



People and Money system

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School or Department Admin Guide- How to Search, View and Upload Employee Documents

School or Department Admin

Before You Start

This guide covers how to search, view and upload documents to Document Records in People and Money.

A School/Department Administrator (SDA) can only add/upload selected file types. For more details, please see the [appendix](#).

- All SDAs should familiarise themselves with the Guide to Employee Files. This can be found on the [People and Money user guides](#) page under the heading Personal Data Maintenance.
- Do not remove any documents that have previously been added to an employee's record.
- Some document records are stored in Document Records in People & Money, others are stored in the Employee File SharePoint. Find out where documents are stored in the [Guide to Employee Files](#).


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In Brief...

Searching and Viewing Employee Data



1. From the **Home** page, click on **My Client Groups**
2. Under the Apps section, click on **Person Management**



3. Search for the employee, click on the **Name** link and their **Employment** page opens.
4. Click on the **Task**  icon on the right and which allows you to select a menu option to view employee data. For example, to view employee documents, click on **Document Records**.

For detailed guidance, see the [Searching and Viewing Employee Data section](#).

Uploading Documents to an Employee's Document Records

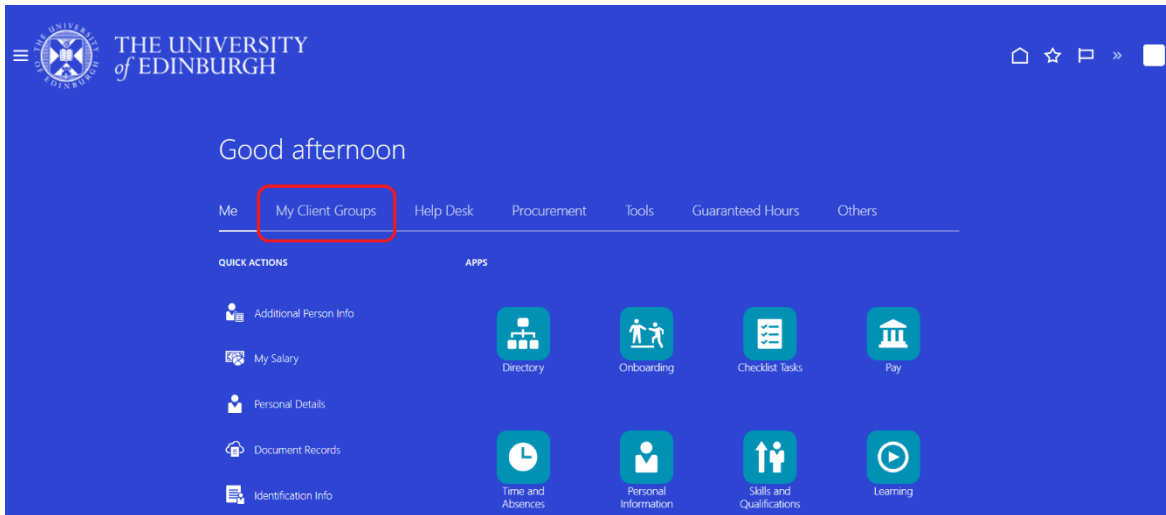
1. From the **Home** page, click on **My Client Groups**.
2. Under the Apps section, click on **Person Management**  **Person Management**
3. Search for the employee, click on the **Name** link and their **Employment** page opens.
4. Click on the **Task** icon  on the right and select **Document Records**.
5. Click on the **Add** button in the **Document Records** page.
6. Select the **Document Type** and complete the online form.
7. Upload the document in the **Attachments** section and click **Submit**

For detailed guidance, see the [Uploading Documents to an Employee's Document Records section](#).

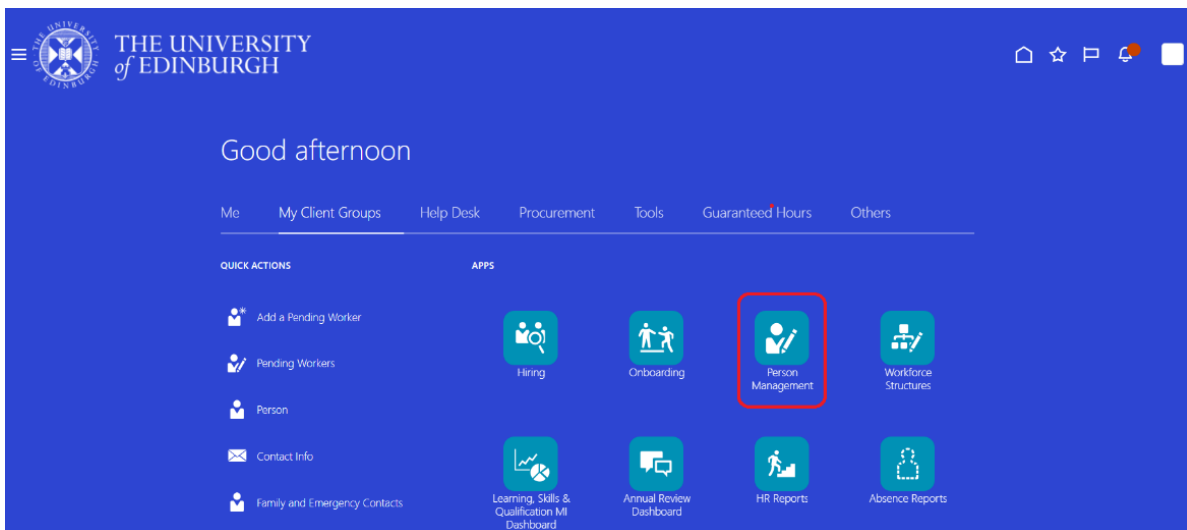
In Detail...

Searching and Viewing Employee Data

1. From the **Home** page, click the **My Client Groups** tab.



2. In the Apps section, click **Person Management**.



3. In the **Person Management: Search** page, complete one or more of the fields and click the **Search** button.

Matching results appear below the search fields.

Search Person

Person Management: Search

Search Advanced Saved Search All People

**** Name** **** Keywords**

**** Person Number** Include terminated work relationships

**** National ID** *** Effective As-of Date**

* Required
** At least one is required

Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
Columns Hidden 11								

4. Click on the employee's link in the **Name** column and their employment information will be displayed on the **Employment** page.

Search Person

Person Management: Search

Search Advanced Saved Search All People

**** Name** **** Keywords**

**** Person Number** Include terminated work relationships


**** National ID** *** Effective As-of Date**

* Required
** At least one is required

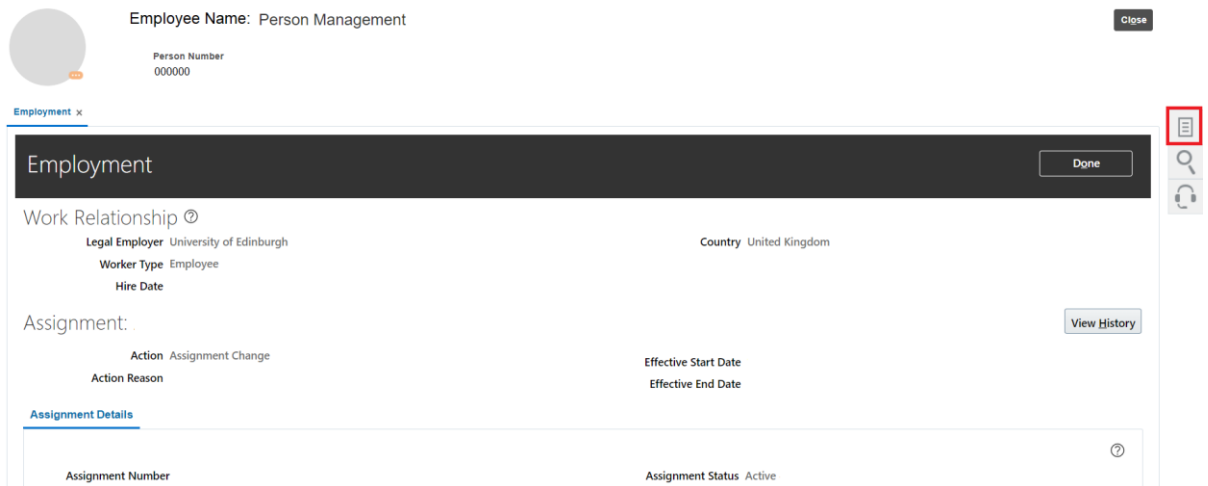
Search Reset Save...

Search Results

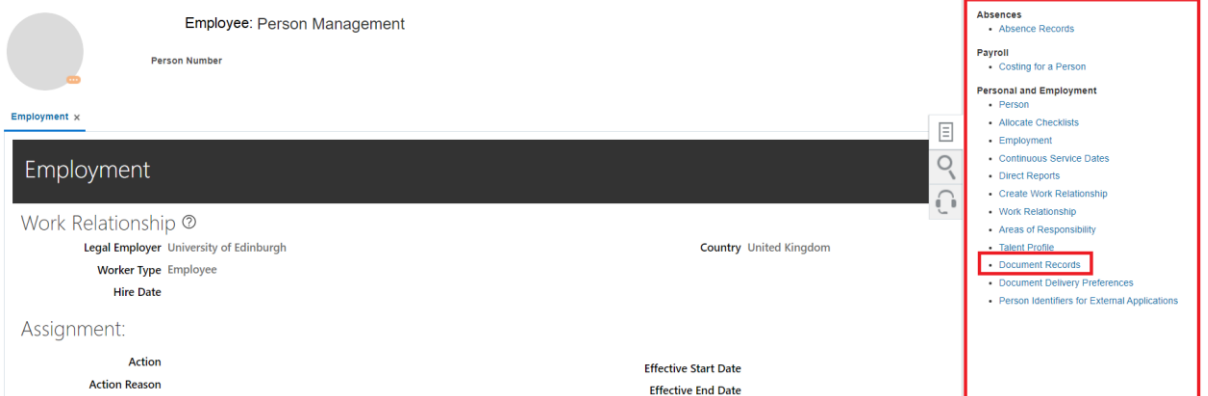
Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
Employee, Name	000000	NA000000	Department	Location	Employee	Job	Active	
Columns Hidden 11								

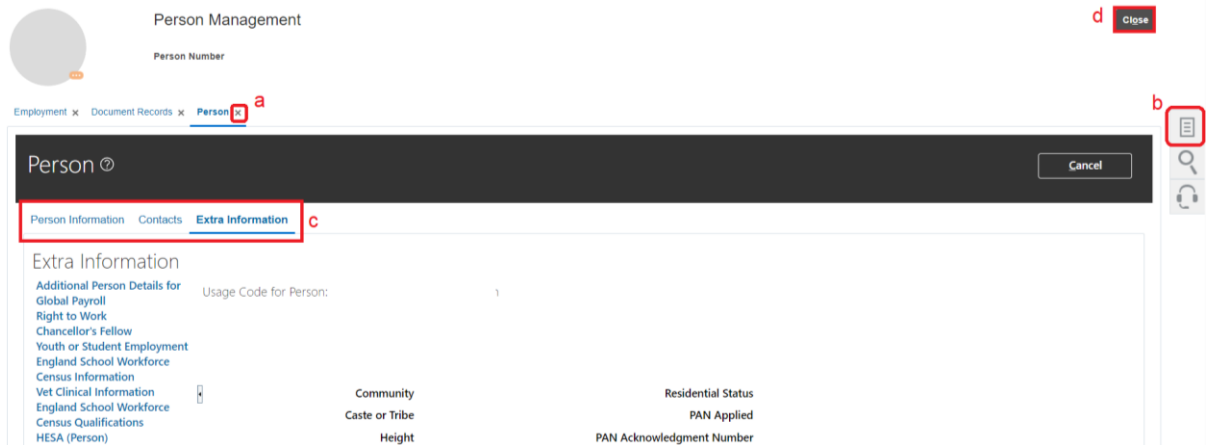
5. To view other information about the employee, click on the **Task** icon on the right of the page to open the navigation menu.



6. There are various menu options detailing different aspects of the employee's personal data. For example, to view an employee's documents, click on **Document Records**.

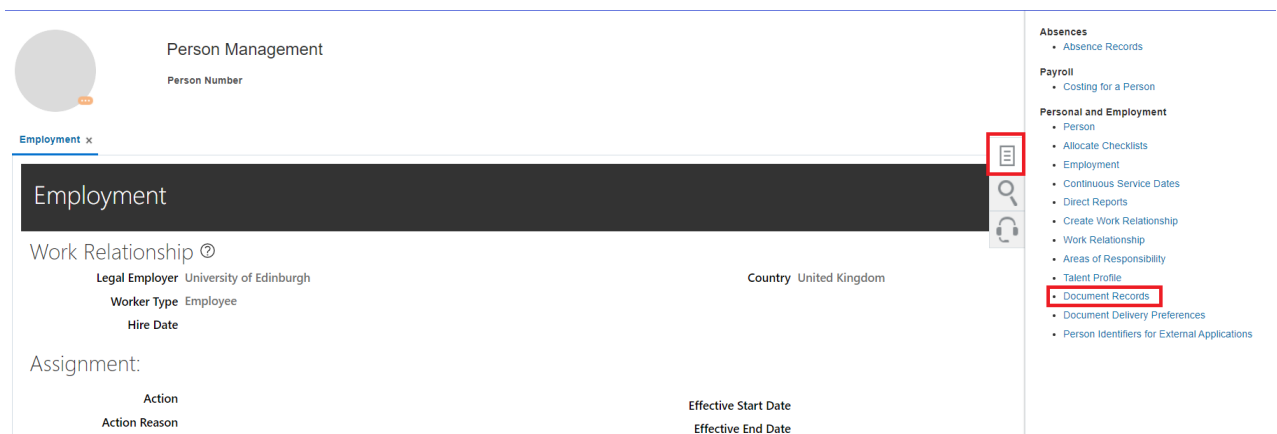


7. After you have viewed the desired information, you can either:
- Close the page by clicking on the small cross next to the page tab.
 - Click on the **Task** icon and select another menu option.
 - View a different subpage within your selected menu option,
 - Click the **Close** button in the top part of the page and reopen the **Person Management: Search** page to find another employee.

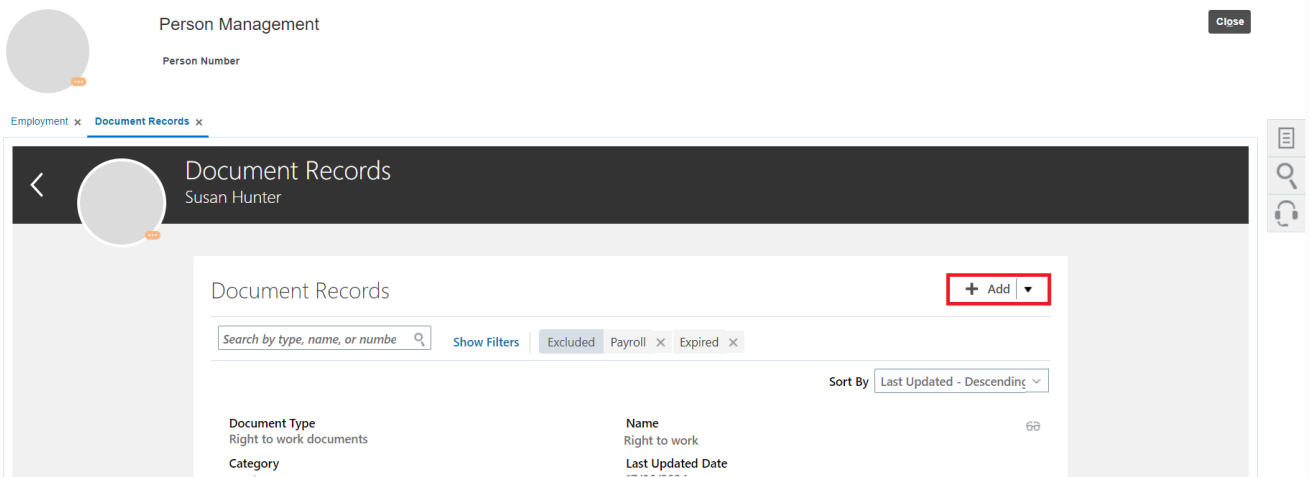


Uploading Documents to an Employee's Document Records

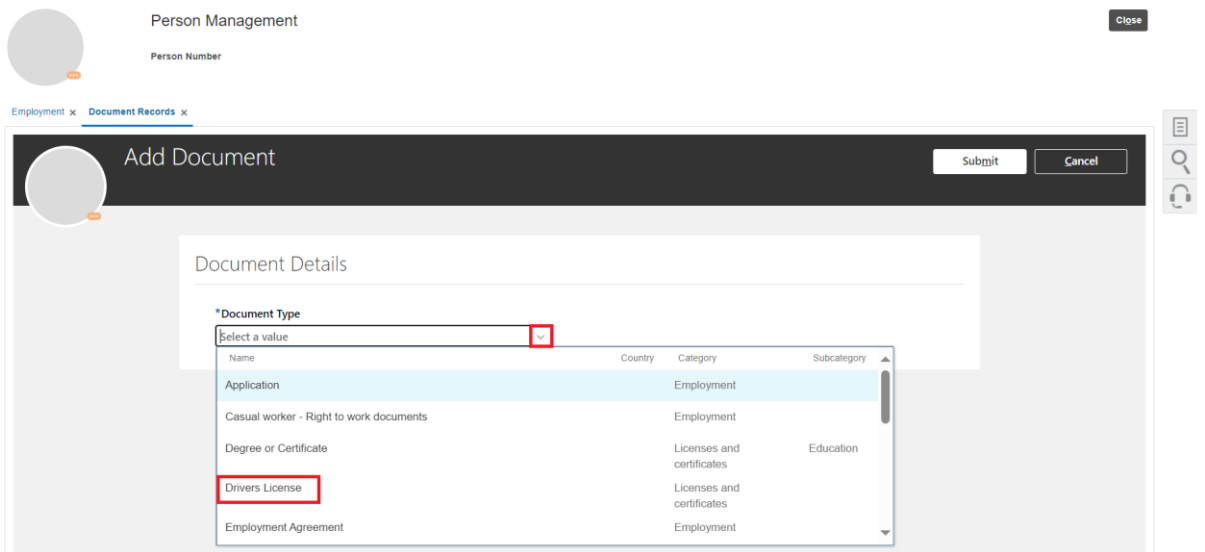
1. From the **Home** page, click on the **My Client Groups** tab.
2. In the Apps section, click **Person Management**.
3. In the **Person Management: Search** page, complete one or more the fields and click the **Search** button. Matching results appear below the search fields.
4. Click on the employee's link in the **Name** column and their **Employment** page opens.
5. Click on the **Task** icon to open the navigation menu and select **Document Records**.



6. To upload documentation for the employee, click on the **Add** button in the **Document Records** page.



- In the **Add Document** page, click on the down arrow in the **Document Type** field and select the applicable document from the list, eg. "Drivers License."



For a list of all the documents available for a School/Department Admin to view and upload, check the [Appendix](#).

- Complete the fields in the online form with the relevant details.

Document Details

*Document Type
Drivers License

Category
Licenses and certificates

Country
All Countries

Description
Driving licence

*Name

Issued On
dd/mm/yyyy

*From Date
dd/mm/yyyy

Context Value

Attachments

Drag files here or click to add attachment

Note:

- Ignore the **Context Value** field.
- The **Name** and **From Date** fields appear for all Document Types but **Issued On** does not. Only complete the fields that appear.
- The **From Date** is the date the document was uploaded and the **Issued Date** is the date the document was issued.

- To upload a document, click on **Drag files here or click to add attachment** in the **Attachments** section, and select **Add File**.

Document Details

*Document Type
Drivers License

Category
Licenses and certificates

Country
All Countries

Description
Driving licence

*Name

Issued On
dd/mm/yyyy

*From Date
dd/mm/yyyy

Context Value

Attachments

Drag files here or click to add attachment

Add File

Add Link

- Navigate to the location where the document is stored, select it and the document name appears in the **Attachments** section.

Document Details

*Document Type Drivers License	Category Licenses and certificates
Description Driving licence	Country All Countries
*Name Drivers License	Issued On 17/06/2024
*From Date 18/06/2024	Context Value
Attachments	

Drag files here or click to add attachment

Document (11.71 KB) By

11. Click **Submit** and the **Document Records** page opens with details of the uploaded document type.

Person Management
Person Number

Employment x Document Records x

Document Records

+ Add

Search by type, name, or number Show Filters Excluded Payroll x Expired x

Sort By Last Updated - Descending

Approval in progress. See how it's going.

Document Type	Name
Right to work documents	Right to work

*Some document types, such as Right to Work, will display a message saying, 'We are submitting your changes for approval'.

12. To upload another document for the employee, click the **Add** button and repeat steps 6 to 11.

Appendix

Documents available to view or upload for School/Department Administrators (SDA)

There are a number of document types in Document Records that an SDAs can view and upload:

Document Type	Description	View or Upload
Degree or Certificate	Qualification	View and Upload
Drivers licence	Driving licence	View and Upload
Employment agreement	Contract of Employment	View (upload would happen within the recruitment process for any new post)
Fit Note (Medical Certificate)	Medical Certificate	View (upload would happen within a sickness absence process)
P45	A document confirming previous employment, tax and national insurance information	View (upload would happen within the recruitment process)
Recruiting	Recruiting	View (upload would happen within the recruitment process)
Recruiting Job Offer Letters	Job Offer	View (upload would happen within the recruitment process)
Relocation - Repayment terms - Visa Loan terms	Repayment terms - Visa Loan terms	View (upload would happen within the recruitment process)
Right to work documents	Right to work documents	View (upload would happen within the recruitment process)
Self Certificate (Return to Work)	Self Certificate (Return to Work)	View (upload would happen within the sickness absence process)
The document types below should no longer be used but are still visible for historic purposes		
Application	Application	View only
Casual Worker – Right to Work Documents	Casual Worker – Right to Work Documents	View only

Other Employment	Other Employment	View only
Relocation – Repayment terms – Partner career transition repayment agreement	Repayment terms – Partner career transition repayment agreement	View only
Relocation – Repayment terms – Relocation repayment agreement	Repayment terms – Relocation repayment agreement	View only
Resignation Letter	Resignation Letter	View only