



This is a short guide to getting started with using MyAccount Payroll Forms. The following information highlights the different types of fields that are used in the forms and how the format of the field boxes will change as data is input and verified.

### Pre-populated employee data fields

One of the initial requirements when completing certain forms will be to select the employee, about whom the request relates, from a drop-down list. When this has been done, a number of data fields in the form relating to the employee will be pre-populated from the employee's existing payroll record.

These fields are set as read-only and will not allow or require manual input from you. You will recognise these fields as the data will display as below and there will be no box provided for you to input data into.

School Name *
Cannon Park Primary School
Post title *
Teaching Assistant

### Manual input data fields

#### Field box border colours

Initially, the border of a box that must be completed (mandatory) will be shown in red.

Employee number allocated to you *
Employee numbers have 6 digits in them starting with '0' or '1'
<input type="text"/>

When you click in the box to add data, the border of the box will change to blue indicating that it is the currently active field.

<input type="text"/>
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When you have entered valid data in the box and clicked out, the border will change to green, and a green tick will appear to the right of the field. This green tick is an indicator that the field has been completed with an appropriate value type.

**Note:** Dependent of the type of validation applied to fields it doesn't necessarily mean that the information input, although valid, is accurate in all cases though.

003155	✓
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If the data input does not conform to the expected format or specific validation criteria set for the field, the border of the box will change back to red indicating this. You will need to change the data for it to be validated.

If you don't spot that a box remains red at the time you input the data or forget to make a change before trying to move to the next section, an error/warning message will be presented indicating the action needed.

Number of 'Term Time Only' weeks Havana will work \*

For part week contracts 1 day = 0.2

The number of working weeks should be between 32 & 44

## Mandatory fields

A red star at the end of the field label \* is an indicator that the field must be completed to be able to progress to the next section on the form. Fields without a red star are non-mandatory and will not need to be completed to move to the next page or submit the form.

**Note:** If data is entered in non-mandatory fields it will be subject to the validation that sits behind the field.

## Check boxes

Some of these are single boxes – left clicking your mouse in the box should add a green tick to the box.

 I confirm that I have read and accept the terms under which the information provided will be used

Some fields will have several check boxes allowing multi-selections to be made.

Reason(s) for change being reported \*

One or more change type can be reported in this request

- Temporary to Permanent Contract
- Extension to Contract
- Working Hours
- Salary Accelerated Increments
- Number of Working Weeks
- Shift Allowance %
- Contractual Overtime
- First Aid Allowance
- Salary Protection

And some fields that have several check boxes will only allow one selection to be made. The boxes turning red is the hint that only one selection can be made.

**Extension to contract**

Please confirm the reason for the fixed term contract extension \*

- Temporary or External Funding
- Maternity Cover
- Organisational Change
- Project Cover
- Secondment
- Sickness Cover
- Vacancy

Please select just one reason

## Radio buttons

Radio buttons work similar to check boxes and are the preferred field type when there are 2 or 3 options to select from. Left clicking the circle required will make the option it relates to the active selection. Clicking another option will simply change the active selection.

Is this a temporary change? * <input type="radio"/> Yes <input type="radio"/> No	Is this a temporary change? * <input checked="" type="radio"/> Yes <input type="radio"/> No	Is this a temporary change? * <input type="radio"/> Yes <input checked="" type="radio"/> No
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## Internet links

Links to additional information contained in websites will be introduced within information boxes and formatted in blue font, as shown [here](#) below. Click the link and the webpage will open in a new browser window.

[more information on the National Fraud Initiative can be found here.](#)

## List selection

Drop down list fields will be identified with the word 'Select' in the text box. Click the down arrow on the far right of the text box to reveal the options in the list. Scroll down until you reach the option required then left click it with your mouse to select it.

Nationality \*

Select... ▼

- Select...
- British
- English
- Scottish
- Welsh
- Afghan
- African
- Albanian

## File Uploads

Within some of the forms, SBMs will be asked to upload/attach files to the form, normally to provide evidence required in support of the request being made. Where the file upload is a mandatory requirement you will see the red star \* at the end of the field label and see that the dashed line frame underneath the  button is red, as shown below.

Reason(s) for change being reported \*

One or more change type can be reported in this request

Temporary to Permanent Contract

Extension to Contract

Working Hours

Progression Salary Increments

Allowances

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**Progression salary increment details**

Type of progression salary increment request type \*

UPS  Leadership Team

Please complete and save a copy of this [Application Form](#) and then upload it to this form using the upload facility below. We need at least the Appendix 2 part of the form to be uploaded.

Please upload the completed UPS progression salary increment application form \*

Drop files here to upload - 

Uploaded: 0 of 1

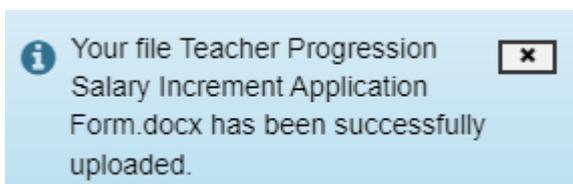
Where the file upload is a non-mandatory request, the dashed line frame underneath the upload button will be grey, as shown below

Please upload copies of documentation relating to Erin's Right to Work in the UK

Drop files here to upload - 

Uploaded: 0 of 5

On clicking the  button, a Windows Explorer (or other operating system) file storage view will be presented for you to navigate to and select the file you want to upload. When you have selected and uploaded the file, a confirmation message will appear in the top right of the screen, as shown below left, and the uploaded file will sit under the Upload box, as shown below right.



Individual file sizes are limited to 5MB per file and a total upload file size limit of 19MB.

## Working pattern screen

A working pattern table is presented to allow the input of the employee's weekly work pattern. Where the employee works a full 37 hour week, the table will be pre-populated in response to selecting the 'Yes' radio and 'Reset hours' buttons.

Will Hannah work 37 hours a week over 5 days? \*

Yes  No

The exact start and end times shown in the working pattern table below are illustrative to add up to the required 37 hour total. There is no need to amend the start and end times

[Reset hours](#)

Day	Start time AM	Finish time AM/PM	Start time PM	Finish time PM	Number of hours and minutes
Sunday					
Monday	08:00	12:00	13:00	16:24	7.4
Tuesday	08:00	12:00	13:00	16:24	7.4
Wednesday	08:00	12:00	13:00	16:24	7.4
Thursday	08:00	12:00	13:00	16:24	7.4
Friday	08:00	12:00	13:00	16:24	7.4
Saturday					

Where the employee works part-time you will need to populate the working pattern manually. Pressing the blue pencil next to each day that the employee works will take you to a sub-screen.

**Working Pattern**

Will Debbie work 37 hours a week over 5 days? \*

Yes  No ✓

Note: If these hours differ from the current hours being worked you will need to return to the previous screen and complete a Working Hours change request

Please click on the reset hours button to create the working hours table

Please click on the blue pencil edit button to input the hours and minutes that Jack works for each day of the week Sunday to Saturday that they are contracted to work.

[Reset hours](#)

Day	Start time AM	Finish time AM/PM	Start time PM	Finish time PM	Number of hours and minutes
 Sunday					
 Monday					
 Tuesday					
 Wednesday					
 Thursday					
 Friday					
 Saturday					

The sub-screen will be presented asking for the start and finish times for AM & PM sessions. You can input the appropriate start and finish times from a list of hours and minutes selection in the time box or type in the values manually and use the tab key to move between time boxes (the quickest option). The number of hours/minutes represented by these times will be recorded under the boxes, 7 in the example below.

Day	Monday
Start time AM	08:00 ✓
Finish time AM/PM	12:00 ✓
Start time PM	13:00 ✓
Finish time PM	16:00 ✓
Number of hours and minutes	7
<small>Minutes will be displayed as a decimal rather than actual minutes</small>	

The working hours table will be updated after each day's times are added.

Day	Start time AM	Finish time AM/PM	Start time PM	Finish time PM	Number of hours and minutes
Sunday					
Monday	08:00	12:00	13:00	16:00	7
Tuesday	08:00	12:00			4
Wednesday	08:00	12:30	13:30	16:30	7.5
Thursday					
Friday	09:00	12:30			3.5
Saturday					

Please note that the table is designed for a Finish time to be input to 'close' either/both Start time sessions. As shown in the Monday row in the example below, the Start AM and Finish PM option combination used here will not calculate the Number of hours and minutes worked for the day. The 15:30 Finish time would have needed to have been input in the Finish time AM/PM field to close the Start Time AM session off, as shown in the Wednesday row, and calculating the number of hours and minutes correctly.

Day	Start time AM	Finish time AM/PM	Start time PM	Finish time PM	Number of hours and minutes
Sunday					
Monday	08:00			15:30	0
Tuesday					
Wednesday	08:00	15:30			7.5
Thursday			13:00	16:00	3
Friday	08:00	12:00	13:00	15:30	6.5
Saturday					

Is the total weekly amount of 17 hours correct? \*

Yes  No

The Wednesday, Thursday and Friday rows show which combinations of Start & Finish times will calculate the Number of hours and minutes value(s) correctly.