

Self-Service Portal Guide

Welcome to your personal self-service portal. The portal puts you in control of your employee record, allowing you to:

- Change your contact details
- Update your bank details
- View and print your payslips and P60s
- Review your leave entitlement and enter annual leave requests
- View your sickness absence
- View company documentation, policies and procedures

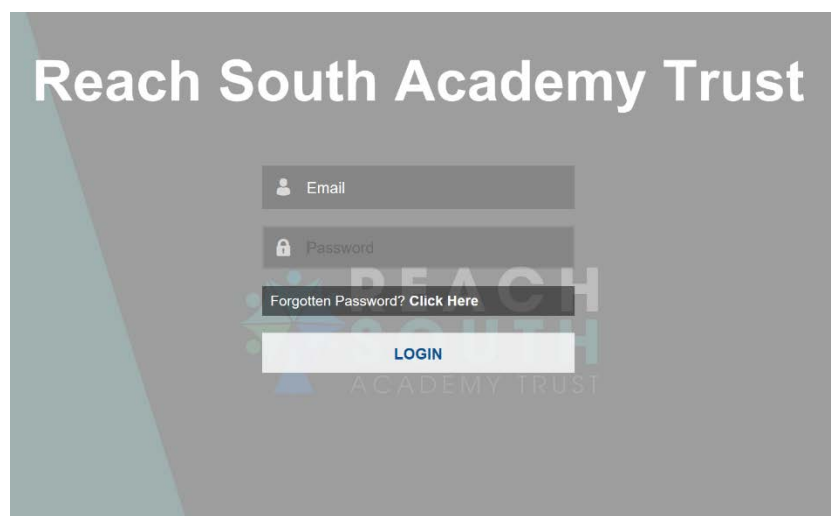
The portal is here for your information and benefit. We are always striving to improve access to information for all employees. If you have any comments or suggested improvements, please contact the HR Team at hr@reachsouth.org

The Reach South Academy Trust self-service portal is designed to be intuitive and self-explanatory. However, we recognise that this is a new system and some staff may require additional support.

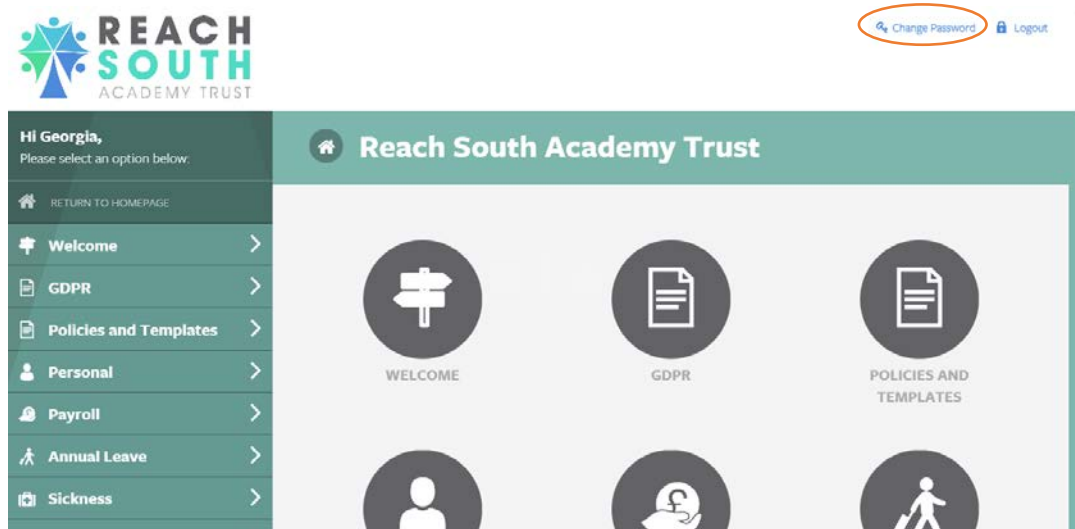
To access the Self-Service Portal please click here or paste the url <https://reachsat.selfservice.global/login> into your web browser.

The portal is supported by all web browsers and can be used on a smartphone, tablet or laptop.

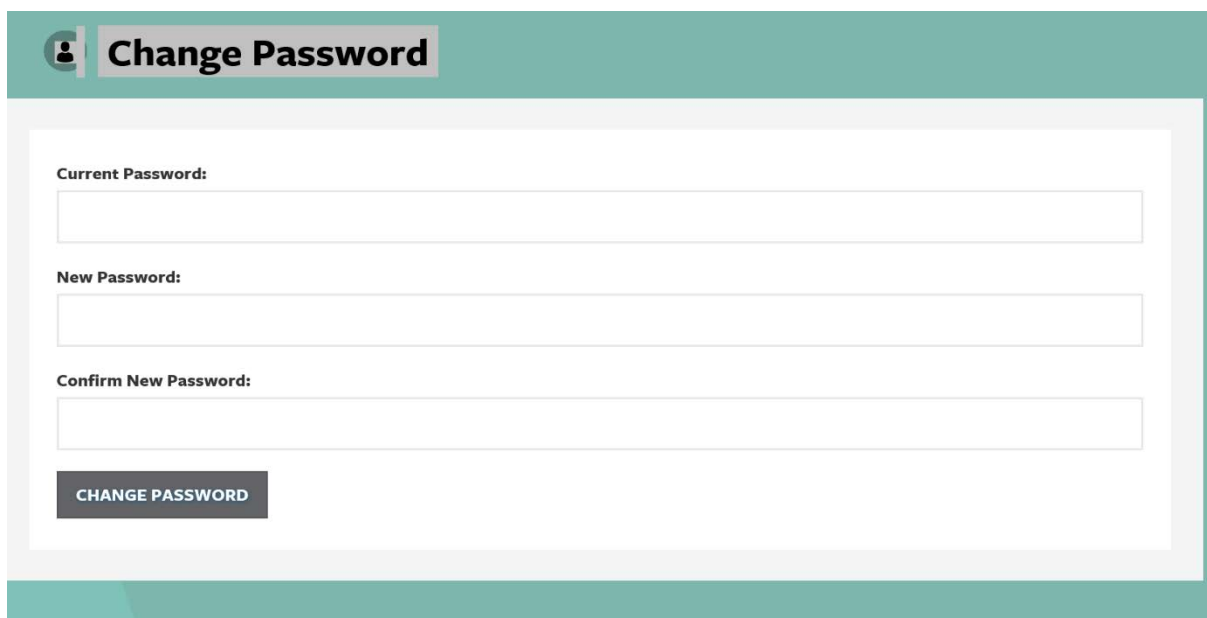
1. When logging in for the first time you will need the email address you currently use to receive your payslip. The password is your national insurance number (CAPITAL LETTERS).



2. Portal users can change their own login password by logging into the portal and selecting *Change Password* on the quick access menu at the top of the screen.



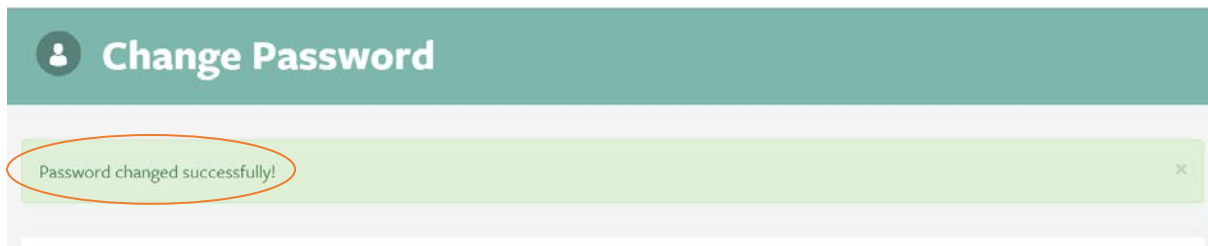
3. Clicking this will bring up the following page where you are asked to enter your current password (which you used to login to the portal), the new password you wish to use to login to the portal and a confirmation of this new password:



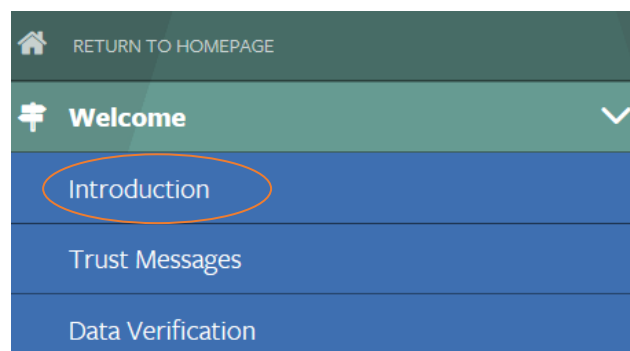
The screenshot shows the 'Change Password' form. It has a header with a user icon and the text 'Change Password'. The form contains three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. Below the input fields is a button labeled 'CHANGE PASSWORD'.

4. We recommend that you change your password to one of your own choice once you have logged in for the first time. Please ensure this is a strong password and is a combination of letters, numbers and special characters. It is the individuals responsibility to keep their password secure.

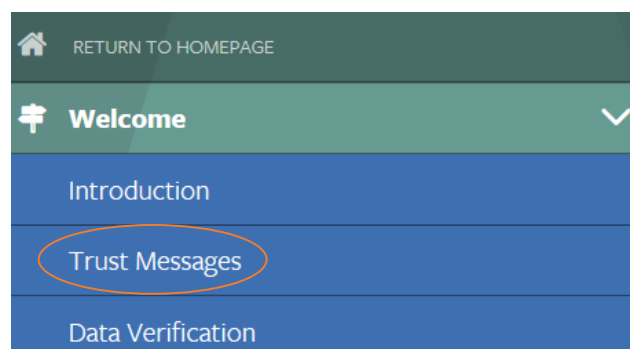
5. If successful, you will see the following:



6. On the left hand side of the page you will see a number of menu options.
7. Click on the **Welcome** menu option. Here you will see three sub-menu options. Click on the sub-menu **Introduction**. Please read the entirety of this page.



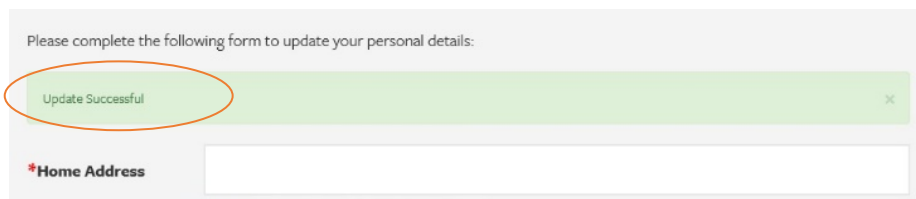
8. Click on the **Welcome** menu option again. Click on the sub-menu **Trust Messages**. This page will be updated with information such as pay dates, Christmas pay date changes, etc. to be coming soon.



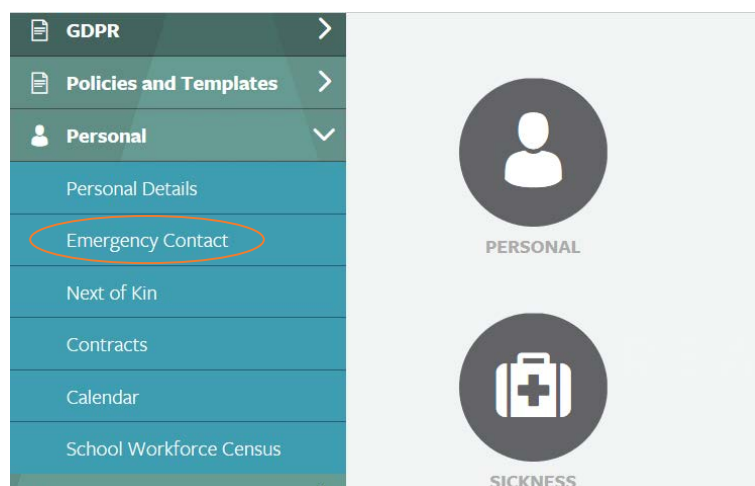
9. Go into the **Personal** page. Choose the **Personal Details** sub-menu.



10. Check that all information shown in **Personal Details** is accurate. If anything is inaccurate, missing or unapplicable, click the *Update* button at the top of the page to change any information. **YOU MUST NOT CHANGE YOUR EMAIL ADDRESS FROM YOUR WORK EMAIL ADDRESS TO A PERSONAL EMAIL ADDRESS.** Please note that if you do then it will be reverted back to your work email address.
11. Once you have input all the information you would like to add or change, click *Submit*. All mandatory fields must be completed to submit. It will state *Update Successful* at the top of the page in green when saved.



12. Please be aware, if you change your email address, you will need to use this email address when logging into the system in the future.
13. Next, go into the **Personal** page and choose sub-category **Emergency Contact**.



14. Check that all information shown in **Emergency Contact** is accurate. If anything is inaccurate, missing or unapplicable, click update to change/add any information.

Here are your emergency contact details. To change them, click update:

Update

Name

Relationship

Home Address

15. Once you have input all information you would like to add or change, click submit. All mandatory fields must be complete to submit. It will state *Update Successful* at the top of the page in green when saved.

*Mobile Phone Number

*Daytime Contact Number

*E-Mail Address

Submit

Please complete the following form to update your emergency contact details:

Update Successful

*Name

16. Next, go into the **Personal** page and choose **Contracts** as the sub-menu. You will see your Employment History.

17. Click on your role(s). This will bring up a pop-up with all of your contract information.

Here are your contract details. To view more information on a contract, click on the row:

Activity	Status	Contract Type	Location	Start Date	End Date
Administrator	Primary Active				31/08/2020

Contract Information

Role: Administrator

Location:

Contract Type:

Employment Status:

Start Date:

End Date:

Salary Grade:

Scale Point:

Salary:

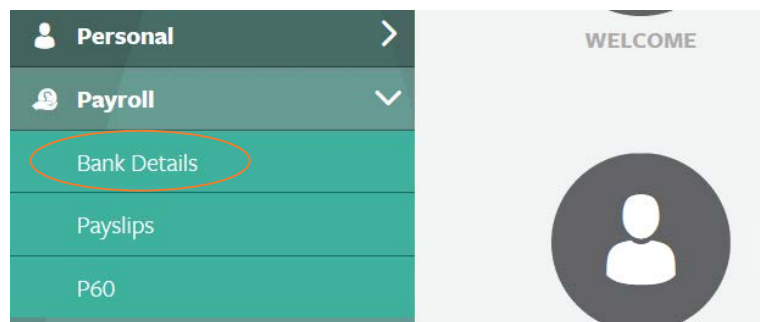
Whole Time Equivalent: Full Time 37.50 hrs & 52.14 weeks

Hours Per Week:

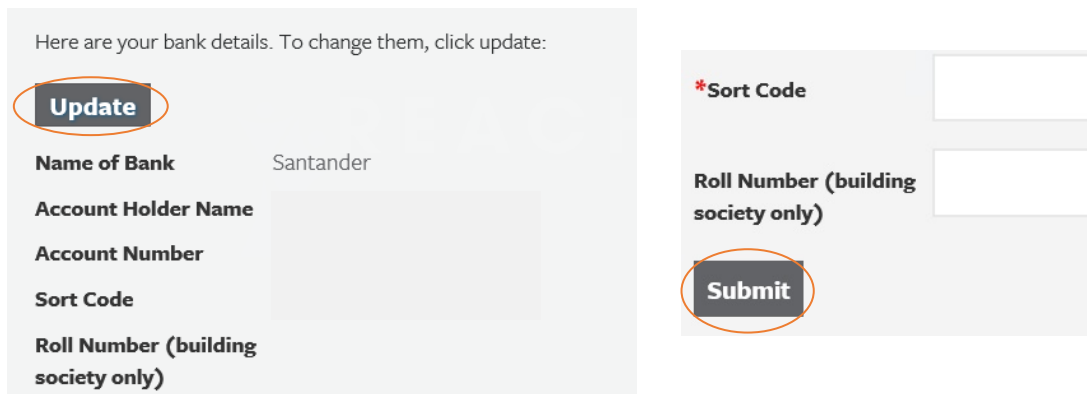
Weeks Per Year:

18. If there is any incorrect information about your role(s), **please contact** hr@reachsouth.org

19. Next, go to Payroll Menu. Here you will be able to see a number of sub-menus. First, check or update your bank details. Click on the sub-menu **Bank Details** as highlighted below.

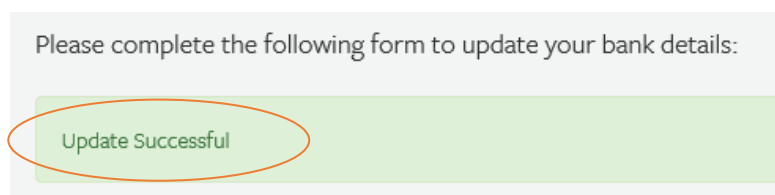


20. If your bank details are incorrect, click Update to amend them. You can now use this method of amending your bank details whenever you change them. Please note it is your responsibility to ensure that your bank details are accurate at all times. Failure to do so may result in delayed payment of salary.

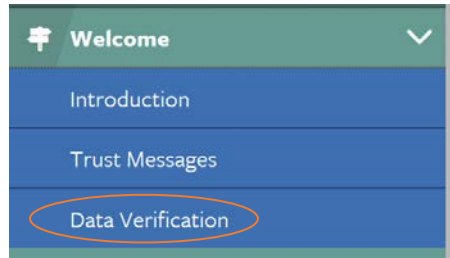


The screenshot shows a form for updating bank details. On the left, there is a section titled 'Here are your bank details. To change them, click update:' with an 'Update' button highlighted by an orange circle. Below this, the form fields are: 'Name of Bank' (Santander), 'Account Holder Name', 'Account Number', 'Sort Code', and 'Roll Number (building society only)'. On the right, there is a section for '*Sort Code' and 'Roll Number (building society only)' with input fields. A 'Submit' button is highlighted with an orange circle at the bottom of the right-hand section.

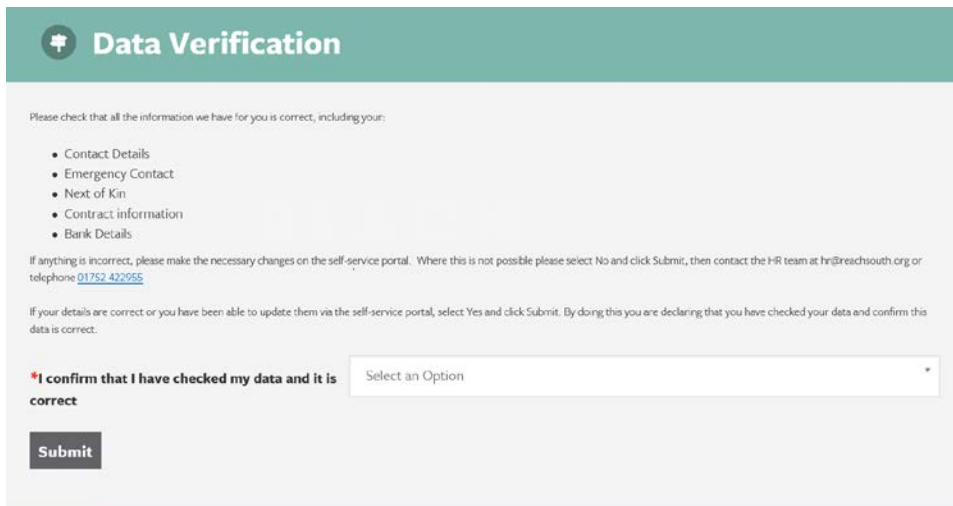
21. Once you submit at the bottom of the page, a green pop-up box will appear at the top of the page saying 'Update Successful.'



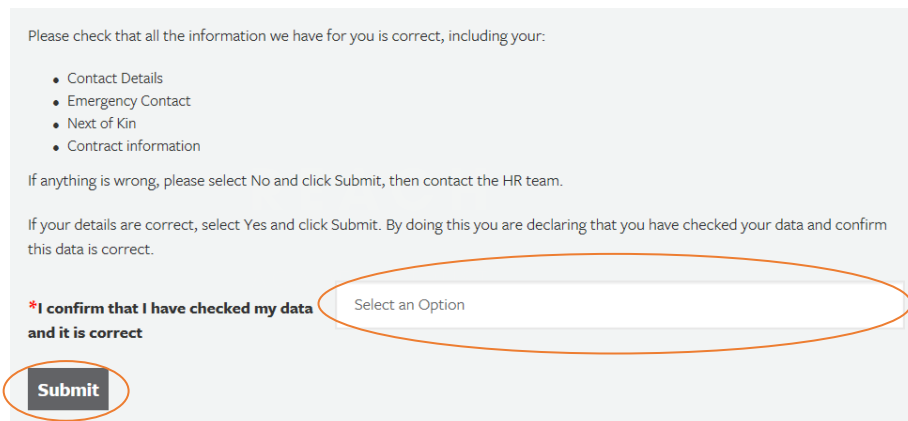
22. Next, click on the **Welcome** menu option. Click on the sub-menu **Data Verification**.



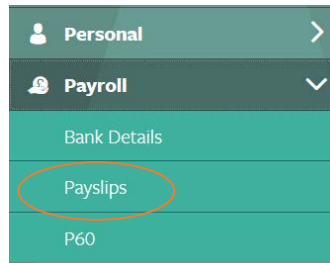
23. Here you will see a list of information that you have checked above, alongside a confirmation selection box.

A screenshot of the 'Data Verification' page. The page has a teal header with a white icon and the text 'Data Verification'. Below the header, there is a list of items to check: Contact Details, Emergency Contact, Next of Kin, Contract information, and Bank Details. A paragraph of text explains that if anything is incorrect, the user should make changes on the self-service portal or contact the HR team. Another paragraph states that if details are correct, the user should select 'Yes' and click 'Submit'. At the bottom, there is a confirmation statement: '*I confirm that I have checked my data and it is correct'. To the right of this statement is a dropdown menu with the text 'Select an Option'. Below the confirmation statement is a 'Submit' button.

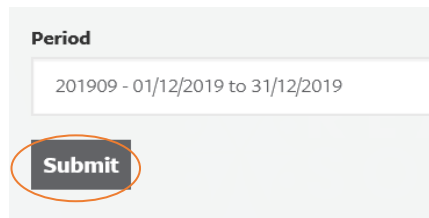
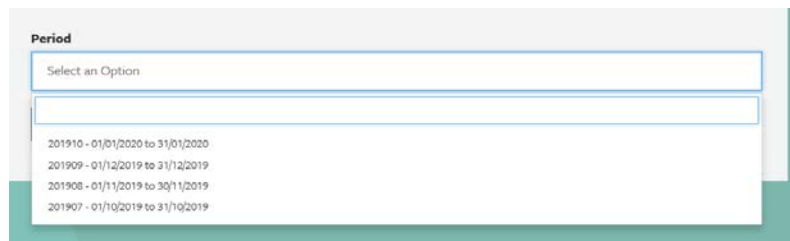
24. If all your information is correct within **Personal Details, Emergency Contact, Next of Kin** (if applicable), **Contracts and Bank Details**, please select *Yes* where asked '*I confirm that I have checked my data and it is correct*' and submit. If anything is wrong that you cannot amend, please select *No* and submit and contact HR at hr@reachsouth.org with further details.

A screenshot of the 'Data Verification' page, similar to the one above. It shows the list of items to check, the explanatory text, and the confirmation statement: '*I confirm that I have checked my data and it is correct'. To the right of this statement is a dropdown menu with the text 'Select an Option'. Below the confirmation statement is a 'Submit' button. Both the dropdown menu and the 'Submit' button are circled in orange.

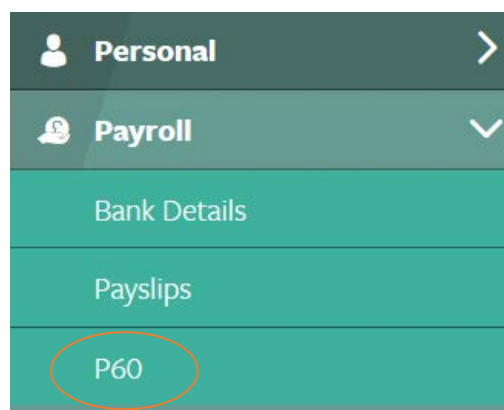
25. Next, go into the **Payroll** page. Choose sub-category **Payslips**. Here, you can see any previous payslip you've had with Reach South Academy Trust since 1 April 2019 when the new payroll system was implemented (or later if started after this date).



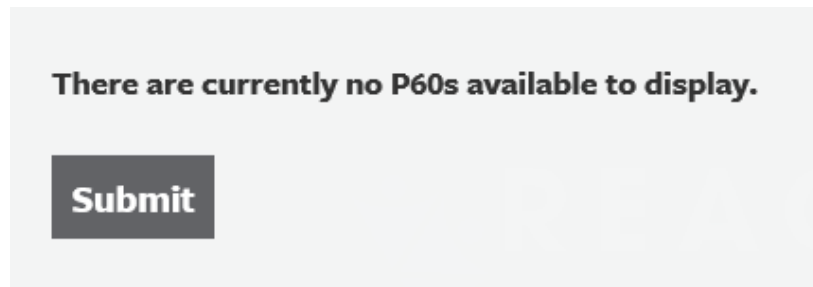
26. If you click the selection box stating *Period*, you will see an option of monthly payslips. When you select a month, click submit. This will open up your payslip attached to that period.



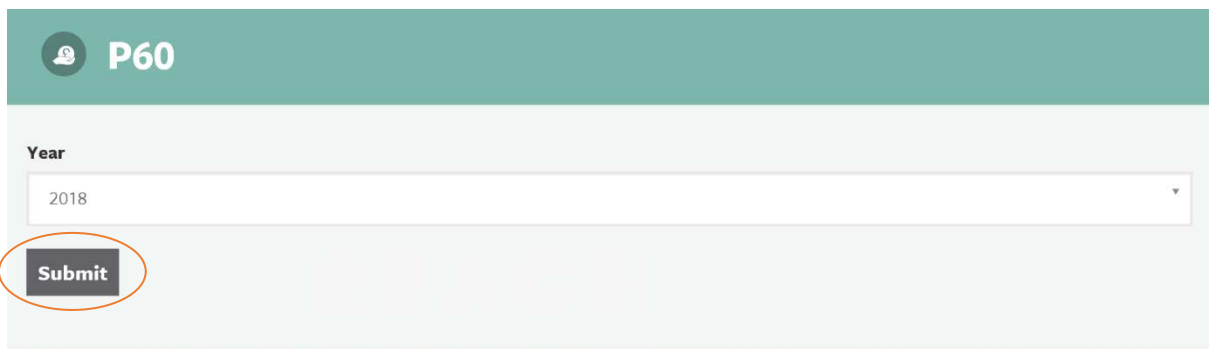
27. To see all previous P60's, go to **Payroll** and sub-menu **P60**.



28. If you click the selection box stating *Period*, you will see an option of annual P60s. When you select a year, click submit. This will open up your P60 attached to that period. You may have no P60's as the first P60s will not be due until May 2020, which means your screen will look like this.



29. If you do it will look like this (and the drop down list will state which financial year the P60 relates to).



A screenshot of a web form titled "P60" with a person icon. Below the title is a "Year" label and a dropdown menu currently showing "2018". At the bottom left of the form, a dark gray "Submit" button is circled in orange.

30. When you click submit, your P60 will open for that year in your default PDF/browser.
31. Reach South Academy Trust plans to provide all policies and templates for all its employee related policies and process over the next 12 months. This page will be updated regularly.
32. Click on the **Policies and Templates** menu option. Go into sub-menu **Policies**. You will find links to all Reach South Academy Trust policies that are currently in use. More are coming soon.



33. Click on the policy you would like to read to open the document. This will open in PDF or your web browser.

Please find below a list of policies that are available to download:

- [Managing Sickness Absence Policy](#)
- [Management of Change Policy](#)
- [Grievance Policy and Procedure](#)

34. For templates, click on the sub-menu **Templates**. Templates are coming soon.

- GDPR >
- Policies and Templates ▾
 - Policies
 - Templates

35. To view your sickness absence go to the **Sickness** menu option and sub-category **History**. Here you will see all of your sickness absence for the past 12 month period. If any absence looks incorrect, contact the HR team at absence@reachsouth.org

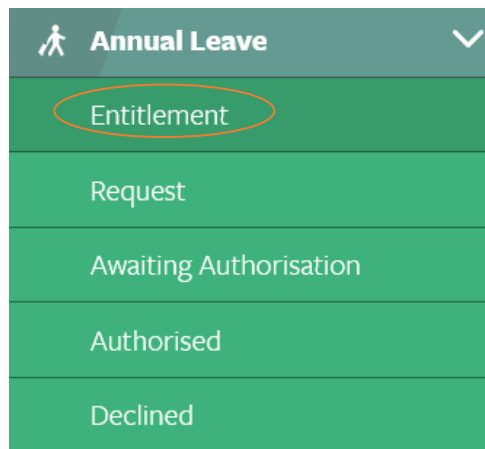
- Sickness ▾
 - History

Here are your sickness records for the past 12 month period:

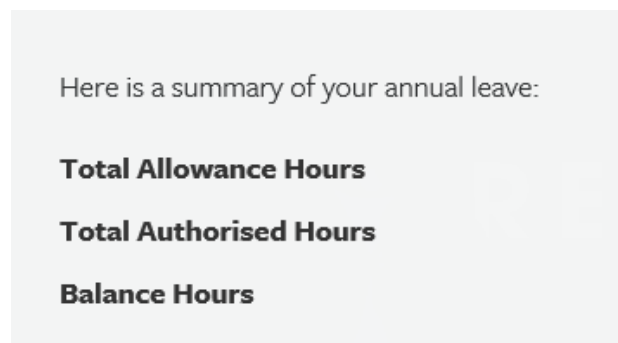
<
Search:

Absence Analysis	Description	Start Date	Last Day of Sickness	Working Days
Cold & Flu	Cold & Flu			2

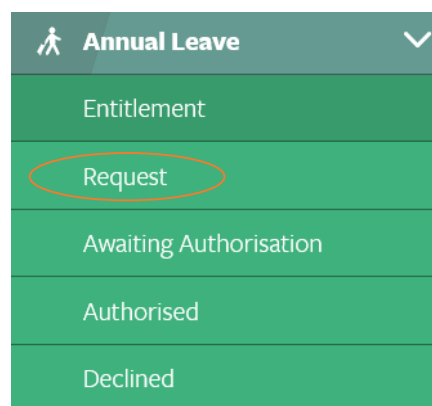
36. Click on the **Annual Leave** menu option. Continue into the **Entitlement** sub-menu option.



37. Here you will see your total annual leave allowance, your total authorised annual leave so far and your remaining balance of annual leave. If you are part-time, your holiday will be shown in hours. If you are full-time, your holiday will be shown in days. If your balance looks incorrect, please contact the Absence Team at absence@reachsouth.org



38. To request annual leave, click on the **Annual Leave** menu option. Continue into the **Request** sub-menu.




39. Here you can book off your annual leave by inputting the start date and end date of your annual leave. You can also put in the number of hours you would like off if it's not for a full day and a description of why you would like to book these dates off. Once you've filled out the mandatory options, select submit to await approval.

Please complete the following form to submit an annual leave request:

*Start Date	<input type="text"/>
*End Date	<input type="text"/>
Hours	<input type="text"/>
Description	<input type="text"/>
<input type="button" value="Submit"/>	

40. Due to the high volume of internet usage at present it may take longer for the request to submit. If you see the following message, please check in **Awaiting Authorisation** before re-submitting as it is more than likely it has been submitted, it is just a system delay. We are working on a solution and will update you shortly.

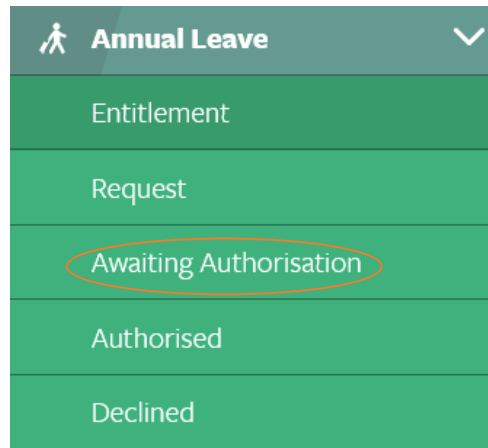
 **Request**

Please complete the following form to submit an annual leave request:

Error:
A problem was encountered communicating with your Web Service. Please wait for a moment, and then re-submit your update.

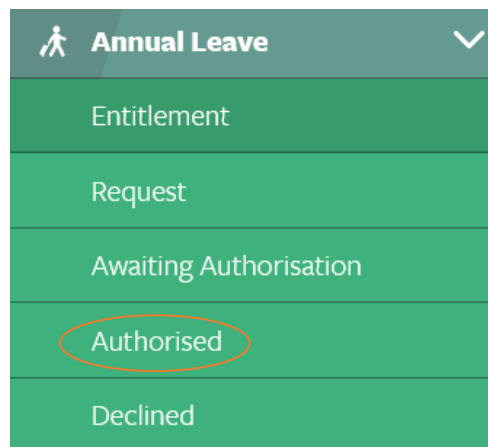
*Start Date	<input type="text" value="29-12-2020"/>
*End Date	<input type="text" value="29-12-2020"/>
Hours	<input type="text" value="7.5"/>
Description	<input type="text" value="Xmas"/>
<input type="button" value="Submit"/>	

41. Click on the **Annual Leave** menu option. Continue into the **Awaiting Authorisation** sub-menu.



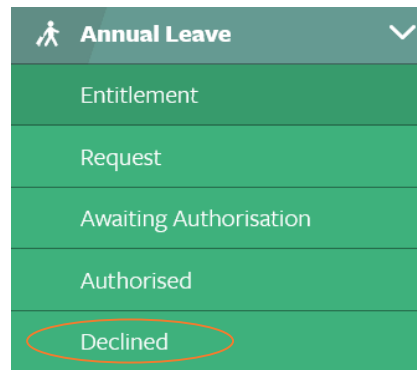
42. Here you can see the annual leave you have requested to book off. If it is showing your annual leave in **Awaiting Authorisation**, your annual leave has not been approved by your line manager yet.

43. Go into the **Annual Leave** menu option. Click on the **Authorised** sub-menu.



44. Here you will see your annual leave requests that have been approved.

45. Go into the **Annual Leave** menu option. Click on the **Declined** sub-menu.



46. Here you will see your annual leave requests that have been declined.

47. To cancel annual leave that has already been authorised you will need to email your line manager and seek written approval to do this. Once received you will need to forward the email to hr@reachsouth.org and they will arrange to cancel it in the system.

48. To request **Other Absences**, please click on the **Other Absences** menu option and click on **Request**. Here you will be able to request leave such as compassionate leave, leave for hospital appointments etc but these requests should be discussed initially with your line manager before submitting them in the system. This works in the same way as annual leave requests, **awaiting authorisation**, **authorised** and **declined** menu options above in section 38-47.