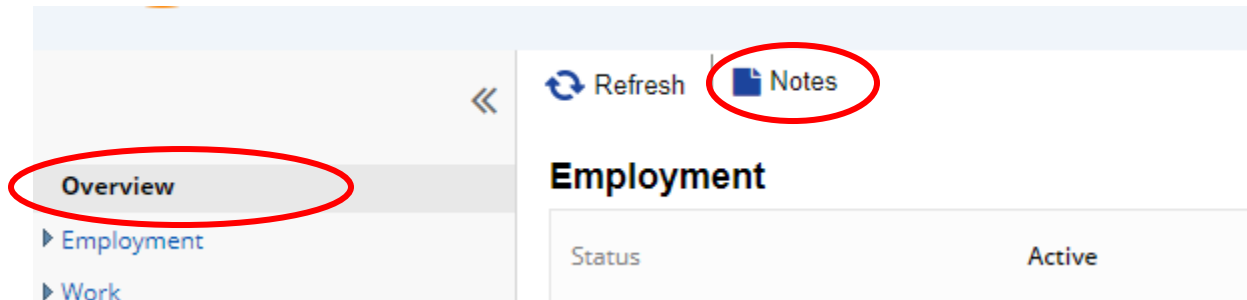


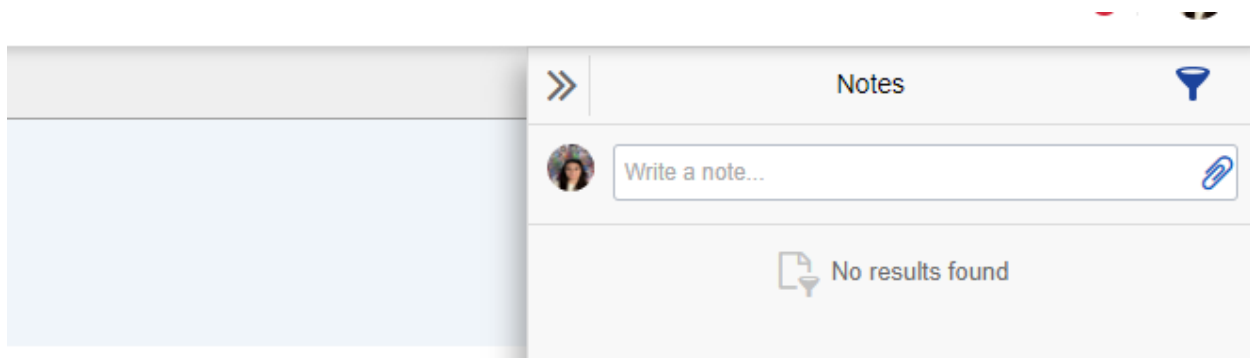
UPLOADING A DOCUMENT (NOTES)

Access the colleagues record within your manager profile, select the relevant colleague and view profile.

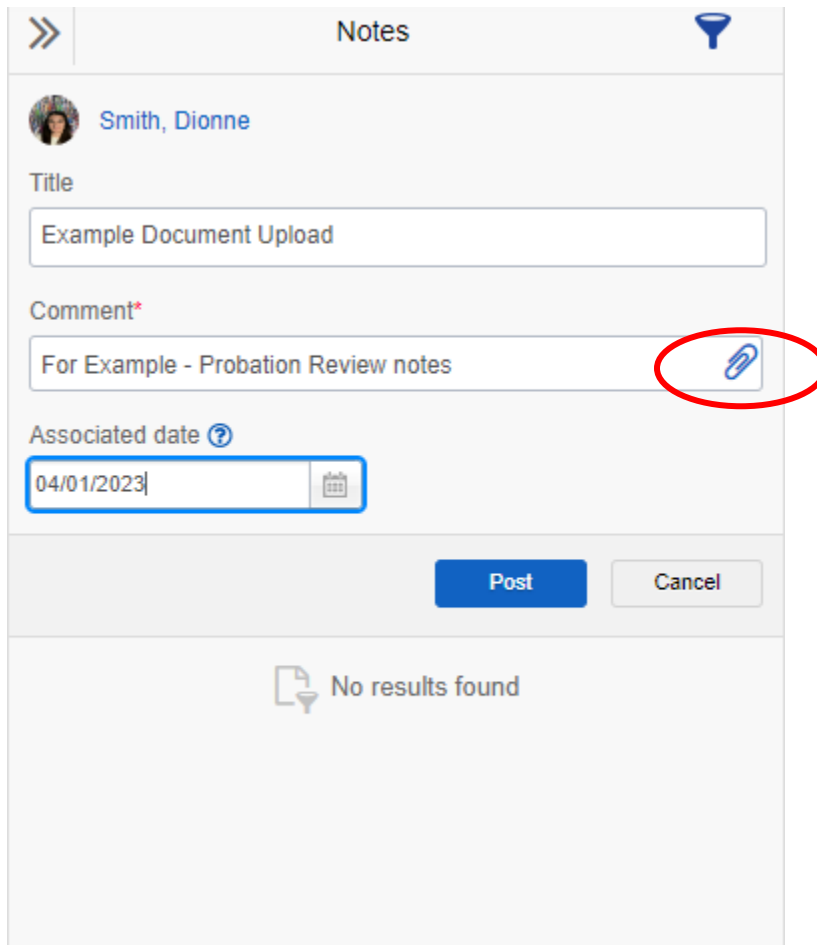
In the Overview tab, you will see the 'Notes' icon:



The 'Note' screen will slide across in the right hand side of the window:



Start to type the headlines of your note and the note section will expand. Enter the details and comments, and select the paperclip icon to attach a document:



The screenshot shows a web form titled "Notes" with a user profile for "Smith, Dionne". The form contains three main input sections: "Title" with the text "Example Document Upload", "Comment*" with the text "For Example - Probation Review notes", and "Associated date" with a date picker set to "04/01/2023". A red circle highlights a paperclip icon located to the right of the comment text box, indicating where to click to attach a document. Below the input fields are "Post" and "Cancel" buttons. At the bottom of the form, there is a message "No results found" accompanied by a document icon.

Select the most appropriate Document Type from the drop down options:

Upload Files

Document Type*

Select an Option...

File Size

Document Type

Absence

EmployeeFile

Eye Test

Flexible Working Request

HR Incidents

Interview_Recruitment

Other

Probation Review

Upload

Clear List

Once document type has been selected, click on 'Add Files'

Upload Files

Document Type*

Probation Review

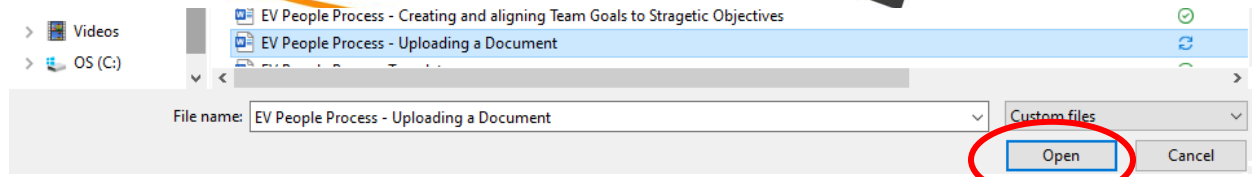
File Name	File Size	Document Type
-----------	-----------	---------------

Add File(s)

Upload

Clear List

Select the file you wish to upload from the document window and select 'Open'



Select 'Upload'

Upload Files

Document Type*

Probation Review

File Name	File Size	Document Type	
EV People Process - Up...	261.9 KB	Probation Review	✕

Add File(s) Upload Clear List

This document will now be attached to the corresponding note. Select 'Post'.

>>

Notes

Smith, Dionne

Title

Example Document Upload

Comment*

For Example - Probation Review notes

EV People Process - Uploading a Document.docx

Probation Review

Associated date

04/01/2023

Post

Cancel

No results found

The note has now been saved and will be available for you to access in this area in future.

>>

Notes

Write a note...

Smith, Dionne

a moment ago

Example Document Upload

For Example - Probation Review notes

EV People Process - Uploading a Document.docx

Probation Review

Associated date: 04/01/2023

Edit

UPLOADING A DOCUMENT (FORMS)

Access the colleagues record within your manager profile, select the relevant colleague and view profile.

In the left hand side menu, select 'Forms' and select the required form. In this example we will use the Fit Note form.


 [Right To Work Document Upload](#)

 [Sickness Absence Return To Work](#)

▼ Professional (7)

 [Fit Note](#)

 [Flexible Working Request](#)

 [Job Assignment and Compensation Change](#)

 [Job Assignment Change](#)

 [Job Assignment Change with Manager](#)

 [Probation Review Form](#)

 [Subject Access Request](#)

▼ Termination/Leave (2)

 [Return to Work](#)

 [Terminate an Employee](#)

The form will open on screen. Complete all relevant fields and select 'Upload File'

Please give dates of your sickness and upload a copy of your Fit Note Below in Supporting Documents.

Start Date of Fit Note:*

Start Date

01/12/2022



End Date of Fit Note:*

End Date

13/12/2022



Fit note reason for absence:*

Back



Please ensure that you have created an absence record in Time Away From Work for this Fit Note.

Supporting Documents

Please upload a copy of your Fit Note.*




+ Upload Files

Comment

☐ Add comment to the employee's file.

 Save Draft

 Submit

Cancel

 Print

Select the file you wish to upload from the document window and select 'Open' and this will load into the upload window. Select 'Upload'. As the system knows that you are working within the Fit Note form, it already identifies that the Document Type is Fit Note.

Start Date of Fit Note:*

01/12/2022

End Date of Fit Note:*

End Date

Fit note reason

Supporting Information

Please upload a copy of your Fit Note.

Upload Files

File Name	File Size	Document Type	
EV Peopl...	175.6 KB	UK Fit Note	X

Add File(s)

Upload

Clear List

+ Upload Files

The file is now attached to the form. Add notes if applicable and select submit.

Please upload a copy of your Fit Note.*

Refresh | + Add X Delete

	File Name	Document Type	Last Updated	Last Modified By
+	EV People Process Tem...	W	04/01/2023, 19:27:58	dionne.smith

Comment

☒ Add comment to the employee's file.

Add relevant comments here if needed, e.g. confirming if check in calls and frequencies have been agreed, next expected update from colleague, etc. These are notes that will be saved to the employees file - keep them short and factual.

Save Draft Submit Cancel Print