THE CHURCH OF ENGLAND

MyView User Guide for Clergy (Responsive Dashboard)

INTRODUCTION

MyView is the self-service system that is offered to everybody on the clergy payroll and is primarily used to provide 24/7 access to pay statements and other payroll documentation such as P11Ds and P60s.

MyView is also used to view personal details, maintain bank details and to submit annual heating, lighting and cleaning (HLC) returns online. Any previous HLC submissions will then be available to view or print for reference.

This updated guide is for use with the responsive dashboard version of MyView that was first released in 2016.Much of the functionality remains the same as the previous version, however the newer version has been designed to be more “mobile friendly” and can now be used with most tablets, phones and other devices.

MyView is currently compatible with Microsoft Edge, Internet Explorer 11, Mozilla Firefox, Google Chrome and Apple Safari. Please note though that the list of compatible browsers is constantly under review by the software providers.

VERSION CONTROL

v1: Initial MyView for Clergy launch – Published 2013

v2: Responsive dashboard update – Published 2017

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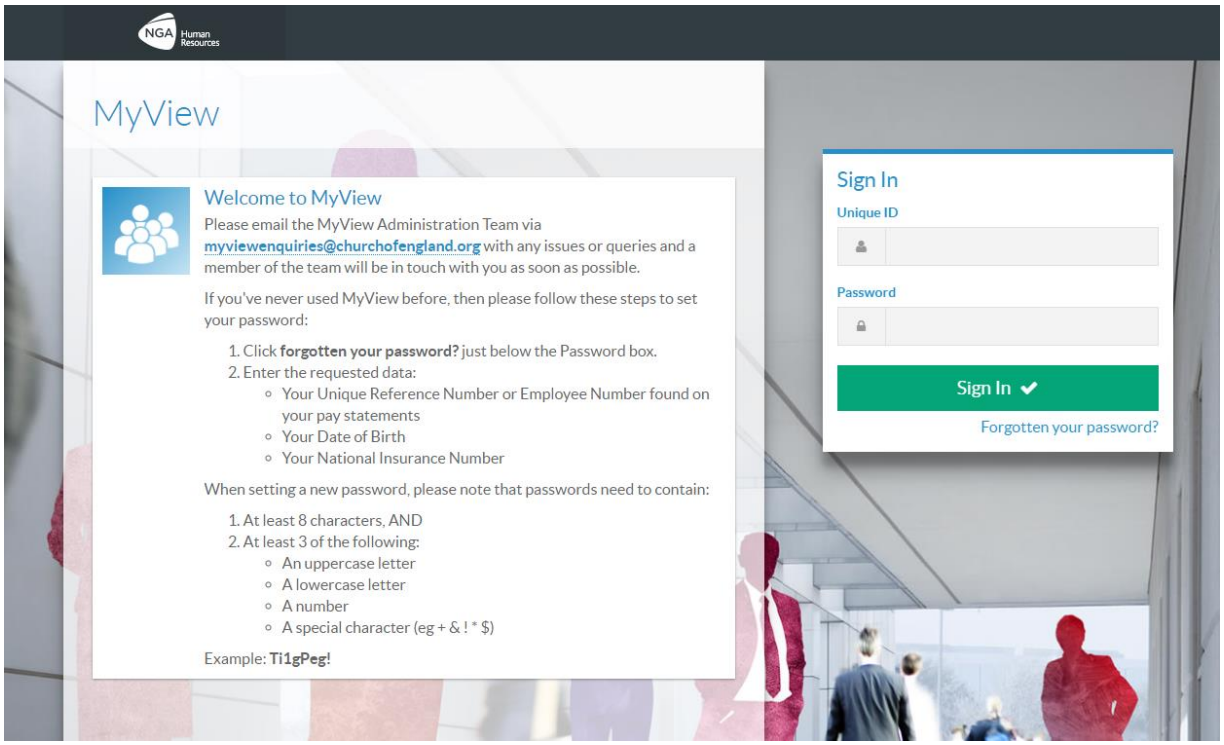
LOGGING INTO MYVIEW FOR THE FIRST TIME

This section gives instructions on how to log into MyView for the first time and can also be followed if you have logged into MyView before but have forgotten your password.

1. Navigate to the MyView log in page by clicking here, or by entering the address https://selfservice.churchofengland.org into your web browser.

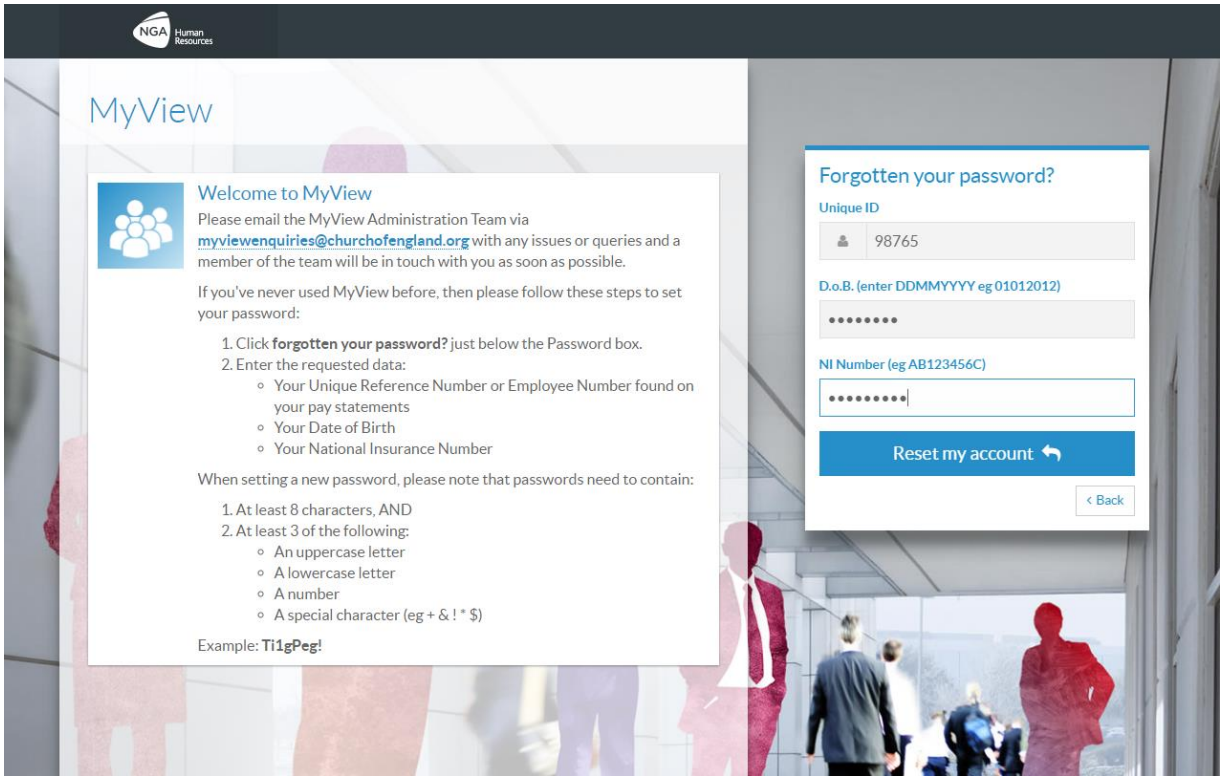


2. Click on the "*Forgotten your password?*" link that is below the green sign in box on the right-hand side of the screen. This will bring up the forgotten password dialogue box.

3. Enter your 5-digit unique ID (also known as your Unique Reference Number or URN) in the *Unique ID* field. It can be found on any of your pay statements, approximately a third of the way down the right-hand side of the page. Press the **TAB** key to move on to the next field.

4. Enter your date of birth in the *D.o.B.* field. The date of birth must be entered in number format without any dashes, dots or slashes. For example, 7 August 1987 will need to be entered as 07081987 and 23 January 2006 would need to be entered as 23012006. Press the **TAB** key again to move on to the final field.

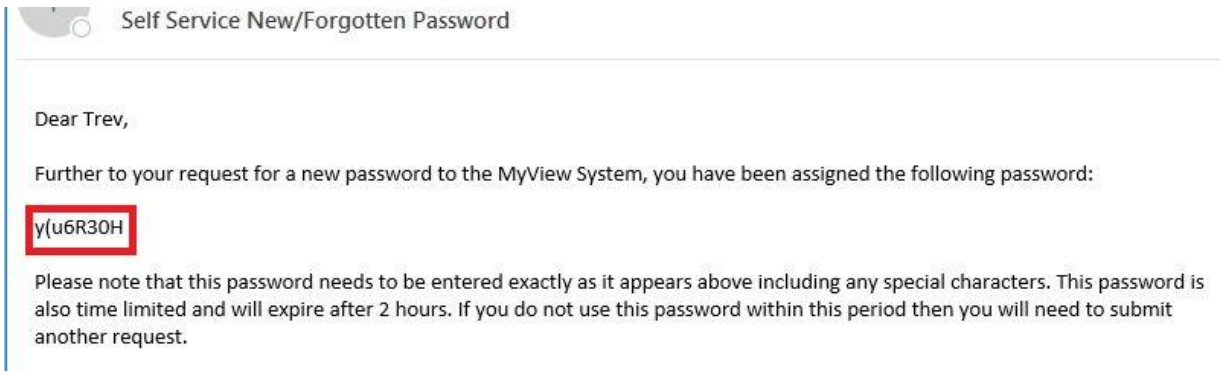
5. Enter your national insurance number in the *NI Number* field. The national insurance number consists of two letters, six numbers and then a final letter (for example AB 12 34 56 C). Your national insurance number can also be found on any of your pay statements but please ignore any other letters that may appear at the end. Once you know your national insurance number it must be entered with each of the three letters in capitals and no spaces between any of the characters so again for example if your number was AB 12 34 56 C then this would be entered as AB123456C. Once you have entered all three pieces of information your screen should look something like the one shown on the next page.



6. Click on the "*Reset my account*" button, and then the system will display a confirmation message. Click *Continue* to return to the main log in page. Provided that you have entered your personal information correctly the system will email you with a temporary password.

7. If at first you do not receive the email then please check any junk or spam email folders that you may have. If you have checked these and still cannot find the email, please try entering the information again and if this has not resolved the issue then send an email to myview.enquiries@churchofengland.org for further assistance.

8. Open up the email either using your email program (for example Outlook or Windows Mail), or by using another browser window and make a note of the temporary password. Alternatively, you can select or highlight the password so that you can copy and paste it in to the *Password* field on the main log in page later.

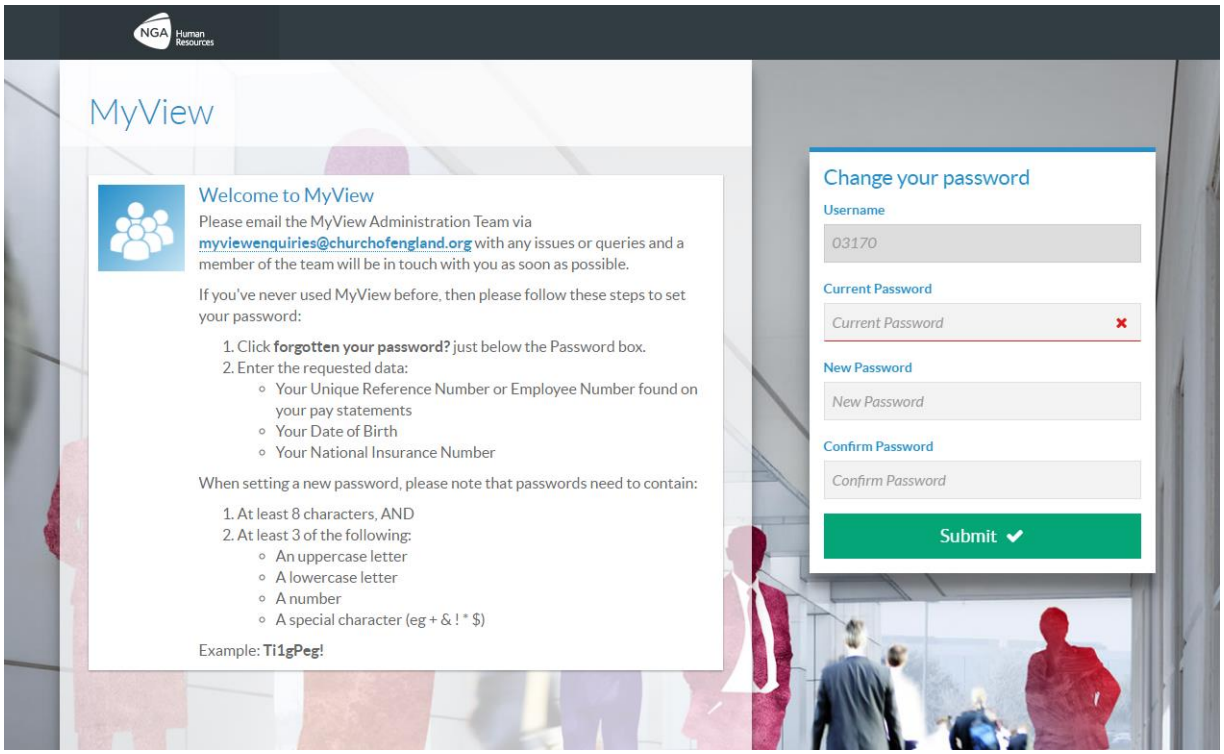


9. On the main log in page enter your unique ID again in the *Unique ID* field and then

press the **TAB** key to move on to the next field.

10. Enter the password from the email or paste it into the *Password* field. Make sure that if you choose to enter it then it must be entered exactly as it appears in the email, including any symbols that may have been included.

11. Click on the *Sign In*" button – the system should then take you to where you can set a new password of your own.



12. Enter the password from the email or paste it again into the *Current Password* field. The press the **TAB** key to move on to the next field.

13. Enter a new password of your own choosing in the *New Password* field. Please ensure that your new chosen password contains at least 8 characters and contains any ***three*** of the following:

- capital letters;
- lower-case letters;
- numbers;
- special characters or symbols.

Please also ensure that you have not chosen a password that you have used before, as this is not allowed for security reasons. Press the **TAB** key again to move on to the final field.

14. Enter the chosen new password again in the *Confirm Password* field. Please ensure that these two passwords match otherwise the system will not accept your new password.

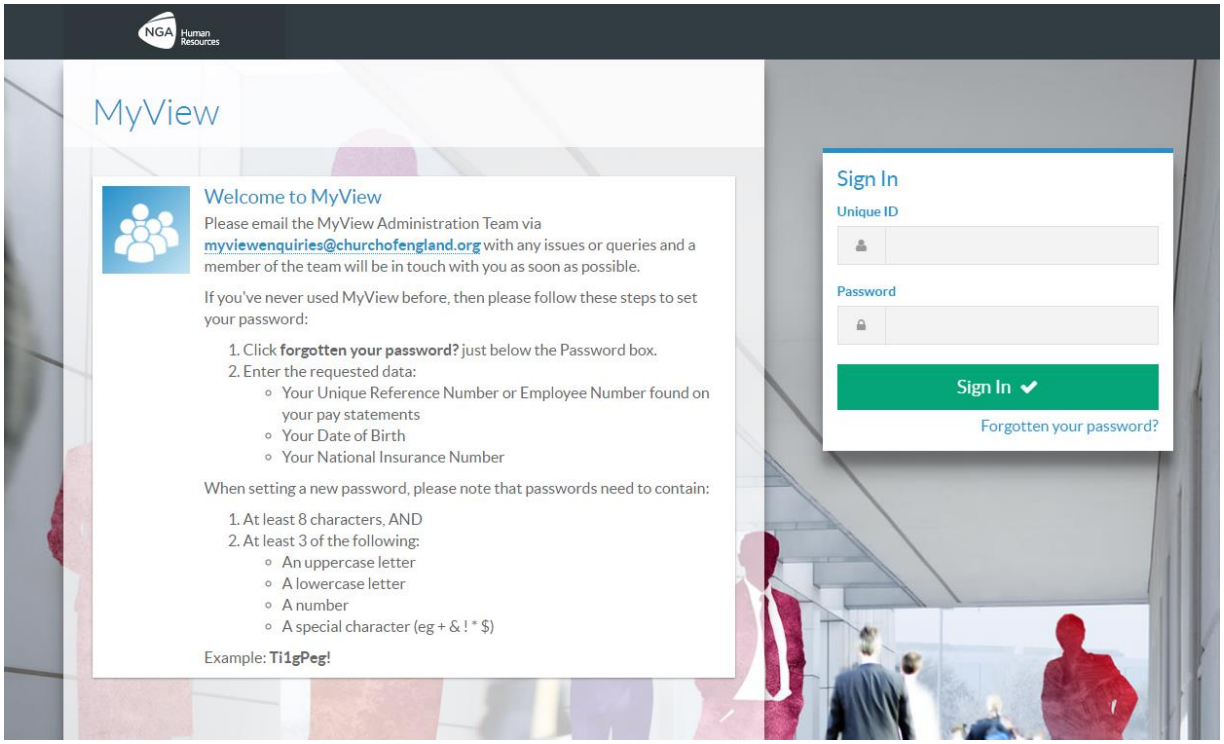
15. Click the "*Submit*" button. If the system has accepted your new password then it will take you back to the main log in page. If it flags up with any error messages then please repeat from paragraph 12, checking each entry carefully before proceeding.

16. Finally, once back on the main log in page, enter your unique ID and the new password you have just set, then click on the "*Sign In*" button to log in. The new password will continue to work until either you choose to change or reset it yourself, or you have contacted us and we have reset it for you. Therefore, please make sure you keep your password safe at all times and be able to remember it each time you wish to use the system.

LOGGING ON TO MYVIEW

This section gives instructions on how to log into MyView if you used the system before and have both your unique ID and password to hand, or you have memorised them.

17. Navigate to the MyView log in page by clicking here, or by entering the address https://selfservice.churchofengland.org into your web browser.

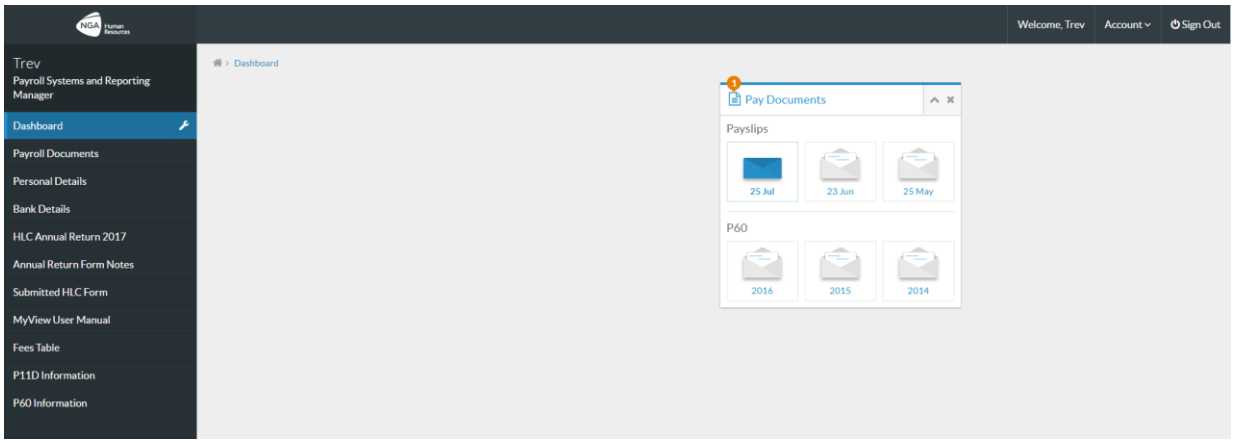


18. Enter your 5-digit unique ID (also known as your Unique Reference Number or URN) in the *Unique ID* field. It can be found on any of your pay statements, approximately a third of the way down the right-hand side of the page. Press the **TAB** key to move on to the next field.

19. Enter your password then click on the "*Sign In*" button to log in. If your password is rejected then please try again, although please be aware that if your password is rejected three times in succession then your account will become suspended and you will need to reset your password by following paragraphs 2 to 16.

THE DASHBOARD

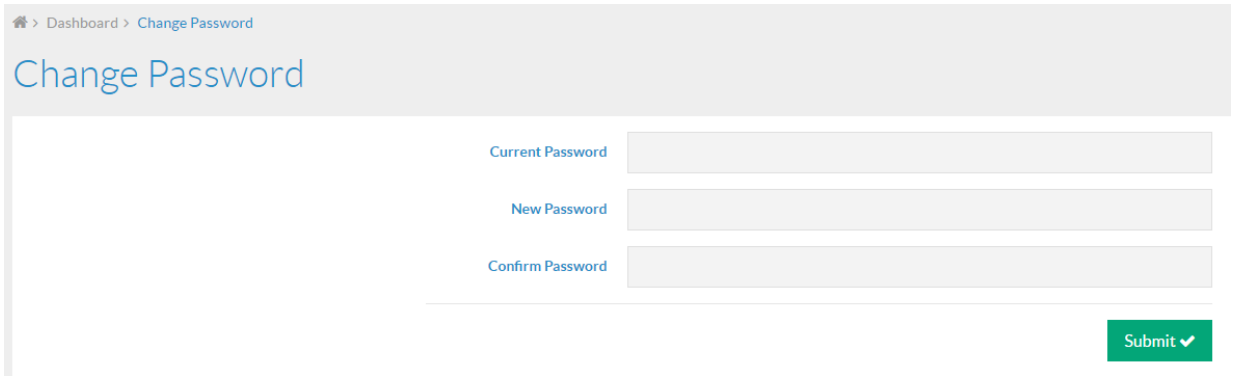
The first screen displayed after logging in to MyView is the dashboard, and consists of the navigational menu on the left-hand side of the screen and then to the right of the navigational menu are widgets (a widget is a short cut to a certain piece of functionality). The dashboard also gives the option to change passwords.



20. To change your password:

- click on "*Account*" in the top right-hand corner of the dashboard;
- from the drop-down list click on "*Change Password*";
- enter your current password in the *Current Password* field;
- press the **TAB** key to move on to the next field;
- enter a new password in the *New Password* field;
- press the **TAB** key to move on to the next field;
- enter the new password again in the *Confirm Password* field;
- click on the "*Submit*" button.

Please ensure that your new password meets the criteria as set out in paragraph 13 earlier in this guide. If the system has accepted the new password you will be taken back to the dashboard and you will see a green tick confirmation box in the top right-hand corner of the page.



21. The pay view documents widget will show the last three pay statements, the last three P11Ds and the last three P60s. A closed envelope means that the document has not been opened yet and an open envelope means that the document has been viewed. To view a particular document simply click on it and it will be displayed on your screen. To print a document once it has been opened please refer to paragraph 38.

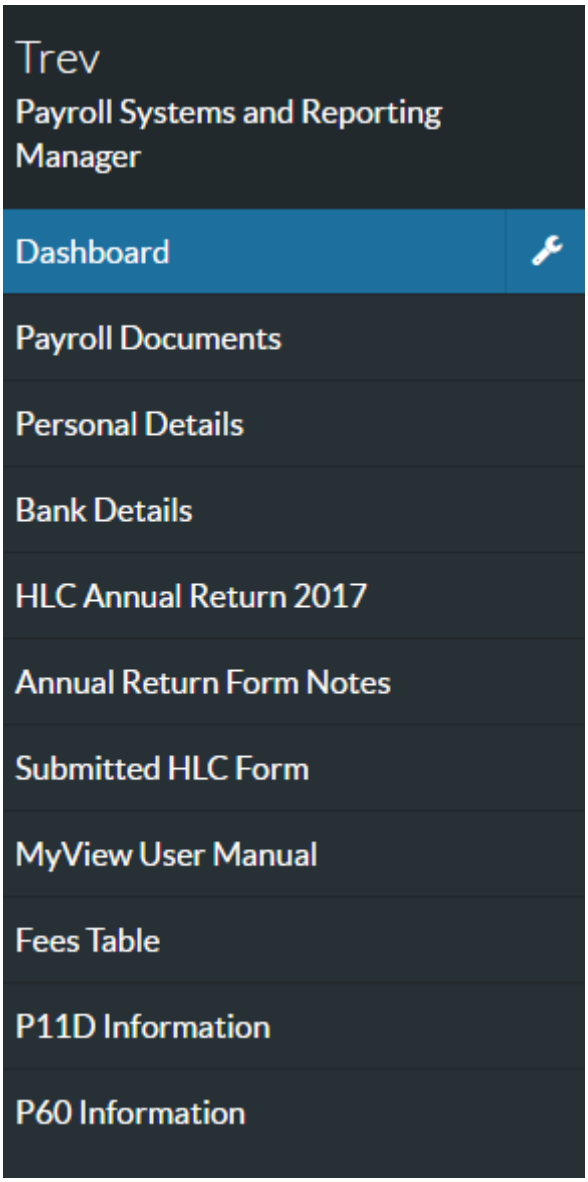
22. To close a widget, click on the "^" in the top-right hand corner of the particular widget. To open the widget again then click on the "v" that will appear when a widget has been closed. To remove a widget completely from your dashboard page then click on the "*X*", again in the top-right corner of the widget.

23. To return to the dashboard at any time click on "*Dashboard*" from the navigational menu on the left-hand side of the screen.

24. To put a widget back on to your dashboard, or to see if there are any new widgets available then click on the spanner, which is next to "*Dashboard*" on the navigational menu. When you see a widget that you would like to add then click on its ">" icon, and then click on "*Back*" once you have finished adding widgets to the dashboard.

25. To log out of MyView at any time click "*Sign Out*", which is in the top right-hand corner of the dashboard page.

NAVIGATIONAL MENU



The navigational menu is used to access the individual pieces of functionality that are available within MyView. The menu stays on the screen at all times and so can be used to jump from one function to another.

The menu also contains links to important information that can be found on the Clergy Payments website.

26. To access your remaining payroll documents that are not shown in the Pay Documents widget click on *"Payroll Documents*" and then refer to paragraphs 36 to 45.

27. To view your personal details, click on "*Personal Details*" and then refer to paragraph 46.

28. To view and/or amend your bank details, click on "*Bank Details*" and then refer to paragraphs 47 to 52.

29. If you need to complete an annual HLC return then click on "*HLC Annual Return 20xx*" and the refer to paragraphs 53 to 64.

30. For help and guidance on completing the HLC annual return form click on "*Annual Return Notes*" – this will open the notes are on the Clergy Payments website in a new window.

31. To view any previously submitted HLC annual returns, click on "*Submitted HLC Form*" and then refer to paragraphs 65 to 69.

32. To open an electronic copy of this manual, click on "*MyView User Manual*" – this will open the manual in a new window.

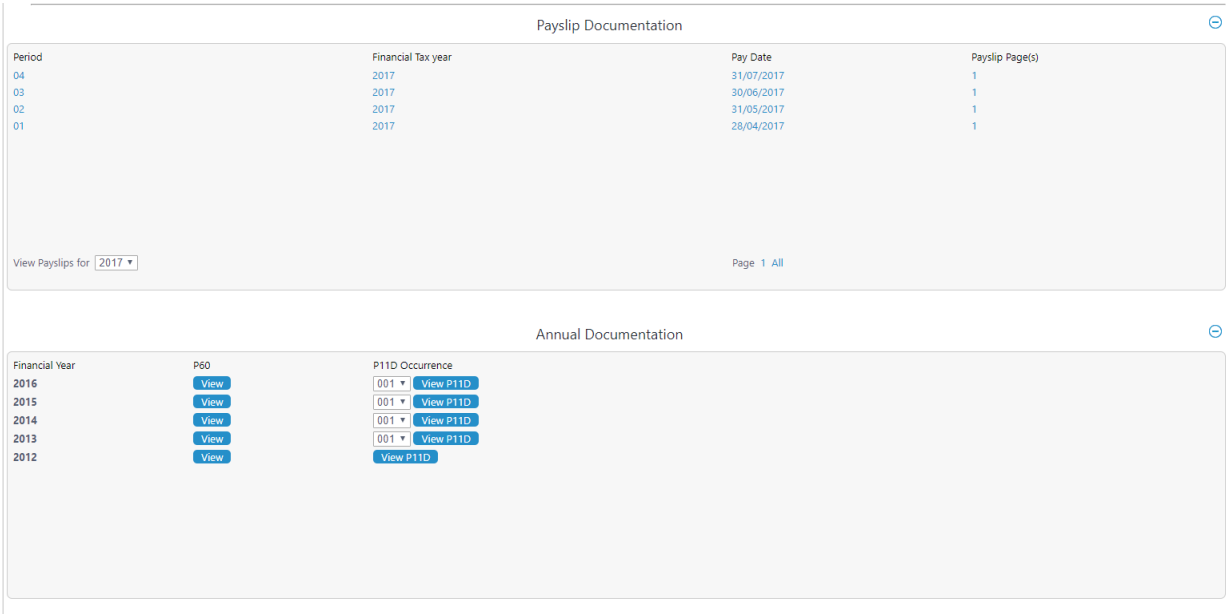
33. To view the current fees table, click on "*Fees Table*" – this will open the relevant part of the Church of England website in a new window.

34. For information regarding P11D forms click on "*P11D Information*" – this will open the relevant section of the Clergy Payments website in a new window.

35. For information regarding P60 forms click on "*P60 Information*" – this will open the relevant section of the Clergy Payments website in a new window.

PAY DOCUMENTATION

This section is where you can access your pay statements, P11Ds and P60s going back to the start of the 2012-13 tax year (ie 6 April 2012). This when MyView was first introduced. The screen is split into two sections – one for pay statements and the other is for annual documentation.

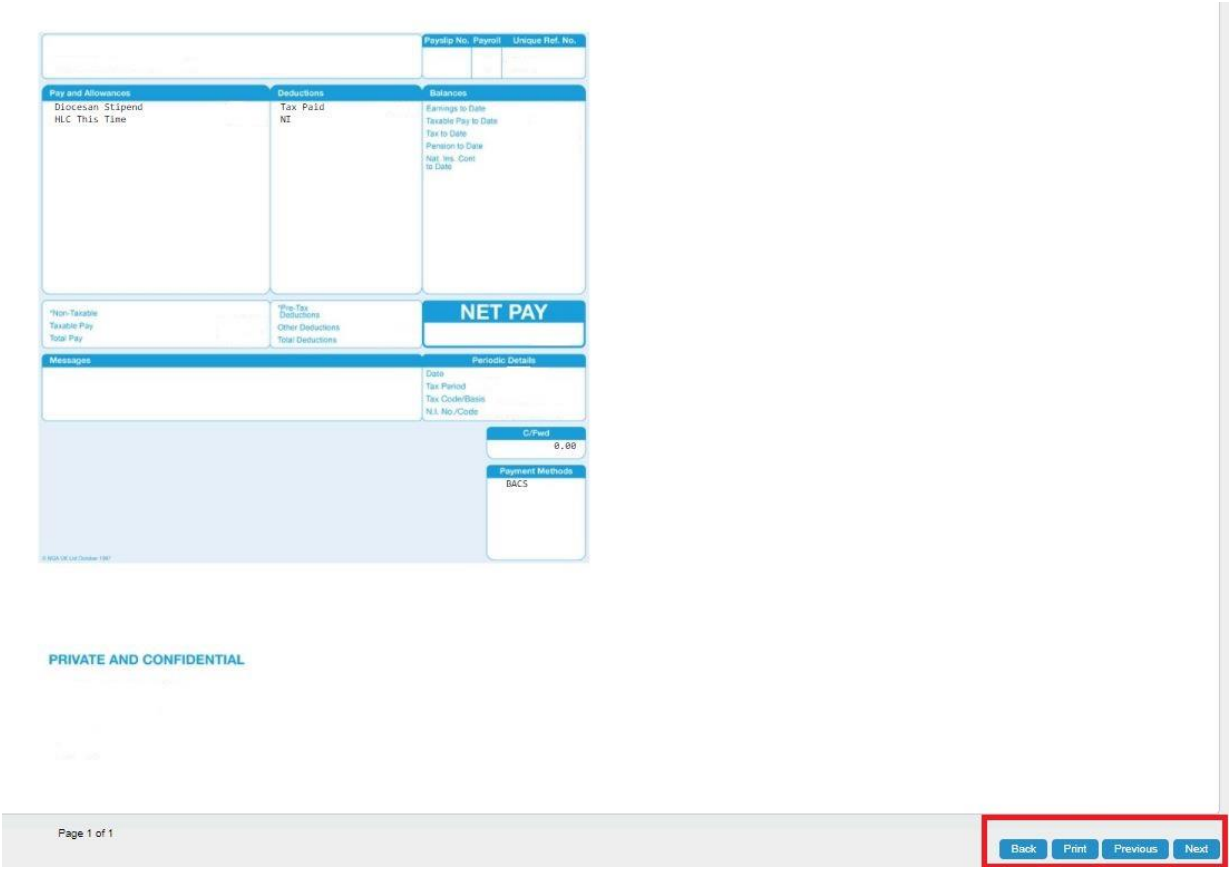


36. To view a pay statement from the current tax year then click either on the period number, the financial tax year, the pay date or the payslip page(s). The pay statement will then be displayed on the screen.

37. To view a pay statement from a previous tax year then use the drop-down box in the Payslip Documentation section to select the desired tax year. The available pay statements from the chosen year will then be listed and then you will be able to click on the pay statement that you wish to view (as per above).

38. To print a pay statement (or any other payroll document) scroll to the bottom right-hand corner of the screen and click on the "*Print*" button. This will open up a dialogue box which will allow you to choose your printer and change your

printer settings should you wish to. The pay statement should then print on to one side of A4.



39. To jump to the previous pay statement, click on the "*Previous*" button.

40. To jump to the next payment statement, click on the "Next" button.

41. To return to the main Payslip Documentation page, click on the "*Back*" button.

42. To view a P60, click on the "*View*" button next to the desired tax year – the P60 will then be displayed on the screen. To print the P60 scroll down to the bottom right-hand corner of the screen and click on the "*Print*" button as per paragraph 38.

43. To view a P11D, click on the "*View*" button next to the desired tax year – ignore the P11D Occurrence drop down box. The P11D will then be displayed on the screen. Again, to print the P11D scroll down to the bottom right-hand corner of the screen and click on the "*Print*" button as per paragraph 38.

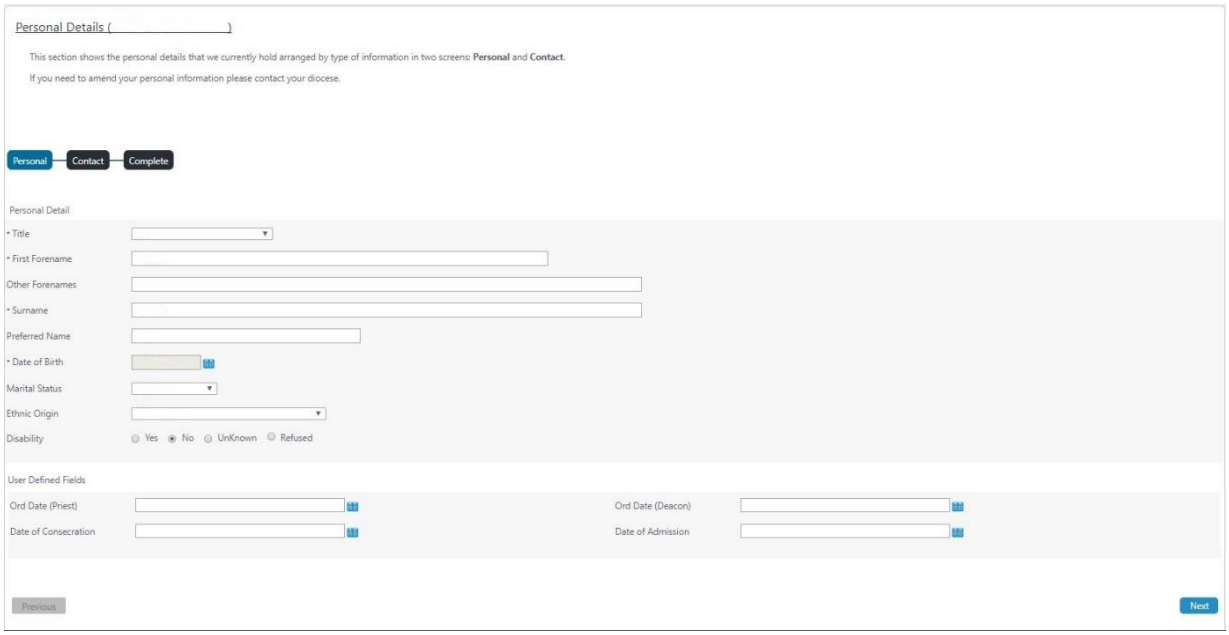
44. If you have a PDF writer or Microsoft XPS Document Writer installed on your computer then you can use these to save the document instead of physically printing it. When choosing your print select your PDF writer or the XPS Document Writer from the list of printers. A further dialogue box will appear asking you where you would like to save your document.

45. If you have any issues in printing or saving a pay document and need further assistance then please contact us via myviewenquiries@churchofengland.org.

PERSONAL DETAILS

This section is where you can view your personal information and make sure that is up to date. **If any of the details are incorrect then please speak to your diocese, who will then liaise with us to update the system** – this is because changes in personal details may have implications going forward for entitlement to HLC.

The section is divided into two sections – Personal, which contains your personal information and Contact, which contains your contact details.

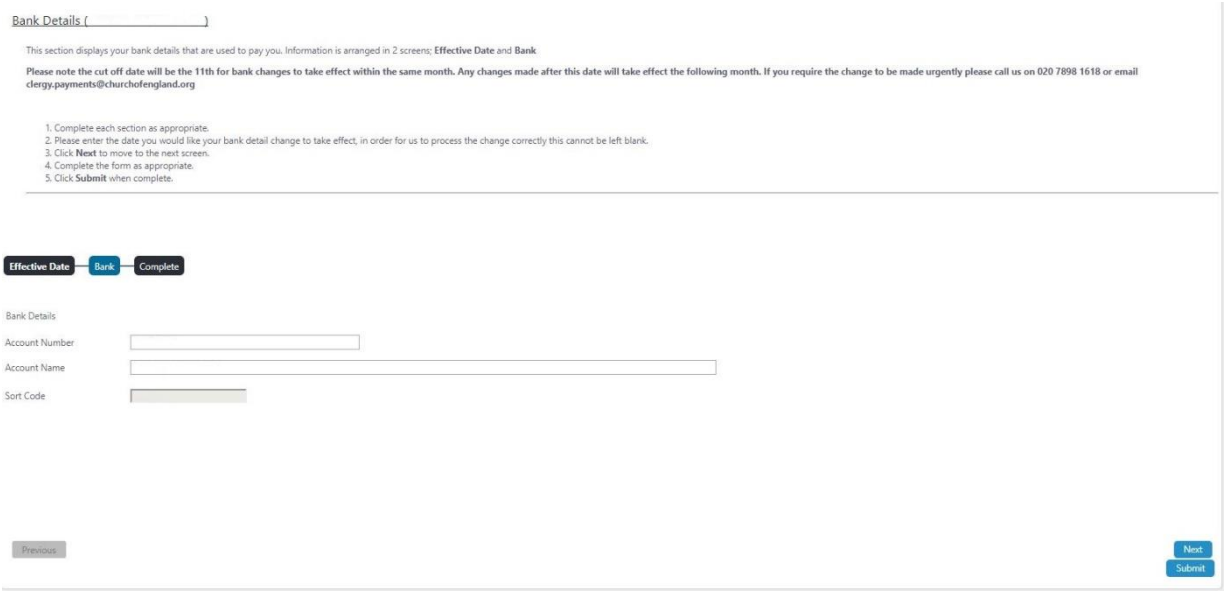


46. Clicking "*Personal Details*" on the navigational menu will take you to your personal details. Click on "*Contact*" to switch over to your contact details. When you have finished using this area either click on another item in the navigational menu or you can click "*Sign Out*" in the top right-hand corner to log out of MyView.

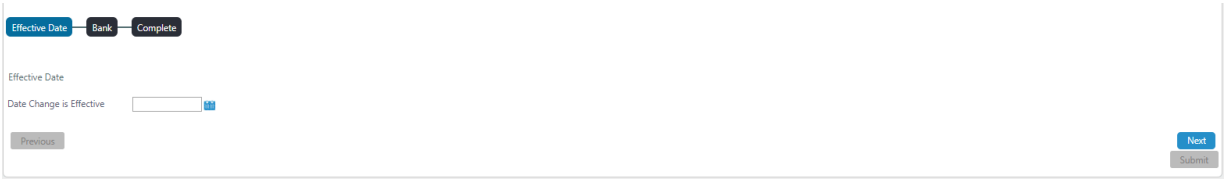
BANK DETAILS

This section is where you can view and amend your bank details. Please take care when using this section as any mistakes made here could have an adverse effect on your monthly payments. When amending the details please make sure you have the correct sort code and bank account number to hand.

Please note the cut-off date will be the 11th for bank changes to take effect within the same month. Any changes made after this date will take effect the following month. If you require the change to be made urgently call us on 020 7898 1618 or send an email to clergy.payments@churchofengland.org.



47. To simply view your bank details, click on the "*Bank*" button and when you have finished using this area either click on another item in the navigational menu or you can click "*Sign Out*" in the top right-hand corner to log out of MyView.



48. To amend your bank details, stay on the "*Effective Date*" section and enter the date from which the change of bank details needs to be effective from. Ideally this would be today's date but can be set in advance. The date needs to be in pure number format so for example 7 August 2017 must be entered as 07082017.

49. Click on either the "*Bank*" button or on the "*Next*" button in the bottom right-hand corner of the screen.

50. Enter the new details (or amend the existing details) accordingly. The sort code must be entered as a 6-digit number without the dashes (for example 01-02-03 would be entered as 010203), and the bank account number must be entered as an 8-digit number.

51. Once the correct details are shown on the screen, click on the "*Submit*" button in the

bottom right-hand corner of the screen to submit the new details.

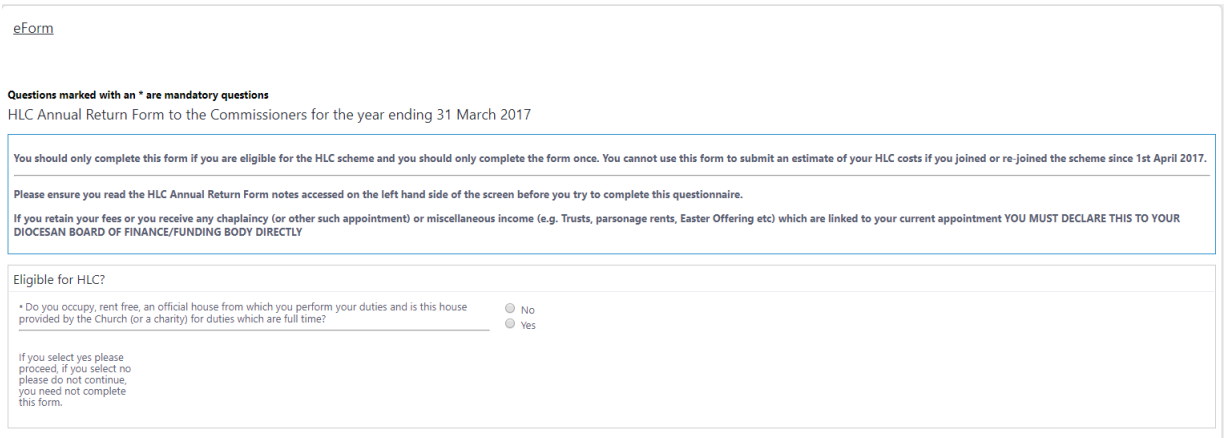
52. The system will then send a confirmation email to advise that the changes have been accepted – if you receive such an email and have not followed paragraphs 48-51 then please contact us immediately so your account can be secured.

HLC ANNUAL RETURN

This is where you can complete your annual HLC return in order to notify us of your actual figures for the previous tax year and then your estimated figures for the following tax year. For example, at time of publishing we are accepting annual returns for 2017, which involve actual HLC figures for the 2016-7 tax year and then estimated figures for the 2017-8 tax year.

When completing the annual return please refer to the communication we have sent to you as this confirms the relevant tax years for which we will need the information. The annual return notes (see paragraph 30) are updated for each year so it is recommended to also read these before proceeding.

The annual returns, where required, should be completed by 30 September of the current tax year in order to continue receiving HLC allowances.


eForm

Questions marked with an * are mandatory questions

HLC Annual Return Form to the Commissioners for the year ending 31 March 2017

You should only complete this form if you are eligible for the HLC scheme and you should only complete the form once. You cannot use this form to submit an estimate of your HLC costs if you joined or re-joined the scheme since 1st April 2017.

Please ensure you read the HLC Annual Return Form notes accessed on the left hand side of the screen before you try to complete this questionnaire.

If you retain your fees or you receive any chaplaincy (or other such appointment) or miscellaneous income (e.g. Trusts, parsonage rents, Easter Offering etc) which are linked to your current appointment YOU MUST DECLARE THIS TO YOUR DIOCESAN BOARD OF FINANCE/FUNDING BODY DIRECTLY

Eligible for HLC?

• Do you occupy, rent free, an official house from which you perform your duties and is this house provided by the Church (or a charity) for duties which are full time? — No / Yes

If you select yes please proceed, if you select no please do not continue, you need not complete this form.

53. Answer the question on whether you are eligible for HLC or not by either clicking "*Yes*" or "*No*". If you have answered yes to this question then click into Box 1 to continue.

54. If you have answered no then you do not need to complete the remainder of the form. Either click on another item in the navigational menu to exit and jump to another area, or click the "*Sign Out*" button in the top right-hand corner of the screen to log out of MyView.

55. Enter the actual amount spent on ***heating and lighting*** during the previous tax year into Box 1. The amount must be whole pounds only (for example £534.79 must be entered as 534). Do not include any amounts that have been reimbursed to you by your parochial church council (PCC) or any other body as you can only claim for the expenditure that you have borne personally. If your actual expenditure was zero for the year then enter 0 instead of ZERO, NIL or N/A.

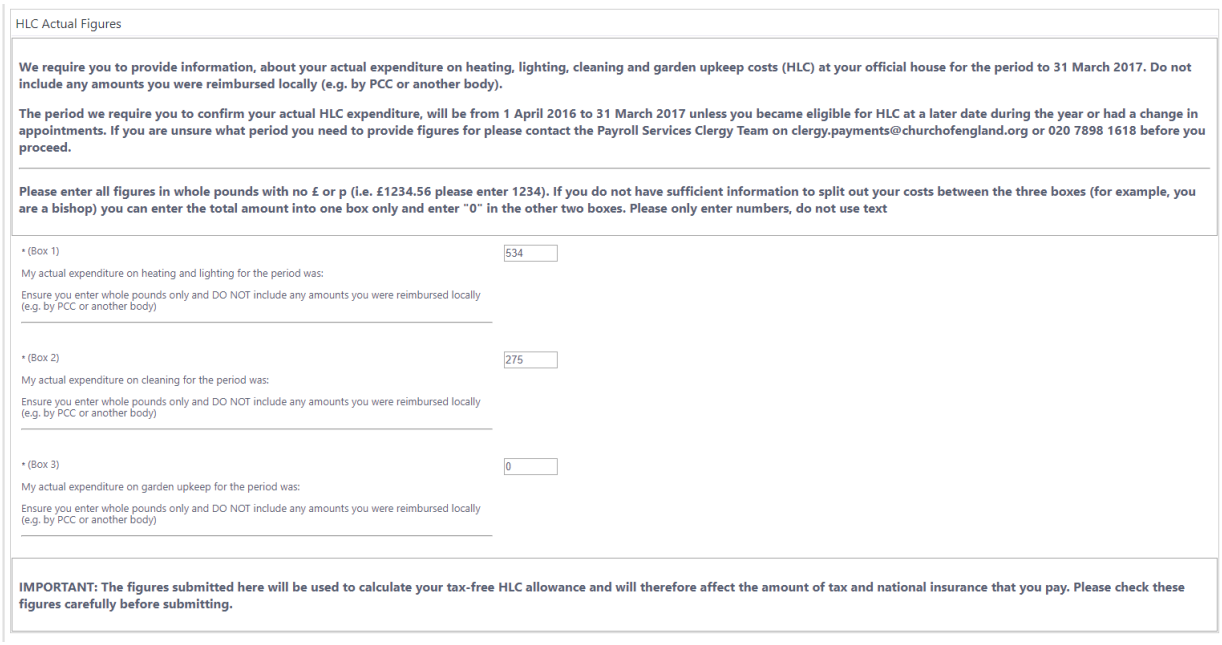
56. Press the **TAB** key to move on to Box 2.

57. Enter the actual amount spent on ***cleaning*** during the previous tax year into Box

2. Again, the amount must be whole pounds only, do not include any amounts that have been reimbursed to you, and if your actual expenditure was zero for the year then enter 0.

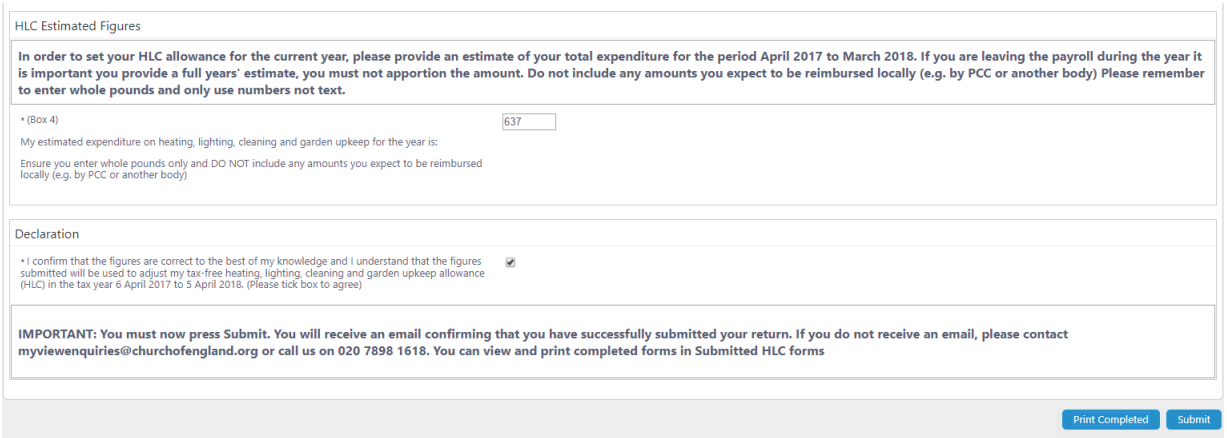
58. Press the **TAB** key to move on to Box 3.

59. Enter the actual amount spent on ***gardening*** during the previous tax year into Box 3. Once again, the amount must be whole pounds only, do not include any amounts that have been reimbursed to you, and if your actual expenditure was zero for the year then enter 0.



60. Press the **TAB** key to move on to Box 4.

61. Enter your estimated total expenditure for the current tax year into Box 4. This must also be whole pounds only (for example £637.74 must be entered as 637), and must also exclude any amounts that will be reimbursed to you.



62. If you are happy with the figures that you have entered then click the check box next to the declaration – the form cannot be submitted until this has been done.

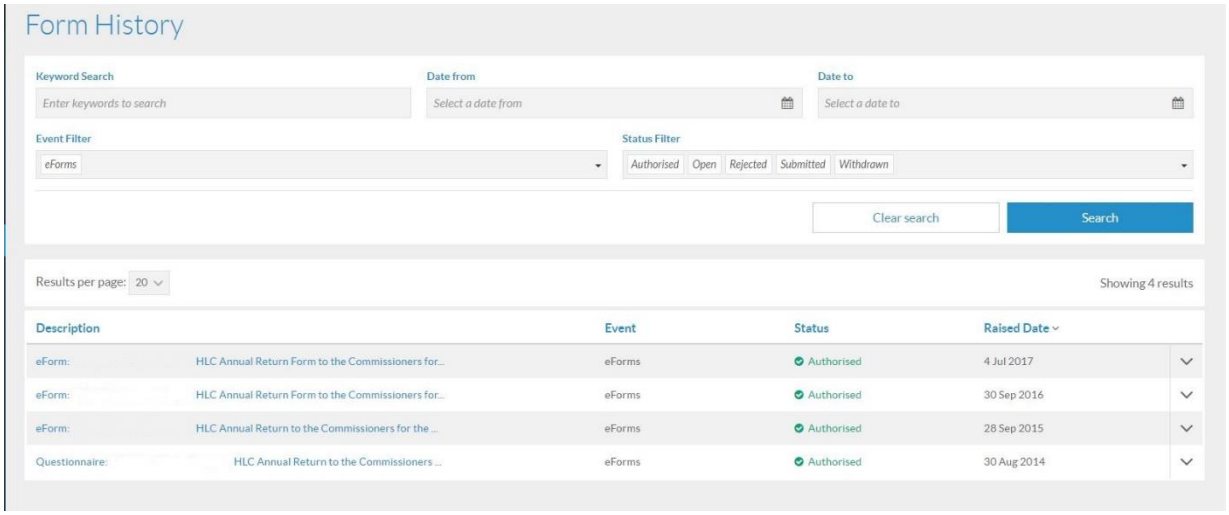
63. Once you have ticked the declaration, then click the "*Submit*" button in the bottom

right-hand corner of the screen. The system will then email you to confirm that your return has been submitted successfully and that we have received it. Should you need to print or save a copy of your return once it has been submitted then please refer to paragraphs 65 to 69.

64. Completing the annual return online is the quickest and easiest way of doing it, however should you experience any issues in submitting your return online, then a paper version of the return is available on the Clergy Payments website (http://www.clergypay.org).

SUBMITTED HLC FORMS

This is where you view, save and print copies of your HLC returns that you have completed online. Any paper returns unfortunately will not be available and so if you need the figures from a previously submitted paper return then call us on 020 7898 1618 or send an email to clergy.payments@churchofengland.org.



65. Click on the Description of the return you wish to view, save or print – the return will then be displayed on the screen.

66. To print the return scroll down to the page until you see the "*Print Completed*" button in the bottom right-hand corner of the screen. This will open up a dialogue box which will allow you to choose your printer and change your printer settings should you wish to. The return statement should then print.

67. If you have a PDF writer or Microsoft XPS Document Writer installed on your computer then you can use these to save the return instead of physically printing it. When choosing your print select your PDF writer or the XPS Document Writer from the list of printers. A further dialogue box will appear asking you where you would like to save your document.

68. If you have any issues in printing or saving a return and need further assistance then please contact us via myviewenquiries@churchofengland.org.

69. Either click on another item in the navigational menu to exit and jump to another area, or click the "*Sign Out*" button in the top right-hand corner of the screen to log out of MyView.

FURTHER HELP AND ASSISTANCE

In most cases, this manual should provide the necessary advice and guidance needed to successfully use MyView, and be able to resolve any query relating to it. If, however, you do require any further advice and/or assistance then the best way to contact us is by sending an email to myview.enquiries@churchofengland.org, quoting your unique ID. Your email will then be looked at by a member of our team, who will be able to help you.

If you do need to get in contact, you can help us resolve your query as quickly as possible by providing as much detail as you can in your email. For example when having difficulties resetting your account, please provide details of what you have entered in each of the boxes and how you have been entering them – this will then help us quickly determine whether the incorrect details have been entered, or if the formatting is incorrect.

If you know which web browser you are using then this might help us in establishing if you are experiencing any compatibility issues.

FREQUENTLY ASKED QUESTIONS

Here are some frequently asked questions that have not been previously covered in this manual for ease of reference.

- ***My account is locked or suspended***

  If your account has been suspended then you will need to reset your password. If your account is locked then we will need to unlock it for you. Please contact us for assistance.

- ***I get a blank screen when I log on***

  If this happens then try refreshing your screen by pressing the CTRL and F5 keys together. If your screen is still blank then sign out, close your browser window and then try logging in again.

  On occasions, the issue may be because MyView does not work with your chosen browser so either make sure your browser is up to date, or if you have an alternative browser available then try using that instead. You could also try using an alternative device if you have access to one - MyView now also works on mobiles, tablets, iPhones and iPads, as well as on PCs and Macs.

- ***I get an error message – "something unexpected happened"***

  On occasions, you may get such an error message if we are updating something from our end of the system or we are running a "bulk" process. This is temporary so if you try doing what you were doing again you should be fine, but if the error is persistent then please contact us for assistance.

- ***I get an error message – "session ended"***

  This is a more serious error message which we will need to investigate. Please contact us, including details of what you were trying to do. We may need to contact the software provider and raise a support call with them on your behalf so please bear with us whilst we are looking into the issue you are experiencing.