PA Guide | Desktop Version

Penderels Trust

A guide to using **My View** for Personal Assistants (PAs)

Welcome to the My View User Guide for personal assistants (PAs). 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.

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 for authorisation by your employer. This is instead of sending a timesheet in for every pay cycle.
- View your payslips and other pay documentation.
- Submit sickness days for authorisation by your employer.

Timesheet claims should be submitted by your employer to meet their usual timesheet deadline at the latest.

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

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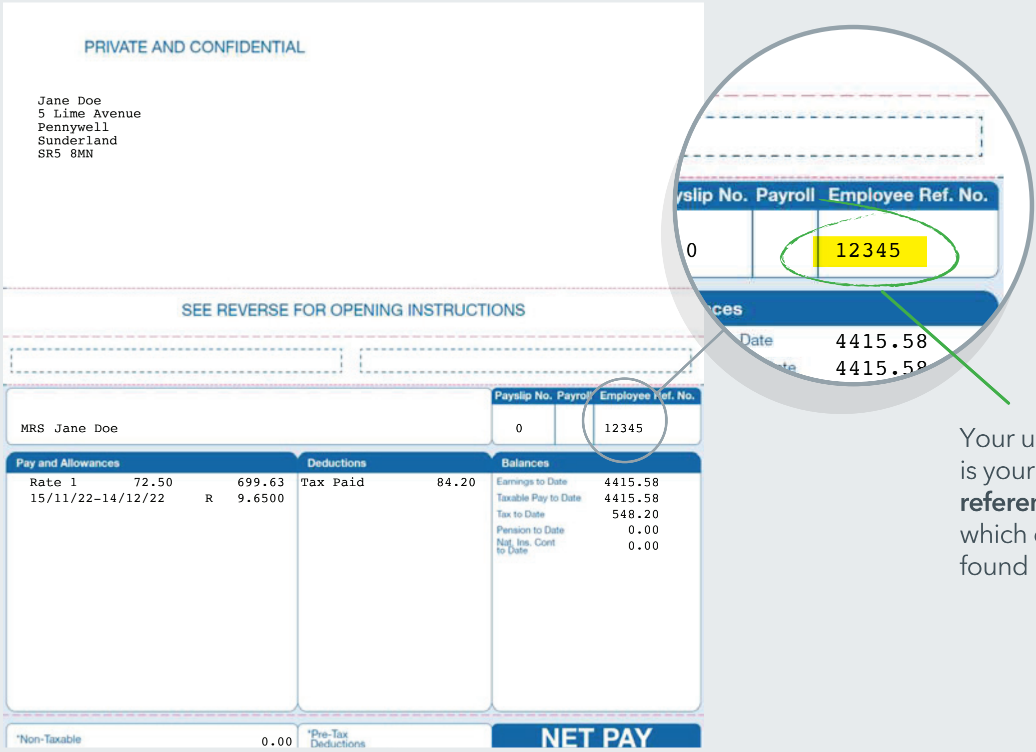
Section One: Getting Started

The first time you use My View, you will need to register. You only have to do this once. Please follow all the steps in this 'Getting Started' section.

Before you start, 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



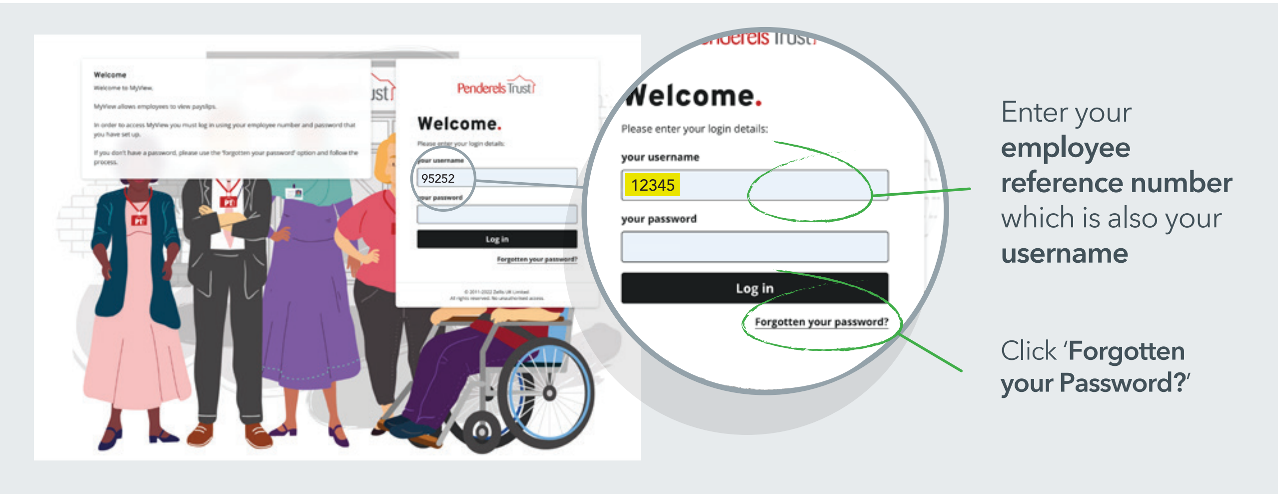
Your username is your **employee reference number** which can be found here

Step 1

Use the link below to access **My View**:
https://penderelstrust.hcm.zellis.com/myview/dashboard-ui/index.html#/landing

To register, you must enter your **username** which is your **employee reference number**.

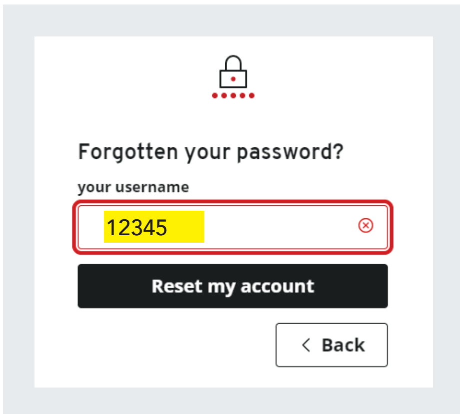
You then need to set up a password. To create a new password, click '**Forgotten your password?**' and follow the instructions in Step 2.



Step 2

In the 'Forgotten your password?' section, enter your **employee reference 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 Employee Self Service Forgotten Password

Dear Jane

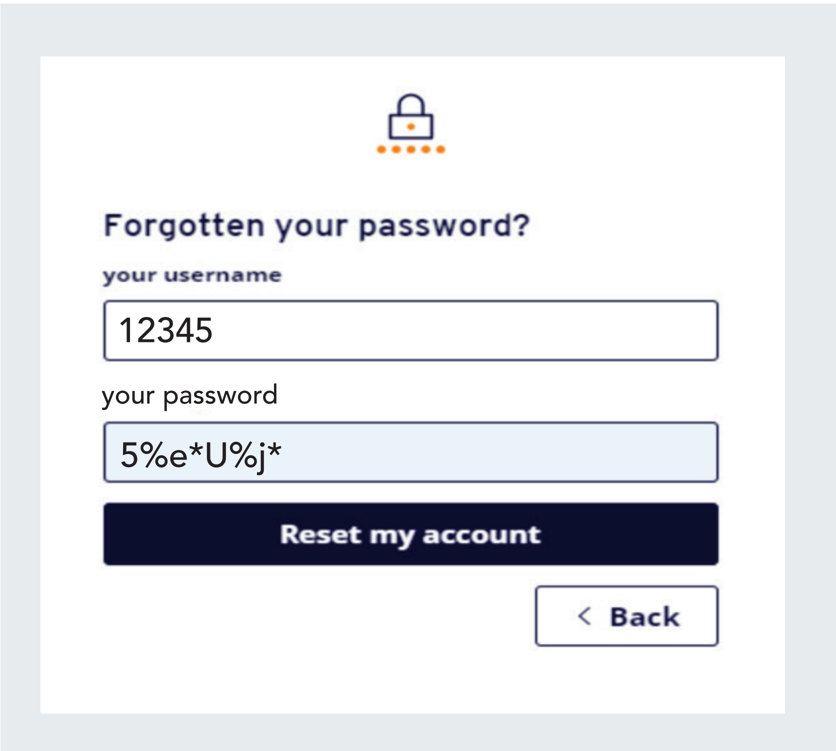
Your request for a password reset has been processed, please copy and paste the password below.

5%e*U%j*

Kind Regards

System Adminisrator

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



Step 4

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

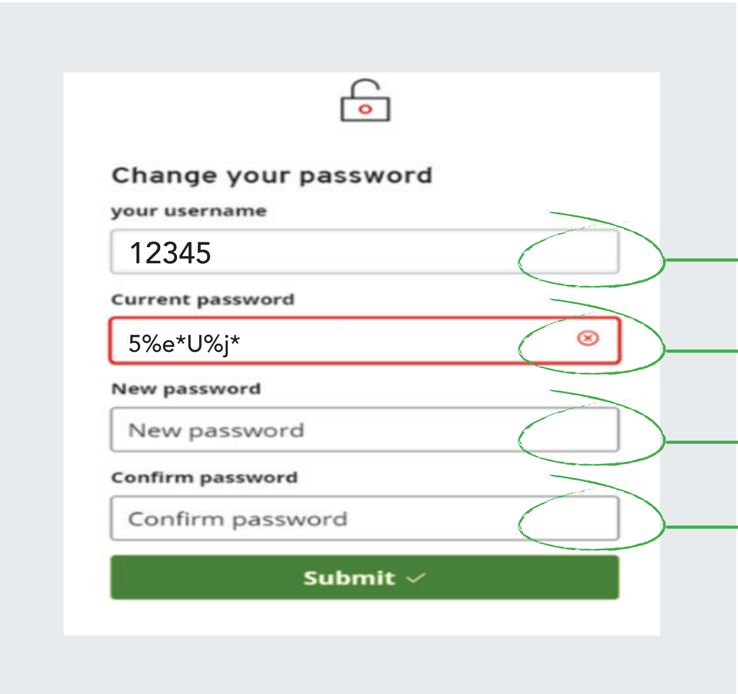
Your new password must be 8 characters long and must include:

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 your **employee reference 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.

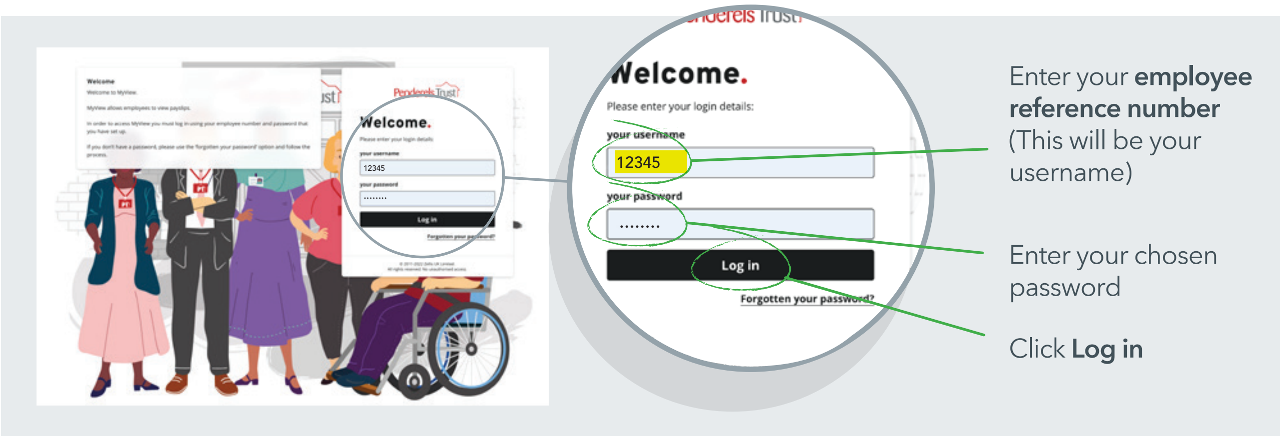
Section Two: Using My View

Step 1

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

To log in, enter your **employee reference number** (which is also 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.

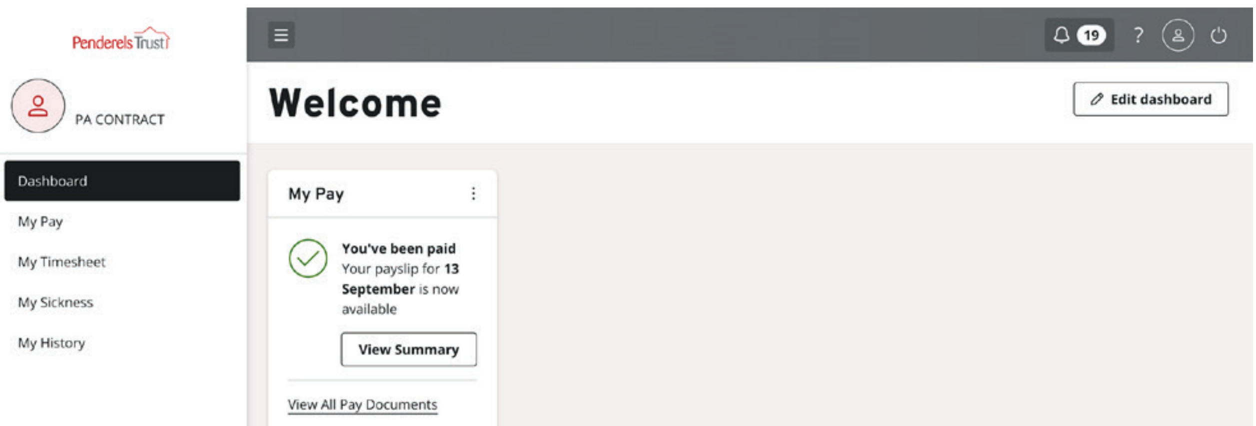


Step 2

Once logged in, you will see the Welcome page.

You can use My View to:

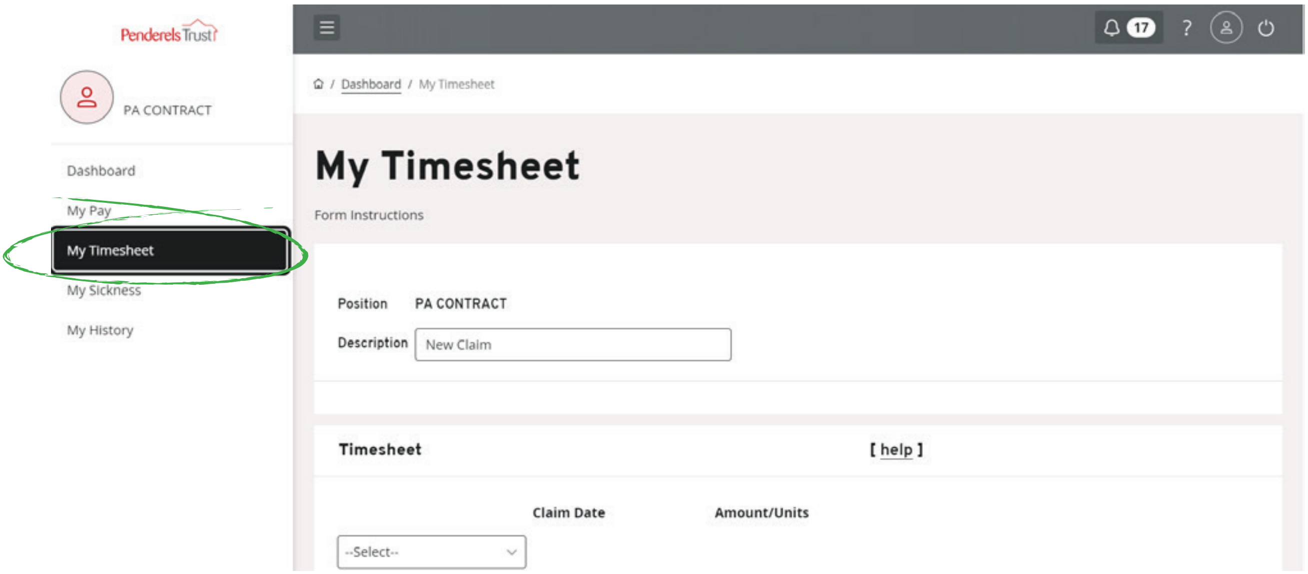
- Input timesheet claims (if your employer has agreed that you do this. They can do it themselves if they prefer.)
- View your payslips
- Input a sickness leave claim.



To complete a timesheet claim

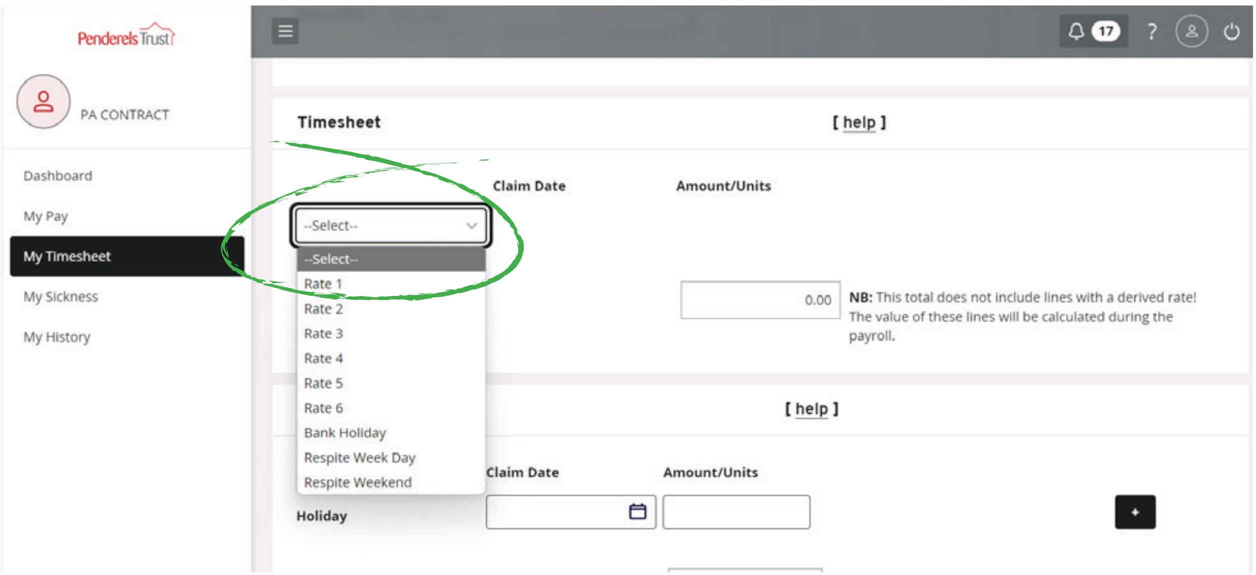
Step 1

Click on ‘My Timesheet’ in the left hand menu list.



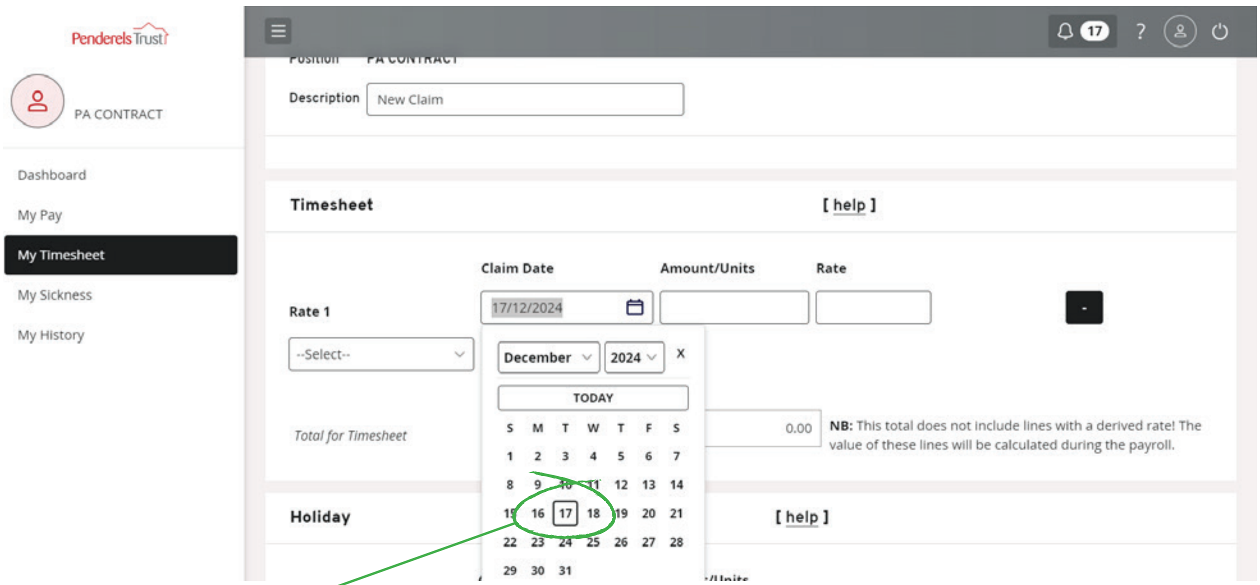
Step 2

Click on ‘**Select**’ to bring up the rate list.

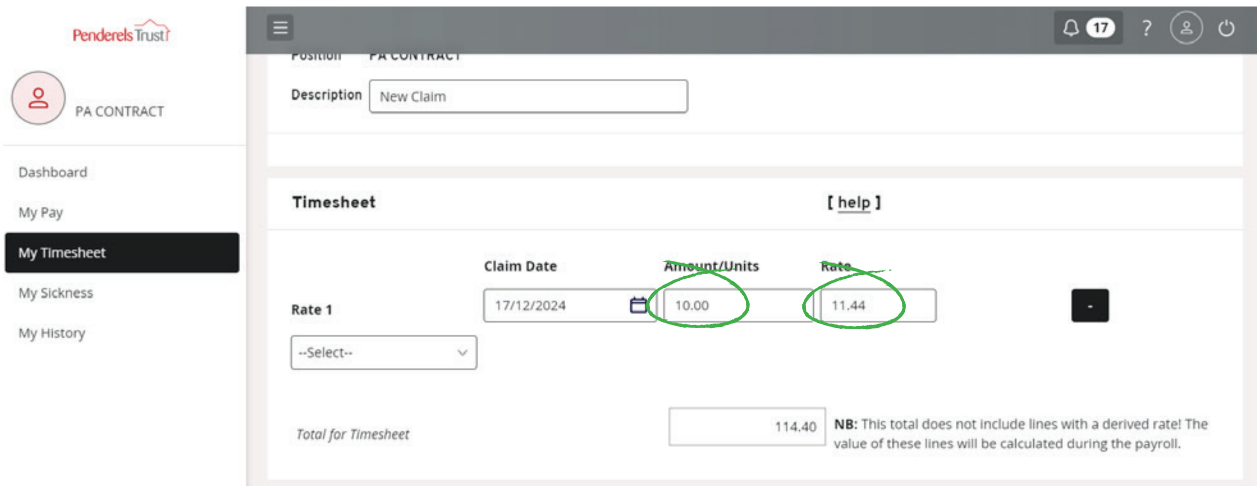


If it is your normal working day rate, choose ‘**Rate 1**’.

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 on the start date of your pay period.

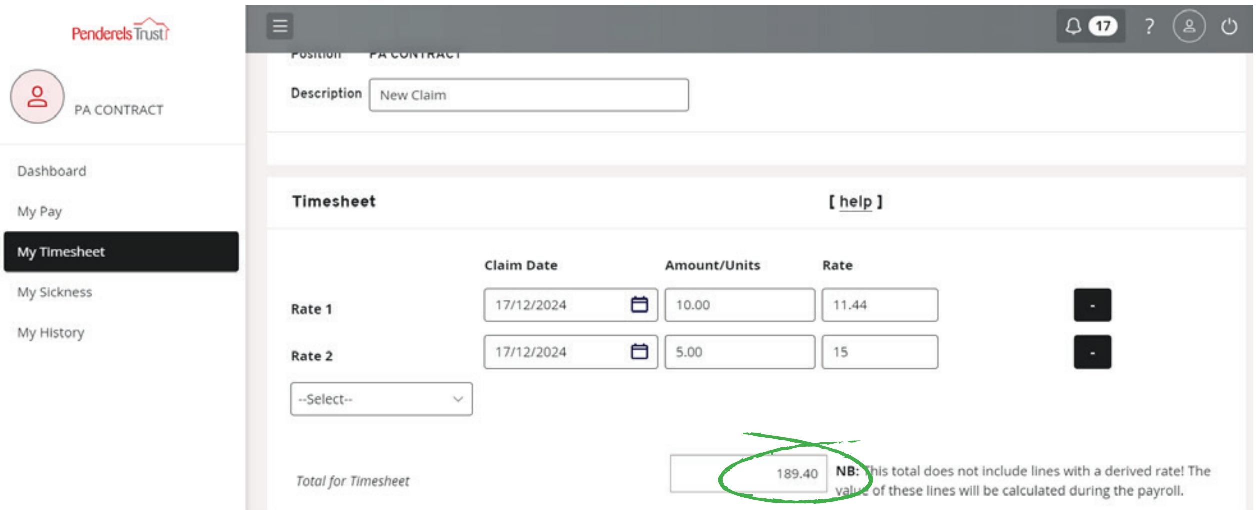


Add in the '**amount/units**'. This is the number of hours worked.

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

If a different rate of pay is needed for some of the hours worked e.g. weekend, click on '**Select**' and choose '**Rate 2**'. This adds a new line. There are also other options including '**Bank Holiday**' and '**Respite Weekend**' so pick the most appropriate one.

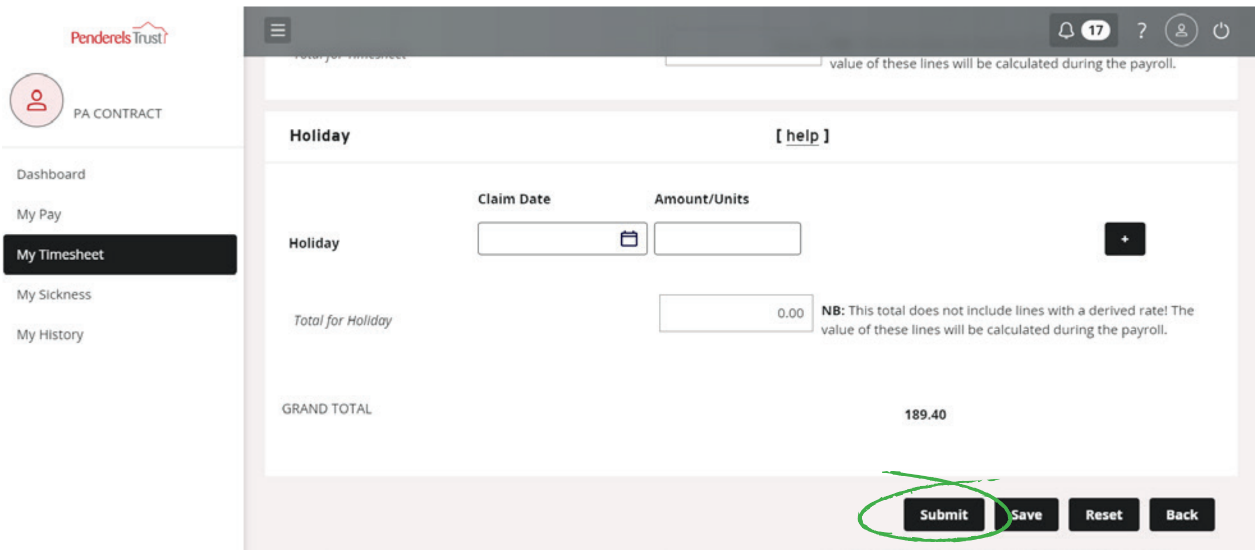
Complete this in the same way you did for Rate 1. When you hit return on your keyboard, it will calculate the amount to be paid in the '**Total**' box.



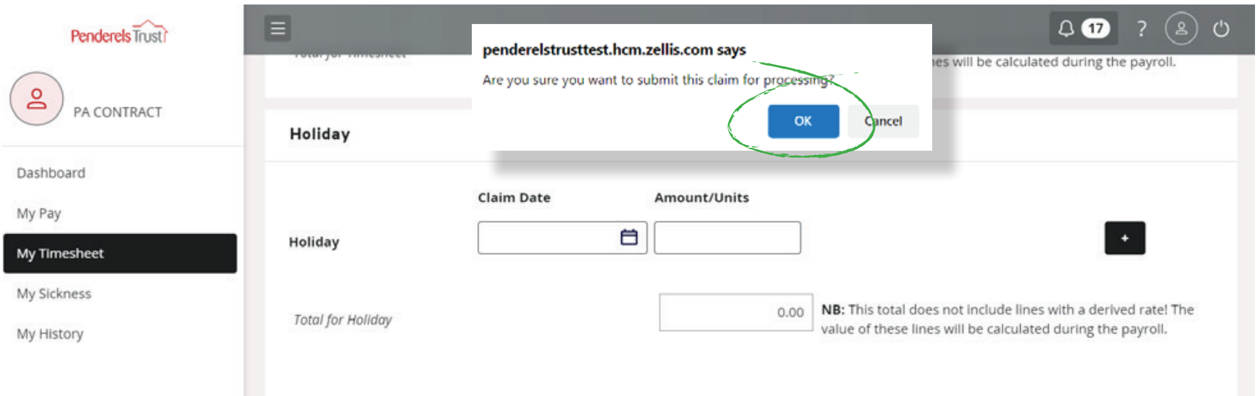
Please ignore the 'NB' sentence, this is not relevant to us.

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

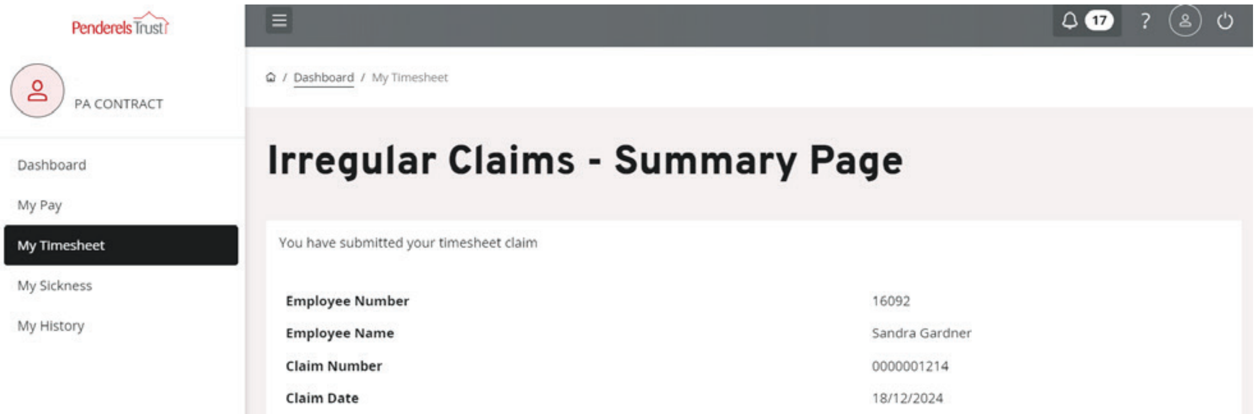
When you have added all the hours worked, scroll down to the bottom where you will see the '**Submit**' button. Click on this.



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

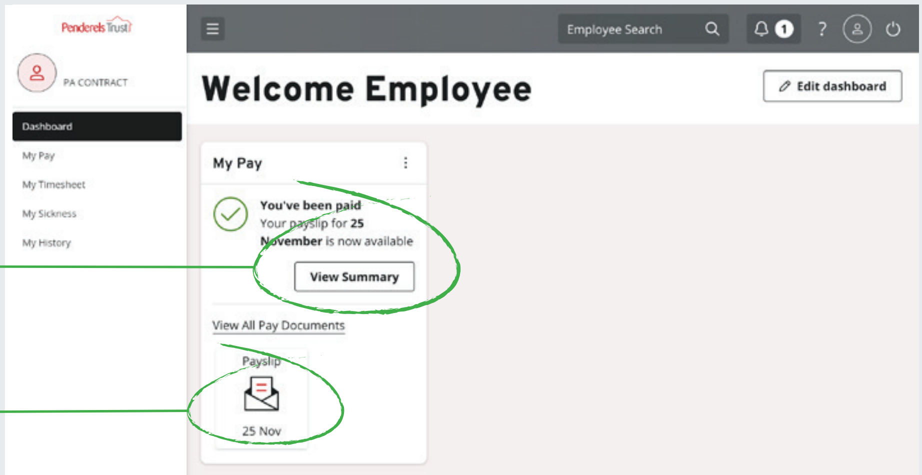
Your latest payslip is available via the Welcome page.

This page will show you when you last had a payslip.

Click on the '**Payslip**' icon to view your latest payslip.

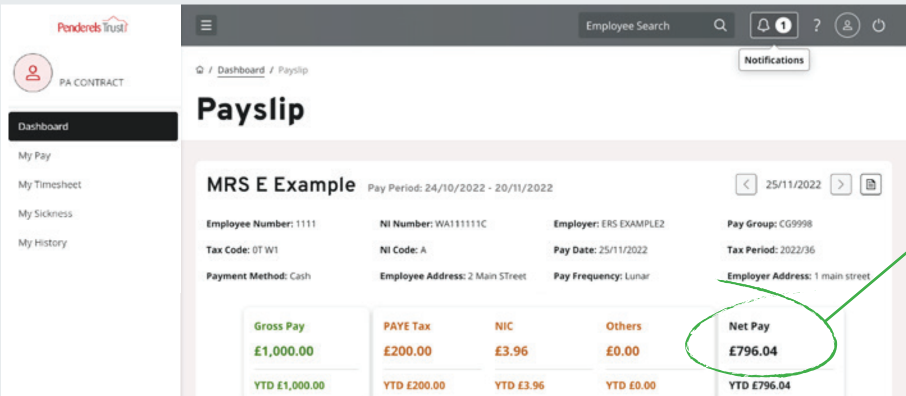
Here you can see when you were last paid

Click on the '**Payslip**' icon to view your latest payslip

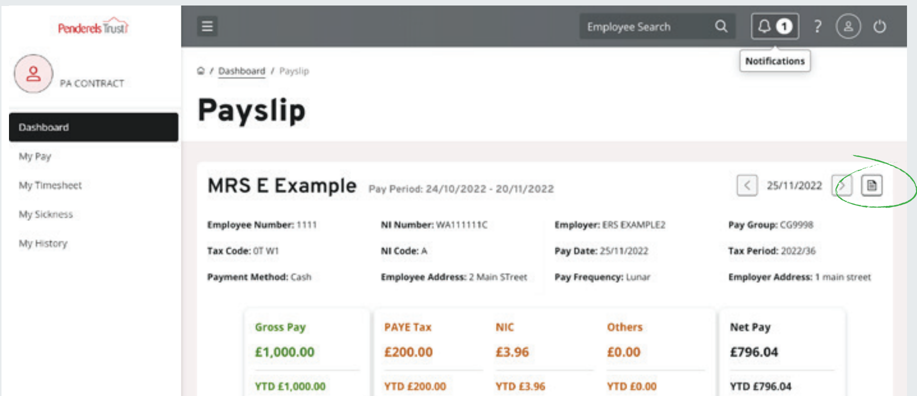


Step 3

You can now see your latest payslip including the net amount your employer needs to pay you.



Here you can see the net figure. This is the amount your employer needs to pay you

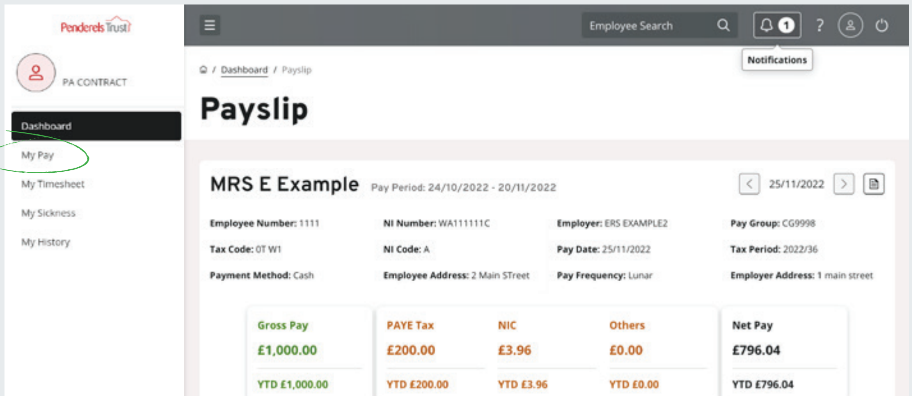


You can download the payslip to save onto your device if you wish

Step 4

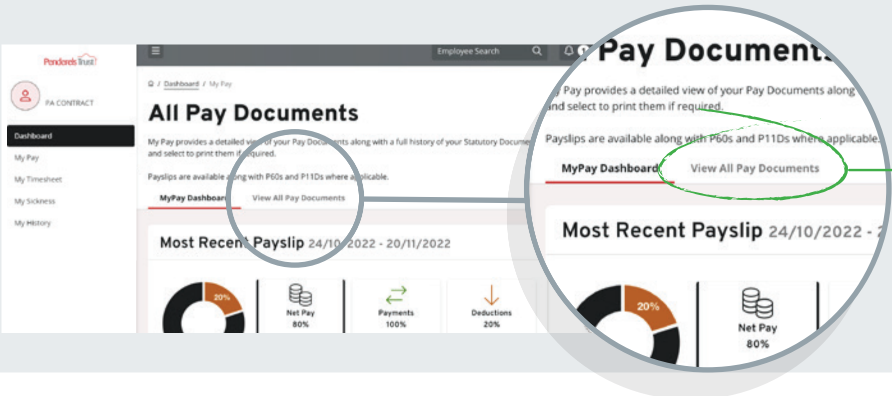
To access other pay documentation such as previous payslips or your P60, click on the **My Pay** tab.

Click on the **My Pay** tab



Step 5

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

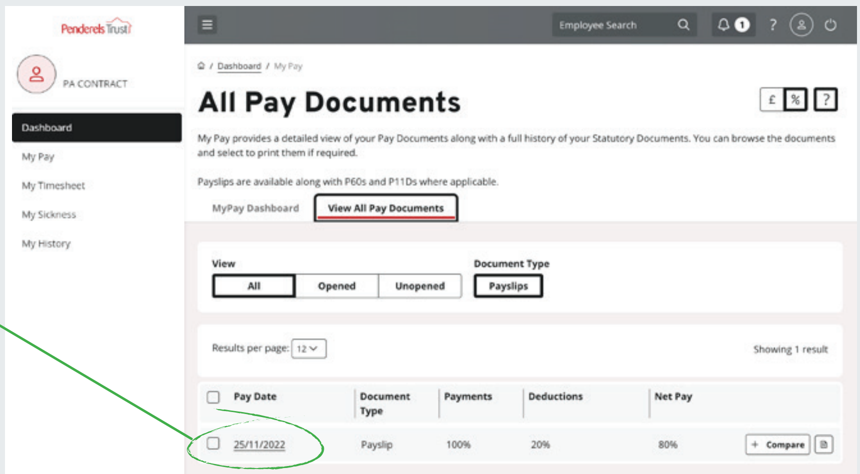


Click on the **'View All Pay Documents'** tab to view previous payslips

Step 6

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

Click the date of the payslip you wish to view

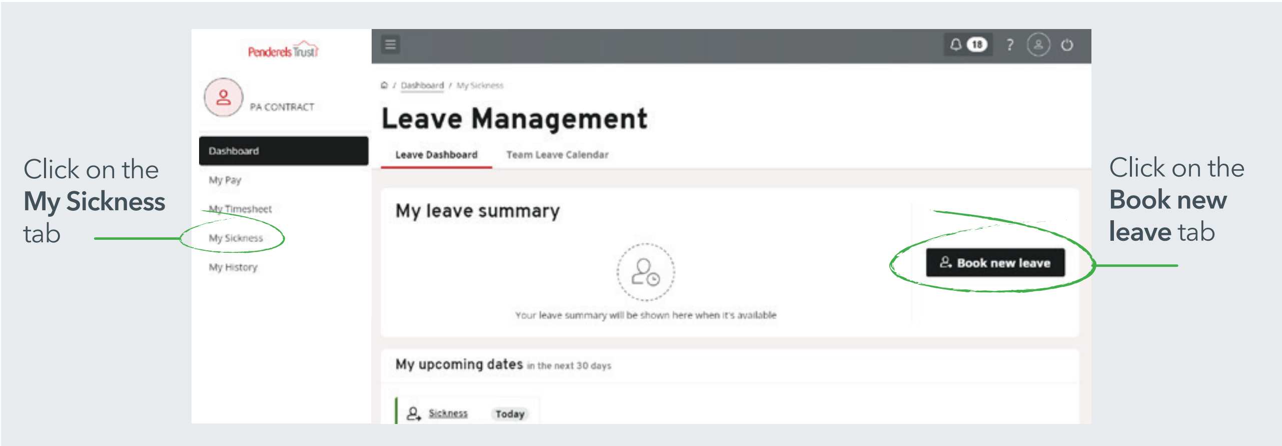


Sickness Leave

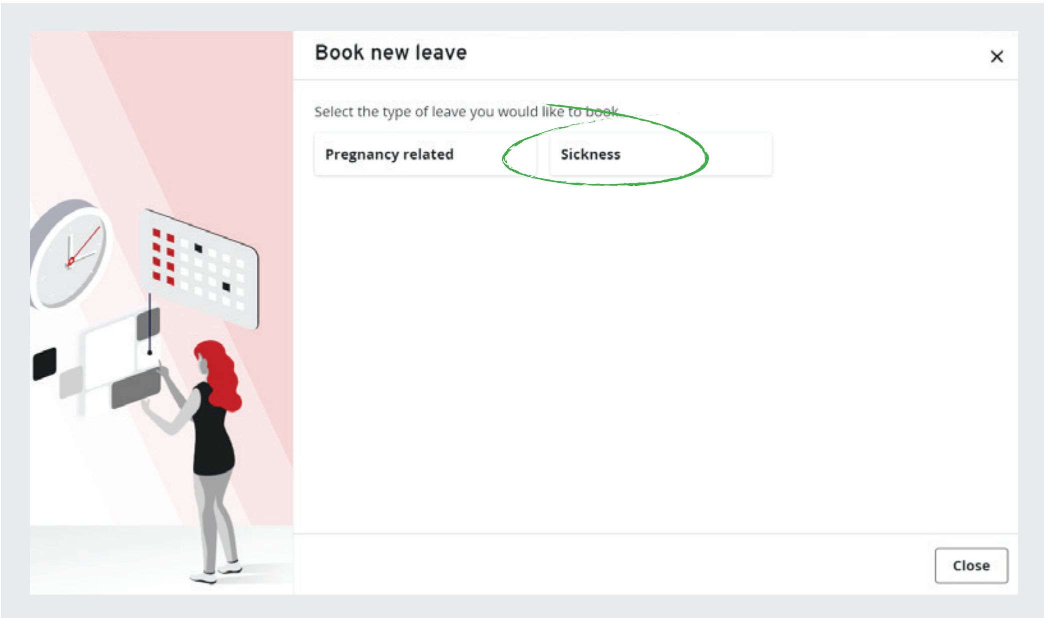
If you are sick, you are able to upload the details on your My View account. This can then be approved or rejected by your employer. This does not necessarily change the current arrangement you have with your employer for letting them know you are unable to work due to sickness.

On the left hand menu, click on '**My Sickness**'.

This brings up the '**Leave Management**' screen. Click on '**Book new leave**'.



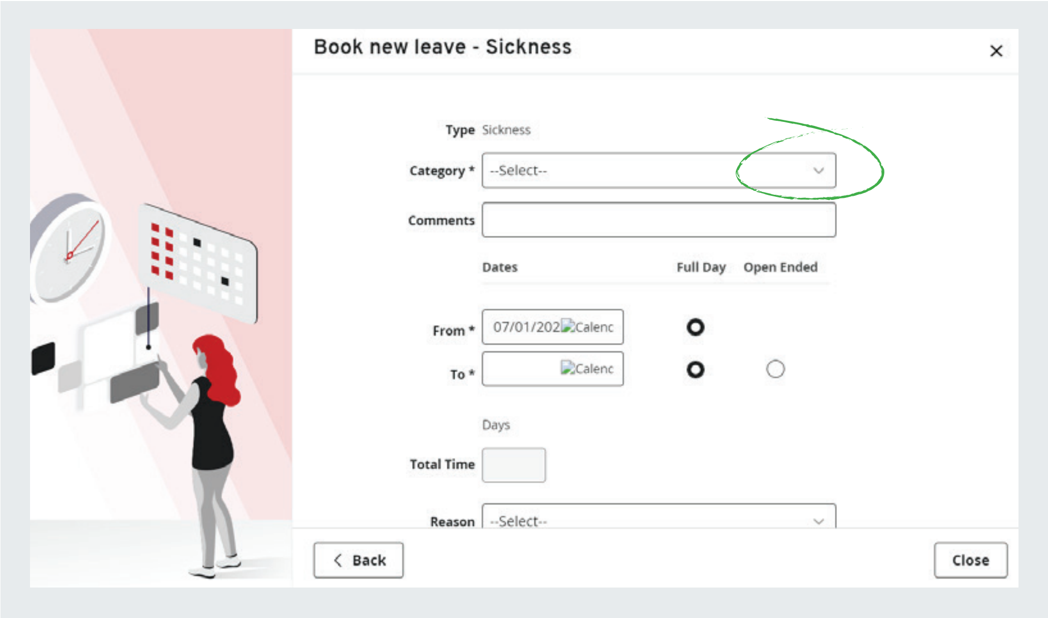
This brings up a new screen. Click on '**Sickness**'.



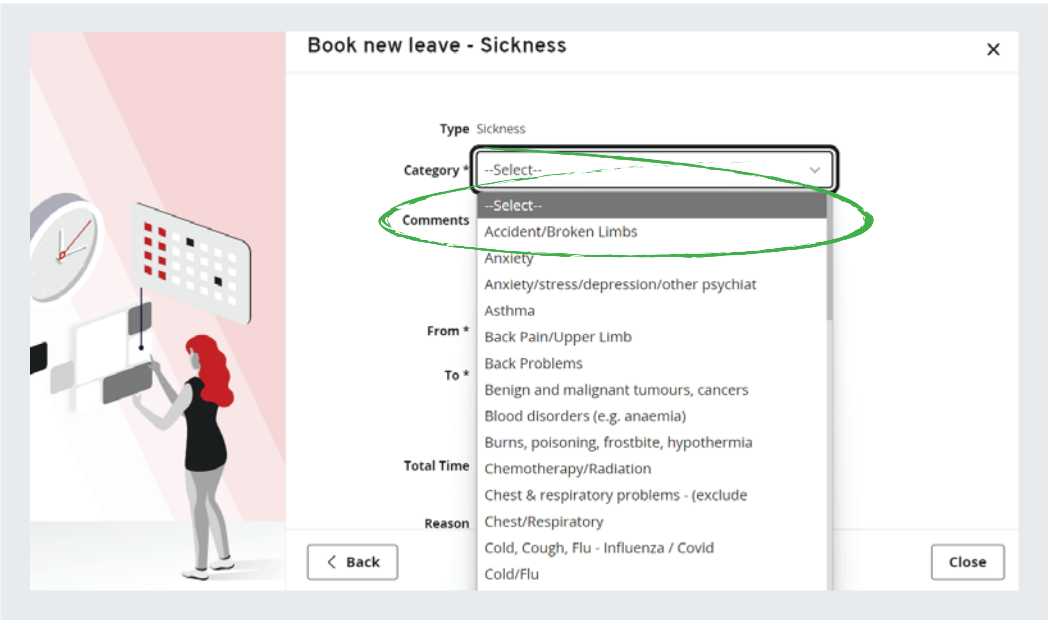
This brings up a new screen where you input details of your sickness leave.

You need to choose a category for your sickness.

Click on the arrow to bring up the list.



Choose the description that closely matches your reason for sickness.



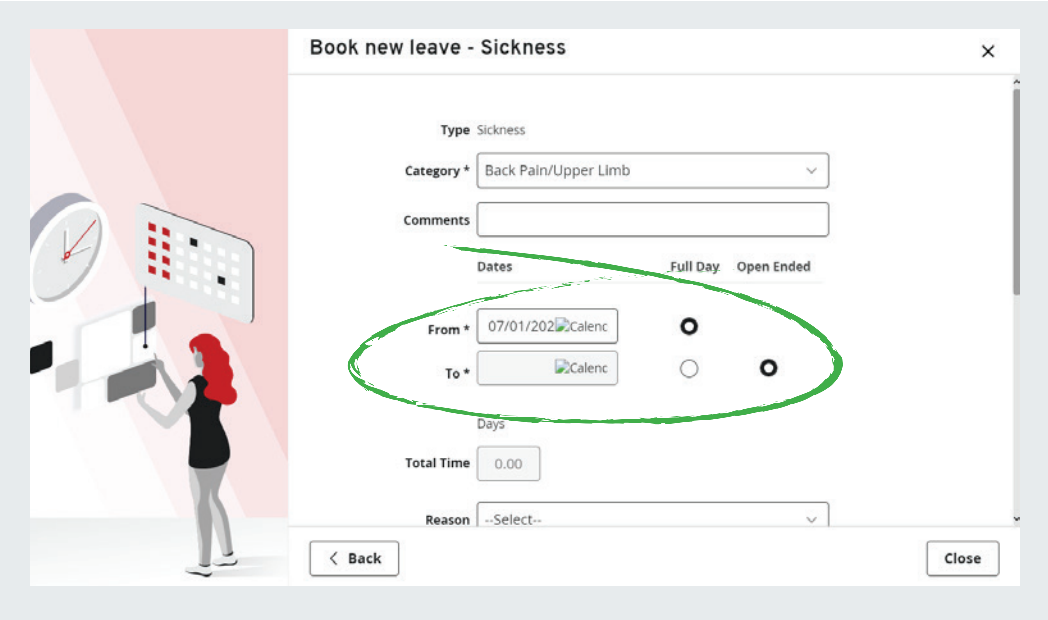
If you wish to leave a comment (for example, giving more detail about your sickness or how it happened if you had an accident), you can do that in the '**Comments**' box.

You do not have to write anything in here.

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

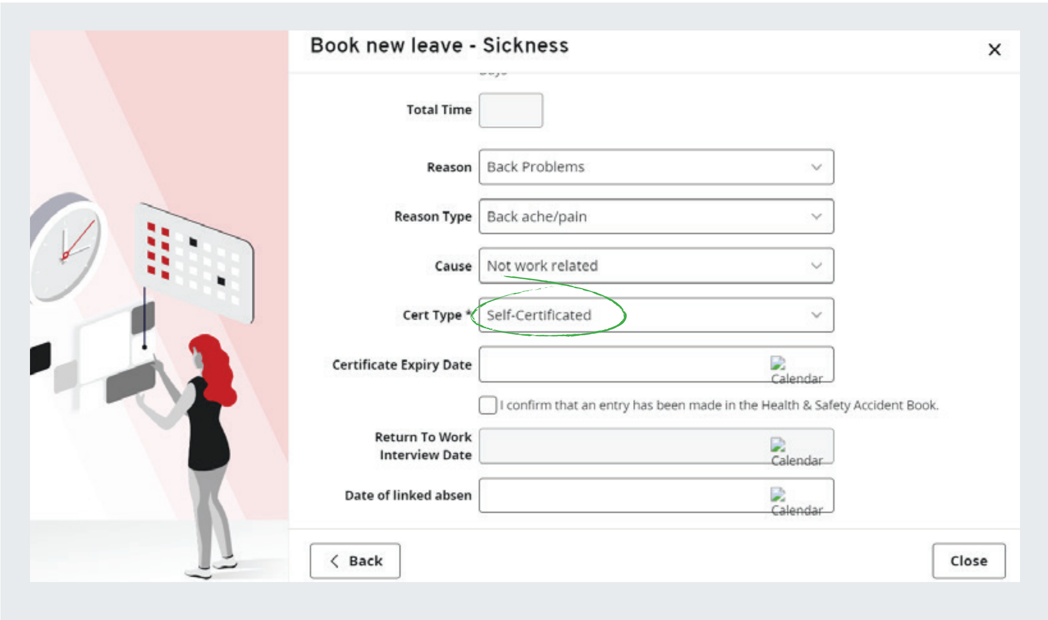
You can input the dates if you know how long you will be off sick.

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 complete the Reason and Cause boxes. These are not compulsory.

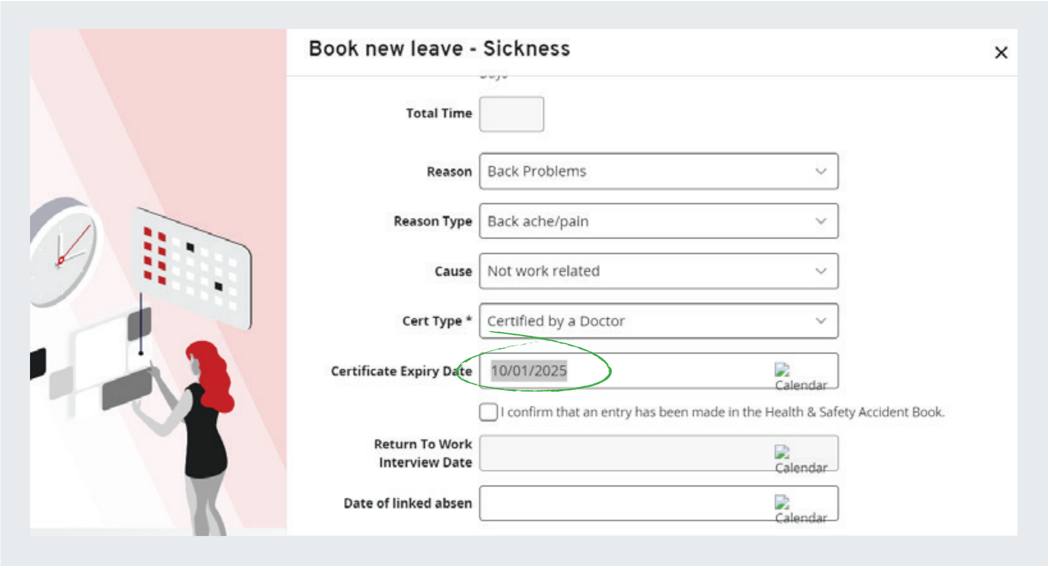
For certificate type, if you have not been to a doctor and have decided yourself that you are too unwell to work, click on '**Self-certificated**'.



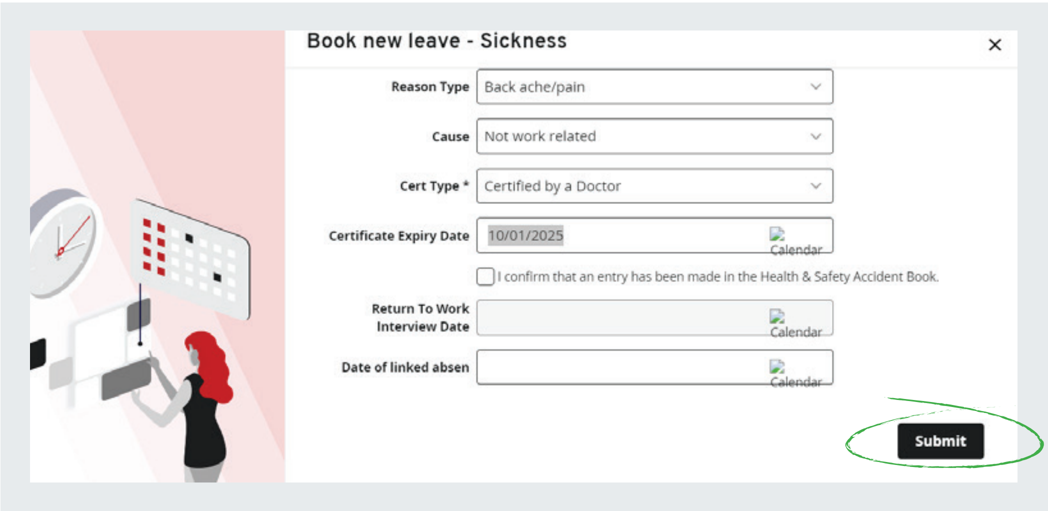
If you have a certificate, please put the expiry date.

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

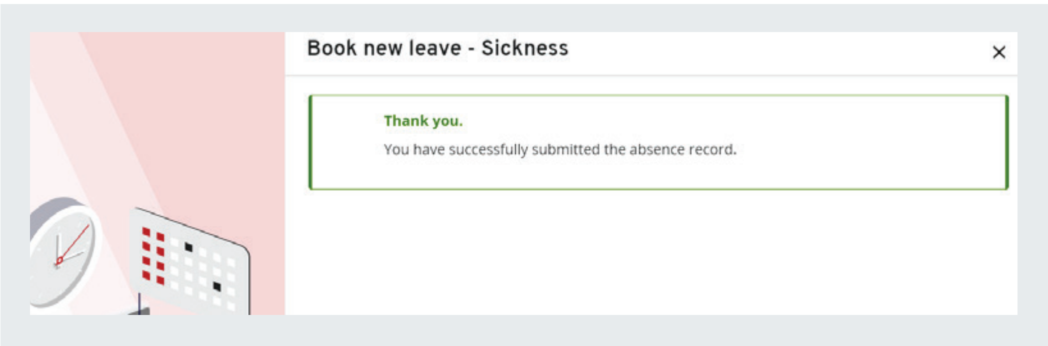
Please leave '**Date of linked absence**' blank.



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



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



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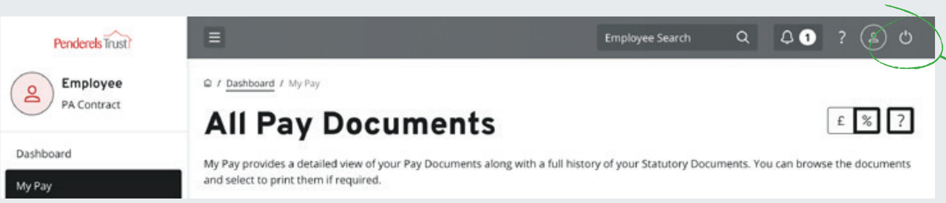
Step 7

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



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

Frequently Asked Questions

Q: How do I access My View?

Simply click on the website
https://penderelstrust.hcm.zellis.com/myview/dashboard-ui/index.html#/landing

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?

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?

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?

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?

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?

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?

You can view your 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 I submit timesheet claims on behalf of my employer?

You can enter your timesheet hours via your own My View account. You cannot submit these directly to us, however, the 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?

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: Can I still access My View after I leave my job?

You can access your payslips via your own My View account for one year so it is important to download/print off your payslips before then if you might need them in the future. Your employer will not be able to see your information on their My View account as soon as you become a leaver.