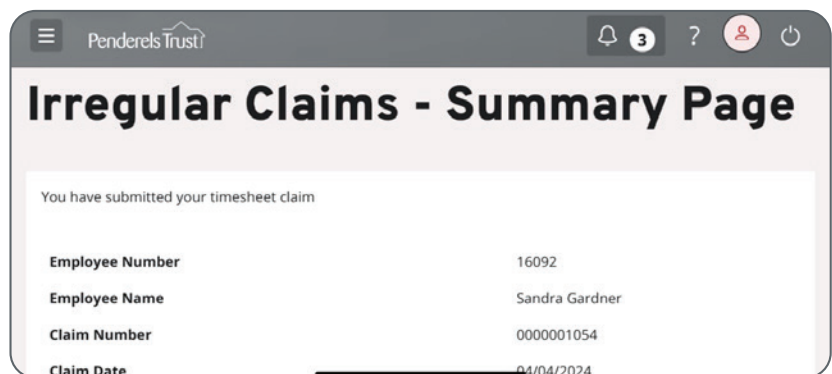
Click **'Submit'**

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.

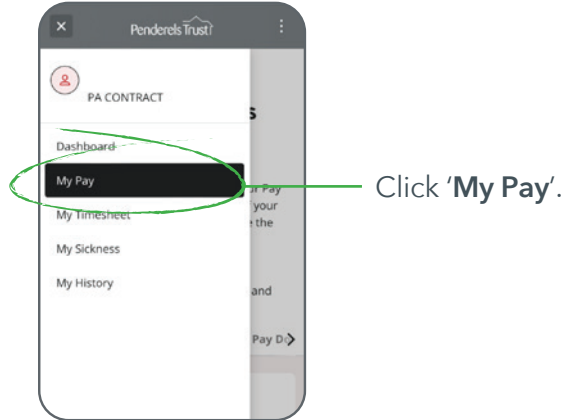


You have submitted your timesheet claim to your employer to authorise. You cannot submit timesheet claims directly to our payroll department. Your employer will receive a notification on their app to say they have authorisations awaiting approval. Once they approve your claim, it will be submitted to our payroll department for processing. If they don't approve it or they choose to reject it, we will not receive it and it will not be processed.

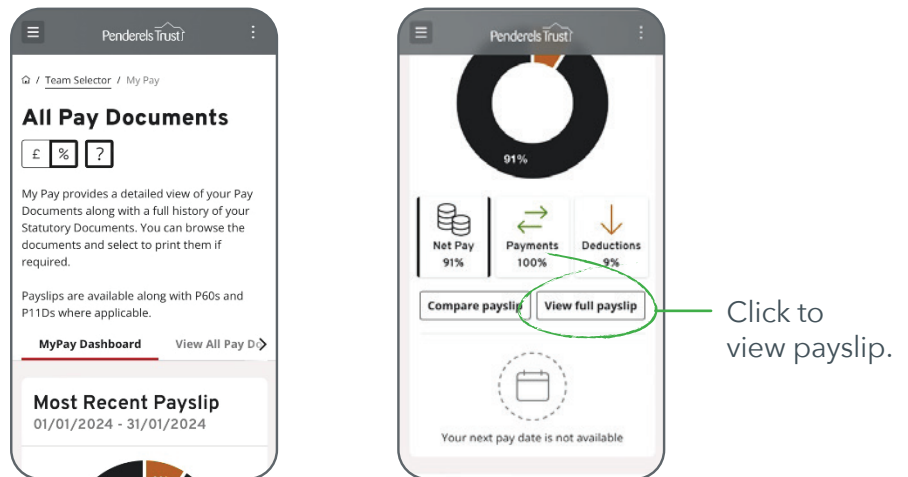
Timesheet approvals must be received from your employer by the timesheet submission deadline date and time.

To view your payslip

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

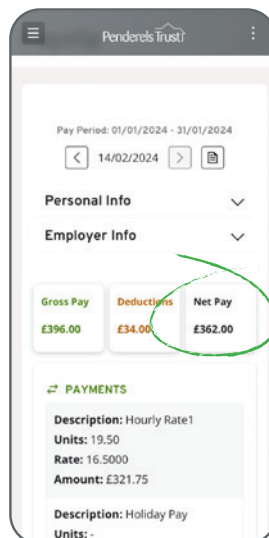


This will bring up the 'All Pay Documents' screen.
Scroll down and click on 'View full payslip'.



This will bring up the latest payslip, showing the net amount that your employer should pay you.

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

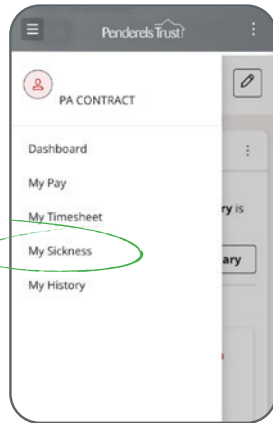


Sickness Leave

If you are sick, you are able to upload the details on your My View app. This can then be approved or rejected by your employer. This does not necessarily change the current arrangement you have with your employer for letting them know you are unable to work due to sickness.

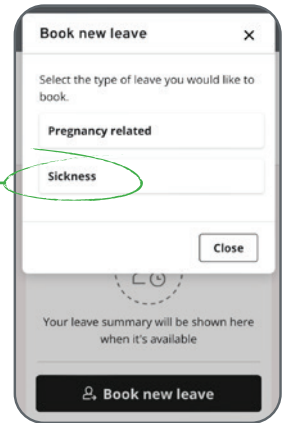
On the app, go to the menu with the three lines to bring up the list.

Click on 'My Sickness'



This brings up a new screen.

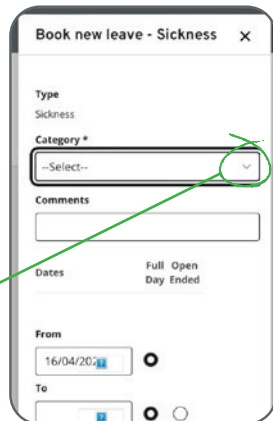
Click on 'Sickness'



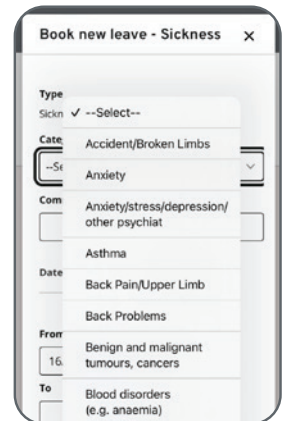
This brings up a new screen where you input details of your sickness leave.

You need to choose a category for your sickness.

Click on arrow to bring up the list.

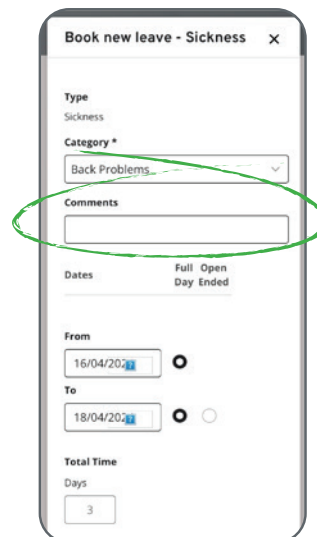


Choose the description that closely matches your reason for sickness.



If you wish to leave a comment (for example, giving more detail about your sickness or how it happened if you had an accident), you can do that in the 'Comments' box.

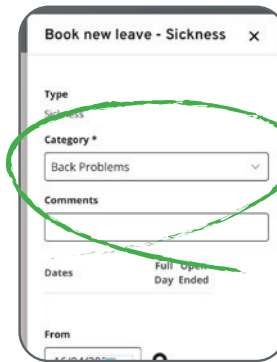
You do not have to write anything in here.



You can input the dates you know you will be off sick.

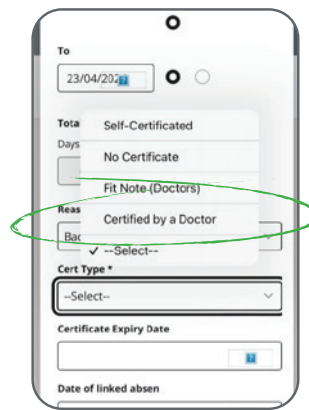
The **'From'** date should be today's date or earlier.

If you don't know when you will be fit to return to work, you can leave the return date and click on 'open-ended'.



Please click on **'Reason'** and click on the appropriate answer.

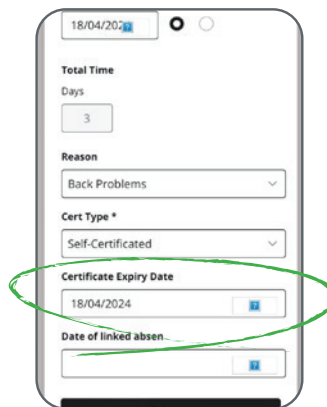
For certificate type, if you have not been to a doctor and have decided yourself that you are too unwell to work, click on **'Self-certificated'**.



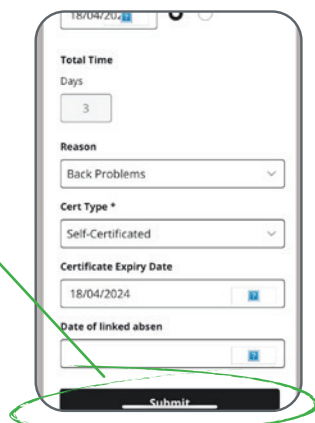
If you have a certificate, please put the expiry date.

You can leave this section blank if you don't have a certificate.

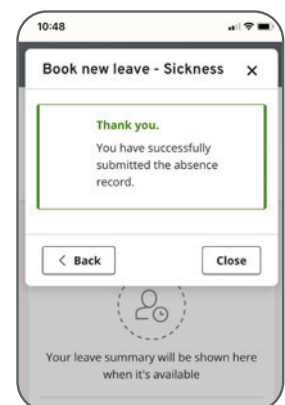
Please leave **'Date of linked absence'** blank.



Click on the **'Submit'** button.



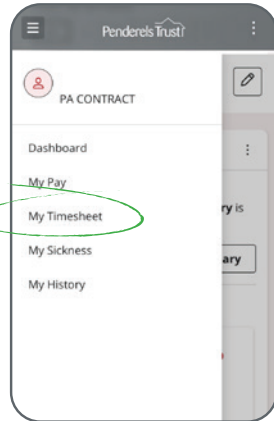
You will then get a message to say your sickness absence has been successfully submitted.



Holiday Hours

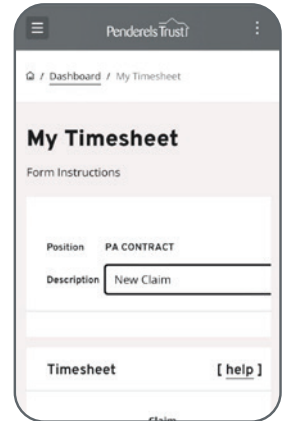
To submit holiday hours on your timesheet, click on the three white lines in the top left-hand corner of your screen which will bring up the main menu.

On the app, go to the menu with the three lines to bring up the list.



Click on 'My Timesheet'.

This will bring up the timesheet screen.

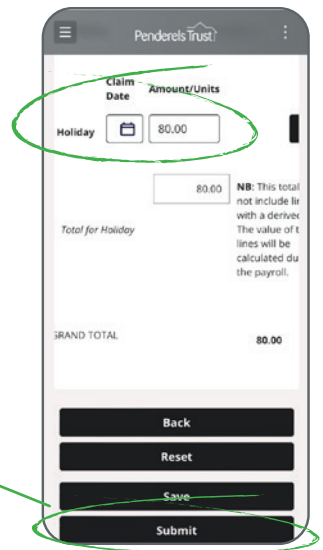


Scroll down to the 'Holiday' section.



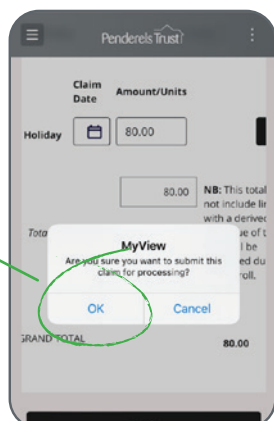
Enter your claim date and how many units (pounds) you wish to claim.

This should be the number of hours multiplied by the hourly rate.



Then click on 'Submit'.

Click on 'OK' when you are asked if you are sure.



This will bring up a summary page.



The holiday claim has been submitted to your employer.

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 posted payslips as well as using My View?

A: Unfortunately, we cannot provide payslips in both ways on one account. If the employer is using My View, then all their PAs will receive their payslips via My View. 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: What documents can I view on My View?

A: You can view your payslips from the latest one back to when you started on My View. You can also see pay documentation including your P60. You can request earlier payslips to be published on your My View account if you need them. Please send us an email to myview@penderelstrust.org.uk with your request.

Q: Can I submit timesheet claims on behalf of my employer?

A: As an employee, you are able to complete timesheet hour claims via your own My View account. You cannot submit these directly to us, however, your employer must authorise the claim via their 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 employer's payroll planner which will show the deadline dates for the pay group you are in.

Q: I am leaving this job, will I still be able to access My View to see my payslips?

A: You will be able to access My View for one year after you are marked as a leaver on our system. It is strongly advised that you download all your payslips and save them on your own device in case you need them in the future well before that date.