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Declarations Automation

Functional Analysis V02

Vera Fortunato

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Version Control

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Version	Date	Author	Reason
01	24/05/2023	Vera Fortunato	Creation of the document.
02	30/05/2023	Vera Fortunato	Change in Out of scope Change salary receipt to payslip; Change the term declarations to documents; Add description of automated process to the 4 entities in TP (slide 14); New structure for requesting foreign entities declarations (slides 11, 13, 15, 19, 20)

1. Introduction

Following the initiative to improve TP PT internal processes, the declarations process is being revised to reduce manual work volume and enhance the employee experience. This project intends to go a step further and kick off the construction of a unique portal for the TP Portugal employee to access basic functionalities such as the one represented in this document – declarations request.

The main goal of this project is to create an automated tool for the TP Portugal employees to request declarations, payslips and a copy of the contract and receive it via email.

This document delivers a description of the functional requirements gathered to deliver the project. The solution described in this document is the first step to create a self-service portal for all TP Portugal employees.

1. Introduction

This document has the following structure:

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1. Introduction

1.1 Stakeholders

IT DEV
- Vera Fortunato, (IT functional analysis)
- Mário Nunes (IT customer development manager)
- José Afonso Gonçalves (IT development team leader)
- Luis Alexandre (development architect)
- Luis Martins Alves (IT customer development manager)

TAP
- Ricardo simões Vicente (transformation business analyst)

Project Owners
- Vera Oliveira (employee experience director)
- Sandra Camacho (employee experience manager)

Introduction

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1.2 Out of Scope

- This analysis considers only the declarations mentioned on the document, other declarations are out of scope and may be included in future developments.

- It will not be possible to automatically send all the contracts and payslips due to the folders organization and lack of digital copies. The organization of this folders and the digitalization of the documents is out of scope.

- Although this project is the kickoff for the Employee Portal, the project focus is on the Declarations process. Any other feature/development that is not related to the declarations is out of scope for this document/project and must be considered as a different project.

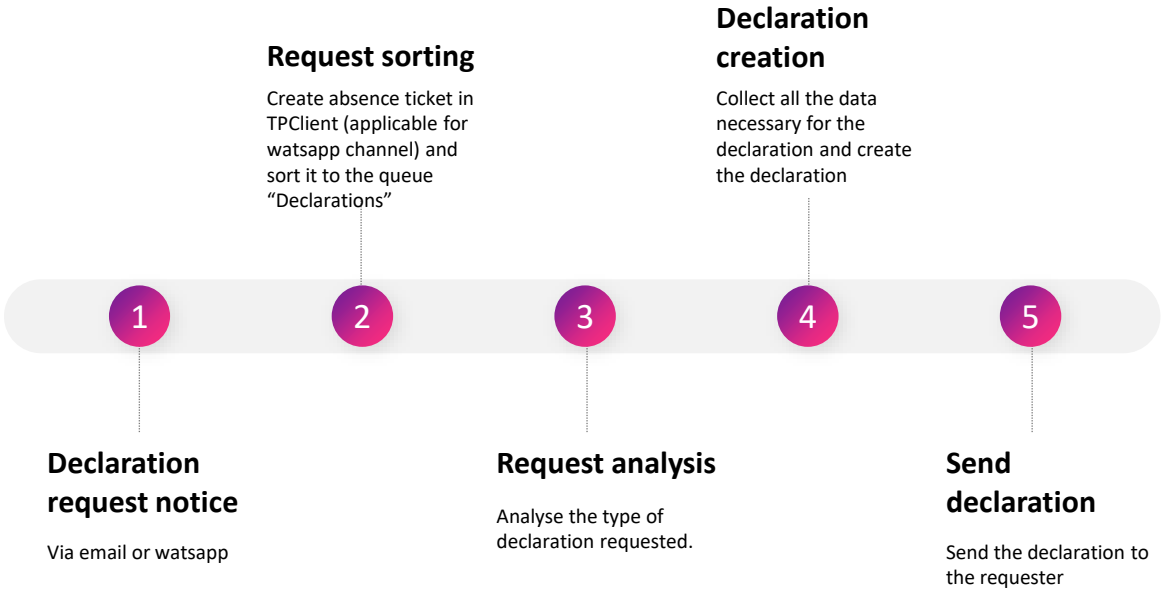
- The templates necessary to implement the automatic process are not part of this document. They will be provided by the Employee Experience team to the Development team. Without the templates it will not be possible to implement the automatic process.

2. Declarations

2.1 Declarations process *AS IS*

The Declarations process is currently performed manually by the Employee Experience team where their main channels of communication with the requester are email and Whatsapp. Currently the Employee Experience team creates every declaration manually, having the need to access confidential information such as salaries.

The current process follows a linear flow with minimal automatisms and starts with a message/email that enters in TP Client, followed by a manual analysis and manual creation of the declaration.



2. Declarations

2.2 Declarations Homepage – Employee Portal

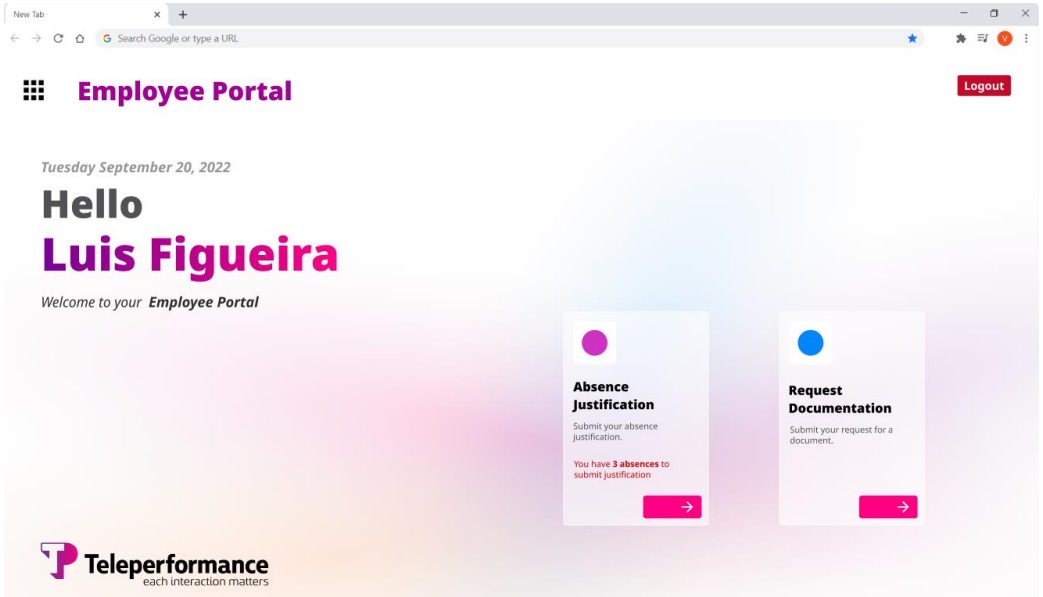
The new Declarations process starts with the development of the new portal where all TP PT employees can request for a declaration, contract or payslips instead of sending an email to the Employee Experience team.

For a user to access TP Absence Tool portal it will need to meet the following criteria:

- Have valid and active credentials;
- Doesn't need to be connected to TP network;
- Needs to be responsive.

After completing the login, the user will be redirected to the Employee Portal (EP) home page, where the user will be able to access the Documentation feature.

It is expected to have the Absence Justification Portal integrated as a feature on the EP however, as of right now it is not possible to guarantee the availability of this feature on the Go Live moment.



2. Declarations

2.2 Declarations Homepage – Employee Portal

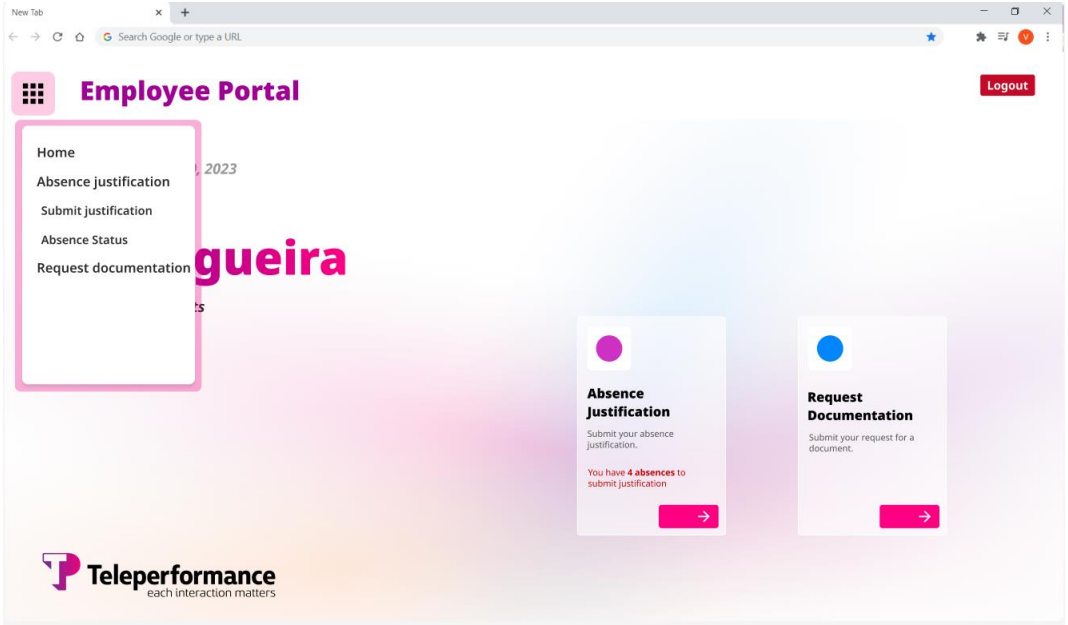
On the EP homepage the user will have available 2 section that redirect the user to the following pages:

1. Absence Justification – Where the user can submit their absence justifications. This menu will also show the number of unjustified absences the user has;
2. Request Documentation – Where the user can request declarations, payslips and a copy of the contract.

This page will also have available two elements that are common to all the pages in this portal:

- Main menu;
- Logout button.

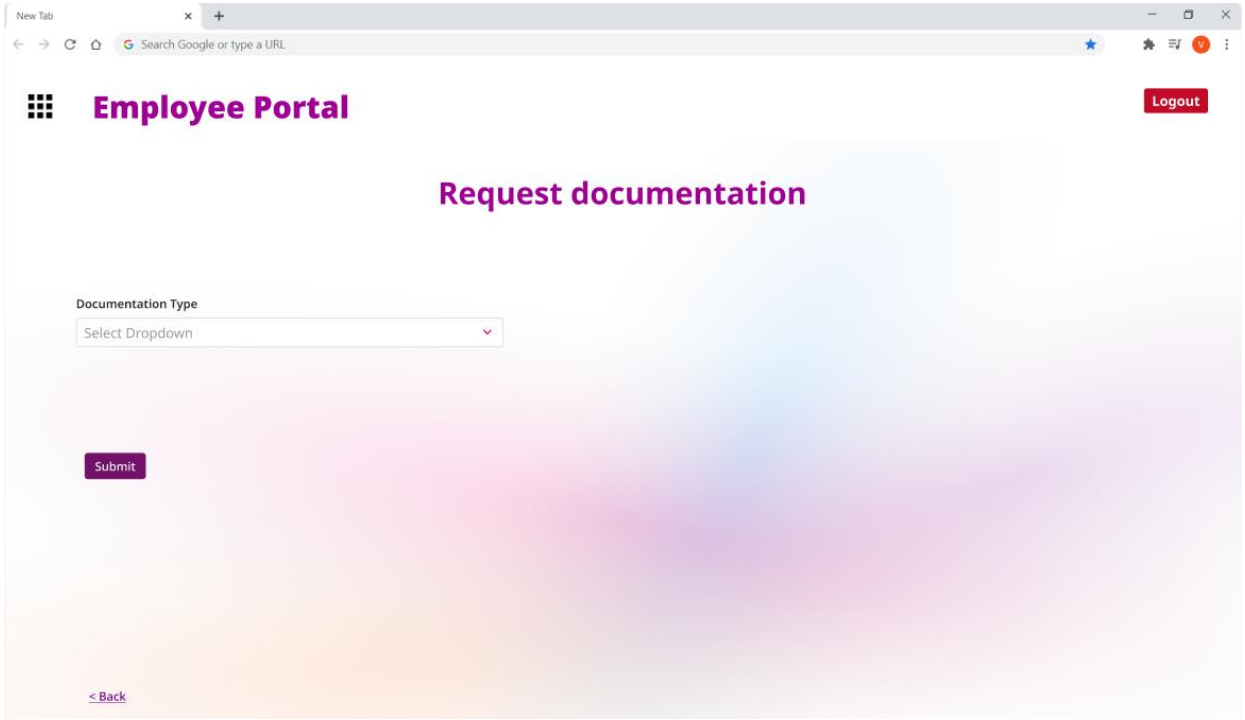
At the Absence Justification section, the user will be able to see his absences and submit all the information needed to justify them. This feature will not suffer any change from what has been defined on the Absence justification project. For more detail, please consult the Absence Justification Functional Analysis.



2. Declarations

2.3 Request Declaration

At the Request Declarations section, the user will be able to submit the request for a declaration. When clicking on the Request Declarations the user must be directed to the following page:



2. Declarations

2.3 Request Declaration

On the “Declarations Type” field the user has 8 options of declarations to select: Foreign Entities declaration, Education declaration, Bank declaration, Rent declaration, SEF declaration, Payslip, Contract and Other declaration.

According to the type of declaration the user chooses, new fields may open to request for additional information (see mockups on annex 1 to 4):

Declaration(s)	Field/Button	Format	Editable	Description
Education declaration, Bank declaration, Rent declaration, SEF declaration	Documentation language	Drop-down	No	Allows the user to select the language of the declaration; The languages available are Portuguese and English; Mandatory.
Foreign Entities declaration	Purpose	Drop-down	No	Allows the user to select the purpose of the declaration; The options available are “Military purposes”, “Bank purposes”, “Insurance purposes”, “School institutions”, “Embassy purposes”, “Government agency purposes”, “Traveling purposes”, “Other purposes”; Mandatory.
Foreign Entities declaration	Description	Text	Yes	Allows the user to write a description of the declaration intended; Mandatory

2. Declarations

2.3 Request Declaration

Declaration(s)	Field/Button	Format	Editable	Description
Payslip	Year	Drop-down	No	Allows the user to select the year of the requested payslip; It can only show until the current year – the current year must only be available on the 1st of February; Mandatory.
Payslip	Month	Drop-down	No	Allows the user to select the month of the requested payslip; If the user selects the current month or a month that hasn't occurred, it must not be possible to submit the request and an error message must appear; Mandatory.
Other declaration	Description of the declaration	Text	Yes	Allows the user to describe the declaration he needs. Mandatory

After completing all the mandatory fields, the user must click on the "Submit" button to submit his request and, if all the rules were followed, a pop-up must appear with a success message. The success message must be different according to the way the request will be completed – automatically or manually.

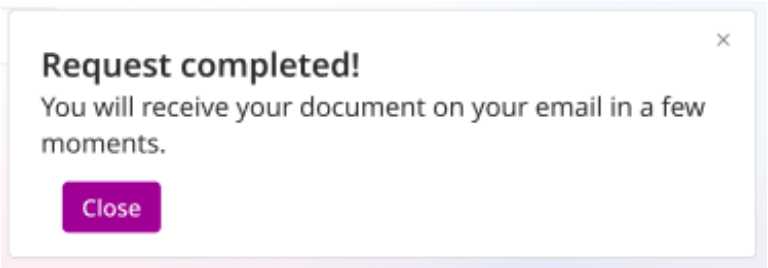
2. Declarations

2.3.1 Request Declaration – Automatic process

For a document request to be completed automatically the following conditions must be met:

1. Not be document type “Foreign Entities declaration” → “Other purposes” or type “Other declarations”;
2. All the information necessary to create a declaration automatically must be available on the source (see annex 3.5);
3. The date of the payslip must be superior to March 2017 and the receipt must be available on the virtual machine PTCITMETA401, folder “Recibos” with the user’s shortlogin present on the name of the document;
4. The contract must be superior to 2022 and available on the folder “HRE300_Confidential_PROCESSOS” with the user’s CCMS ID present on the name of the correspondent folder;

When a request for a document that is generated automatically submitted, the system must show the following success message:



2. Declarations

2.3.1 Request Declaration – Automatic process

For the system to create the declarations automatically the Employee Experience team will provide the Development team the necessary templates for each declaration – one template for each set of declaration/entity/language.

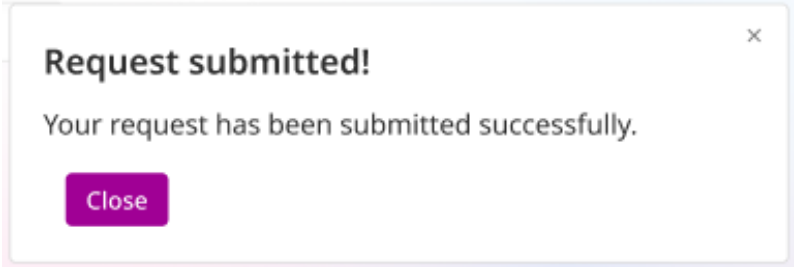
Since there are 4 entities in the TP Portugal universe (Teleperformance, MySeguros, PSTEP and Empreced) the system must know the entity for which the user works (available in Meta4) and select the template with the correct signature. If it is not possible to obtain the authorization from PSTEP and Empreced to use their signature in our automatic process, all the requests for declarations must go through the manual process (see next slide).

The requested documents must be sent to the same email used to send the payslip.

2. Declarations

2.3.2 Request Declaration – Manual process

If the system is not able to meet all the criteria listed on the previous slide or if the user submitted a request that is "Other", the request must go through the manual process and the following message must appear:



After submitting a manual request, the system must open a case on the TP Client process https://tpclient.teleperformance.pt/TPClient_EMS/Main.aspx and, depending on the document type should go to the following queues:

- Declarations - Foreign Entities declaration (including all the "other purposes" requests), Education declaration, Bank declaration, Rent declaration and SEF declaration;
- Contract – Contract;
- Payroll – Payslip;

The request for "Other declaration" must go to the main pool of the TP Client process, and not be associated to any queue (manual process).

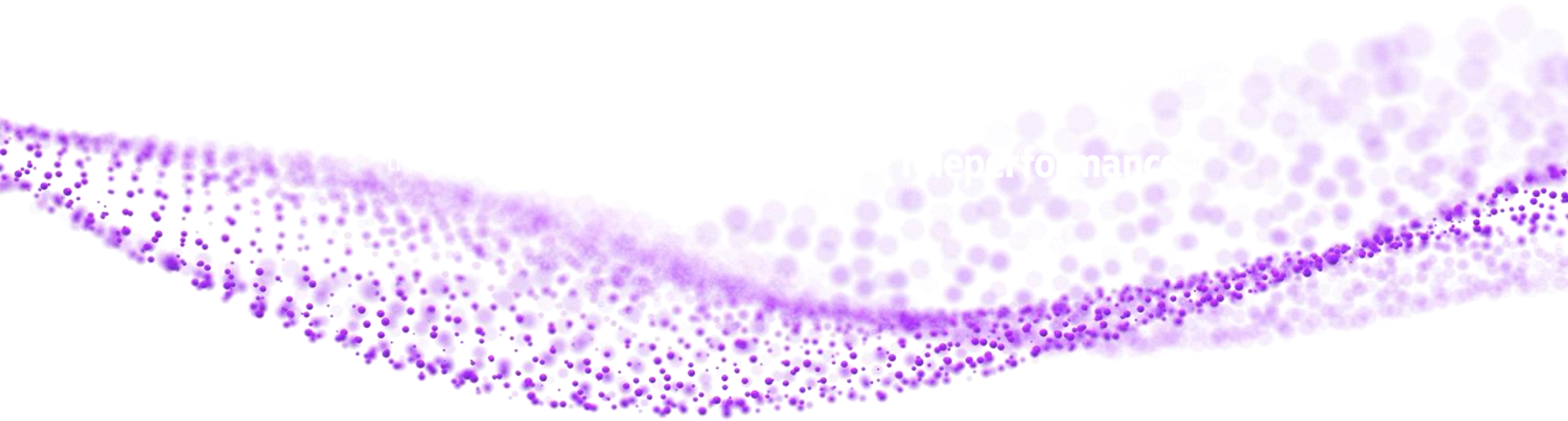
2. Declarations

2.3.2 Request Declaration – Manual process

All the cases opened automatically by this solution in TPClient must have all the information inserted on the platform by the user, as well as his BMS ID (CCMS ID), e.g.:

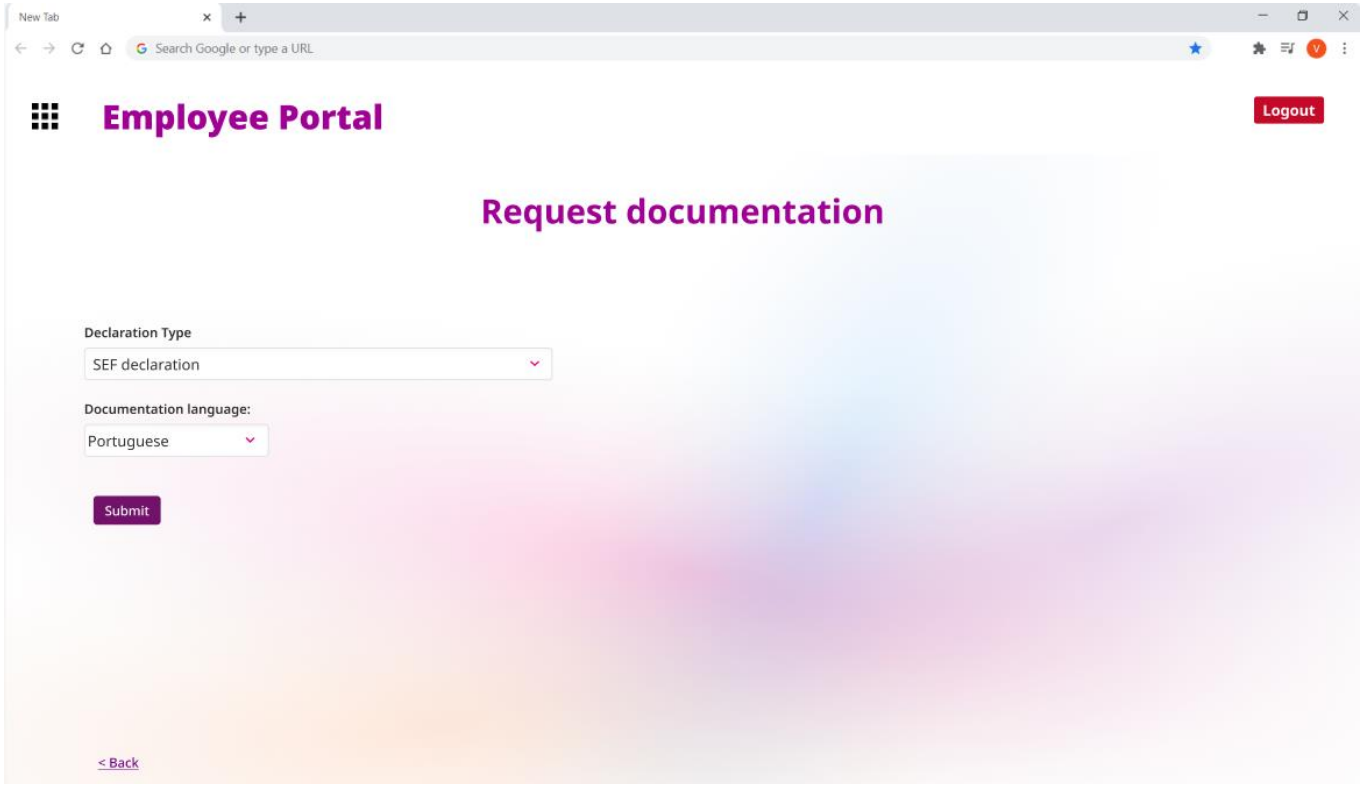
The user submits a request for a declaration type “Other declaration” → The system must open a case in TPClient with the user’s BMS ID, “Declaration type” and “Description of the declaration”.

After the request is sent to TPClient the case follows the current process implemented and the user will be contacted by the team that is responsible to provide the document.



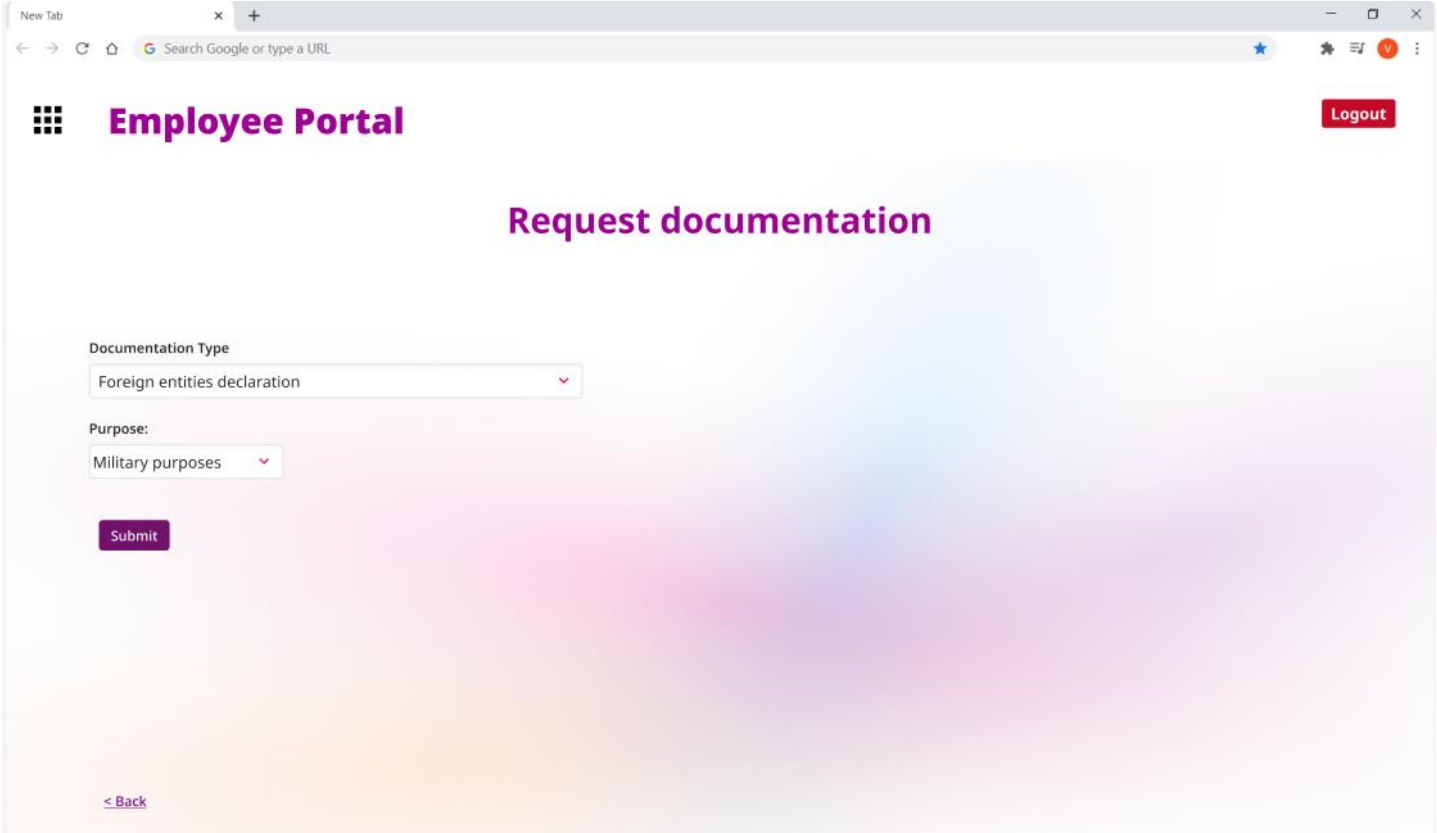
3. Annex

3.1 Documentation Language field



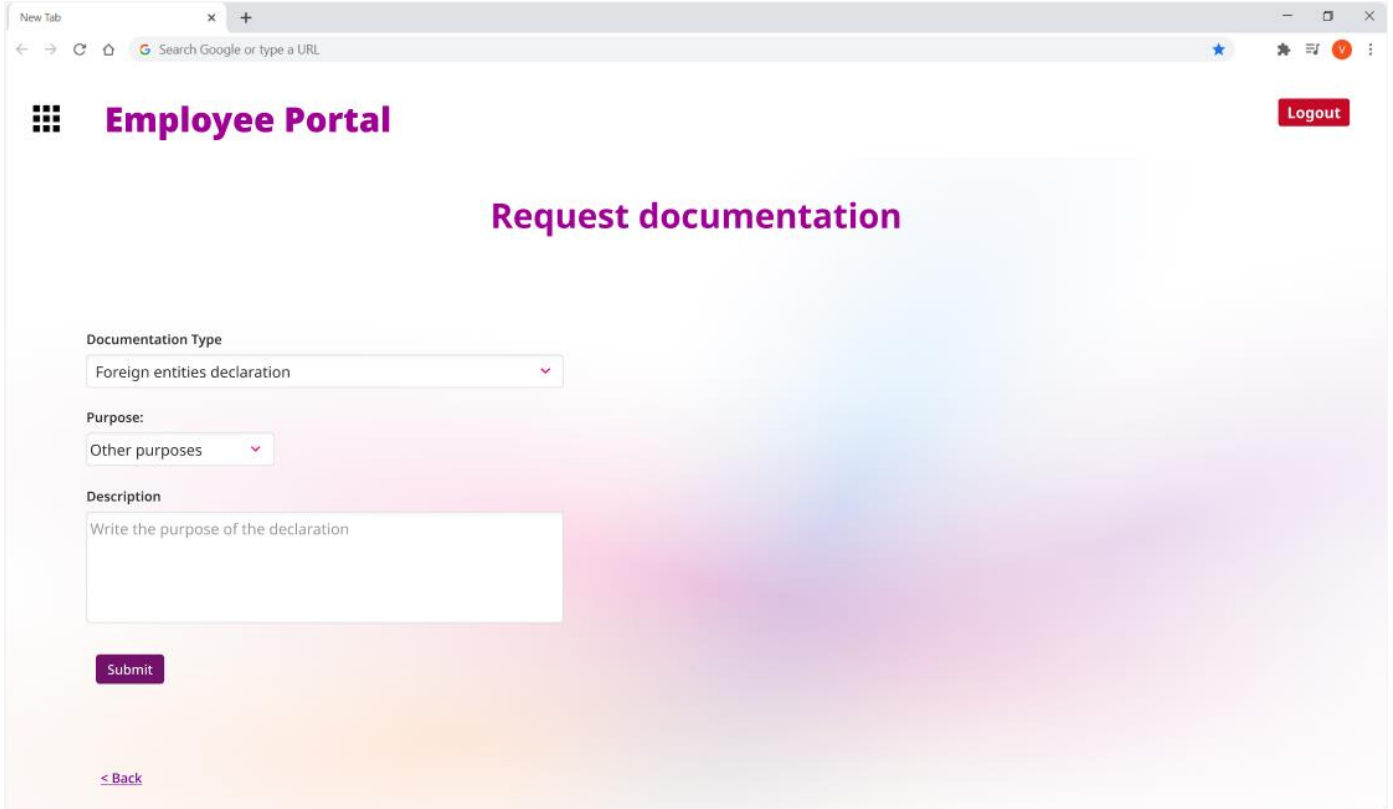
3. Annex

3.2 Foreign entities declaration fields



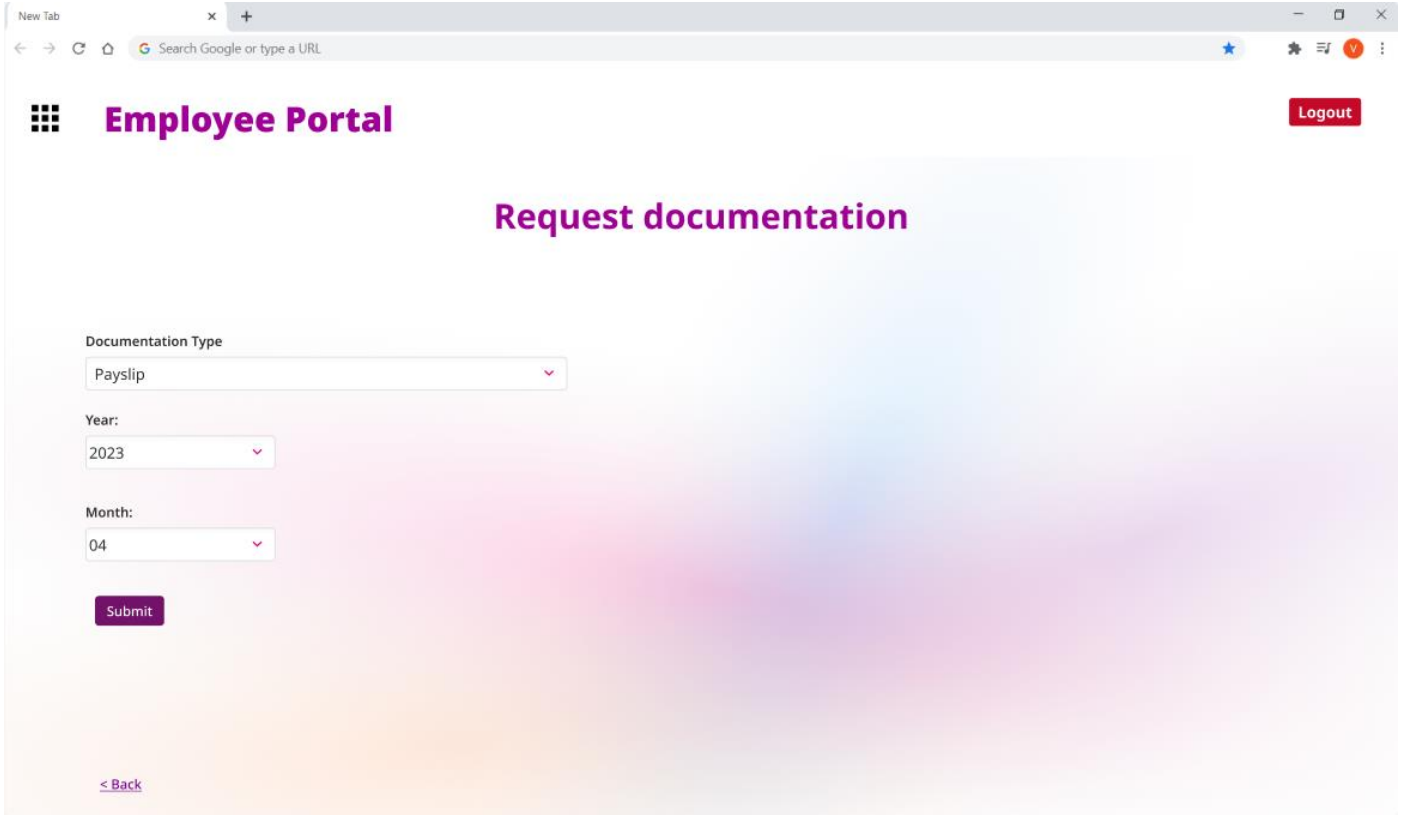
3. Annex

3.2 Foreign entities declaration fields



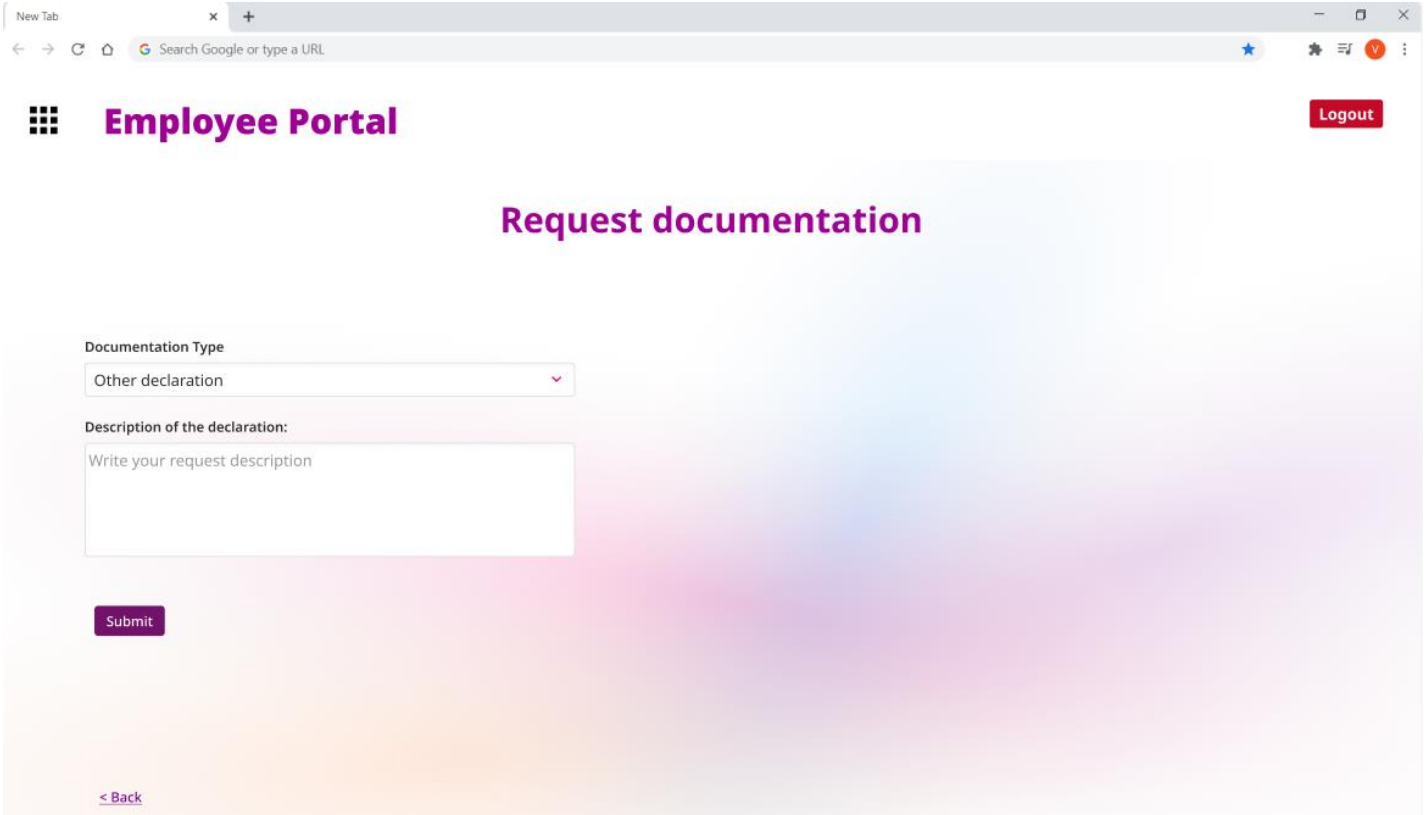
3. Annex

3.3 Payslip declaration fields



3. Annex

3.4 Description of the declaration field



3. Annex

3.5 Fields for each declaration

Fields	Declarations				
	Foreign Entities declaration	Education declaration	Bank declaration	Rent declaration	SEF declaration
Legal Name	X	X	X	X	X
Civil Identification number	X	X	X	X	X
Tax identification number	X	X	X	X	X
Start work date	X	X	X	X	X
Type of contract	X		X	X	X
Professional Category		X			
Working hours (H/W)		X			
Schedule (HH:MM)		X			
Remuneration (base/month)			X		X
Work location (address)		X			