People Manager Guidance

This guidance document outlines:

- How to navigate People Manager
- How to view personal and employment details about your staff
- How to authorise an employee's time and expense claim and redirect claims
- How to view and add PDR Objectives for your staff

Data Protection

The data contained in this system and its usage is subject to general data protection regulations and the City of York Council's Information Systems Security and Acceptable Use Policy, available from the ICT Homepage on the Intranet

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Introduction

People Manager provides managers with access to important information about staff who report to you and other tasks that fall under the manager's responsibility.

Things you can do in People Manager:

- Access personal details such as name, address and emergency contacts
- View employment information about start date, length of service, hours of work and pay grade
- Allow you to manage staff expenses, overtime and additional hours
- Complete PDR objectives and log PDR meetings

Important!

People Manager is only accessible via a CYC device.

Should you have any queries regarding the items below, please contact the Payroll Services team by emailing payrollservices@york.gov.uk

- Incorrect employee data
- Line Manager changes
- Time and expense claims authorisation

Logging into People Manager

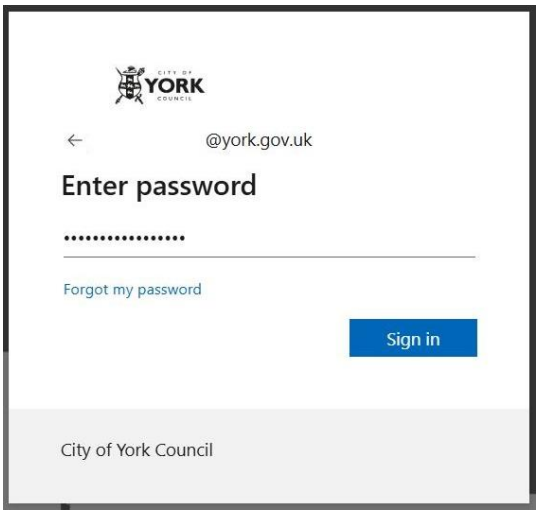
The People Manager icon is available on the desktop of CYC devices.



If you do not have an icon, please email itrent@york.gov.uk

People Manager uses Single Sign-On (SSO).
Enter your CYC email address and password.





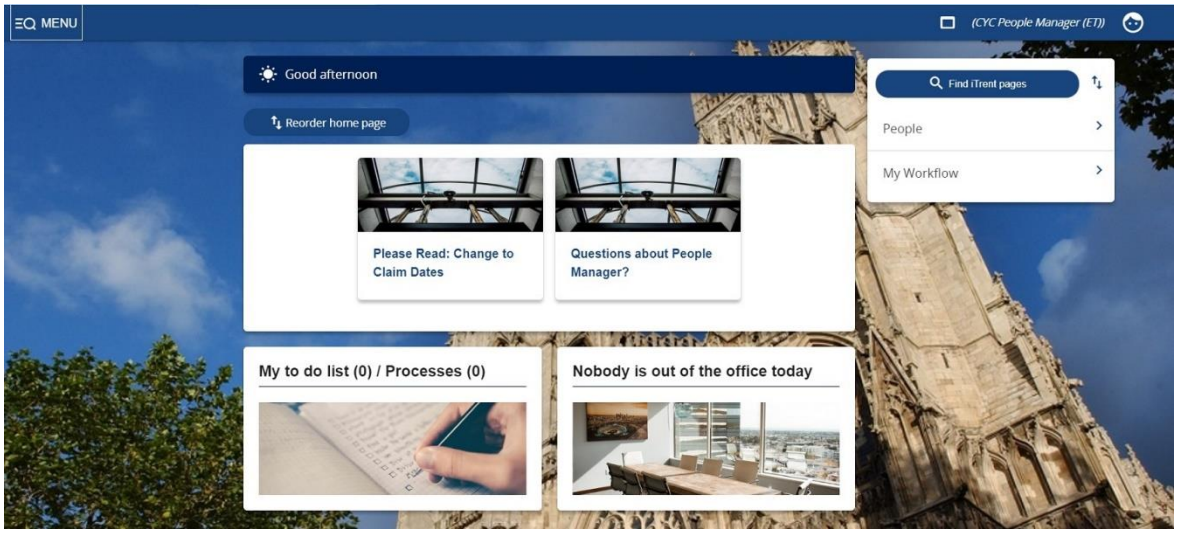
Important!

Do not try and reset your password on this screen.

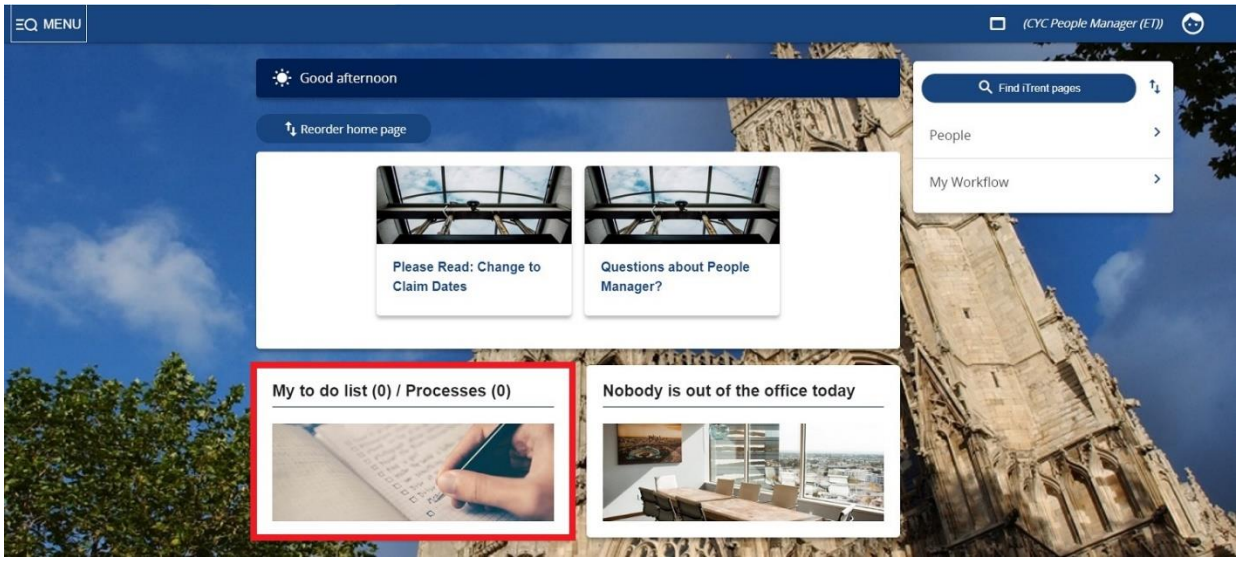
Please raise a case via the ICT self-service icon on your desktop or call 01904 55 2222

The Homepage

The Homepage will display information that managers will need to be aware of such as updates from Payroll or HR. Please check this regularly.



My to do list / Processes



The section will contain claims that have been submitted for authorisation. You will see a number in the brackets if you have any outstanding tasks.

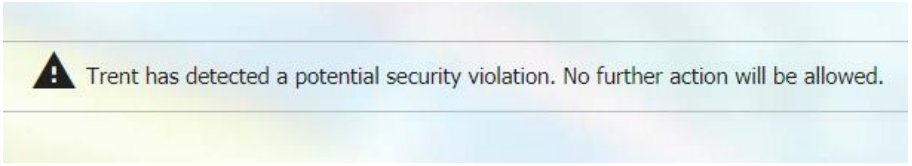
It is good practice to check this regularly. You will also receive an email when someone sends a claim for authorisation. Please see the Time and Expenses claims section on how to authorise claims.

Out of office today

This was used before the Council started to use Medigold to report staff absences. We are unable to remove this from the People Manager home page:



Clicking this link will cause a security violation message to appear:

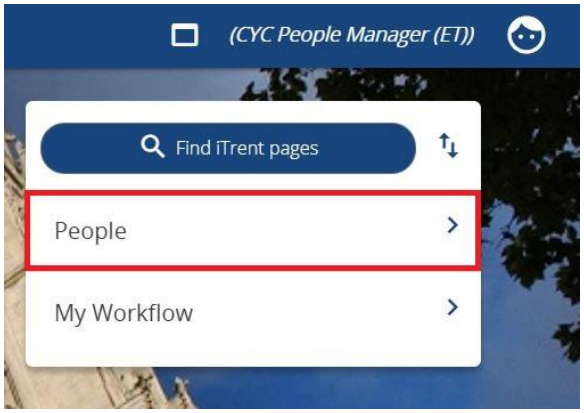


Any CYC staff who are reporting any unplanned absence must do so by calling the following number **01904 809584**, available 24/7. They should call again to close an absence when they are due to return.

Should you have any feedback or general queries regarding the Day One absence procedure please email HRDayoneabsence@york.gov.uk

If your query relates to the MedigoldOne portal, then please submit these though MedigoldCS8@medigold-health.com rather than phoning the CYC Absence line number.

People



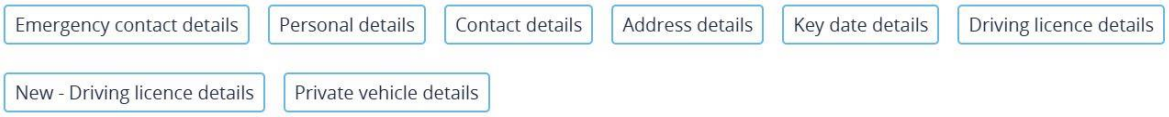
This section will show staff who report directly to you. You can also search for staff who report to any managers in your team. The search field automatically defaults to surname.

After selecting a member of staff, the following links will become available.



The options available under each of these links may change over time as new functionality is added.

Personal Details links:



Employment links:

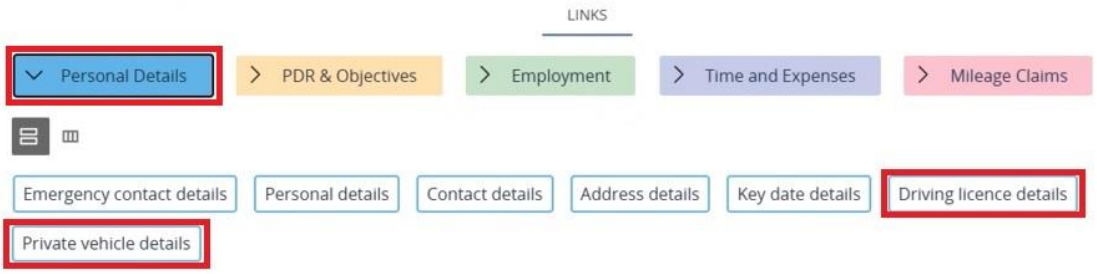


Driving Licence and Insurance Policy Checks

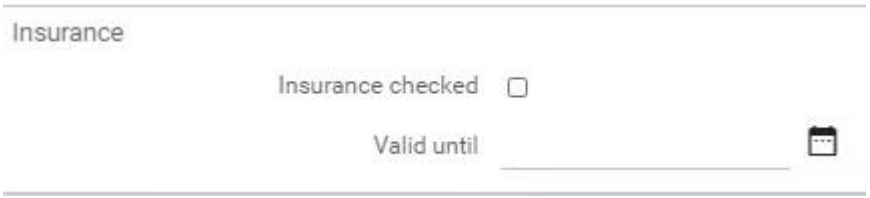
Under the personal details link is the driving licence details section which is the manager's responsibility to keep up to date. Staff can add private vehicle details through Employee's Self Service (ESS).

You will receive an email asking you to check their Driving Licence and Insurance details.

Links are available in People Manager for both Driving Licence details and Private Vehicle details:



Managers will need to check that an employee has appropriate insurance and record that this has been checked here:



Important!

You must make this check, and record it in People Manager, before authorising any mileage claims against a vehicle.

Performance Development Reviews (PDRs)

More details can be found on the PDR page on the Intranet

After holding a PDR meeting, managers must ensure that objectives are recorded. Objectives can be recorded either by the employee in Employee Self Service or by the manager in People Manager. Further details on how to do this are set out below.

Managers must also record the PDR completion date in People Manager. This ensures it is included in the council's PDR completion figures, which are monitored and reported to the Corporate Management Team.

There are limited exemptions where an employee is not required to have an annual PDR. These exemptions are set out here.
In exceptional circumstances, where a PDR cannot take place due to an employee being on long-term absence for most of the PDR year (for example long-term sickness absence, maternity leave or a career break), managers must record this using the "PDR not held – long-term absence" option in People Manager.

Everything you need to support you through the process outside of People Manager is set out in the PDR Manager Toolkit available on the intranet.

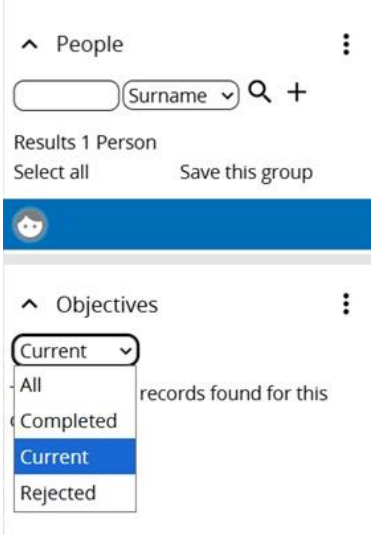
Viewing and updating an Employee's Objectives

Staff will enter objectives via ESS. You will be able to view these objectives and comment on them. Objectives can be updated at any time throughout the year, by the manager or the employee.

Click on the employee you wish to view, select the Performance Management link and then Objective Details.



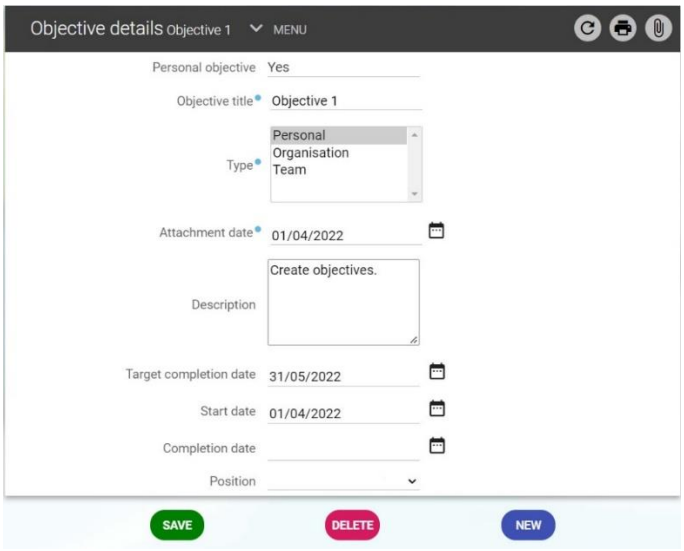
Objectives are displayed on the left-hand side of the page. Use the drop-down menu to see either **‘current’** objectives or **‘all’** current and completed objectives.



Current objectives are those without an end date against them.

Completed objectives are those with an end date against them.

To view the objective, click on the objective title. The details will be displayed on the right of the screen. You can edit this information.



The target completion date is optional, and it is there for you and your staff to monitor the progress of the objective.

A completion date can be entered when appropriate.

Setting a New Objective

Managers can add an objective for their staff. Please select New – Objective details.



A new objective details page will be opened. Complete the sections and press save. The objective will be added to the list on the right-hand side of the page, and the employee will be able to view it in ESS.

Performance Development Review template

A PDR template is available from the link below. This can be used as a guide when having a PDR meeting and deciding what objectives to set.

This guide is available on the CYC intranet in the download section:
Intranet | Performance and Development Review (PDR) (york.gov.uk)

Important!

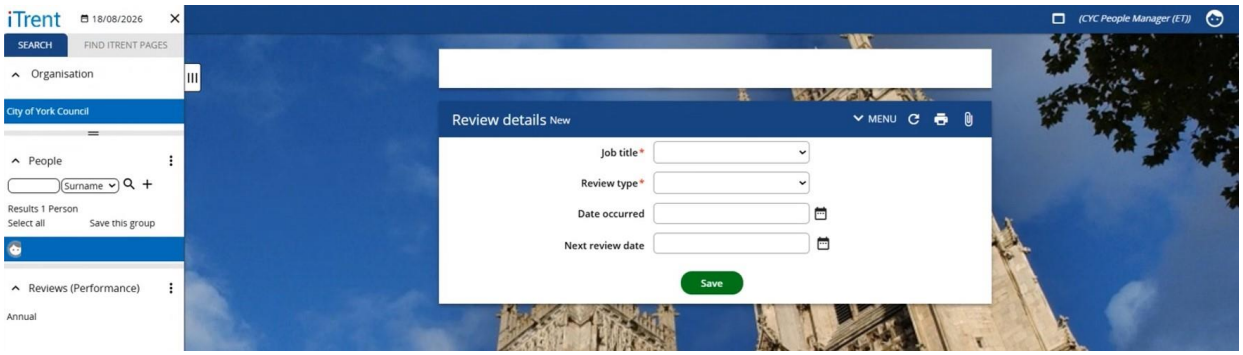
Once a PDR meeting has taken place, you must record the completion date in People Manager (see next section). The PDR will not be counted as complete until this date is recorded.

Entering a PDR completion date

Select the employee and click on the Performance management tab and then the Log PDR Meeting option:



Ensure the correct job is selected if the employee has more than one position. Then select the Review type of 'Annual' and the date the meeting occurred, then click save.



If a PDR template is completed manually, this needs to be sent to payrollservices@york.gov.uk

Ensure you record the date of the PDR in People Manager.

For further information about how to see objectives or log a completed PDR meeting please email iTrent@york.gov.uk

When a PDR cannot take place due to long-term absence

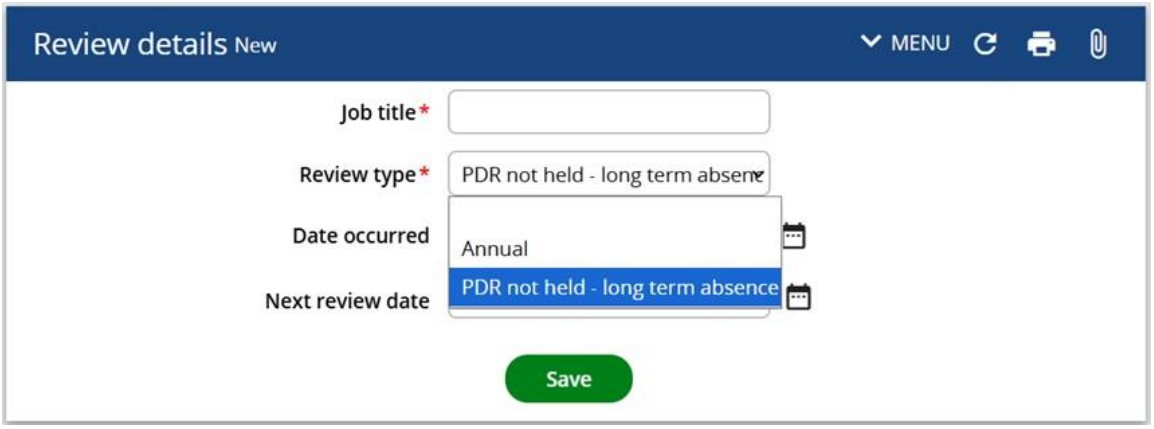
An option is available to record when a PDR could not take place due to long-term absence, for example long-term sickness absence, maternity leave or a career break.

This option should only be used where an employee has been absent for most of the PDR year that is under review, and it has not been possible to hold a meaningful PDR meeting. It is intended for exceptional situations involving extended periods of absence and must not be used where PDR deadlines have been missed due to:

- time or workload pressures
- managers have changed roles or responsibilities

This option has been introduced to ensure records accurately reflect individual circumstances, supporting fair and consistent reporting and provides a more accurate picture of overall PDR completion rates. Where appropriate, managers should still ensure that a return-to-work conversation takes place, and objectives are set or revisited once the employee has returned to work.

Ensure the correct job is selected if the employee has more than one position. Then select the Review type of ‘PDR not held – long term absence’ and in the date occurred field enter the date you recorded this, then click save.



Time and Expenses claims

Authorising Time and Expenses

Important!

It is your responsibility to ensure all information contained in a claim is accurate before it is authorised.

When an employee submits a claim, an email will be sent to the line manager containing a basic summary.

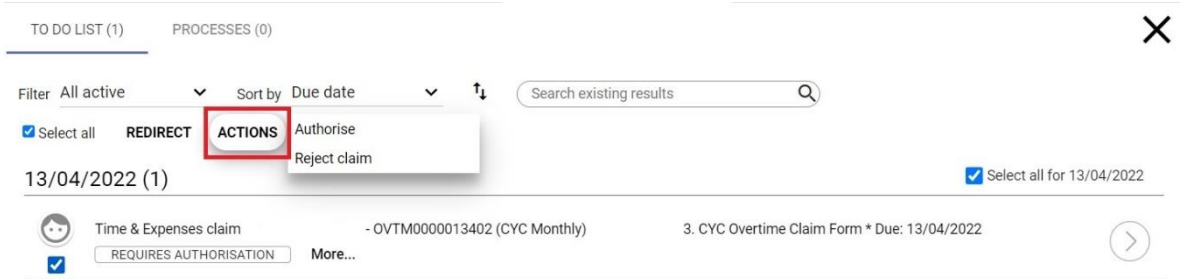
Appendix 1 shows an example of this email.

There is also a notification on the Homepage under ‘My to do list’.

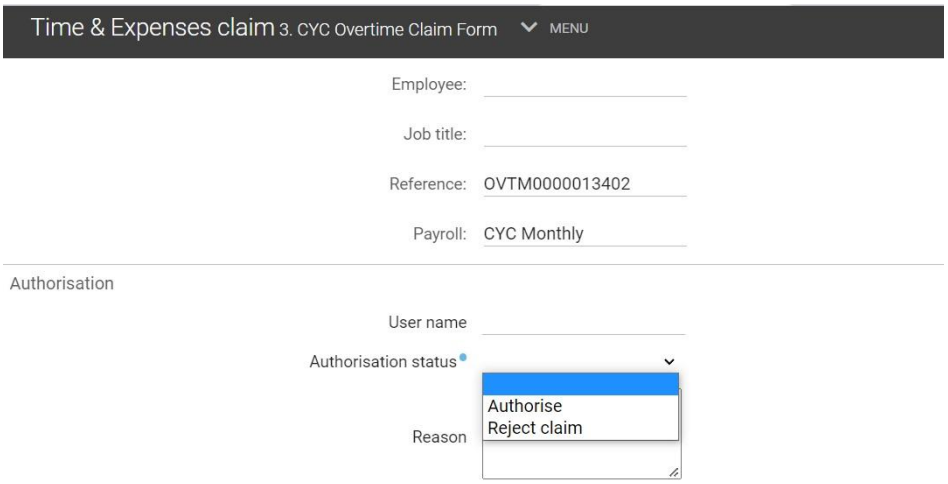


Clicking on this box will open your to-do list and allow a claim to be authorised or rejected.

First place a tick in the box next to the claim and select actions.



Further details of the claim can be viewed by clicking anywhere on the claim in your to do list. You can also authorise or reject from this page.



Employees will be notified when a claim is authorised or rejected.

Additional Notes:

- The payroll cut-off date is the date by which the manager must authorise the claim for it to be paid the same month. This date is the **ninth** of each month.

- Both the Manager (through People Manager) and the employee (through Self Service) will be able to view both current and historical claims that have been submitted.

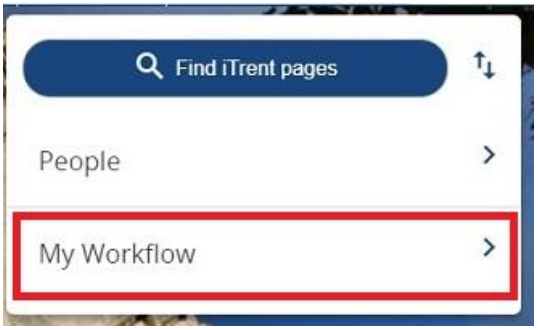
- Claims that are over **90 days** cannot be authorised in People Manager.

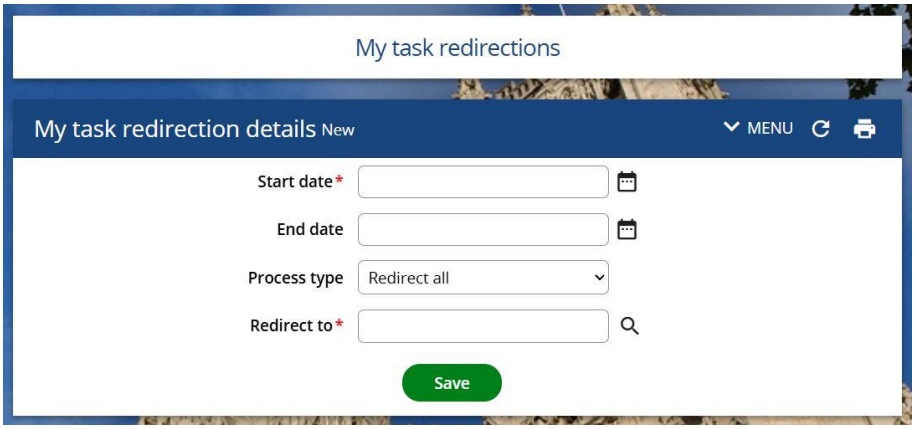
- If a claim **does** need to be paid and it is past the deadline, please email Jane.Benson@york.gov.uk with a reason why this wasn't able to be authorised within the 90 day time frame allowed. This may be because of long-term manager absence, a position change or a manager/employee leaving the council.

Workflow

Claims can be redirected if you are due to take annual leave or have a period of authorised absence coming up. This means another manager can authorise claims on your behalf.

To do this, select Workflow and then My Task Redirections.





Start Date: This can be in the future for things like planned annual leave.

End Date: This is the return-to-work date. If left blank, claims will continue to be redirected to the chosen manager until an end date is entered.

Process Type: Always select 'Redirect all'

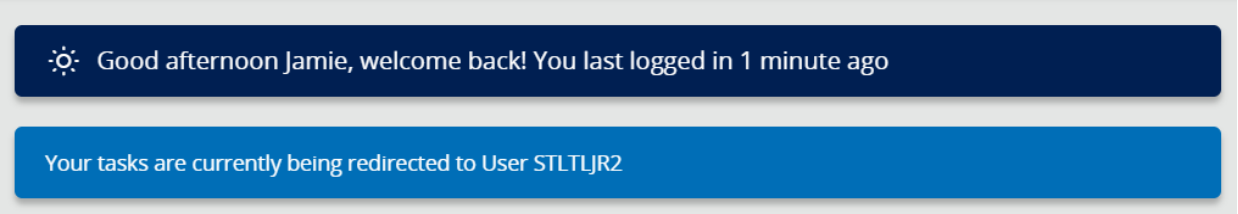
Redirect to: The manager is selected by using the search icon.

Important!

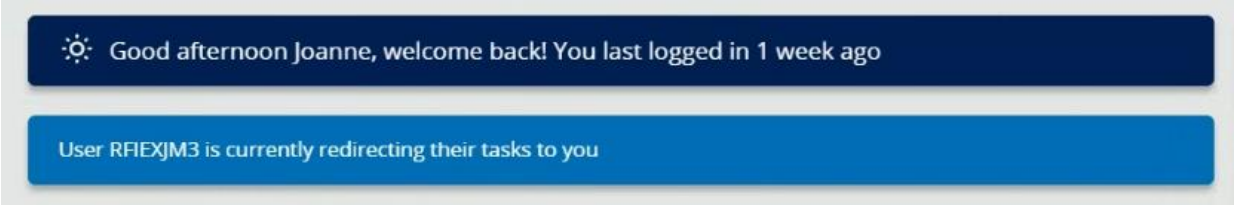
Make your selection carefully as there may be employees with the same name. Please email itrent@york.gov.uk to confirm if needed.

Redirect Tasks Notification Banner

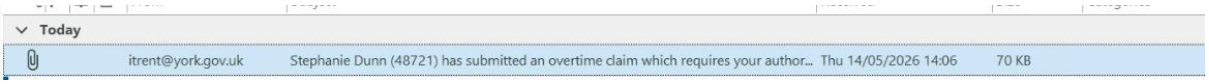
If a redirection has been set up due to annual leave or authorised absence, the banner below will appear on the front screen of your People Manager to notify you that your tasks are being redirected.



The following banner will appear on the screen of the manager the tasks are being redirected to.



If the redirection has been set up in People Manager, then the acted upon manager will receive an email as below:

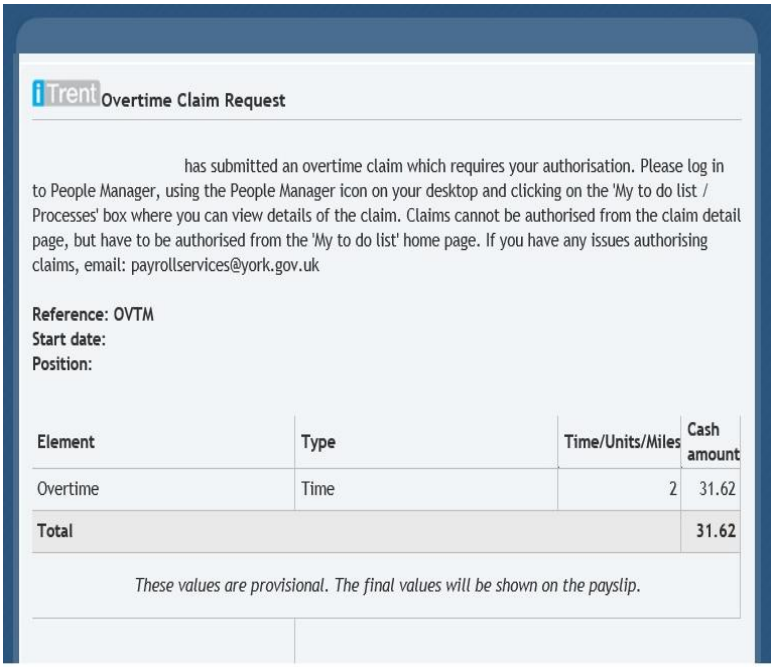


If a task has been redirected by the HR Systems team, an email will not be received. There will be a pop up for a few seconds at the top of the People Manager screen if you are logged in.

Ensure you check your to-do list for any claims to be actioned.

Appendix 1 – Email notification of a submitted claim

Example email triggered to the Manager, when one of their staff submits a claim:



iTrent Overtime Claim Request

has submitted an overtime claim which requires your authorisation. Please log in to People Manager, using the People Manager icon on your desktop and clicking on the 'My to do list / Processes' box where you can view details of the claim. Claims cannot be authorised from the claim detail page, but have to be authorised from the 'My to do list' home page. If you have any issues authorising claims, email: payrollservices@york.gov.uk

Reference: OVTM
Start date:
Position:

Element	Type	Time/Units/Miles	Cash amount
Overtime	Time	2	31.62
Total			**31.62**

These values are provisional. The final values will be shown on the payslip.

Note: The email will contain a brief summary of the claim. Log in to People Manger to see more details and authorise/reject the claim.

Appendix 2 – Converting minutes into decimal

When completing your Time and Expenses Claim Forms using iTrent Employee Self Service, you are required to record the number of hours being claimed in *'decimal'* hours, rather than in Hours and Minutes.
For example, if you are claiming for **2hrs 30mins** overtime, this would be recorded as **2.5**.
Note: Claiming 2.30 instead of 2.5 will result in you *under*-claiming

This is because the hour is divided into 100 parts instead of 60 minutes. The table below provides the decimal equivalent of each 1 minute value in the hour:

Mins	Hour/100	Mins	Hour/100	Mins	Hour/100	Mins	Hour/100	Mins	Hour/100
1	0.02	13	0.22	25	0.42	37	0.62	49	0.82
2	0.03	14	0.23	26	0.43	38	0.63	50	0.84
3	0.05	**15**	**0.25 (¼hr)**	27	0.45	39	0.65	51	0.85
4	0.07	16	0.27	28	0.47	40	0.67	52	0.87
5	0.08	17	0.28	29	0.48	41	0.68	53	0.88
6	0.1	18	0.3	**30**	**0.5 (½hr)**	42	0.7	54	0.9
7	0.12	19	0.32	31	0.52	43	0.72	55	0.92
8	0.13	20	0.33	32	0.53	44	0.73	56	0.93
9	0.15	21	0.35	33	0.55	**45**	**0.75 (¾hr)**	57	0.95
10	0.17	22	0.37	34	0.57	46	0.77	58	0.97
11	0.18	23	0.38	35	0.58	47	0.78	59	0.98
12	0.2	24	0.4	36	0.6	48	0.8	**60**	**1.0 (1hr)**

Note: City of York Council operates a standard 37 hour working week, which over a typical Monday to Friday 5-day pattern works out to 7hrs 24mins per day.