My Portal - An Employee's Guide to Self Service

EPM Connect Guide

Contents

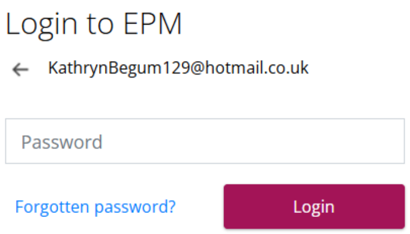
My Portal Guide

My Portal provides employees with access to their profile and depending on the modules chosen by the school, access to self-service functionality.

Access

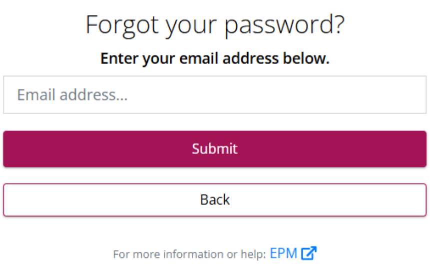
To Access the system for the first time

1. Using your preferred browser, enter **epmportal.uk**
2. The first time you login you will need to create a new password via **Forgotten Password**.
3. Click **Forgotten Password.**



4. Enter your work email address and click **Submit**.

   For those with multiple email addresses, it is important that you enter the work email address that your school registered with the EPM Implementation Team.



5. An email will be sent to you with instructions. Open the email and click **Please click on this link to reset your password**. A webpage will open.
6. In the **Email Address** field, enter your email address.

   Your new password should be:

   - 10 characters long
   - include a combination of upper and lower case letters
   - include at least one special character
   - include one number.
7. Re-enter your password and click **Reset**.

   Your password has been reset. Please return to the website and enter your **Login** and **Password**.

To Access the EPM Connect Platform

1. Using your preferred browser, enter **www.epmportal.uk**.
2. Enter your work email and click **Login**.
3. Enter your password and click **Login**.
4. Once logged into the system, on the left-hand side of the EPM Connect window, select **My Portal**. A list of further menu options will appear.
5. Select the module you wish to view.

My Account

This tab allows you to view your **Email Address** and the **User Groups** you have been added to.

Password Settings

This section allows you to change your password.

1. From the left-hand navigation pane, select **My Account**. The **My Account** module is displayed.
2. In the **Current Password** field, enter your current password.
3. In the **New Password** field, enter your new password.

   Passwords should be 10 digits long, with at least one special character and one lower and upper-case letter.

4. In the **Confirm New Password** field, enter your current password.
5. Click **Save** to finish.

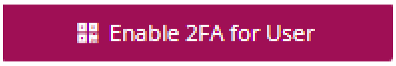
Permissions

This section displays your current permission settings. These can only be changed by users with Superuser access.

Two Factor Authentication

This section allows you to enable two factor authentication.

If Two Factor Authentication is disabled at Property or MAT level, use click the **Enable/Disable 2FA for User** button to enable or disable it for your account.



My Summary

When you login to **My Portal**, you will be taken to the **My Summary** page. This can also be accessed via the left-hand navigation pane, by selecting **My Portal**, followed by **My Summary**.

This page provides an overview of all your **My Portal Information** and provides a variety of metrics and infographics, across four tabs.

Tasks

The **Tasks** tab provides a list of your tasks and an overview of your performance regarding task completion via a variety of metrics and infographics.

Absences

The **Absences** tab provides an overview of your absences by type and your holiday entitlement.

Performance

The **Performance** tab provides an overview of your performance, including the name of your reviewer and your objectives.

Training

The **Training** tab provides an overview of your training including total logged hours and completed, incomplete and overdue training.

My Profile

This page displays your profile information. Some of this information is view-only, whilst other fields can be updated. Follow the steps below to edit the information. All amendments to the information will appear within the **Audit Trail** within your profile.

Personal Information

This tab provides **Personal Information**, **Contact Details** and **Next of Kin** information. The information on this tab can be updated.

1. From the left-hand navigation pane, select **My Profile**. Your **My Profile** page is displayed.
2. Select the **Personal Information** tab.
3. Click the **Edit Details** button.

4. Update the relevant fields.
5. Click **Save** to finish.

Qualifications

This tab provides information relating to your **Qualifications**. The information within this tab is view-only.

ID & Other Checks

This tab provides information related to the **ID & Other Checks** you provided when you joined the school. The information within this tab is view-only.

Employee Documents

This tab displays your **Employee Documents**. The information on this tab can be updated.

- Click the pencil icon to edit the file.
- Click the x to delete the file.
- Click the download icon to download the file.

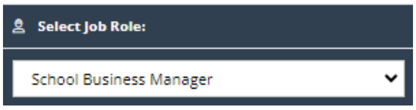
Upload Documents

1. Click the **+ Upload Documents** button.
2. In the **Title** field, enter a title.
3. Click **Select File** and upload the relevant document.

View Job Role Information

The remaining tabs all relate to your job role(s). Select the role you require, to view the information related to that role and select the tab you require.

1. Select **My Profile**. Your **My Profile** page is displayed.
2. From the **Select Job Role** drop-down menu, select the job role you wish to view.



3. Select the tab you wish to view.

Job Information

This tab provides information relating to your **Job Information**, including **Contract Information** and **Work Pattern**. The information within this tab is view-only.

Salary Information

This tab provides information relating to your **Salary Information** and is the area in which you can update your **Bank Details**. The information within this tab is view-only, however

1. Select **My Profile**. Your **My Profile** page is displayed.
2. Select the **Salary Information** tab.
3. Click the **Edit Details** button. A new **Manage Bank Details** tab is displayed.

4. Update the details within the form.
5. Click **Save** to finish.

Pensions & Benefits

This tab provides information relating to your **Pensions & Benefits**. The information within this tab is view-only.

Documents

This tab provides **Documents** relating to the role you have selected. The information within this tab is view-only.

Probation

This tab provides information relating to your **Probation**. The information within this tab is view-only.

My Tasks

This **My Tasks** area provides a list of your tasks **To Do** and tasks **Completed**.

1. From the left-hand navigation pane, select **My Tasks**. Your **My Tasks** page is displayed.
2. Select the **To Do** tab.
3. View the task **Title** and **Description** for information regarding the task.
4. In the **Response** text box, enter a response.
5. Once complete, from the **Status** drop-down menu, select **Completed**.
6. If relevant click the **Upload File** button to upload a file.
7. Click **Save** to finish. The task will now be displayed within the **Completed Tasks** tab within the main **My Tasks** page.

My Payslips & Statements

From the left-hand navigation pane, select **My Payslips &** Statements. This section will allow you to view and download all payslips and statements in relation to your pay.

My Documents

The area provides access to any documents linked to your file.

Documents can be filtered using the magnifying glasses or sorted using the column headings.

From the left-hand navigation pane, select **My Documents**. The **My Documents** page is displayed.

Documents for Signing: Displays documents awaiting your signature.

Signed Documents Library: Displays all signed documents

All Employee Documents: Displays all employee documents.

All Job Documents: Displays all documents relating to specific roles.

Documents

View documents relating to your specific roles or employee documents relating to your general employment.

1. Select the **All Job Documents** tab to view documents relating to a specific role or the **All Employee Documents** tab to view documents relating to you as an employee.
2. Click the download icon on the far right-hand side of the document you wish to view.

   The document is downloaded and will appear within your downloads.

Signable Documents

1. Select the **Documents for Signing** tab.
2. Click the eye icon on the far right-hand side of the document you wish to view. A new window is displayed with a message from the user who has sent the document.

   Click the Preview Document button to preview the document. The document must be previewed to enable you to sign.

   Click the Download Document button to download the document.

3. In the **Signing message (optional)** field, enter a message.
4. Tick the confirmation box. The window expands.
5. Use the mouse to draw your signature or use the textbox to enter your name and initials within the **Text for canvas (optional)** text box as a signature.
6. Change font and font size
7. Click **Clear Signature** to remove the signature or **Update Signature** to confirm the signature.

8. Click **Sign** to sign or **Reject** to reject.

My Leave

This page is only available for employees whose schools have subscribed to the Enhanced Absence Module.

The page provides self-service access for employees, with the ability to submit absences for approval, including General Absence, Holiday and TOIL. It is not possible for employees to add Sickness, Lateness and Family Leave.

View information regarding your holiday entitlement and TOIL, in addition to all submitted and approved absences. These absences can be viewed via both **Calendar View** and **List View** and all **Absence Requests** and a full **Audit Trail** available to provide a full picture of your absence record.

The heatmap at the top of the page highlights any trends related to the days in which your absences have fallen. For example, should a large number of your absences fall on Monday, the **M** will be highlighted.

View Absences

1. From the left-hand navigation pane, select **My Leave**. Your **My Leave** page is displayed.
2. Select either the **Calendar View** or **List View** tab to view your absences.
3. Select the **Absence Requests** tab to review open absence requests.
4. Select the **Audit Trail** tab to view a full audit trail.

Request General Absence

1. Select **My Leave**. Your **My Leave** page is displayed.
2. Select the **Request General Absence** button at the top of the screen. A new page is displayed.

3. From the **Reason for Absence** drop-down menu, select the option you require.

   Reason for Absence will display the options you selected within Settings.

4. In the **First Day of Absence** text box, select a date from the calendar, followed by a time.
5. In the **Last Day of Absence** text box, select a date from the calendar, followed by a time.

   If the time is left empty, the system will assume that you have been absent for the full day.

   The **Last Day of Absence** can be amended at a later date should the absence be extended.

6. In the **Details** text box, add any relevant details.
7. In the **Roles** field, select all the roles that the absence relates to.

   The system will calculate the workings days lost for **Absent For (Days)** using the information in the system. This is shown in the **Use Suggested** box.

8. In the **Absent for (Days)** text box either click the **Use Suggested** button to populate the text box or override manually by entering a number into the text box.

9. Click **Save** to finish. The page will refresh and additional tabs are displayed at the bottom of the page.

Should any errors be made or mandatory fields be left incomplete, the system will alert the user to these errors.

10. Scroll down to the bottom of the page. The **Documents** tab is displayed.
11. Click **+ Add Document**. A new window is displayed.

12. In the **Title** text box, provide a title for the document.
13. Click **Upload File** and select the document you wish to upload from your files.
14. Select the **Notes** tab. The Notes tab is displayed.
15. Click **+ Add Note**. A new window is displayed.

16. In the text box, enter any relevant notes.
17. Click **Save** to finish.

All changes can be viewed within the **Audit Trail** tab.

18. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View** and **List View**.

Request Holiday

1. Select **My Leave**. Your **My Leave** page is displayed.
2. Click the **Request Holiday** button at the top of the screen. A new page is displayed.

3. In the **First Day of Absence** text box, select a date from the calendar, followed by a time.
4. In the **Last Day of Absence** text box, select a date from the calendar, followed by a time.

The **Last Day of Absence** can be amended at a later date should the absence be extended. This can be left empty and added at a later date.

If the time is left empty, the system will assume that the employee has been absent for the full day.

5. In the **Details** text box, add any relevant details.

The system will display the **Allowance Period** under **Details** and also display the **Annual Leave Allowance, Taken, Awaiting Approval** and **Remaining** under each role listed under **Roles**.

6. From the **Roles** drop-down menu, select all the roles that the absence relates to.

7. In the **Absent for (Days)** text box enter 1 unless the employee has returned to work. This can be amended at a later date.

   The system will calculate the workings days lost for **Absent For (Days)** using the information in the system. This is shown in the **Use Suggested** box.

8. Click **Save** to finish. The page will refresh and additional tabs are displayed at the bottom of the page.

   Should any errors be made or mandatory fields be left incomplete, the system will alert the user to these errors.

9. Scroll down to the bottom of the page. The **Documents** tab is displayed.
10. Click **+ Add Document**. A new window is displayed.

11. In the **Title** text box, provide a title for the document.
12. Click **Upload File** and select the document you wish to upload from your files.
13. Select the **Notes** tab. The Notes tab is displayed.
14. Click **+ Add Note**. A new window is displayed.

15. In the text box, enter any relevant notes.
16. Click **Save** to finish.

17. Click **Back** at the top of the page. The absence you have added will be displayed within the **Calendar View**.

Add TOIL

1. Select **My Leave**. Your **My Leave** page is displayed.
2. Click the **Add TOIL** button at the top of the screen. Further options are displayed.

3. Select **Earn TOIL**. A new **Add Time Off in Lieu Earned** window is displayed.
4. In the **Start of TOIL** text box, select a date.
5. In the **End of TOIL** text box, select a date.
6. From the **TOIL Reason** drop-down menu, select a reason.
7. In the **Notes** text box, enter any relevant notes.
8. Select all **Roles** that apply.
9. In the **TOIL Hours Earned** text box, enter the total number of hours.
10. Click **Save** to finish.

Spend TOIL

1. Select **My Leave**. Your **My Leave** page is displayed.
2. Click the **Add TOIL** button at the top of the screen. Further options are displayed.

3. Select **Earn TOIL**. A new **Spend Time Off in Lieu Earned** window is displayed.
4. In the **Start of TOIL** text box, select a date.
5. In the **End of TOIL** text box, select a date.
6. From the **TOIL Reason** drop-down menu, select a reason.
7. In the **Notes** text box, enter any relevant notes.
8. Select all **Roles** that apply.
9. In the **TOIL Hours Earned** text box, enter the total number of hours.
10. Click **Save** to finish.

Edit an absence

1. Select **My Leave**. Your **My Leave** page is displayed.
2. Select the **List View** tab.
3. Click the pencil icon next to the absence you wish to view.
4. Amend the absence as required.
5. Click **Save** to finish.

Add Self-Certification

1. Click the **+ Add Self Certification** button.

2. In the Self Certification applicable from and until fields, adjust the dates if relevant.
3. In the Brief Description of Illness filed, enter a description.
4. Tick the boxes if relevant.
5. Click the Upload Alternative Self Certification Form to upload an alternative.

6. Click **Save** to finish.

Employee Directory

This section allows you to search for employees within your organisation and view email, telephone and car registration numbers.

The **Search** function allows you to search for any of these information items, for example typing in the employee's name or car registration to find their file.

Once the file has been found click on the listing on the left-hand side to view the full employee profile and whether the employee is absent. Only relevant information is shown, any information that would be unsuitable for your employees is not visible.

My Time

My Time provides an overview of all your **Open Time Claims**, **Closed Time Claims**, **Open Timesheets** and **Closed Timesheets**.

Creating a new Time Claim

1. From the left-hand navigation pane, select **My Time**. The **My Time** module is displayed.
2. Click the **+ Create Time Claim** button. A new window is displayed.

3. In the **Reference** field, enter a reference
4. In the **Claim Title** field, enter a Claim Title.
5. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
6. Click the **Add Time Line** button.

7. In the **Purpose** field, enter a purpose, for example Conference.
8. In the **Date Worked** field select a date. Additional fields are displayed.
9. From the **Job Role** drop-down menu, select the relevant job role.
10. In the **Start Time** field, enter a start time.
11. In the **End Time** field, enter a start time.
12. In the **Hours Worked** field, enter hours and minutes worked.
13. In the **Breaks** field, enter breaks in hours and minutes.
14. Click either the **Save Draft** or **Save and Submit** button. This will now be sent to your Line Manager or Approver for approval.

Edit Open Time Claims and Open Timesheets

These can be edited by clicking the pencil icon.

Closed Time Claims and Timesheets

These cannot be edited but can be viewed by clicking on the eye icon.

My Expenses

My Expenses provides an overview of all your **Open Expense Claims** and **Closed Expense Claims**.

Creating a new Expense Claim

Claims can be entered together or individually or together. For example, inputting hotel and mileage claims one after another.

1. From the left-hand navigation pane, select **My Expenses**. The **My Expenses** module is displayed.
2. Click the **+ Create Expense Claim** button. A new window is displayed.

3. In the **Reference** field, enter a reference.
4. In the **Claim Title** field, enter a Claim Title.
5. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
6. Select either **Add Mileage Line** or **Add Mileage Line**.

Add Mileage Line

1. In the **Purpose** field, enter a purpose, for example Conference.
2. In the **Date Incurred** field select a date. Additional fields are displayed.
3. From the **Job Role** drop-down menu, select the relevant job role.
4. From the **Vehicle** drop-down menu, select the relevant vehicle type. Additional fields are displayed.
5. In the **From** field, enter the starting location.
6. In the **Total Miles** field, enter the total miles.
7. Select the **Round Trip** tick box if you wish to include the both the outgoing and return trip as a single claim.
8. The **Total Amount (Gross)** field will be updated. To check the calculation, click the calculator icon next to the figure displayed.
9. Click the box next to the message at the bottom of the page.
10. Click either the **Save Draft** or **Save and Submit** button. This will now be sent to your Line Manager or Approver for approval.

Add Non-Mileage Line

1. In the **Date Incurred** field, select a date. A new window is displayed.
2. Select the expense item you wish to claim and click the **Select Item** button. You will return to the main page where additional fields are displayed.

   The fields displayed depend on the expense type selected.

   For some expense claims the **Total Amount (Gross)** will be calculated automatically. We therefore recommend completing this field last. If this has not been completed automatically, enter the total within this field.

3. Complete the remaining fields.
4. Click the box next to the message at the bottom of the page.

   To enter the next claim click **Add Mileage Line** or **Add Non-Mileage Line** or if all claims have been entered click either the **Save Draft** or **Save** and **Submit** button.

5. Once all claims have been entered click either the **Save Draft** or **Save and Submit** button. This will now be sent to your Line Manager or Approver for approval.

Edit Open Expense Claims

These can be edited by clicking the pencil icon.

Closed Expense Claims

These cannot be edited but can be viewed by clicking on the eye icon.

My Training

This area of **My Portal** displays completed & incomplete training.

The metrics within the page provide an overview of all **Total Logged Training**, **Incomplete Training**, **Overdue Training**, **Completed Training**, **Certificates** and **CPD Hours**.

View assigned courses and update

1. From the left-hand navigation pane, select **My Training**. The **My Training** page is displayed.
2. Select the **To-Do** list tab to view all incomplete training assigned to you.
3. Click the **Course Title** you wish to view.
4. In the **CPD Hours** field, enter the total hours of training completed.
5. In the **Date Completed**, select the date the training was completed.

   Once a course has been completed it will move to the **Completed** tab within **All Training**.

6. Click **Save** to finish.

Add Documents

1. To add documents, click the **+Add Document** button. A new window is displayed.

2. Click **Upload File** to upload a file.
3. From the **Document Type** drop-down menu, select an option.
4. In the **Title** field, enter a title.
5. Click **Save** to finish.

Add Notes

1. To add documents, click the **+Add Document** button. A new window is displayed.

2. In the **Note** field, enter a note.
3. Click **Save** to finish.

All Training

This tab displays a list of all completed and incomplete training.

1. Select the **All Training** tab.
2. Click the View button on the far right-hand side of the course information you wish to view.

Audit Trail

The **Audit Trail** displays every action that has been undertaken within the module. View when each course was started and completed, any documents and notes that have been uploaded and any changes to **Approval Status**.

Download certificates

1. On the left-hand side of the EPM Connect window, select click **My Portal**. A list of further menu options is displayed
2. Select **My Training**. The **My Training** page is displayed.
3. Click **Download All** in the **Certificates** box at the top of the screen.

Log Training

1. Click the **+ Log Training** button at the top of the screen. A new **Log Training for *(Name)*** screen is displayed.

2. From the **Course** drop-down menu, select the course. Further fields are displayed.
3. From the **Required** drop-down menu, select **Critical**, **Mandatory** or **Optional**.
4. In the **Date Due** field, select a due date.
5. In the **CPD Hours** field, enter the total hours of training completed.
6. In the **Date Completed**, select the date the training was completed.
7. Click the **Select files** button to add files.

My Performance

From the left-hand navigation pane, select **My Performance**. This section allows you to view your full performance record.

For employees with multiple roles, select performance record relating to the role you wish to view in the top right-hand corner of the screen.

Click through the tabs to view:

– Performance Summary
– Standards
– Objectives
– Reviews
– Observations
– Audit Trail

Performance Summary

This tab provides you with a summary of your performance via a number of metrics and infographics and displays the name of your **Reviewer**.

General Guidance

The fields in grey cannot be edited.

You will only be able to review the information relating to each standard, objective, review and observation if the person who has set the performance activity has provided visibility to the employee.

Standards

The table shows all standards that have been assigned to you.

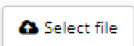
Edit Rating

1. Select the eye icon or click on the **Standard** title to edit the **Employee Rating**.
2. Click **Save** to finish.

Add Evidence

1. Select the eye icon next to the standard you wish to view or click on the **Standard** title.
2. Click the **+ Add Evidence** button.

3. In the **Title** field, enter a title.
4. In the **Note** filed, enter a note.
5. Click **Select File** to upload a file.



6. Click **Save** to finish.

Objectives

The table shows all the objectives that you should be working towards. If any objectives are awaiting your agreement select the pencil icon to agree to the objective.

Once agreed you will be able to edit the objective status as well as uploading evidence by selecting the pencil icon.

1. Select the eye icon next to the standard you wish to view or click on the **Standard** title.
2. Tick the **Approved by Employee** box to agree the objective.
3. From the **Status** drop-down menu, select a status.
4. In the **Date Completed** field, select the date completed.
5. Click **Save** to finish.

6. Click the **+ Add Evidence** button to add evidence.

Reviews

This tab shows assigned reviews for this performance record.

The fields in grey cannot be edited.

1. Select the pencil icon on the far right-hand side of the review you wish to view or click on the **Review** title.
2. Complete the Employee Questionnaire and View the review information and click the **+ Add Evidence** button to add evidence.

3. Click the Dow the top left-hand corner to download the review. nload Review button in

Observations

1. Select the eye icon next to the standard you wish to view or click on the **Standard** title.
2. In the **Employee Comments** field, enter comments.
3. Click the **+ Add Evidence** button to add evidence.

4. Click **Save** to finish.

Audit Trail

The **Audit Trail** displays every action that has been undertaken within the module, including a time stamp and the person who has made the change.