**Proxy Users**

**Guidance Note and Request Form**

1. **What Is A Proxy User**

In line with local arrangements there may be requirements to setup Proxy Users across NHS Greater Glasgow and Clyde (NHSGGC) for Manager Self Service.

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

* a line manager; or
* peer employees
* via self-service-based access.

Proxy for Manager Self Service must be specifically requested to and setup from the eESS Support Team. This Guidance Note outlines the process for doing this and details the governance rules associated with Proxy Users.

1. **Proxy for Manager Self Service (MSS)**

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

Proxy Manager Self Service menu options include:

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

1. **Requesting Proxy for Manager Self Service**

Managers should submit the form at Appendix 1 to request the setup of a Proxy for Manager Self Service. Managers need to ensure that the form is duly authorised and that individuals have carried out, as a minimum, the eESS Manager LearnPro Module. The module provides a quick overview of Manager Self Service & links to our Standard Operating Procedures. Individuals should logon to LearnPro and search for “eEES” under the Specialist Subjects tab.

Completed Request Forms should be returned to [eESS@ggc.scot.nhs.uk](mailto:eESS@ggc.scot.nhs.uk).

**Once Approved**

1. **Setting up Proxy Employee List**

“My List” Principles – within eESS the standard Manager Self-Service people hierarchy is not available for the proxy user because a 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.

1. **Carrying Out Transactions**

To carry out a transaction as a Proxy:

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.
9. **Approvals by Proxy**

The basic principle is that the proxy user is the transactor, and not the approver of the transaction.

Therefore transactions requiring approval will be issued to the named Manager 1 and Manager 2, where relevant.

**Proxy Users Request Form**

|  |  |
| --- | --- |
| Manager Name |  |
| Directorate |  |
| eESS User ID Number |  |

I request the following individual to be named Proxy for Manager Self Service:

|  |  |
| --- | --- |
| Proxy Name |  |
| Directorate |  |
| eESS User ID Number |  |
| e-Mail Address |  |

For the following individuals:

|  |  |  |
| --- | --- | --- |
| eESS User ID Number (Essential) | Name | E-Mail Address |
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I confirm that I have ensured that the Proxy named above has undertaken the LearnPro Manager Module. I will also ensure that I will review the Proxy ‘My List’ when this is firstly constructed to ensure that it is accurate.

In the event that the named Proxy changes their role or their authorisation as Proxy is removed then I will inform the eESS Support Team with immediate effect to ensure that there is no information governance breaches.

Authorised by:

|  |  |
| --- | --- |
| Manager Name (Print) |  |
| Manager Signature |  |
| Date |  |

Please return to eESS@ggc.scot.nhs.uk.