

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

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Ryan Reynolds HR Team Leader (Payroll Services)	Customer Engagement & System Team Leader (POS011641) Customer Engagement & System Team Leader (POS011641) C Employee has another reporting manager © 0206014	⊠ tanya.dixon@xentrall.org.uk � 01642 528168	Select + Show Reports >
Assession (ADDR Documents	Ryan Reynolds HR Team Leader (Payroll Services) (POS002867) 7004592		Select
Forms Qualifications	Ann Robinson Payroll & Pensions Manager (POS011642) © 1007466	🔁 samantha.hind@xentrall.org.uk � 01642 524517	Select + Show Reports >
Training V Forms History	Joanne Vowles HR & Recruitment Team Leader (POS011661) © 1007513	☑ samantha.hind⊛xentrall.org.uk � 01642 524519	Select +

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

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Me My People	level.		eennen en er en empreyee
Ryan Reynolds HR Team Leader (Payroll Services)	Store Tasks	٩	Search documents Q
Team Selector	Upload a new document	Absence	~
Appraisal/PDR Documents		Contracts & Changes	~
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Ryan Reynolds HR Team Leader (Payroll Services)	Store Tasks	8	earch documents Q
Team Selector	Upload a new document	Absence	^
Appraisal/PDR Documents Delegations		Return to work Interview form.pdf 28/09/2021	
Forms Qualifications		Contracts & Changes	~

Add a new document

- Click Upload a new document

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- Click Chose file

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Me My People		
Ryan Reynolds HR Team Leader (Payroll Services)	Managers Documents, such as policy documents, car also see some documents held at an empl	n be viewed and downloaded from this area. If you are a manager, you can loyee level.
Team Selector	Store Tasks	File Details-
Appraisal/PDR	× Cancel upload	File name: Choose file No file chosen
Delegations	System Limits	Category: Absence Comments:
Forms	Maximum file size: 10 MB	
Qualifications	System storage remaining: 199.99 GB	Submit
Poporte		

- Locate the document form your files
 - Note: File Names must not exceed 40 characters (including spaces)
- Use the dropdown to select the appropriate category
 - See list below for categories and document types
- Comments are optional
 - 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 (<u>hr@darlington.gov.uk</u>) 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 <u>found here</u>

Document Category	Document Type
Absence Ensure absence is also recorded via time & Attendance	COVID-19 test results (also report to Health & Safety) 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 Ensure PDR's are also Recorded in the PDR module	Appraisal or PDR interview documents Probation Correspondence
Fit Notes Ensure absence is also recorded via Time & Attendance	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 & Attendance)</i>
Recruitment	Induction Checklist
Supervision	Supervision (Adults & Children)
Training & Development Ensure all external training courses are recorded in the Training module	Training / Course Certificates AC10 Profiles/completion certs Apprenticeship Documentation (i.e. agreements)
Training & Qualification Certificates Ensure all qualifications are also recorded in Attainments	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.	
Select All Deselect All	View Only View Only
Appraisals/PDRs	View Only 🗸
Document View:Appraisal & PDR Documents	Save & Submit V
🗌 Document View:Employee's 🗮	Save & Submit V
🗌 Document View:Fit Notes 🛛 🗱	Save & Submit 🛛 🗸
Document View:Manager	Save & Submit V
Time Management	View Only V

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.			
Select All Deselect All	View Only v Set All		
Appraisals/PDRs	View Only 🗸		
Document View:Appraisal & PDR Documents	Save & Submit V		
Document View:Employee's	Save & Submit V		
Ocument View:Fit Notes	Save & Submit v		
Document View:Manager	Save & Submit v		
✔ Time Management	Submit v		

To set up a delegation, see Delegations notes.