Managers MyHR Guide

Insurance

Version 16

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Welcome to MyHR

How to get onto MyHR

Type myhr.coop.co.uk into the address bar of any web browser on your computer/smartphone/tablet and log in with your **Username (employee number)** and **Password.**

Toolbar

In the top right corner you will see your toolbar

Homepage

Notifications

Search

Actions – log out

Approvals

Approving changes and requests

1. From your homepage select the **Bell** icon
2. Find the request you are looking for, using **Load More Items** if needed
3. Use the **Approve** or **Reject** buttons to action the approval

Viewing old approvals

1. From your homepage select the **Bell** icon and then **Show All**
2. Select **All** and all approved and rejected will be viewable

Adding an approval vacation rule

1. From your homepage select the **Bell** icon then **Show All**
2. Select **Worklist**
3. Select the **Arrow** next to your name then **Preferences**
4. Tick the **Enable Vacation Period** box
5. Enter a **Start Date** and **End Date** using the calendars
6. Select **Reassign to** and then the **Magnifying glass**
7. Enter the **First Name** and **Last Name** and click **Search**
8. Select the correct person and then **OK**
9. Select **Save**

Examples of changes and requests that you receive on MyHR are:
Overtime
Contractual Changes
One off payments

Manage Direct Reports

Viewing your teams personal details

1. Select **My Team** then **Team Details**
2. Select **Team Contacts** on the left hand side
3. Enter your employee number and select **OK**
4. You will now be able to view your direct reports employee number, name, address and phone number

Adding direct reports to one of your team members

1. Select **My Team** then **Team Details**
2. Find the manager who you would like to add direct reports to and click on the **3 dots at the far right …**
3. Select **Manage Direct Reports**
4. Enter the date you would like to add the direct reports from and select **continue**
5. Enter the colleague's **name** or **person number** and select from the list (repeat until you have all the colleagues to be added as direct reports)
6. Select **Submit** in the top right hand corner

This section is to help you find personal details of your direct reports.
Please note, you are unable to view emergency contacts.

Manage Indirect Reports

Viewing your indirect reports

1. Select **My Team** then **Team Details**
2. Locate the manager of the indirect reports you'd like to view
3. Click on the **blue numbers** on their card to view their direct reports

Mass moving indirect reports from one of your team members to a new manager

1. Select **My Team** then **Team Details**
2. Find the manager whose direct reports you are moving and click on the **3 dots at the far right …**
3. Select **Manage Direct Reports**
4. Enter the date the manager is changing from and select **continue**
5. Select the colleagues you would like to move to the **new manager**
6. Enter the new manager’s **name** or **person number** and select from the list and **continue**

   (if you are adding new direct reports, please follow the steps above, if not move to step 7)
7. Select **Submit** in the top right hand corner

Use this section if you wish to reassign a new manager to your indirect reports.

New starters

External new starters

Prior to your **new starters**' first day, Resourcing will set up their **MyHR** record ready for their **start date**.

Make sure you're arranging any **induction**, passes and IT equipment they need and that they know who they're meeting on their first day. You will also need to request **access** to the systems required.

On Day 1, your new starter will get an email with their **employee number** and a **link** to set a **password** for MyHR. Please **encourage** them to complete the actions below as soon as possible:

- Adding bank details into MyHR to avoid any delay with their first pay.
- Adding emergency contacts in MyHR.
- Completing new starter checklist or send P45 to payroll to ensure tax code is correct for first pay.
- Adding diversity details in MyHR.

Please also remember to add a **work pattern** for the colleague on their **first day** otherwise they **won't be paid correctly**.
(Guidance on how to complete this can be found under the Manage Work Pattern section of the guide).

Managing your new starter's record is really important, as their pay could be affected if any of the key information is missing or incorrect.

Change Manager

Transferring a colleague out of your team to a new manager.

1. Select **My Team** then **Team Details**
2. Find the colleague you are moving and click on the **3 dots at the far right …**
3. Select **Change Manager**
4. If there are any additional actions you need to complete in the list, please select, if not **continue**
5. Enter the date the manager is changing from and select **continue**. (This can be a date in the past).
6. Enter the new manager's **name** or **person number** and select from the list
7. If the colleague has a **team** that need moving to a **new manager**, please follow the steps **below,** if not move to step 8.
8. Select **Submit** in the top right hand corner

Reassigning the colleague's existing direct reports to a new manager

1. Select the colleagues you would like to move to the **new manager**
2. Enter the new manager's **name** or **person number** and select from the list
3. Select **Submit** in the top right hand corner

You can search for the new manager by typing their name or person number in the Name field

Change Position

Transferring a colleague into your team/promoting/demoting someone.

1. Select **My Team** then **Team Details**
2. Find the colleague you are updating and click on the **3 dots at the far right**
3. Select **Change Position**
4. If there are any additional actions you need to complete in the list, please select, if not **continue**
5. Select the date you are changing the position from and **continue**
6. Click in the **Business Unit** field and start **typing** the name of the Business Unit you require and select from the list
7. Click in the **Position** field and start **typing** the position name, department name, cost centre or Hub number and select the required position from the list (do not select positions beginning ZZZ)
8. Check the position details in the pop-up window are correct and select **OK**
9. Check that the **Working Hours** are correct, if not amend and select **continue**
10. Check the salary is correct, if the salary is changing select **Annual salary** or **Hourly salary** and enter the correct **Salary Amount**
11. Select **Submit** in the top right hand corner
12. Please ensure the colleague's work pattern is correct in the **Manage Work Pattern** action, as this will affect their pay.

Each position is unique to its department. So to find the correct position, type the desired department name, cost centre or hub number into the position field. This will only bring up positions in the specified area that you want

Once submitted, your line manager will need to approve this in MyHR

Change Working Hours

Changing a colleague's working hours

1. Select **My Team** then **Team Details**
2. Find the colleague you are updating and click on the **3 dots at the far right**
3. Select **Change Working Hours**
4. If there are any additional actions you need to complete in the list, please select, if not **continue**
5. Select the date you are changing the hours from and **continue**
6. Enter the new **working hours** (this cannot be more than the Standard Working Hours) and **continue**
7. If the salary is changing select **Annual salary** or **Hourly salary** and enter the correct **Salary Amount** (for annual salary, this needs to be the actual salary for their new working hours, not full time equivalent)
8. Select **Submit** in the top right hand corner
9. Please **update** the work pattern to reflect the new working hours using the **Manage Work Pattern** action as this will affect the colleague's **pay**.

Once submitted, your line manager will need to approve this in MyHR

The salary and work schedule must correspond with the working hours, otherwise the colleague's pay will be incorrect.

Manage Work Pattern

Adding a work pattern

1. Select **My Team** then **Team Details**
2. Find the colleague you are updating and click on the **3 dots at the far right…**
3. Select **Manage Work Pattern**
4. Add an **End Date** to the current work pattern (day before the new work pattern is to start)
5. Select **+**
6. Select the **Arrow** below the **Name** field then select **Search**
7. In the **Name** field type the work pattern name in the below format

   Name : **37.5hrs_5dys_0_7.5_7.5_7.5_7.5_7.5_0**

Contract Hours	Number of working days	Sunday hours	Monday hours	Tuesday hours	Wednesday hours	Thursday hours	Friday Hours	Saturday hours
37.5	5	0	7.5	7.5	7.5	7.5	7.5	0

8. Select the **correct** work pattern from the list
9. Using the calendar select the **Start Date** and **End Date**

   (if indefinite leave the end date field blank to default to 31/12/59)
10. In the **Primary** field select **Yes** (all work patterns should say yes)
11. Select **Review** then **Submit**

If the work schedule is not correct, the colleague's pay will be affected.

If the work pattern is changing due to and increase or decrease in working hours, please update the salary accordingly.

Change Salary

1. Select **My Team** then **Team Details**
2. Find the colleague who's salary you wish to change and click on the **3 dots**
3. From the drop-down select **Change Salary**
4. Input the date for the salary change
5. Select a reason for the change and click **Continue**
6. Check the **Salary Basis** is correct (Annual Salary/Hourly Rate)
7. Enter the new **Salary Amount** (For colleagues on annual salary basis, this should be the actual salary based on actual working hours, not the full time equivalent)
8. Select **Continue** then **Submit**
9. Select **Yes** then **OK**

Your line manager will now need to approve this

Salary calculator
If you only have the full time equivalent salary for a part time colleague then select the calculator icon to pro rata the salary down to the colleagues working hours.

Allowances

Entering an allowance

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to update and click on the **3 dots**
3. Select **Manage Compensation**
4. Click **+**
5. In the **Plan** field select **Allowance** from the drop down
6. In the **Option** field, select **First Aid R/Local weighting R,** then **OK**
7. Enter an allowance **amount** then OK
8. Select **Continue** to enter comments, then select **Submit**

Deleting an allowance

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to update and click on the **3 dots**
3. From the drop-down select **Manage Compensation**
4. Find the allowance under **Other Compensation** and then select **X** for that line
5. Select **Continue** then **Submit**

This section refers to additional payments that may be recurring over several pay periods.

Additional Payments

This section is for one off additional payments like Stepping up allowance.

Entering the payment

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to update and click on the **3 dots**
3. Select **Manage Compensation**
4. Click **+**
5. In the **Plan** field select **Additional Payments or Stepping up allowance** from the drop down
6. In the **Option** field, select the relevant premium or commission payment, then **OK**
7. Enter an allowance **amount** then OK
8. Select **Continue** to enter comments, then select **Submit**

Deleting an allowance

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to update and click on the **3 dots**
3. From the drop-down select **Manage Compensation**
4. Find the allowance under **Other Compensation** and then select **X** for that line
5. Select **Continue** then **Submit**

Stepping Up is about performing additional tasks for a short period, so it only requires a one-off payment. If you do not enter the payment in MYHR before self service cut off date, it will not be captured by Payroll. Please process the payment again before the next Payroll cut off date.

Secondments

New Secondments

As a manager you need to complete the following steps:

1. Raise a Requisition in MyHR using one of the following options:

- Secondment - Needs help in recruiting
- Secondment - Colleague/s lined up for the role

2. Complete interviews if needed
3. Agree Secondment details with colleague

Please include the name of the colleague being seconded, the amount of secondment allowance to be paid, and the start/end date of secondment in the requisition. Resourcing will then inform the Onboarding team for them to action as follows:

- Process the secondment in MyHR (including secondment allowance)
- Send confirmation of secondment details to the manager and colleague

As the line manager, you will get a reminder one month before the end of the secondment advising you of the options/next steps.

All secondments are set up and managed by HR Services/Hire to Retire Team

Changes to Existing Secondment

If you need to Change the amount of Allowance paid during Secondment:

To change the amount of the secondment allowance, you will need to email screening@coop.co.uk advising of the new amount to be paid and the effective date of the change

If you need to Change the manager whilst a Colleague is on secondment:

To change the manager whilst a colleague is on secondment, you need to email screening@coop.co.uk advising of the new manager and the effective date of the change.

If you need to shorten a Colleague's Secondment:

To shorten a Colleague's secondment, you need to email screening@coop.co.uk advising of the date the secondment needs to end.

If you need to extend a Colleague's Secondment or make the position permanent:

If you need to extend a secondment or make the position permanent, you will need to raise a new requisition in MyRecruit using one of the following options:

- Secondment - Extend an existing Secondment
- Secondment - Convert the existing seconded colleague/s to a permanent position

This will then be actioned by the Onboarding team and a confirmation email will be sent to you.

If the colleague leaves the business whilst on secondment:

- To process a Colleague as a Leaver whilst on secondment, you need to email screening@coop.co.uk advising

of the leave date.

The Onboarding team will then remove the future dated changes on the colleague's record and pass back to you to process the colleague as a Leaver on MyHR.

If you have any other queries around the Secondment process, please contact HR Shared Services on 0330 606 1001.

Entering Team Sickness

Entering a Team Member's Sickness

1. Select **My Team** then **Team Details**
2. Find the colleague who you wish to add an absence for and select the **3 dots…**
3. From the drop-down select **Record Team Absence**
4. From the **Type** drop down, select **Absence Type** and **Absence Reason** where applicable
5. Select the **Start Date** and **End Date** of the absence, select **Open Ended** if you do not know the colleagues return date
6. (To change the duration to part day, select **Edit Entries** then select the pencil icon. Change the **Absence Duration** then select **OK**)
7. Select **Submit**

Adding an end date to an open ended absence

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to update click on the **3 dots**
3. Select **View Team Absence**
4. From the list of absences, select the absence in progress which you would like to end
5. Click on the pencil icon and untick the **Open ended** box and enter the **End Date** for the absence
6. Select **Submit**

Remember the colleagues next pay will reflect this sickness depending on:

1. When this sickness was logged on MYHR.

2. The amount sickness pay entitlement available

Entering Team Holiday (non customer facing colleagues only*)

Entering a Team Member's Holiday

1. Select **My Team** then **Team Details**
2. Find the colleague who you wish to add an absence for and select the **3 dots…**
3. From the drop-down select **Record Team Absence**
4. From the **Type** drop down, select **Absence Type** and **Absence Reason** where applicable
5. Select the **Start Date** and **End Date** of the absence
6. (To change the duration to part day, select **Edit Entries** then select the pencil icon. Change the **Absence Duration** then select **OK**)
7. Select **Submit**

*Customer Facing colleagues will continue to manage holiday via the resource planning team.

Entering Other Team Absences

Entering an Absence (Paid Leave/Unpaid Leave)

1. Select **My Team** then **Team Details**
2. Find the colleague who you wish to add an absence for and select the **3 dots…**
3. From the drop-down select **Record Team Absence**
4. From the **Type** drop down, select **Absence Type** and **Absence Reason** where applicable
5. Select the **Start Date** and **End Date** of the absence (Select **Open Ended** if you do not know the colleagues return date)
6. (To change the duration to part day, select **Edit Entries** then select the pencil icon. Change the **Absence Duration** then select **OK**)
7. Select **Submit**

Adding an end date to an open ended absence

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to update click on the **3 dots**
3. Select **View Team Absence**
4. From the list of absences, select the absence in progress which you would like to end
5. Click on the pencil icon and untick the **Open ended** box and enter the **End Date** for the absence
6. Select **Submit**

Absences logged as Paid leave will not show on the next payslip. They are part of the basic salary.

Absences logged as Unpaid leave will reflect on the next payslip.

Viewing Team Absence and Holiday Entitlement

Viewing Team Absences

1. Select **My Team** then Team Details
2. Find the colleague whose absence you would like to view and click on the **3 dots…**
3. Select **View Team Absences**

You can sort absences by date range or by absence type

Viewing Entitlement

1. Select **My Team** then Team Details
2. Find the colleague whose entitlement you would like to view and click on the **3 dots…**
3. From the drop-down select **View Team Holiday Entitlement**
4. Select the word **Holiday**

- **Balance** – remaining entitlement
- **Accruals** – full years entitlement
- **Absences** – number of hours holiday taken/requested

Please Note:

You can view Holiday entitlement for your team on MYHR, but not sickness entitlement.

For sickness entitlement contact HR Services on 0330 606 1001.

Paternity leave

Entering paternity leave

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to add paternity leave for and click on the **3 dots …**
3. From the drop-down select **Record Team Absence**
4. Select the absence type - **Paternity Birth or Paternity Adoption** option
5. Enter the Expected Date of birth and the **Actual Date of Child Birth** using the calendar
6. Select the **Start** and **End** date of the absence using the calendars
7. Select **Submit**

Please Note:

Once entered, HR Services will work out what pay they're entitled to and email/send a letter to the colleague confirming their entitlements.

Career break

Entering a career break

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to add a career break for and click on the **3 dots …**
3. From the drop-down select **Record Team Absence**
4. Select **the absence type – Career Break**
5. Enter the **Start Date** and **End Date** of the absence.
6. From the drop-down select an **Absence Reason**
7. Select **Submit**

Please Note:

Once entered Business Services Team will email/send a letter to the colleague confirming the arrangements.

PILON

PILON is a payment to a colleague who is being terminated by the Co-op but not required to work their notice period. PILON entitlement is specified in colleagues' terms & conditions, so this information can be obtained in the contract or by contacting ER Services. You will need to know the colleague's **length of service**

Working out a colleagues length of service

1. Select **My Team** then **Team Details**
2. Find the colleague and select their name
3. You will see the **Years Worked in the Company**

To Add PILON

1. Select **My Team** then **Team Details**
2. Find the colleague who you would like to add the payment to and click on the **3 dots…**
3. Select **Manage Compensation**
4. Click **+ Add**
5. In the **Plan** drop down select **PILON**
6. In the **Option** field, select **PILON Tax and NI NR**
7. Enter the number of weeks required
8. Select **Continue** to enter comments, then select **Submit**

Please Note:

If you miss the cut off for MyHR self service, this payment will never pass to Payroll and therefore it will not be paid.

Leavers

Processing a leaver

If you need to enter a PILON payment, do this before you make them a leaver. Make Sure to complete "End of Termination" form on the intranet, so that the any outstanding holidays are paid.

1. Select **My Team** then **Team Details**
2. Find the colleague you are transferring and click on the **3 dots …**
3. Select **Terminate**
4. In the **Reason** field select the appropriate option
5. Using the calendars select the **Notification Date** and **Termination Date**
6. If leave date is in the future, select **Revoke User Access – After Termination**
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 make them a leaver, if not skip to step 13**
9. Click on the grey arrow next to **Reassign Line Reports**
10. Select the **Arrow** next to **Proposed Manager** then select **Search**
11. Enter the new manager's name (Surname, First name) then select **Search**
12. Select the correct manager and then **OK**
13. Click on **Review** then **Submit**
14. Select **Yes**

Please Note:

Once terminated, the colleague will receive all outstanding payments on the next eligible payday. Ensure that all holidays taken match MyHR records, to avoid over/underpayment.