This is a step-by-step guide to the actions managers need to take when processing hybrid working scheme applications through Staff Connect.

**During Application Window (default 30th June – 30th July 2021)**

- As applications are submitted, on Staff Connect you will notice these will accumulate in your authorisation widget. **DO NOT AUTHORISE.** Let these build up until the end of the application window (in most cases 30th July 2021).

- If you have already authorised any forms you will need to ask the colleague to resubmit to place them back at pending. Forms that have been accidentally authorised without sign-off at director level will not be reviewed as part of this process.
After application window closes (default 30th July 2021)

- Click on Reporting Services to view Line Manager Reports available to you.

- You can add this widget if you need to via the ‘Edit Dashboard’ button above.

- Note: You can only utilise this service if you are on campus or accessed via the VPN. If you are already in Staff Connect you will need to log out, close browser then re enter Staff Connect.

- Bottom right of the Reports window you will find the new ‘Employee Applications’ report.

- You will see two input controls: “Submission Date” (choose from Latest and All) and “Management Levels” (choose from Direct reports only or up to 3 levels down). These are set to default as All and Direct reports only, respectively.

- Click ‘Apply’ bottom left to view your data.
Your report will populate and you can click the ‘export as’ button to select XLSX.

Once exported to XLSX, the information will be presented as per the sample extract below. This allows you to see each colleague’s response to each of the questions in the application form. Please note:

1. The green column under “Work at home days” will not be populated when you run the report. This is where you record the days of the week you approve – subject to sign off at director level.

2. The “Remote Working/DSE Risk Assessment” column will be highlighted red and “needs review” if any issues are flagged on the risk assessment checklist. Clicking on this cell will take you to the detailed responses on the checklist, which should then be discussed with the team member concerned.

<table>
<thead>
<tr>
<th>Employee/Institutional details</th>
<th>Work at home days</th>
<th>Requested</th>
<th>Approved</th>
<th>Remote Working/DSE Risk Assessment</th>
</tr>
</thead>
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</table>
• You will notice the section ‘For completion by management’ appears on the worksheet towards the right hand side. Here you will record your comments against each colleague (row).

• Please note the final two columns in yellow are to be completed by the director (or their nominee) who has final sign-off on decisions.

• Save the workbook with a title making clear which team it relates to.

• Email completed sheets to the relevant Director (or their nominee) by the deadline that has been set locally. Please take care to send this information securely. It is advisable to password protect the document, or to save it in a secure area accessible by those who need to review it instead of using email.

• Directors (or their nominees) should complete the columns highlighted in yellow and send the spreadsheet back to the relevant line manager to input the details into Staff Connect.
After review by director (or nominee)

- Line managers will receive their relevant sheet back, populated with the decisions made at director level.

- Go back to your Staff Connect home screen and now click on the date/name of each colleague. **DO NOT CLICK ACCEPT/DECLINE JUST YET**
• The colleague’s form will appear and you have the option to ‘Edit’ the form.

• Now enter all the Managers information you typed into the XLSX Sheet including those comments/decisions received by SMT

• Click either the green authorise or the red reject button as appropriate.