Self-Service Portal Guide

Welcome to your personal self-service portal. The portal puts you in control of your employee record and your team members records, 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
- Authorise leave requests
- Report sickness absence and manage return to work processes

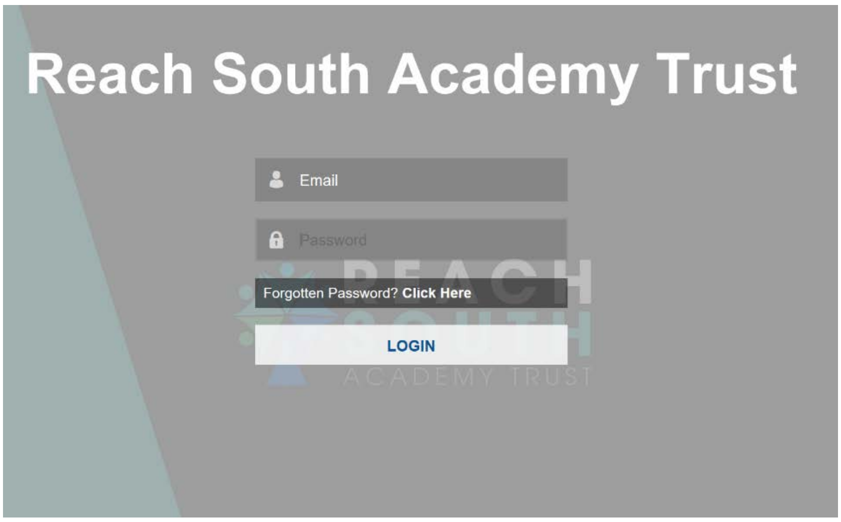
The portal is here for your information and benefit. We are always striving to improve access to information for all employees. If you have any comments or suggested improvements, please contact the HR Team at hr@reachsouth.org

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.

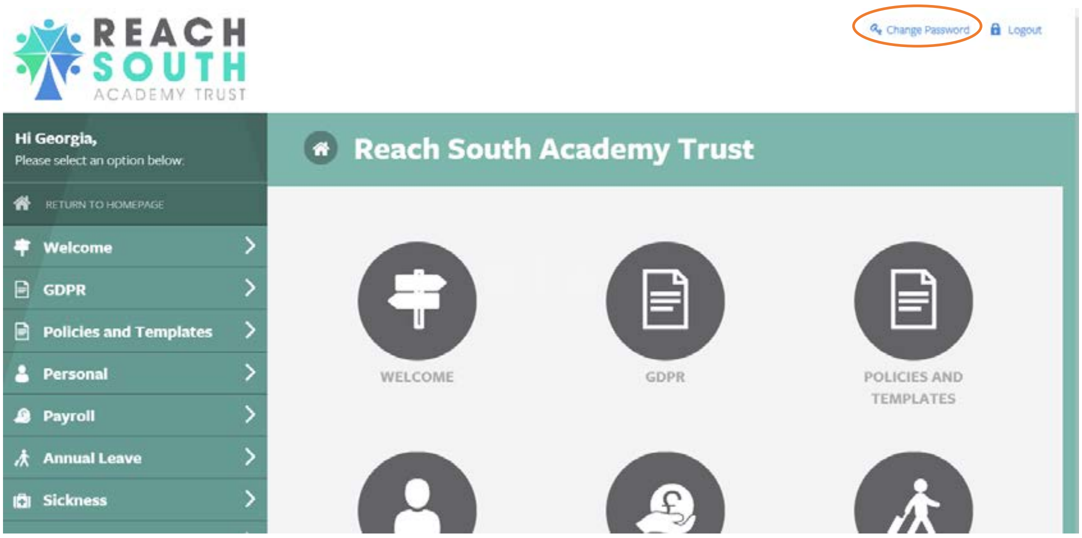
To access the Self-Service Portal please click here or paste the url https://reachsat.selfservice.global/login into your web browser.

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

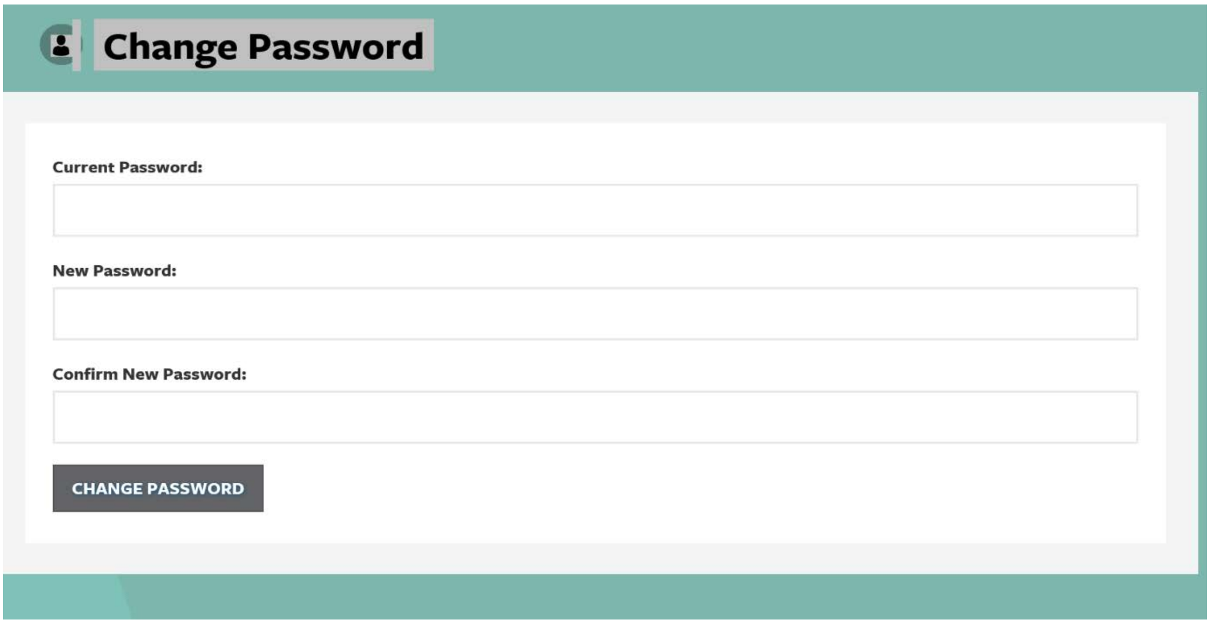
1. When logging in for the first time you will need the email address you currently use to receive your payslip. The password is your national insurance number (CAPITAL LETTERS).



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.



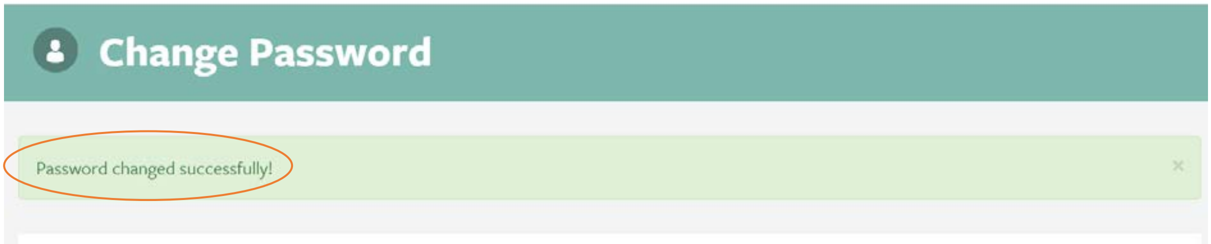
3. Clicking this will bring up the following page where you are asked to enter your current password (which you used to login to the portal), the new password you wish to use to login to the portal and a confirmation of this new password:



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

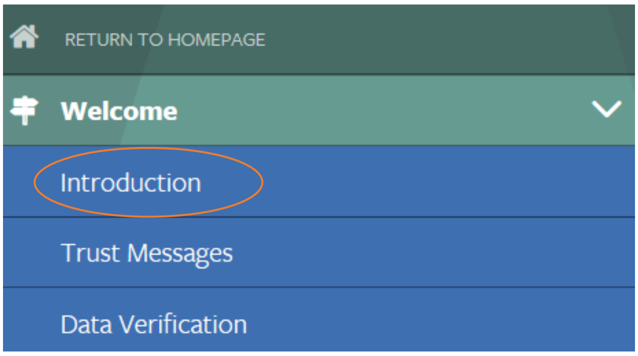
combination of letters, numbers and special characters. It is the individuals responsibility to keep their password secure.

5. If successful, you will see the folllowing:

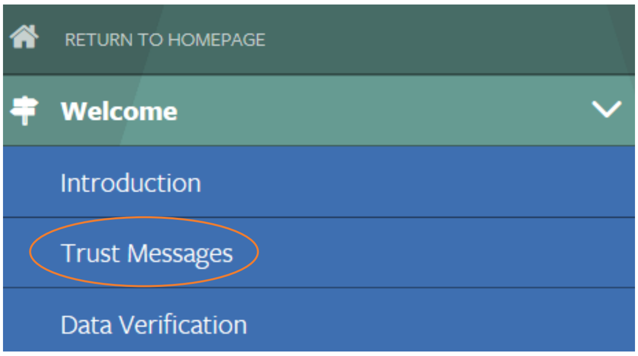


6. On the left hand side of the page you will see a number of menu options.

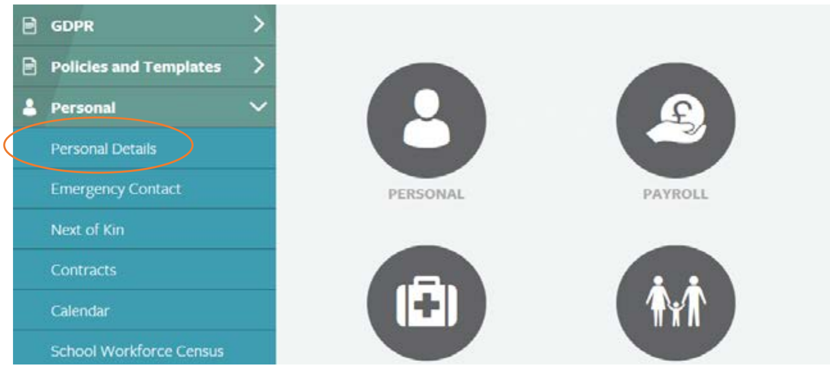
7. Click on the **Welcome** menu option. Here you will see three sub-menu options. Click on the sub-menu **Introduction**. Please read the entirety of this page.



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.

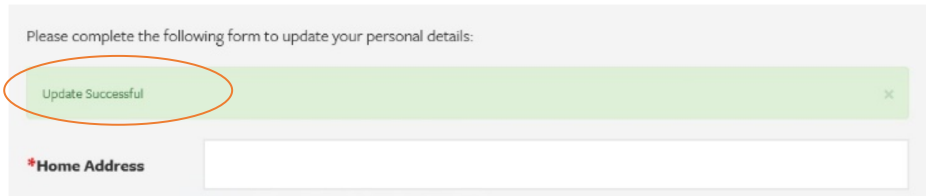


9. Go into the **Personal** page. Choose the **Personal Details** sub-menu.



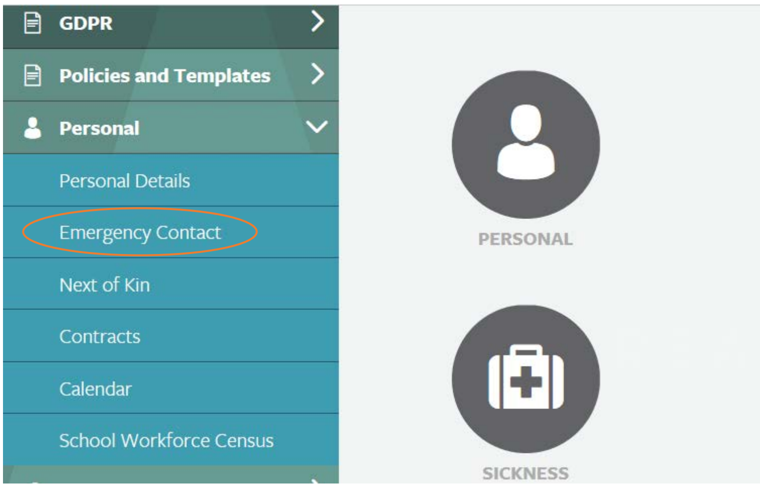
10. Check that all information shown in **Personal Details** is accurate. If anything is inaccurate, missing or unapplicable, click the *Update* button at the top of the page to change any information. **YOU MUST NOT CHANGE YOUR EMAIL ADDRESS FROM OUR WORK EMAIL ADDRESS TO A PERSONAL EMAIL ADDRESS.** 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.

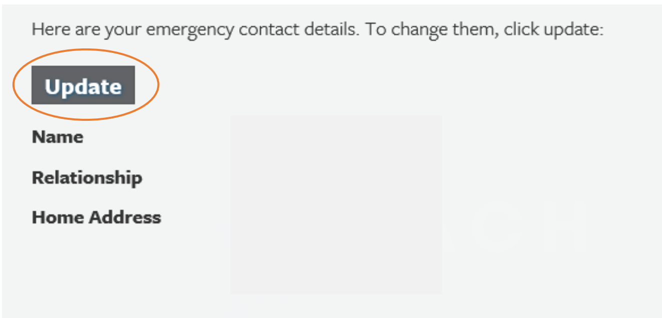


12. Please be aware, if you change your email address, you will need to use this email address when logging into the system in the future.

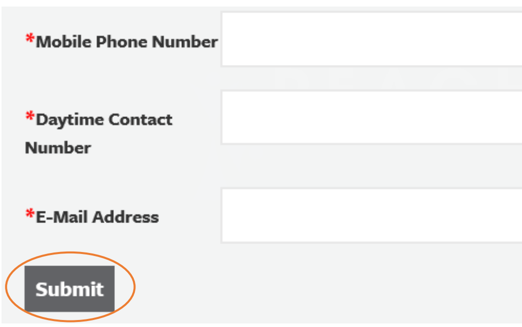
13. Next, go into the **Personal** page and choose sub-category **Emergency Contact**.

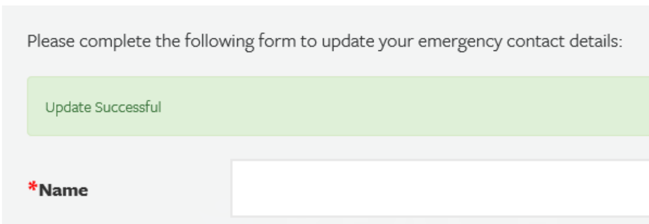


14. Check that all information shown in **Emergency Contact** is accurate. If anything is inaccurate, missing or unapplicable, click update to change/add any information.



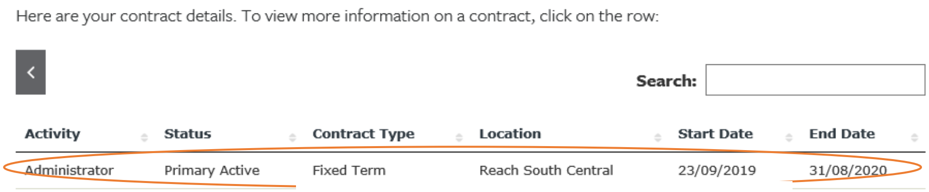
15. Once you have input all information you would like to add or change, click submit. All mandatory fields must be complete to submit. It will state *Update Successful* at the top of the page in green when saved.

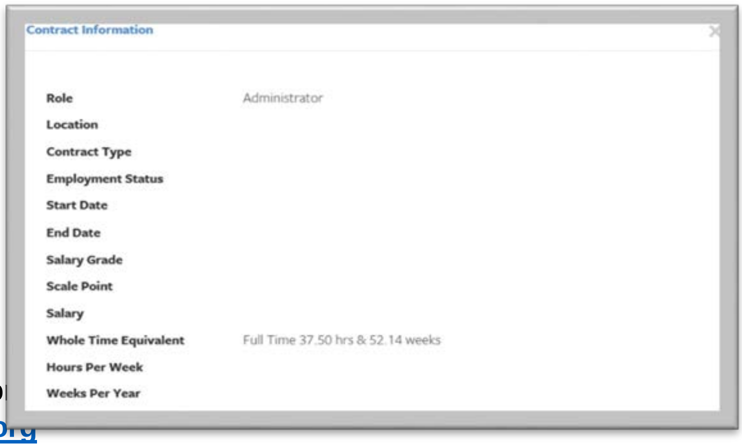




16. Next, go into the **Personal** page and choose **Contracts** as the sub-menu. You will see your Employment History.

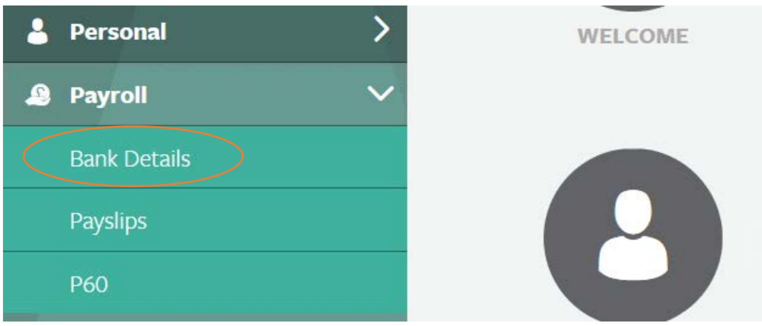
17. Click on your role(s). This will bring up a pop-up with all of your contract information.



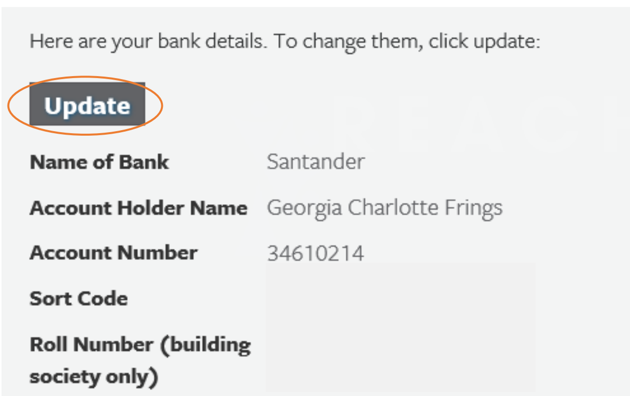


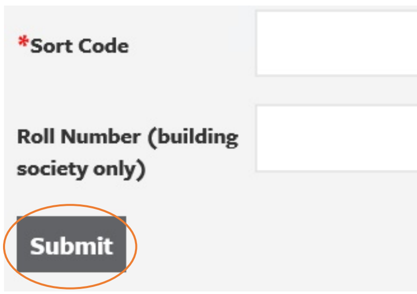
18. If there is any inco
    hr@reachsouth.o

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.



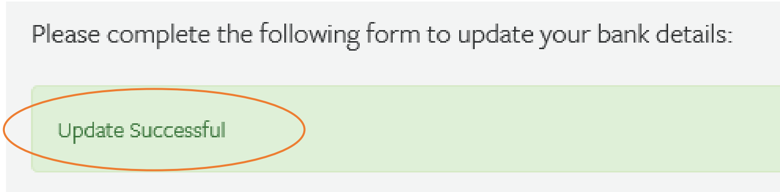
20. If your bank details are incorrect, click Update to amend them. You can now use this method of amending your bank details whenever you change them. Please note it is



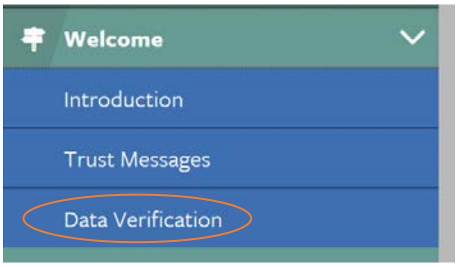


your responsibility to ensure that your bank details are accurate at all times. Failure to do so may result in delayed payment of salary.

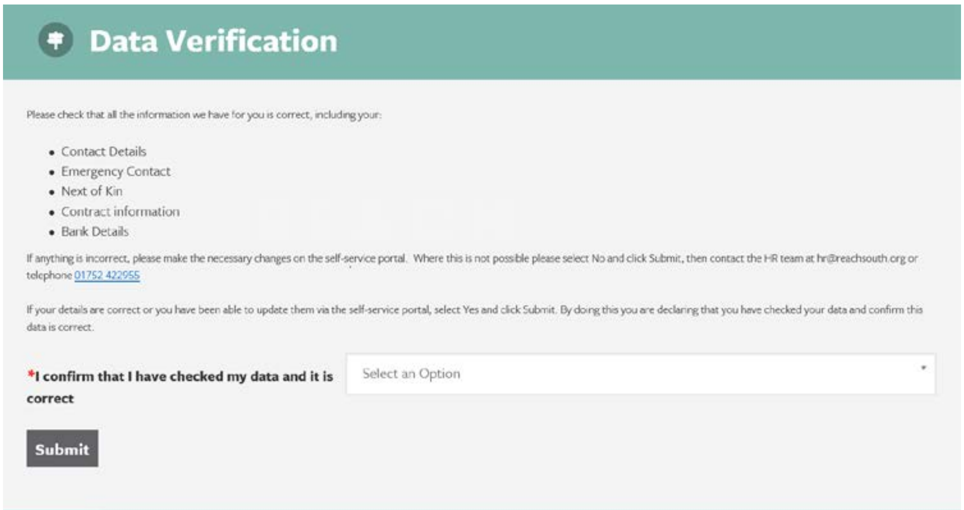
21. Once you submit at the bottom of the page , a green pop-up box will appear at the top of the page saying '*Update Successful.'*



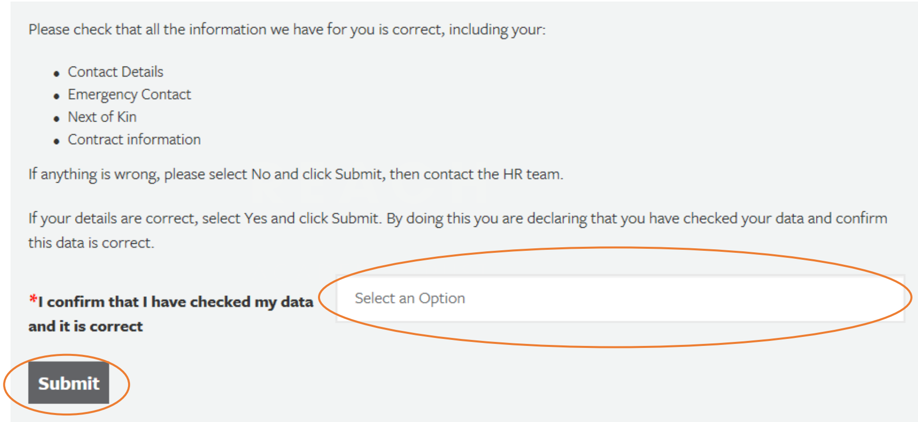
22. Next, click on the **Welcome** menu option. Click on the sub-menu **Data Verification.**



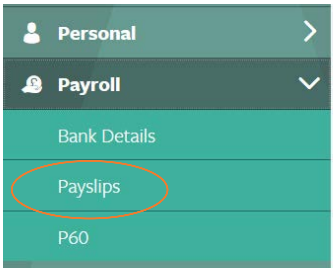
23. Here you will see a list of information that you have checked above, alongside a confirmation selection box.



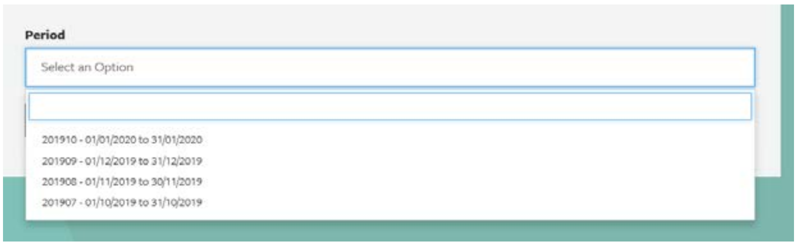
24. If all your information is correct within **Personal Details, Emergency Contact, Next of Kin** (if applicable), **Contracts and Bank Details**, please select *Yes* where asked '*I confirm that I have checked my data and it is correct'* and submit. If anything is wrong that you cannot amend, please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

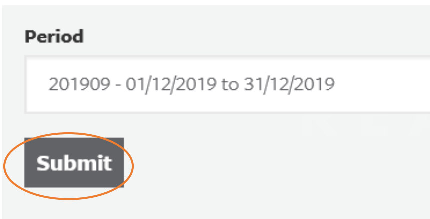


25. Next, go into the **Payroll** page. Choose sub-category **Payslips**. Here, you can see any previous payslip you've had with Reach South Academy Trust since 1 April 2019 when the new payroll system was implemented (or later if started after this date).

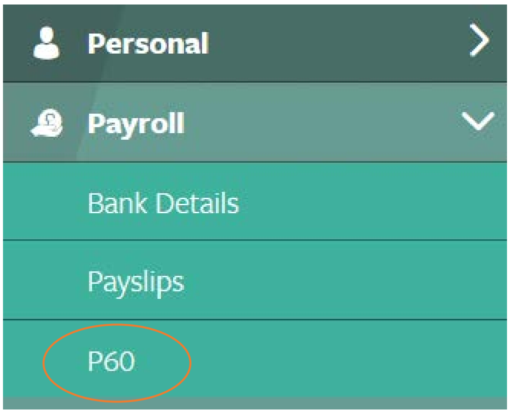


26. If you click the selection box stating *Period*, you will see an option of monthly payslips. When you select a month, click submit. This will open up your payslip attached to that period.

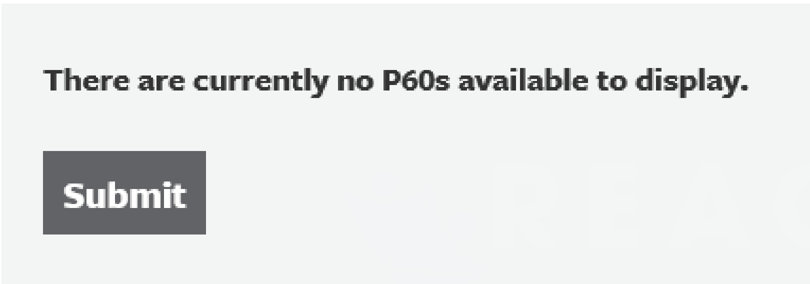




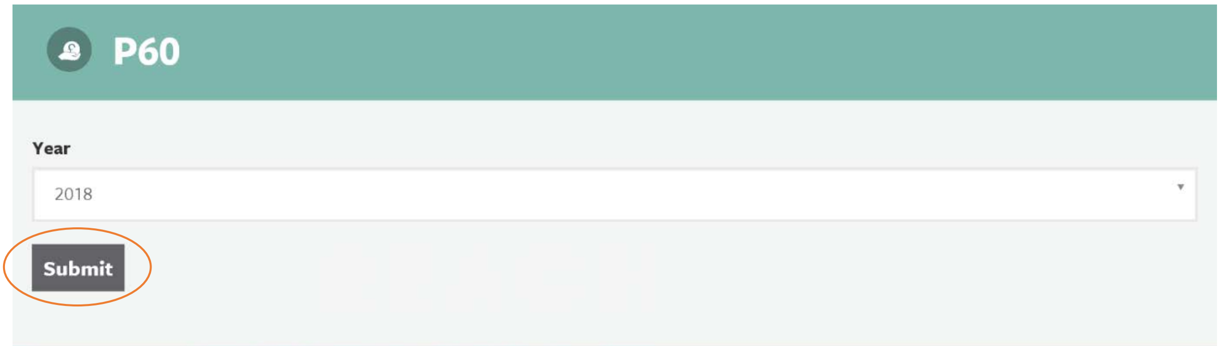
27. To see all previous P60's, go to **Payroll** and sub-menu **P60.**



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).

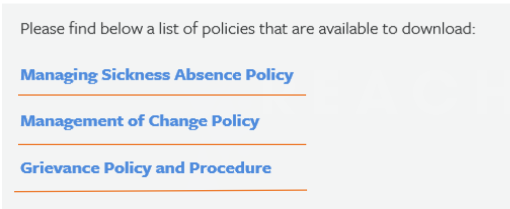


30. When you click submit, your P60 will open for that year in your default PDF/browser.

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.

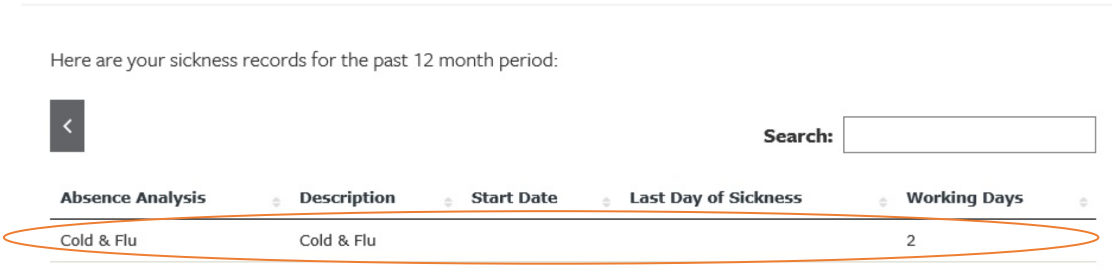
32. Click on the **Policies and Templates** menu option. Go into sub-menu **Policies**. You will find links to all Reach South Academy Trust policies that are currently in use. More are coming soon.

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

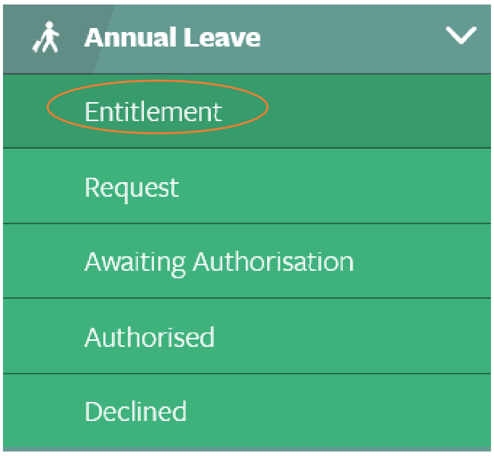


34. For templates, click on the sub-menu **Templates**. Templates are coming soon.

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

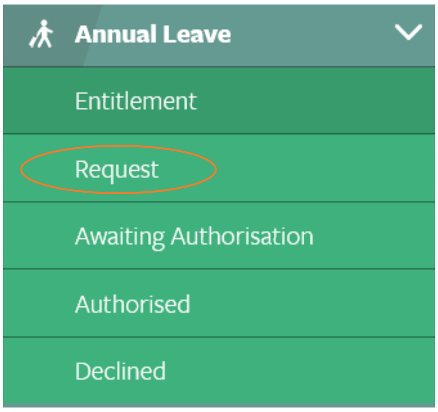


36. Click on the **Annual Leave** menu option. Continue into the **Entitlement** sub-menu option.

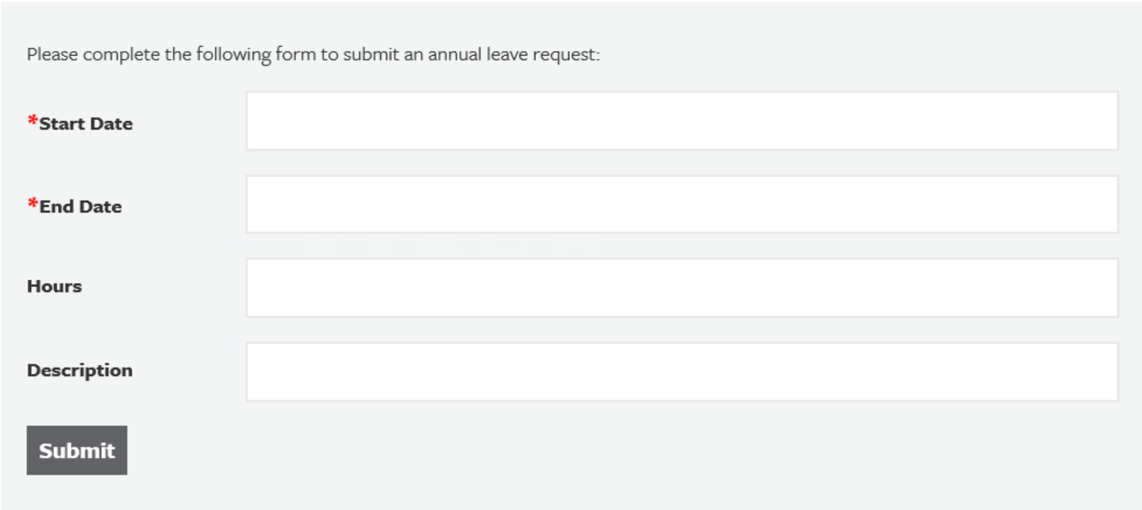


37. Here you will see your total annual leave allowance, your total authorised annual leave so far and your remaining balance of annual leave. If you are part-time, your holiday will be shown in hours. If you are full-time, your holiday will be shown in days. If your balance looks incorrect, please contact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

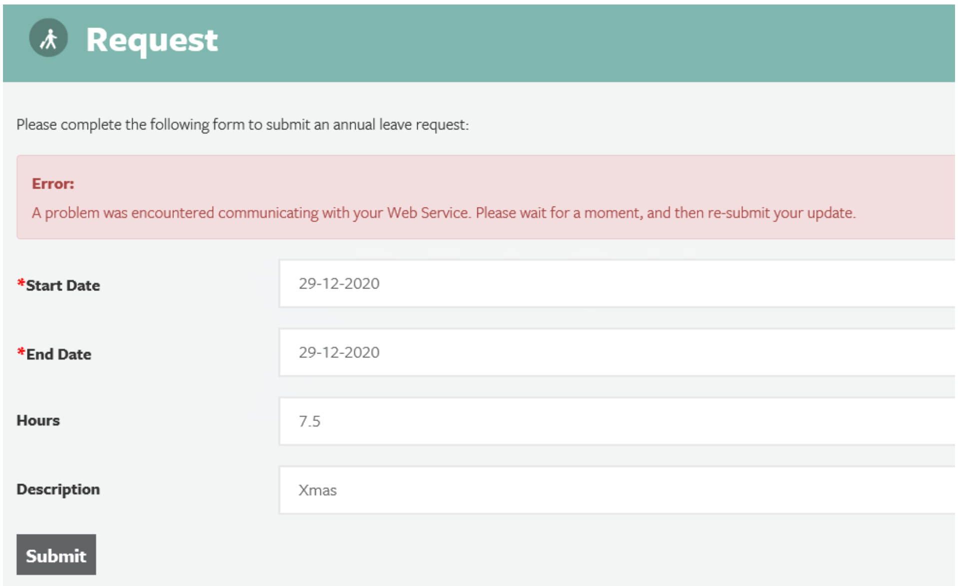
*End Date

Hours

Description

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 29-12-2020

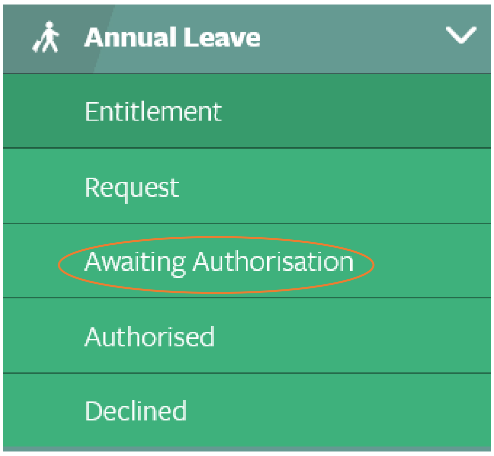
*End Date 29-12-2020

Hours 7.5

Description Xmas

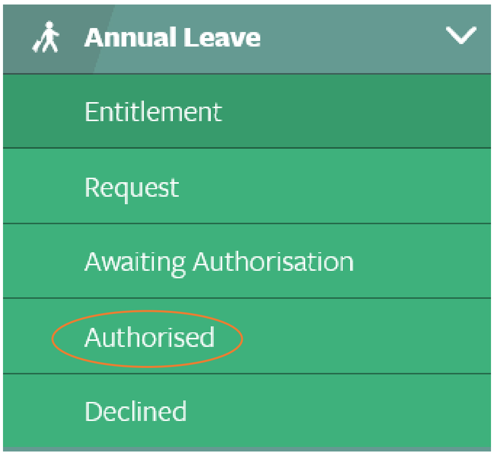
Submit

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



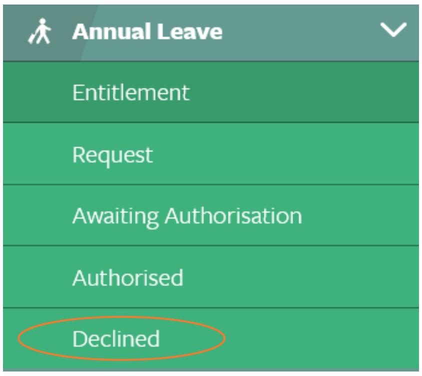
42. Here you can see the annual leave you have requested to book off. If it is showing your annual leave in **Awaiting Authorisation**, your annual leave has not been approve by your line manager yet.

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 authorisaiton, authorised** and **declined** menu options above in section 38-47.

LINE MANAGERS

49. For those staff with line manager responsiblities you will also see the following menu options:

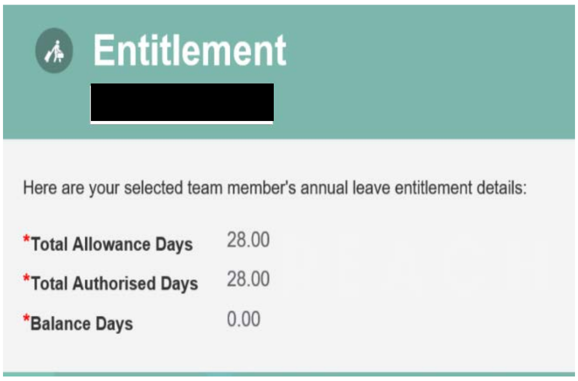
50. As a line manager you will receive requests for annual leave and other leave through the Self-Service Portal. All requests should be authorised or declined using this system. For any requests that you plan to decline you must first discuss this with the employee so that it does not come as a surprise to them when they receive a declined request.

51. To approve a leave request you will receive an email giving you further details and asking you to access your Self-Service Portal to review the request.

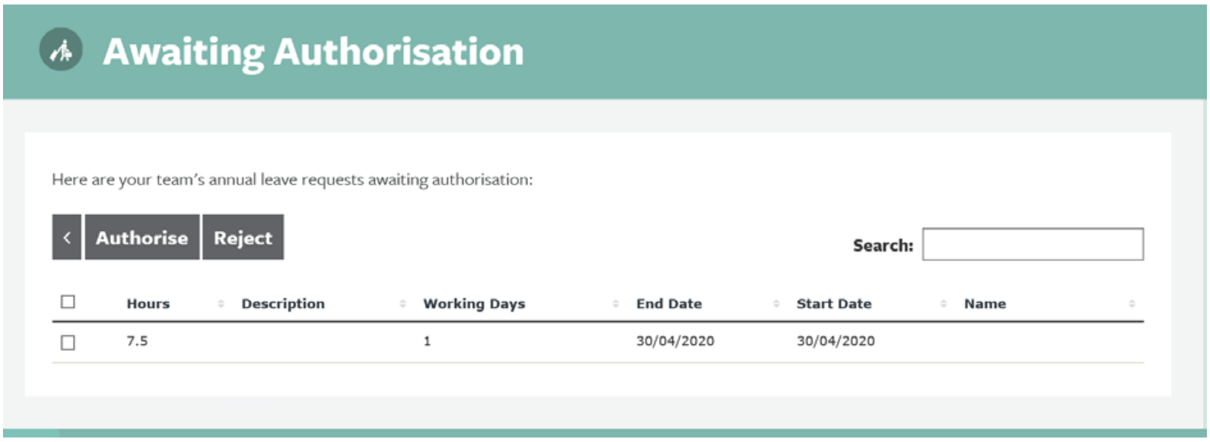
52. When accessing the Team's Annual Leave menu option you will see the following sub menu options:

53. To see the **Entitlement** of each of your team members you will need to select the team member as follows:

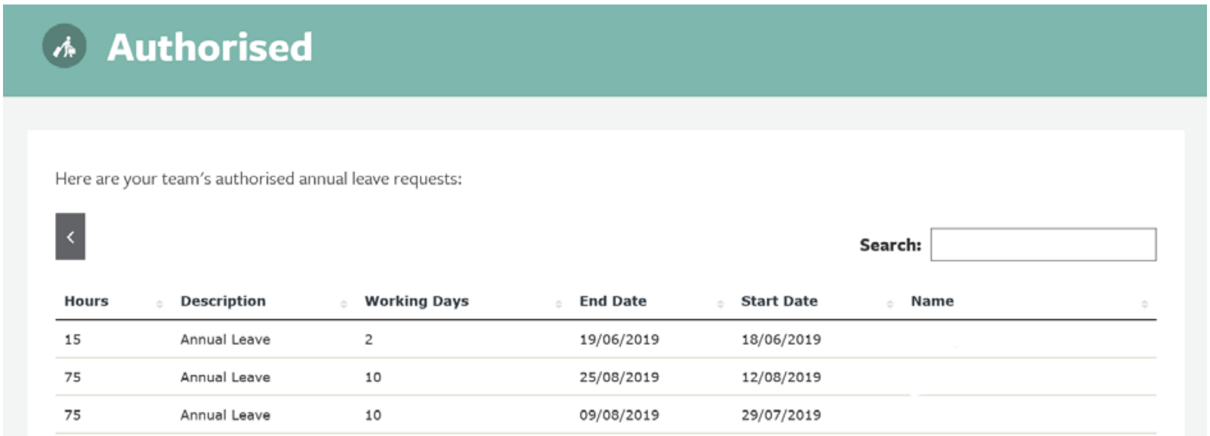
54. When you click into the box a drop down list of current team members will be presented and you will need to click the relevant team member. Then click the select team member button on the right hand side. This will then show the annual leave entitlement, total authorised days and balance for the team member.



55. Click on **Awaiting Authorisation** to see all requests awaiting reivew. You can either authorise or rejct at this stage.



56. To see annual leave already authorised please click on the **Authorised** menu option:

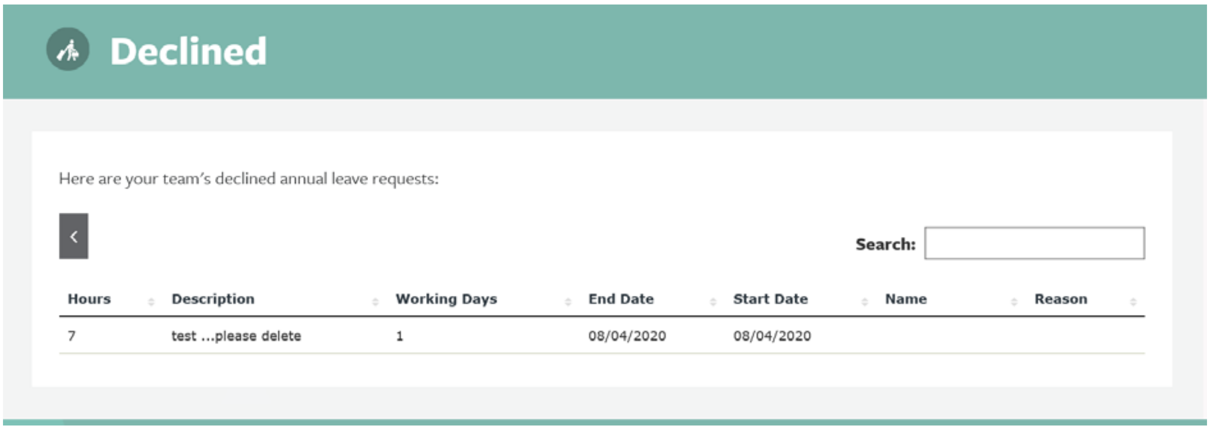


57. If you want to search for a specific employees **requested**, **authorised** or **declined** leave then type the name into the search box to the right as below:

Authorised:

Declined:

58. To see annual leave requests that have been declined please click on **Declined**



59. If a team member wants to cancel annual leave that has already been authorised, click on **Authorised** under **Team's Annual Leave.** This will show you all of the annual leave you have authorised within your team. To cancel an episode of annual leave, click once on that episdoe (making sure it is the correct dates for the correct team member) and this will create a pop-up where there is a **Cancel** button in the bottom left. Click **Cancel**, and then this leave will be cancelled within the system, and the team member will be alerted.

60. **Other Team Absence** is the same process as **Team's Annual Leave.**

61. **Team Sickness –** To report a new sickness absence please contact HR on 01752 422955 and they will guide you through the process. Please do not use the portal for reporting sickness absence at this stage.