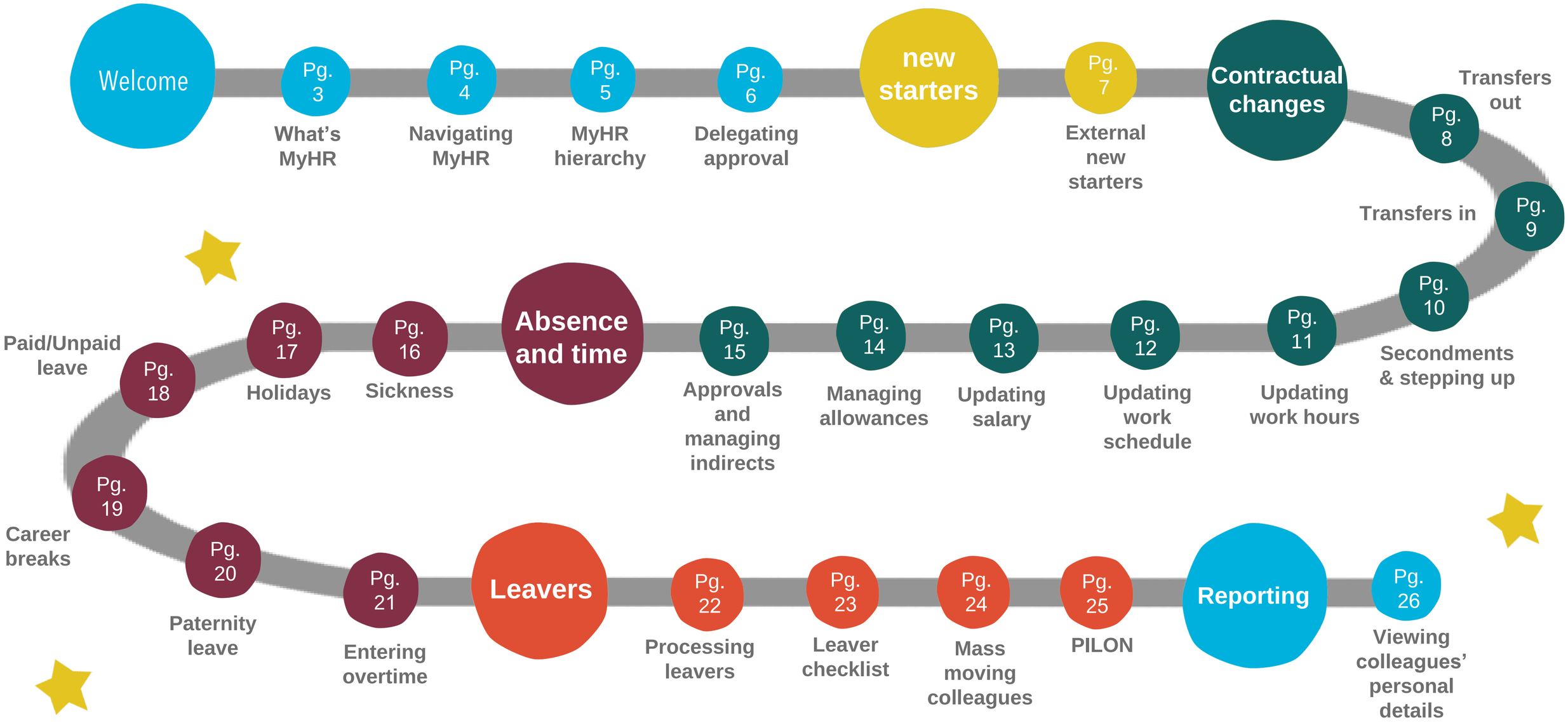
Managers

Your Guide to MyHR

Funeralcare

Get Started ❯

Welcome to MyHR



What's MyHR?

MyHR is a cloud based HR system which holds all of our HR data in one secure place. Making it easily easier to access, view and update your own and teams HR data.

What do you mean by cloud based?

The cloud is just a network of servers that will store and allow us to securely access our data.

If you've ever used Facebook or similar, you've already used the cloud, you just might not have realised it.

What's good about the cloud is that we will get regular MyHR updates, meaning that we will always be up to speed on the latest version – like when your phone has an update.

So, what does this mean for me?

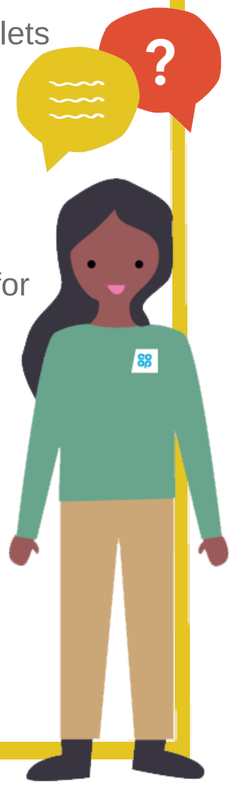
It means that you'll be able to view and manage your own and your teams HR data online. It will make tasks like transferring colleagues, approving leave requests and processing new starters and leavers easier than ever.

Because the system is cloud based you can access it anywhere and on any device (i.e. personal phones, tablets and computers), making it more convenient for you.

Sounds great, what next?

In this guide you'll find all the information you need to access the system and step by step guidance for completing all of the tasks relevant to you.

You'll also find some 'What ifs' just in case something doesn't go to plan.



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Navigating MyHR

How do I access MyHR

You can access MyHR by using the following link on any device (Co-op or personal):

myhr.coop.co.uk

Log in with your **username (employee number)** and **password.**

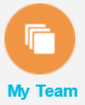
Your homepage

Let's start by explaining some of the icons you'll see on the MyHR homepage:

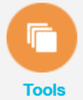
The **About Me** section is where you'll spend most of your time as a colleague; you'll find information such as personal details, payslip emergency contact information etc.

You'll find step by step guidance for completing colleague tasks in the **Your Guide to MyHR – Colleagues** guide.

The following sections are where you'll spend most of your time as a manager:



My Team is where you'll manage your colleagues employment information i.e. transfers, salary changes, work hours etc.



The **Tools** section is where you'll find the dashboards as well as approval requests and checklists.

You'll also see this toolbar at the top of every page

Use the star icon in the toolbar to add frequently used pages to your favourites, so that they're only a click away.

To do this go to the page you'd like to save as a favourite, click on the **star icon** from the toolbar, click **Add to Favourites**, click **Save and Close.**

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Understanding the MyHR hierarchy

It's important that you understand how the MyHR hierarchy is built up so that we are able to move colleagues to new roles and update their information.

MyHR is built up of six levels.

Enterprise

This is the top level of the hierarchy. Our **Enterprise** is called **Co-operative Group (CWS) Ltd**

Legal Entity

The **Legal Entity** refers to the registered company that employs the colleagues. Our Legal Entities are either **Co-operative Group**

Division

Division is the first level that starts to divide down the separate areas of our business, examples of divisions are **Funeral and Legal Services**

Sub Division

Sub Division breaks the Divisions down further, for example Funeralcare break downs into options like **Funeral FC**

Business Unit

A **Business Unit** breaks down the enterprise further for example **Funeral Support Centre, Funeral Ops North & East**

Department

Department is the lowest level of the structure and is what you and your colleagues are assigned to. It is also what your Cost Centre is assigned to. This will be your **home** or your **care centre.**

MyHR Terminology

There are some phrases that are hardwired into the system below, are some examples

Location – Refers to a physical address i.e. store, depot, branch or office

Positon – A specific occurrence of one job, fixed within one organisation, and belonging to that organisation. There maybe one, many, or no holders of a position at any time

Job – A generic role, which is independent of any single organisation and therefore common across the Enterprise

.

Job Family – A group of jobs that have different but related functions, qualifications and titles

Workers - Refers to colleagues

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Delegating approval (vacation rule)

There may be times that you'd like a colleague to manage approvals for your team members for you. A typical reason for this is if you're on holiday or are sick.

It's easy to set up approval on your behalf in MyHR, just follow the steps below:

1. From your toolbar click on the **notification icon**
2. Click on **More Details**
3. Click on the **arrow next to your name** located in the top right hand corner
4. Select **Preferences**
5. Tick the **Enable Vacation Period** box
6. Select a **Start Date** and **End Date**
7. Select the box next to **Reassign to**
8. Click on **Select User**
9. Enter the **First Name** and **Last Name** of the manager you're delegating to and click **Search**
10. Select the correct manager from the list and select **OK**
11. Click on **Save**

All of your notifications will now go to the assigned manager for the selected dates.

What if…

I forget to delegate approval before I take annual leave?

Continue ❯

External new starters

Before the external new starters' first day, Resourcing will setup your new starter so they'll appear on MyHR on their start date. You'll get an email confirming this has happened along with their employee number so you can order any other equipment etc they may need.

On Day 1

You'll need to add a work schedule for the colleague. This is so MyHR knows what days they'll be working and can pay them.

If you don't do this, then they won't get paid. To do this go to Managing Work Schedules here.

Your new colleague will receive an email with their employee number and a link to set their password for MyHR on or just after day 1, to the email they applied with.

Make sure they add their bank details and emergency contacts as soon as they start. More details can be found in the email they get and in the colleague guide.

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What if…

I can't see my new starter?

My new starter is Internal?

Transfers out

When a colleague moves into a new team, as the outgoing manager you need to transfer them to the new manager.

To do this follow the steps below:

Change of manager

1. From the homepage select **My Team,** then **Team Details**
2. Click on the **orange arrow icon** to the right of the colleagues name
3. From the drop-down select **Personal and Employment** and select **Change Manager**
4. Using the calendar icon select the **Change Manager Date** (the date you'd like this change to be effective from)
5. Use the drop-down to select a **Change Manager Reason (**i.e. Change to Supervisor)
6. Under the **Manager Details** section locate the current manager name (your name), click on the **arrow** next to the name and select **Search.**
7. Enter the name of the new manager (surname, first name) into the **Name** field and click **Search**
8. From the list of managers displayed, select the correct one and click **Ok**
9. If the mover has a team reporting into them you must reassign them to a new manager. You'll see a section called **Manage Direct Report**. Click on the small grey arrow to the left to drop-down to see the direct reports
10. In this section you'll see a list of all the leaver's direct reports. Enter the name of the new manager (surname, first name) into the **Reassign to** field. The proposed manager will now have been applied to all colleagues. If you want to reassign each direct report to different managers, you can enter the name of the new manager (surname, first name) into the **Proposed Manager** field, next to each of the direct reports
11. Select **Review** to check the changes you are about to make and select **Submit.**

Tips, tricks and more

To find the name of a manager quickly, you can start typing their name directly into the field (surname, first name), instead of clicking the search arrow.

What if…

I can't find the new managers details?

The colleague is moving from Group to Insurance/CFSMS or vice versa?

Continue ❯

Transfers in

When you recruit an internal colleague into your team their details will be sent to you by their outgoing manager on MyHR.

You now need to update their employment information. To do this follow the steps below:

1. From the homepage select **My Team,** then **Team Details**
2. You'll now see all colleagues who report into you, identify the new starter and click on the **orange arrow icon** to the right of their name
3. From the drop-down select **Personal and Employment** and select **Transfer**
4. Using the calendar icon select the **Transfer Date**
5. Use the drop-down to select a **Transfer Reason.** For promotions select **Career Progression**
6. To find the colleagues new **Business Unit** click on the search arrow and select **Search,** type in **funeral** and select **Search**. Select the correct unit from the list, then select **Ok**
7. You now need to select the **Position.** Each branch/location has it's own unique set of positions, only applicable to that location so it's important that you select the correct one. To do this click on the search arrow in the **Position** field and select **Search**
8. Click on **Advanced Search** and type the location into the **Department** field and select **Search**.
9. You'll see a number of positions displayed for that location, select the relevant position and click **OK.** You might see some positions starting with ZZZ, these are closed positions and should not be used.
10. Click **Yes** in the pop-up window to accept the default position information
11. **Grade** and **Location** will be auto populated based on the selected position.
12. To apply a grade ladder, where applicable, click on the next to the grade field and select the correct grade (80, 90 or 100) from the **Step** drop-down and click **OK**
13. Enter the **Working Hours** and select if they're a **Manager**
14. The manager section should be correct so when you've finished select **Next**
15. Select Propose New Salary and then enter the new agreed salary/hourly rate into the **New Salary** field.

Salary Calculator – If the colleague is part-time and salaried, you can click on the **calculator icon** to bring up the salary calculator, type in the full-time equivalent salary (this is the salary they would earn if they worked full-time) into the **Annualized Salary** field, the calculator will then work out the new salary based on the hours of work you entered on the previous screen

16. Select **Next** and then **Submit.**

Check the colleague's work schedule to ensure its correct, see the work schedules section of this guide or **click here**

What if…

I can't see my internal new starter?

I don't know the Business Unit, Department or Grade etc?

I don't know what the correct hourly rate is for the position?

Continue ❯

Secondments & stepping up

'Secondments' are a temporary move for a defined period of time to another role. The MyHR system steps for a secondment are managed by the HR Shared Services on-boarding team, they will set up the secondment, extend where applicable and end it when the secondment concludes.

As a manager you need to complete a number of out of system steps, see below:

1. The **manager** will get authorisation to recruit. The **manager** will follow the recruitment process for internal vacancies in My. Recruit
2. The **manager** will complete the interviews
3. Secondment details will be agreed with colleague
4. Confirmation of secondment details will be sent to the **manager** and colleague
5. HR Shared Services will process the secondment on to MyHR including allowances
6. Confirmation that the secondment has been processed on MyHR will be sent to the **manager**
7. The **manager** will get a reminder one month before the end of the secondment advising them on their options/next steps
8. If the secondment is to be extended the **manager** will get authorisation and will inform HR Shared Services by raising a requisition in My.Recruit
9. HRSS complete extension or return colleague to home role and remove allowance if secondment is ending

A manager would raise a requisition in My.Recruit under the following circumstances:

- The manager needs help in recruiting
- The manager already has a colleague/s lined up for the role
- The manager would like to extend an existing secondment
- The manager would like to convert the existing seconded colleague/s to a permanent position

'Stepping Up' is taking on additional responsibilities within a team for a short period of time (under 6 months), whilst also continuing in your own role. Speak to your HR Business Partner for more information.

You can add a stepping up allowance under Manage Compensation. See the section on Allowances for more information

What if…

I can't see my internal new starter?

Continue ❯

Change contract working hours

When colleagues change their working hours you need to update this in MyHR .

At the same time you should update the salary to reflect the hours change

Change of hours for a salaried colleague

Change of hours for hourly rated colleagues

To do this, follow the steps below:

1. From the homepage select **My Team,** then **Team Details**
2. You'll now see all colleagues who report into you, identify the colleague with the change of working hours and click on the **orange arrow icon** to the right of their name
3. From the drop-down select **Personal and Employment** and select **Change Working Hours**
4. Using the calendar icon select the **Change in working hours** date
2. Navigate to the **Working Hours details** section
3. Enter the new number of hours in the **Working Hours** field
4. Click **Next**. If your colleague is on an hourly rate click **Next** to bypass the next screen. Then click **Submit.**

For salaried colleagues, you need to update their actual salary to pro rate it if they aren't working full-time hours. To do this select Propose New Salary then...

8. Click on the **calculator** next to the **Adjustment Percentage** field.
9. Enter the full-time equivalent (FTE) salary into the Annualized full-time Salary field and click **OK**.
10. The system will then calculate the actual salary for you
11. Click **Next** and then **Submit.**

Once you've completed the change in hours you MUST now update the work Schedule to reflect the new working hours. To do this navigate to the change in **Work Schedule Section** of this guide.

Tips, tricks and more

Important! The work schedule must reflect the working hours in MyHR, as it's the work schedule that drives colleague pay and not the working hours.

What if…

I have updated the working hours and not the work schedule?

Continue ❯

Managing Work Schedules

If a colleague changes their work schedule (you might know this as work pattern), you need to update this in MyHR. You'll also need to add in a work schedule for a new starter. The work schedule is what drives colleagues' pay and not the working hours.

Adding in a new work schedule

To do this, follow the steps below:

1. From the homepage select **My Team,** then **Team Details**
2. You'll now see all colleagues who report into you, identify the colleague with the change of schedule and click on the **orange arrow icon** to the right of their name
3. From the drop-down select **Absence** and select **Manage Work Schedule**
4. Click on the **+** to add in a new work schedule
5. Navigate to the **Name** field, click on the **arrow icon** to the right of the field and select **Search**
6. You can now search for the colleague's work schedule*. Start by typing the colleagues contracted hours, followed by the number of working days and then the number of hours they work per day, starting with Sunday. This information **must** be entered like this example 37.5hrs_5dys_0_7.5_7.5_7.5_7.5_7.5_0. To the right is a table explaining what the work schedule combination means.

Contact Hours	No of working days	Sun hrs	Mon hrs	Tues hrs	Wed hrs	Thurs hrs	Fri hrs	Sat hrs
20	5	0	4	4	4	4	4	0

8. A list of schedules will appear, from the list **highlight** the relevant schedule and click **Ok**
9. Using the calendar select the **Start** and **End Date** that the schedule will run for, if indefinite leave the **End Date** field blank (this will default to 31/12/59)
10. Select **Yes** in the primary field to ensure this is the work schedule used by the system (all work schedules in MyHR should have yes selected in the primary field)
11. Click **Review** and then click **Submit**
12. This has now been sent to your manager for approval.

Deleting a work schedule

1. Follow steps 1-3
2. **Highlight** the work schedule you want to delete
3. Click on the **X** icon.

Tips, tricks and more

***Important –** If a colleague works different shifts across different weeks their weekly working hours will be split over 5 days equally.

If the colleague has also changed their working hours make sure you update this in the MyHR.

What if…

I can't find the work schedule I am looking for?

My colleague works 1 week on, 1 week off, what schedule do I need to enter?

My colleagues don't work the same schedule each week, what would I enter?

Continue ❯

Managing salary

If a transferred or existing colleague has an out-of-cycle change in salary you must update this in MyHR.

To do this, follow the steps below:

1. From the homepage select **My Team,** then **Team Details**
2. You'll now see all colleagues who report into you, identify the colleague with the change of salary and click on the **orange arrow icon** to the right of their name
3. From the drop-down select **Compensation** and select **Change Salary**
4. From the drop-down select an **Action Reason** (i.e. Job Change)
5. Select Propose New Salary then select a **Salary Basis**
6. Enter the **new salary** or **rate per hour**
7. Click **Continue**
8. Click **Submit**
9. Click **Yes**
10. Click **Ok**
11. This has now been sent to your manager for approval.

Salary calculator

Next to the salary adjustment field you'll see a calculator icon, by clicking on this you can add the annualised salary (full-time equivalent), the system will then calculate the actual salary for part-time colleagues.

1. Click on the **calculator icon**
2. Add the full-time salary into the **Annualised Salary** field and select **Ok**
3. The system will then add in the colleague's actual salary based on the working hours.

Tips, tricks and more

You can also use the percentage field in this section to increase salary by a percentage (i.e. apply a 5% increase in salary).

Salary is displayed with four decimal places.

It is best practice not to future date changes too far in advance as this can stop you being able to make other contractual changes.

What if…

I want to update a colleague salary outside of a review?

Continue

Entering allowances

Colleagues won't be able to submit their own allowances, as their manager you need to do this on their behalf.

To do this, follow the steps below:

1. From the homepage select **My Team**
2. From the drop-down select **Team Details**
3. Click on the **orange arrow icon** next to the relevant colleague name
4. Click on **Compensation** and then **Manage Compensation**
5. Click on **Award Compensation**
6. From the drop-down select the **Plan** (i.e. allowance, additional payments)
7. From the drop-down select the **Type** (i.e. first aid) allowance
8. You'll now be asked for the **Value**, this could be amount, salary percentage or weekly allowance dependent on the plan you've selected
9. Select **Ok**
10. Select **Continue**
11. Select **Submit.**

Viewing and deleting existing allowances

You can easily view and amend existing allowances by following the steps below:

1. Follow **steps 1-4**
2. If colleagues have existing allowances you'll see them listed on this screen
3. To delete an allowance click **X** on the relevant line.

Tips, tricks and more

The allowances you can enter depends on your area of business an example is first aid or step up.

What if…

I don't know what the value of the allowance is?

Continue

Approving contractual changes

Manager of managers

When your direct reports have made any contractual changes to one of their team members you'll need to review and authorise the change.

Follow the steps below to do this:

1. From the homepage select **Tools**
2. From the dropdown select **Worklist**
3. Select the notification that requires your approval. The notification will read something along the lines of **'Tasks require your attention'**
4. Check the details the colleague has submitted and click either **Approve** or **Reject.**

Examples of some contractual changes you'll need to approve:

- Transfers
- Salary changes
- Some allowances

Viewing indirect reports

As well as approving contractual changes you are also able to perform them for your indirect reports.

Follow the steps below to do this:

1. From the homepage select **My Team**
2. Locate the manager of the indirect reports you'd like to view
3. Click on 2, 3 to view your indirect reports
4. You can complete all tasks for your indirect reports by follow the steps in this guide.

Tips, tricks and more

You can also complete these tasks using the **Notifications Icon (bell)** from the toolbar.

What if…

I am going on annual leave and I'm not able to approve contractual changes?

My team member who is so a manager is off can I approve tasks as the manager +1?

My notification failed to open?

Continue ❯

Sickness
Holidays
Paid/unpaid leave
Career break
Paternity
Entering overtime

Managing sickness

When a colleague notifies you of their sickness absence you need to open the absence in my MyHR. When the colleague returns to work you need to complete the return to work interview and close the absence down.

Follow the steps below to enter sickness on behalf of a colleague:

From the homepage select **My Team**

1. From the dropdown select **Team Details**
2. You'll now see all colleagues who report into you, identify the absent colleague and click on the **orange arrow icon** to the right of their name
3. From the drop-down select **Absence** and then **Manage Absence Records**
4. Use the ➕ icon to add a new absence record
5. From the drop-down select the **Absence Type,** in this case **Sickness**
6. Click to select the **Open Ended** box
7. Use the calendar icon to enter the **start date** of the absence.
8. From the drop-down select an **Absence Reason** (i.e. flu)
9. Select **Submit.**

Do not just Save, always press Submit or the absence won't be sent to Payroll and the colleague will be overpaid

Close the open ended absence

When the colleague returns to work, as well as completing the return to work interview, you also have to close the absence with their return date.

1. Follow **steps 1 – 4** to the left to go to the absence records
2. Find the relevant absence and click on the date to open the record
3. Deselect the **Open Ended** box
4. Use the calendar to add in the Absence **End Date. Note –** This is the last day of the colleagues absence and not the day they return to work

Important - If your colleague's work schedule shows less hours on the day of the absence than the colleague worked you may need to overwrite the duration of the absence, to do this select **Advanced Mode**

5. Amend the **duration** for each days absence
6. When you have finished, select **Submit**

To delete an absence

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and scroll along until you come to the **delete** column, click on the **X** to delete the absence, you'll see that the status has now changed to withdrawn.

What if…

I want view the number of absences the colleague has had?

I forget to close the absence down?

My Team member who is also a manager is off, can I approve tasks as the manager +1

Continue ❯

Holiday entry on behalf of colleagues

Managers in Transport, Masonry and Branches will enter holiday absence into MyHR on behalf of their colleagues.

Colleagues in support centre will enter holiday absence into MyHR themselves which will then be approved by the manager

Follow the steps below to enter a holiday on behalf of a colleague:

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You'll now see all colleagues who report into you, identify the colleague and click on the **orange arrow icon** to the right of their name
4. From the drop-down select **Absence** and then **Manage Absence Records**
5. Use the ➕ icon to add a new absence record
6. From the drop-down select the **Absence Type, Holiday**
7. Use the Calendar icon to enter the **Start** and **End Date** of the absence. For a single day absence, select the **Single Day** tick box and just enter the start date

Important - If your colleague's work schedule shows less hours on the day of the absence than the colleague worked you may need to overwrite the duration of the absence. To do this select **Advanced Mode**

8. Amend the **duration** for each days absence
9. Select **Submit.**

If a colleague works one week on, one week off you need to split their absence hours over two weeks i.e. a colleague has 35 hours holiday in week 1 and doesn't work in week 2. You need to enter 17.5 hours holiday in weeks 1 and 2.

Updating and deleting an absence

If the absence has been submitted by the colleague, ensure you have approved it before trying to update it.

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and click on the dates to open it. Using the calendar icons update the **Start** and **End time** and/or reason where applicable
3. Select **Submit**

To delete an absence

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and scroll along until you come to the **delete** column, click on the **X** to delete the absence, you'll see that the status has now changed to withdrawn.

What if…

I want to see the colleagues holiday entitlement?

My Team member who is also a manager is off, can I approve tasks as the manager +1

Continue ❯

Paid/unpaid entry on behalf of colleagues

Managers in Transport, Masonry and Branches will enter paid/unpaid leave into MyHR on behalf of their colleagues.

Colleagues in support centre will enter paid/unpaid into MyHR themselves this will then be approved by the manager

Follow the steps below to enter paid/unpaid leave on behalf of a colleague:

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You'll now see all colleagues who report into you, identify the colleague and click on the **orange arrow icon** to the right of their name
4. From the drop-down select **Absence** and then **Manage Absence Records**
5. Use the ➕ icon to add a new absence record
6. From the drop-down select the **Absence Type**
7. Use the calendar icon to enter the **Start** and **End Date** of the absence.
8. From the drop-down select an **Absence Reason** (i.e. jury service)

Important - If your colleagues work schedule shows less hours on the day of the absence than the colleague worked you may need to overwrite the duration of the absence, to do this select **Advanced Mode**

9. Amend the **duration** for each days absence
10. When you have finished, select **Submit.**

Updating and deleting an absence

If the absence has been submitted by the colleague ensure you have approved it before trying to update

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and click on the dates to open it, using the calendar icons update the **Start** and **End time** and/or reason where applicable
3. Select **Submit**.

To delete an absence

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and scroll along until you come to the **delete** column, click on the **X** to delete the absence, you'll see that the status has now changed to withdrawn.

What if

The wrong number of hours per day is being calculated for the absence?

My Team member who is also a manager is off, can I approve tasks as the manager +1

Continue ❯

Career break entry on behalf of colleagues

Managers in Transport, Masonry and Branches will enter absence into MyHR on behalf of their colleagues.

Colleagues in all support centre will enter absence into MyHR themselves which will then be approved by the manager

Follow the steps below to enter a career break on behalf of a colleague:

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You'll now see all colleagues who report into you, identify the colleague and click on the **orange arrow icon** to the right of their name
4. From the drop-down select **Absence** and then **Manage Absence Records**
5. Use the ➕ icon to add a new absence record
6. From the drop-down select the **Absence Type, Career Break**
7. Use the calendar icon to enter the **Start** and **End Date** of the absence.
8. Select **Submit.**

Updating and deleting an absence

If the absence has been submitted by the colleague ensure you have approved it before trying to update:

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and click on the dates to open it, using the calendar icons update the **Start** and **End time** and/or reason where applicable
3. Select **Submit**.

To delete an absence

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and scroll along until you come to the **delete** column, click on the **X** to delete the absence, you'll see that the status has now changed to withdrawn.

Tips, tricks and more

Colleagues can take a career break for a minimum of 3 months up to to a maximum of 12 months. Please refer to the Career Break Policy for further information.

What if

I'm not sure if I should grant a career break, where can I get some advice?

The wrong number of hours per day is being calculated for the absence?

My Team member who is also a manager is off, can I approve tasks as the manager +1

Continue ❯

Paternity entry on behalf of colleagues

Managers in Transport, Masonry and Branches will enter absence into MyHR on behalf of their colleagues.

Colleagues in support centre will enter absence into MyHR themselves which will then be approved by the manager

Follow the steps below to enter paternity leave on behalf of a colleague:

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You'll now see all colleagues who report into you, identify the colleague and click on the **orange arrow icon** to the right of their name
4. From the drop-down select **Absence** and then **Manage Absence Records**
5. Use the ➕ icon to add a new absence record
6. From the drop-down select the **Absence Type, Paternity**
7. Use the calendar icon to select the **Actual Date of Childbirth**
8. Select the **Start** and **End Date** for the absence
9. When you have finished, select **Submit.**

Updating and deleting an absence

If the absence has been submitted by the colleague ensure you have approved it before trying to update

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and click on the dates to open it, using the calendar icons update the **Start** and **End time** and/or reason where applicable
3. Select **Submit**.

To delete an absence

1. Follow **steps 1 – 4** on the left to navigate to the absence records
2. Find the relevant absence and scroll along until you come to the **delete** column, click on the **X** to delete the absence, you'll see that the status has now changed to withdrawn.

Tips, tricks and more

Paternity leave can only be taken for either **7** days or **14** days. Please refer to the Paternity Policy for further information.

What if

The wrong hours per day are being calculated by the absence?

My Team member who is also a manager is off, can I approve tasks as the manager +1

Continue ❯

Entering overtime

- Managers in **Transport** and **Masonry** will enter overtime into MyHR on behalf of their colleagues.
- Managers in **Operations** will continue to enter overtime into timesheet.

To enter overtime on behalf of your team, follow the steps below:
Generating and populating a timecard

1. From the homepage select **My Workforce** and then **time Management**
2. Select **Manage time Card** icon on the left hand side
3. Select the **+** icon
4. Enter the name of the colleague (surname, first name) and select the start timecard start date (Sunday) and click **OK**
5. Use the arrow in the **Assignment Name** field to select the colleagues employee number (this will have an E in front of it)
6. Use the arrow in the **Payroll time Type** to select the overtime type i.e. Plain time, Double time
7. Type in the number of overtime hours underneath the correct date. You can use the additional lines to add in different types of time
8. When you have added all the overtime for the week select **Next** and then **Submit.**

Approving the timecard:

1. To find the timecard from the homepage select **My Workforce** and then **Time Management**
2. Enter the colleagues employee number into the **Person Number** field
3. Select the **Start Date** of the timecard (Sunday) and **End Date** (Saturday) and select **Search**
4. The timecard will now appear below, highlight it and select **Approve**.

What if…

My Team member who is also a manager is off, can I approve tasks as the manager +1

Continue

Processing a leaver

If a colleague has given you their notice or you've terminated a colleagues contract of employment you need to process them as a leaver in MyHR.

Follow the steps below to do this:

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You'll now see all colleagues who report into you, identify the leaver and click on the **orange arrow icon** to the right of their name
4. From the drop-down select **Personal and Employment** and then **Terminate**
5. In the **Action** field select **Termination**. Use the drop-down in the reason field to select a **reason for the termination**
6. Using the calendar icons select the **Notification date** and **Termination date**
7. Select **Yes** or **No** in the **Recommended for Rehire** field
8. If the colleague is a manager you need to reassign their team to a new manager before you can submit them as a leaver. Click on the **grey arrow** next to **Reassign Line Reports**, this will display the leavers direct reports.
9. Remove the name of the old manager from the **Name field** and type in the name of the new manager (surname, first name) or use the **search arrow** at the side of the field
10. Click on **Review** and check that you're happy with the details
11. Click **Save** and **Submit**
12. You'll now see a pop-up, select **Immediately**, then click **yes**
13. Click on **Ok** to return to the homepage.

Failed to start

If a colleague fails to start, action them as a leaver following the steps to the left. When asked for a reason for termination select **Failed to start.**

Tips, tricks and more

Ensure that the colleague record is up to date, including absence, before you make the colleague a leaver.

What if…

I have processed a leaver by mistake?

I have processed a leaver but they have revoked their notice?

The manager has left the business but the new manager is yet to be recruited

Continue ❯

Leaver checklist

When you've processed a leaver on MyHR you need to complete the leavers checklist to ensure all actions have taken place.

To do this follow the steps below;

1. From the homepage select **My Team,** then **Team Details**
2. You'll now see all colleagues who report into you, identify the leaver and click on the **orange arrow icon** to the right of their name
3. From the drop-down select **Manage Allocated Checklists**
4. Click on the name of the **off-boarding checklist** to open the checklist details. Select **Edit** at the top of the page
5. You'll see that there are a list of tasks that you need to complete at the bottom of the page, click on the icon next to the first task (you may need to scroll to the right)
6. In the pop-up window update the **Status** drop-down to **Complete** when you've completed the task. Use the calendar icon to enter **the Action Start Date** and **End Date** that you complete this task
7. When you've finished, select **Ok**
8. Repeat this process until you've completed all of the tasks in the off-boarding checklist, then click **Submit**
9. Click **Yes**
10. Click **Ok.**

What if…

Continue

Mass mover updates

As a Manager +1 you can mass move colleagues, who report into your direct reports, to a new manager. This is useful when there are large changes to teams and reporting lines.

Follow the steps below to do this:

1. From the homepage select **My Team**, and then **Team Details**
2. Click on **orange arrow icon** next one of your employees, from the drop-down select **Personal and Employment** and then **Manage Direct Reports**
3. Use the **Manage Direct Report Effective of** field to input the date you'd like this change to take effect from
4. In the **Manage Direct Report Reason** field select the drop-down **Change to Supervisor**
5. You'll now see a list of direct reports below, in the field next to the colleague name you'll see a proposed manager has been entered. If this is correct select **Review** and then **Submit** to make the changes. You can also use the check box next to the colleague's name to opt them out of this change
6. If the proposed manager name is incorrect click on the **arrow next to the name** and then select **Search**
7. Use the search box to find the correct manager by entering their surname into the **Name** field and clicking on **Search**, a list of names will appear. Find the correct name and **double click** on it to select
8. Repeat this for all relevant colleagues, using the check box to de-select any colleagues you don't wish to apply the changes to. When complete select **Save** and then **Submit.**

Tips, tricks and more

If a manager is leaving you can reassign their team while you're processing them as a leaver, see the leaver page (page 23) in this guide or by **clicking here**

What if

The manager has left the business but the new manager is yet to be recruited?

Continue ❯

PILON (Pay in lieu of notice)

PILON is a payment that is made to a colleague if their employment has been terminated and they're not required to work their notice period.

If this situation occurs the manager will calculate the colleagues PILON entitlement and enter it into MyHR so that the colleagues receives the correct payment.

A colleague receives a week's pay for every week they're entitled to.

PILON entitlement

This is based on two factors, the colleague's length of service and their grade;

Grade E and above

- If a colleague is in their probationary notice period, their entitlement is 4 weeks pay
- If a colleague is outside of their probationary period, 13 weeks pay is entered into MyHR.

Below Grade E

- If a colleague is in their probationary period, 1 weeks pay is entered into MyHR
- If a colleague is outside of their probationary period and has 4 or less years' service, 4 weeks pay is entered in MyHR. If the colleague's length of service is over 4 years', the number of weeks increases by 1 for each additional years' service, up to a maximum of 12 years' (i.e. if a colleague has 6 years' service you'd enter 6 weeks pay into MyHR).

Before you can work out the colleagues entitlement you'll need to check MyHR for their length of service, to do this follow the steps below:

1. From your homepage select **My Team** and then **Team Details**
2. Click on the **name** of the relevant colleague (this will be highlighted blue)
3. You'll now see the colleagues **Employment Information** which includes the hire date
4. Click **Done** when you have finished.

Once you know the colleagues entitlement you are able to enter this into the system, using the steps below:

1. From the homepage select **My Team**
2. From the drop-down select **Team Details**
3. Click on the **orange arrow icon** next to the relevant colleague name
4. Click on **Compensation** and then **Manage Compensation**
5. Click on **Award Compensation**
6. From the drop-down select the **Plan** in this case 'PILON'
7. From the Options drop-down select 'PILON TAX and NI NR'
8. You'll now be asked for the **Number of weeks** entitlement
9. Select **Ok**
10. Select **Continue**
11. Select **Submit.**

What if

I'm not sure if a colleague should receive PILON?

I need some advice about PILON, where can I go?

Continue

Viewing the personal details dashboard

You can view a colleague's personal contact details such as address and phone number in your dashboard

To view your personal details dashboard follow the steps below:

1. From your homepage select **My Team**
2. Click on **Team Details**
3. Click on the **Team Contacts** icon on the left hand side
4. Enter **your employee number** into the field and search
5. This will now bring up the personal details for your direct team members. you'll see things like employee number, name, address and phone number.

Tips, tricks and more

You must enter your employee number and not the employee number of the colleague who's details you are looking for.

What if

I get an error message and no information is found?

Continue

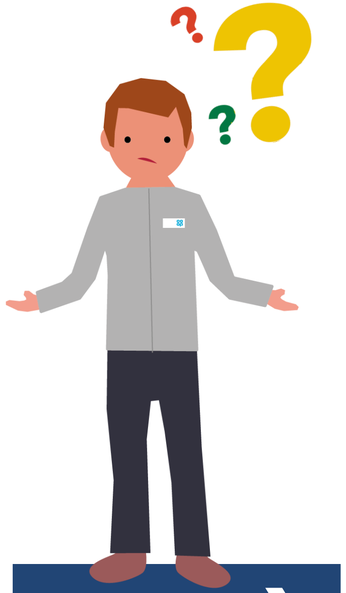
What if…

Welcome

I forgot to delegate approval before I took annual leave	Your manager is able to manage approvals on your behalf if you forget to delegate approval.

New starters

I haven't processed my new starter and they haven't been paid	Process your new starter as soon as possible and ensure they have added their bank details into the system. Call HR Shared Services who can advise you on payment options.
I can't see my new starter	Your new starter will only appear once they have accepted their contract and Eligibility to Work (ETW) has been accepted – if you believe that this has taken place contact your Resourcing Partner who can update you on the status of the new starter.
My new starter is internal	They will be transferred to you from the old manager – see the transfer sections of this guide for more information.
I can't find the correct job to populate the job field	If you already have a colleague in the same role you can view their job information and search for the same details. To view an existing colleagues job from your homepage click My Team – Team Details – click on the name of the relevant colleague – you'll now see their employment information including job. If you are still unsure what to select speak to your manager.
My Notification failed to open	Dependent on your computer, some notifications may open in a separate window which will open like it has failed to open. Minimise your current screen and should see your notification behind.



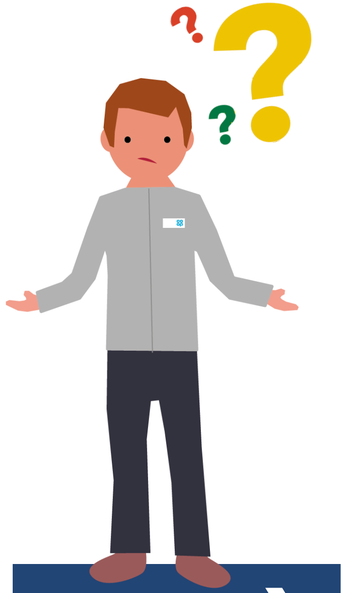
Continue ❯

If you can't find the answer to your question refer to the FAQs. If you still need help, contact HR Shared Services on 0330 606 1001 or HRServices@coop.co.uk

What if…

Contractual changes

I can't find the new manager details	Ensure you are searching for the managers surname first. If you still can't find this information call HR Shared Services for support.
The colleague is moving from Group to Insurance/CFSMS or vice versa	Contact HR Shared Services for support.
I can't see my internal new starter	The outgoing manager may not have completed the transfer yet, contact them to ensure the new starter is moved to you as soon as possible. If they have transferred the colleague to the wrong line manager, contact HR Shared Services who can correct the line manager for you.
I don't know what the business unit, department or grade is	You should have provided this information when you raised the requisition. If you already have a colleague in the same team you can view their employment information and search for the same details. To view an existing colleagues employment information from your homepage click My Team – Team Details – click on the name of the relevant colleague – you'll now see their employment information.
I can't find the location I am looking for	If you believe that a location is missing, contact HR Shared Services.
I have updated the work hours and not the work schedule	The work schedule drives the colleagues pay and not the hours worked therefore the colleague will continue to be paid the same as before the change.
I can't find the work schedule I am looking for	If you believe that a work schedule combination is missing, contact HR Shared Services.
My colleagues don't work the same schedule each week, what would I enter?	Contact HR Shared Services for support
What if I want to update a colleagues salary outside of a review	You'll need to speak to your manager to gain authorisation for this change.
I don't know what that the value of the allowance is	Speak to your manager for advice.
I'm going on annual leave and I'm not able to approve contractual changes	You can delegate approval to a colleague, see the delegating approvals section of this guide.
My team member who is also a manager is off, can I approve tasks as the manager +1	To do this click on the notification icon (bell) > More details > My staff tasks. Your team members approvals will now be available for you to approve or reject on their behalf
I don't know what the correct hourly rate is for the position	Refer to the Funeralcare Incremental Rates document on the colleague hub for the hourly rates per position
My Notification failed to open	Dependent on your computer, some notifications may open in a separate window which will open like it has failed to open. Minimise your current screen and should see your notification behind.



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What if…

Absence and time

I want to view the number of absences the colleague has had	You can see all absences taken by a colleague in their absence record. To view the absence record click My Team – Team Details – The orange arrow next to the colleagues name – Absence – Manage absence record. You'll now see all the absences the colleague has taken including entitlements.
I forgot to close the absence down	Follow the steps in the managing sickness section of this guide to close the absence, ensuring the end date is the last day of the colleagues absence not the day they returned to work. Payroll will offset any incorrect absence pay.
I want to see the colleagues holiday entitlement	You can view the colleague's holiday entitlement by navigating to the absence record . To view the absence record click My Team – Team Details – The orange arrow next to the colleagues name – Absence – Manage absence record. You'll now see the colleague's entitlement.
The wrong number of hours per day are being calculated by the system	This is due to the work schedule being applied across 5 days, you'll need to over write the duration the system is generating, instructions for how to do this can be found in the absence section of this guide.
I'm not sure if I should grant a career break, where can I get some advice?	You can find the policy information for career break on the HR Shared Service intranet page which will inform your decision.
My team member who is also a manager is off, can I approve tasks as the manager +1	To do this click on the notification icon (bell) > More details > My staff tasks. Your team members approvals will now be available for you to approve or reject on their behalf.

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If you can't find the answer to your question refer to the FAQs. If you still need help, contact HR Shared Services on 0330 606 1001 or HRServices@coop.co.uk

What if…

Leavers

I have processed a leave by mistake	Contact HR Shared Services who can reverse the termination.
I have processed a but they have revoked their notice	Contact HR Shared Services who can reverse the termination.
What if the manager has left the business but the new manager is yet to be recruited	The colleagues will report into the managers manager until they're moved to the new manager, to do this see the mass assignment updates section of this guide.
I'm not sure if I colleague should receive PILON	Speak to your manager or HRBP for advice.
I need some advice about PILON, where can I go?	Speak to your manager or HRBP for advice.

If you can't find the answer to your question refer to the FAQs. If you still need help, contact HR Shared Services on 0330 606 1001 or HRServices@coop.co.uk