



## **MyHR - Document Storage**

[Accessing Document Storage](#)

[Add a new document](#)

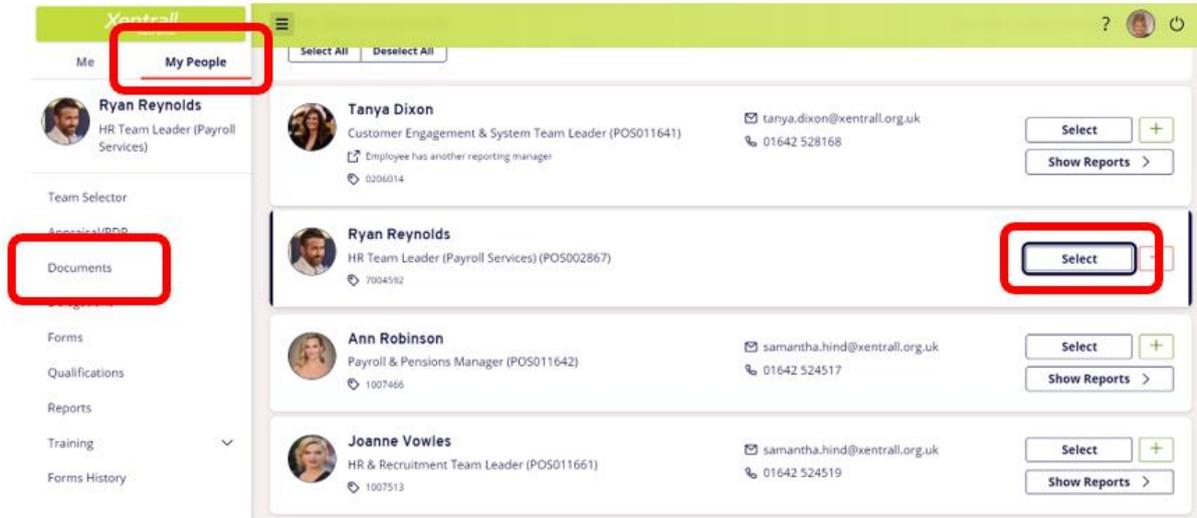
[Document Categories & Document Types](#)

[Delegating Document Storage](#)

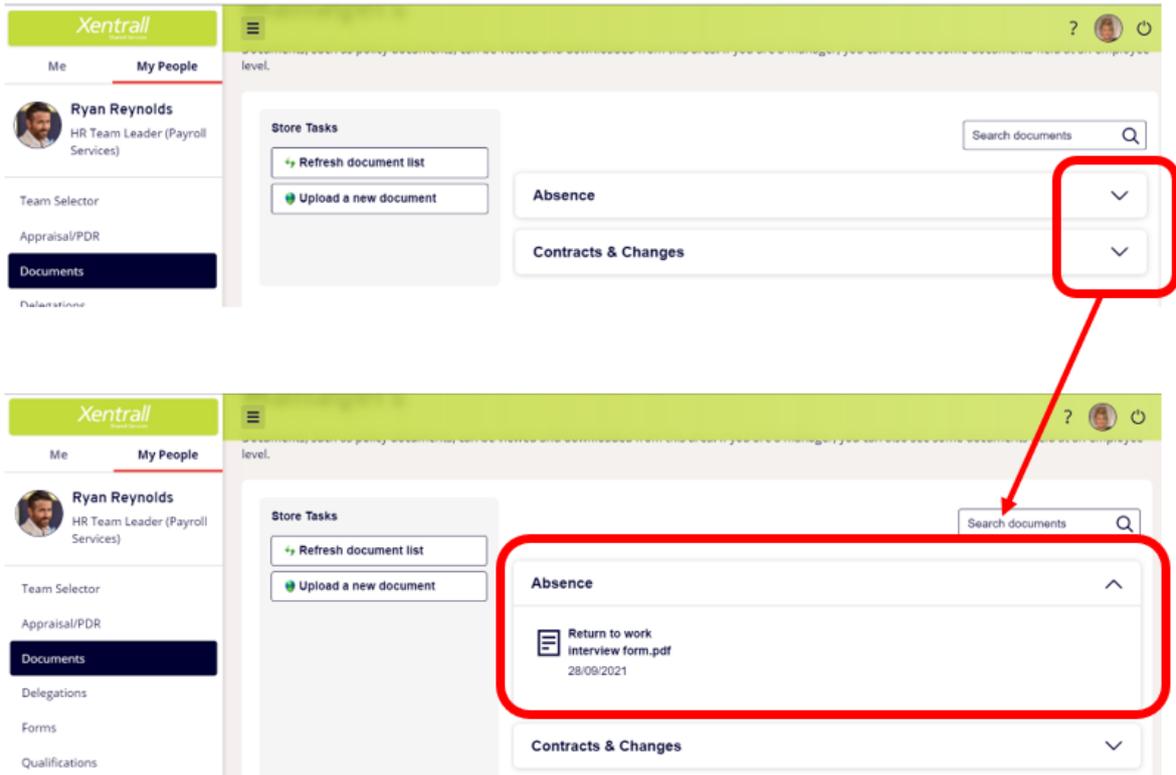
## Accessing Document Storage

To access employee document storage:-

- Sign on to MyHR
- Click My People
- Locate the required Employee
- Click Select
- Documents will show on the side menu

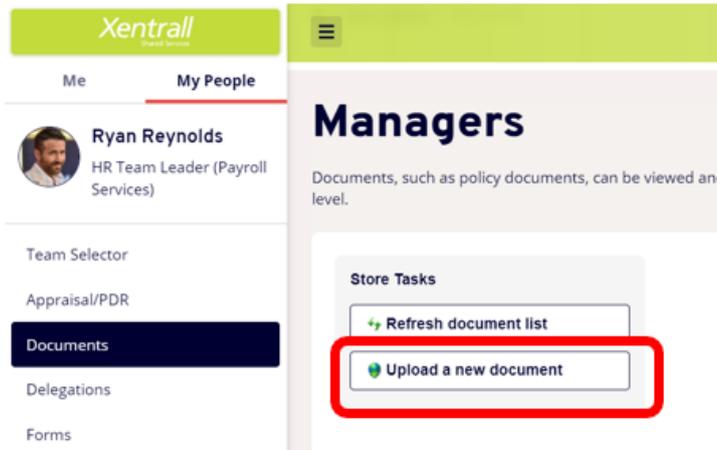


- Documents are saved by category
- Use the V on the category to expand and view the documents

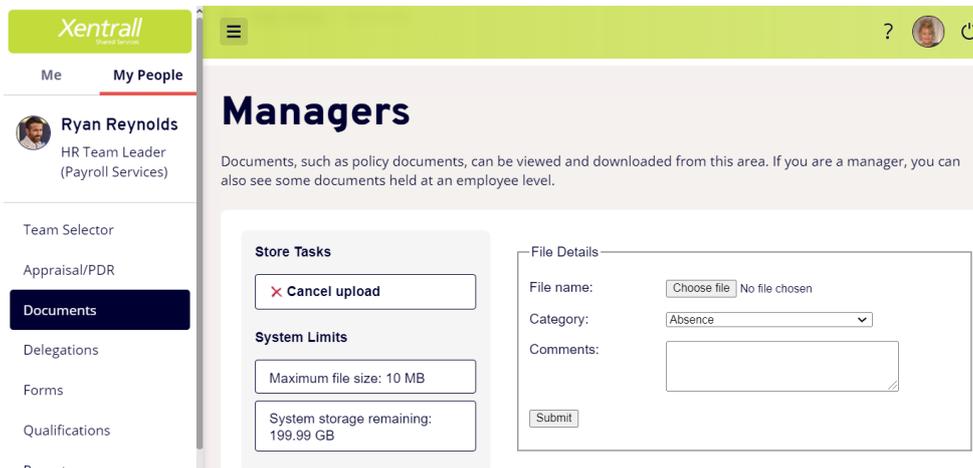


## Add a new document

- Click Upload a new document



- Click Chose file



- Locate the document from your files
  - o *Note: File Names must not exceed 40 characters (including spaces)*
- Use the dropdown to select the appropriate **category**
  - o *See list below for categories and document types*
- **Comments** are optional
  - o *any comments saved here can be seen by the employee and HR/Payroll.*
- Click Submit to save the document

**Note:** Documents cannot be deleted via MYHR – please contact HR advisory ([hr@darlington.gov.uk](mailto:hr@darlington.gov.uk)) if you need a document removing from an employee record.

## Document Categories

Below is a summary of the documents that are expected to be saved in Document Storage. For any documents not listed, please refer to the Managers Guide to Retention of HR related Information which can be [found here](#)

Document Category	Document Type
Absence <i>Ensure absence is also recorded via time &amp; Attendance</i>	COVID-19 test results <i>(also report to Health &amp; Safety)</i> Any other medical Notes received from the ees Doctor Leave of Absence documentation Sickness Absence Review Meeting Correspondence Absence Improvement Plans Stress Questionnaire and Wellness Action Plan
Appraisals/PDR's <i>Ensure PDR's are also Recorded in the PDR module</i>	Appraisal or PDR interview documents Probation Correspondence
Fit Notes <i>Ensure absence is also recorded via Time &amp; Attendance</i>	Fit Notes and Isolation Notes
Miscellaneous	Compliments/Congratulations/Thanks DSE Assessments Dynamic Risk Assessments Trade Union Facility Timesheets <i>(Ensure this is also logged in Time &amp; Attendance)</i>
Recruitment	Induction Checklist
Supervision	Supervision (Adults & Children)
Training & Development <i>Ensure all external training courses are recorded in the Training module</i>	Training / Course Certificates AC10 Profiles/completion certs Apprenticeship Documentation (i.e. agreements)
Training & Qualification Certificates <i>Ensure all qualifications are also recorded in Attainments</i>	Qualification Certificates

## Delegating Document Storage

Document Store contains confidential and sensitive information about your employees, please take extra care when setting up a delegation and ensure the correct **Document View** is selected.

### DO NOT DELEGATE DOCUMENT VIEW: MANAGER or DOCUMENT VIEW: EMPLOYEE'S

Select the Modules, Process Groups and Views that you wish to delegate.

<input type="checkbox"/> Appraisals/PDRs	View Only
<input type="checkbox"/> Document View:Appraisal & PDR Documents	Save & Submit
<input type="checkbox"/> Document View:Employee's ❌	Save & Submit
<input type="checkbox"/> Document View:Fit Notes ❌	Save & Submit
<input type="checkbox"/> Document View:Manager	Save & Submit
<input type="checkbox"/> Time Management	View Only

Each module has a supporting Document View

e.g. If you are delegating **Time & Attendance**, you should also select **Document View: Fit Notes**

Select the Modules, Process Groups and Views that you wish to delegate.

<input type="checkbox"/> Appraisals/PDRs	View Only
<input type="checkbox"/> Document View:Appraisal & PDR Documents	Save & Submit
<input type="checkbox"/> Document View:Employee's	Save & Submit
<input checked="" type="checkbox"/> Document View:Fit Notes	Save & Submit
<input type="checkbox"/> Document View:Manager	Save & Submit
<input checked="" type="checkbox"/> Time Management	Submit

To set up a delegation, see Delegations notes.