Manager Self Service

Proxy Manager
(Not included in the Payroll Interface)

Version control

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<td>0.1</td>
<td>31 May 2018</td>
<td>First Draft</td>
<td>Ian Stuart</td>
</tr>
<tr>
<td>0.2</td>
<td>19 July 2018</td>
<td>eESS Brand Refresh</td>
<td>Lorraine Whyte</td>
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Standard Operating Procedure

1. Definition of proxy usage

A proxy user is someone who will transact self-service functions on behalf of

- a line manager (within or out with own supervisor hierarchy, as appropriate); or
- peer employees
- via self-service-based access.

2. NHSS Proxy for Manager Self Service (MSS)

- This allows the transaction requestor to be different to the transaction subject

- The Proxy for Manager User will have access to Manager Self Service actions as per Manager Self-Service menu, but not be able to view any salary details. My Employee Information pages are also personalised to remove the Salary tab.

Proxy Manager Self Service menu options:

Absence Management, Absence Carryover, Allowances and Deductions, Change Assignment Costing, Change Job and Terms, Doctors in Training, Doctors in Training, Documents of Records, Maternity, Paternity, Personal Information, Qualifications, Registrations, Return to Work, Terminations, Terminations Assignments

N.B Proxy for Manager Self Service must be specifically requested to and setup from your local eESS system team.
3. Setting up Proxy Employee list within NHSS Proxy for Manager Self Service

“My List” principles

The standard Manager Self-Service people hierarchy is not available for the proxy user because proxy user is not direct or indirect supervisor of the population they transact for. Proxy usage is therefore based on a “My List” concept, which allows a user to construct a table of people for whom they have access. This table is then presented to the user when they click on a self service function. Users need to construct and maintain “My List”.

In order to create My List, the user needs to:

- Select a menu link (e.g. Change Job and Terms, Allowances and Deductions etc)
- Use Advance Search link or search for Employee in name field at top of screen and click Go
- Add to My List (this list will appear under all proxy menu links)
- Carry out transaction

(The proxy's manager may wish to review My List when it is first constructed.)

Navigate to NHSS Proxy for Manager Self Service

1. Click on any transaction for example Change Job and Terms,
2. Click on advance search
3. Enter search criteria and click Go to return results
4. Select relevant people records and click Add To My List
5. Confirmation displays
6. View My List under a different transaction for example Change Job and Terms
7. Click on My List to view employees
8. Click on Action icon of relevant employee in order to transact as required
4. Approvals by proxy

The basic principle is that the proxy user is the transactor, and not the approver of the transaction. Transactions issued by the proxy user will be approved on the following basis:

- as if proxy user’s manager issued the transaction OR
- as if the subject of the transaction issued it (i.e. as if requested by the employee)

Available approval paths for self-service transactions:

- No approval required (though an FYI notification may be issued to the subject of the transaction)
- Approval required from the requestor’s (proxy user’s) line manager (i.e. the person that the proxy is transacting on behalf of)
- Approval from HR, where the Board approval rules have been changed locally so that HR Approval is set as ‘Yes’
- FYI to HR
- FYI to requestor’s line manager