

# Guidance for Managers –

## Finance Team Options

Options available to Finance Teams:

- Approve
- On hold
- Amend
- Return to Manager

ECS have a two-stage approval process which includes an additional option of Reject.

### Approve

When you submit your single Change of Circumstance (CofC), an email will automatically be sent to your Finance Team, asking them to access MyPKC Staff Portal to progress your CofC.

Once it has been approved by your Finance Team, you will receive an automatic email advising you of the approval and your CofC will be forwarded to your HR Team.

### ECS CofCs

As ECS has an additional approval stage, the automatic email sent to you will advise that your request has been approved at Stage 1 by your Finance Team and will now progress to Stage 2.

### On Hold

When your Finance Team put a CofC on hold, they must complete a mandatory field to provide a reason:

Action

Action \*



On hold comments \*

Query re budget holder

The automatic email sent to you will include the Finance Team's comments and the name of the Finance employee to contact:

The CofC will remain live on MyPKC Staff Portal while it is on hold and your Finance Team can then progress the CofC once they've spoken to you and resolved any issue. Once approved, you will receive the usual confirmation email.

## Amend

When your Finance Team amend a CofC, they must complete a mandatory field to provide a description of the amendment made:

### Action

Action \*

✓

Amend comments \*

Changed budget holder to Thomas Glen

✓

The confirmation email will be sent to you and will include details of the amendment made by your Finance Team and the name of the Finance employee who made the amendment. The CofC will automatically be forwarded to your HR Team (or Finance Stage 2 for ECS) for approval.

## Return to Manager

When your Finance Team select 'Return to Manager', they must complete a mandatory field to provide a reason:

### Action

Action \*

✓

Return to manager comments \*

Need to look at current allocation

✓

An email will be sent to you which will include your Finance Team's comments and the name of the Finance employee to contact. You will also be provided with a link to MyPKC Staff Portal to allow you to amend your CofC and resubmit:

When you access MyPKC Staff Portal, you will see text at the top of the screen, asking you to update the CofC:

Current Task: 2c. Manager changes

### Change of circumstances request - manager changes

Update all applicable fields below with the required changes.

Once you have made your changes, you should provide details at the end of the submission and submit the CofC for your Finance Team to reconsider.

#### Summarise changes

Comments \*

Start date changed to 5 December 2022 ✓

Add a general note

✕ Cancel

✓ Submit

## Reject

For ECS Finance Stage 2 only, there is the additional option of **Reject**.

When your ECS Finance Team reject a CofC, they must complete a mandatory field to provide a reason:

#### Action

Action \*

On hold

Approve

Amend

Reject

Return to manager ✓

Reject comments \*

An email will be sent to you which will include your Finance Team's comments and the name of the Finance employee to contact. The CofC will no longer be available to you and will be moved into **Archives**.