Managers

Your Guide to MyHR

Get Started ❯

Welcome to MyHR

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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?

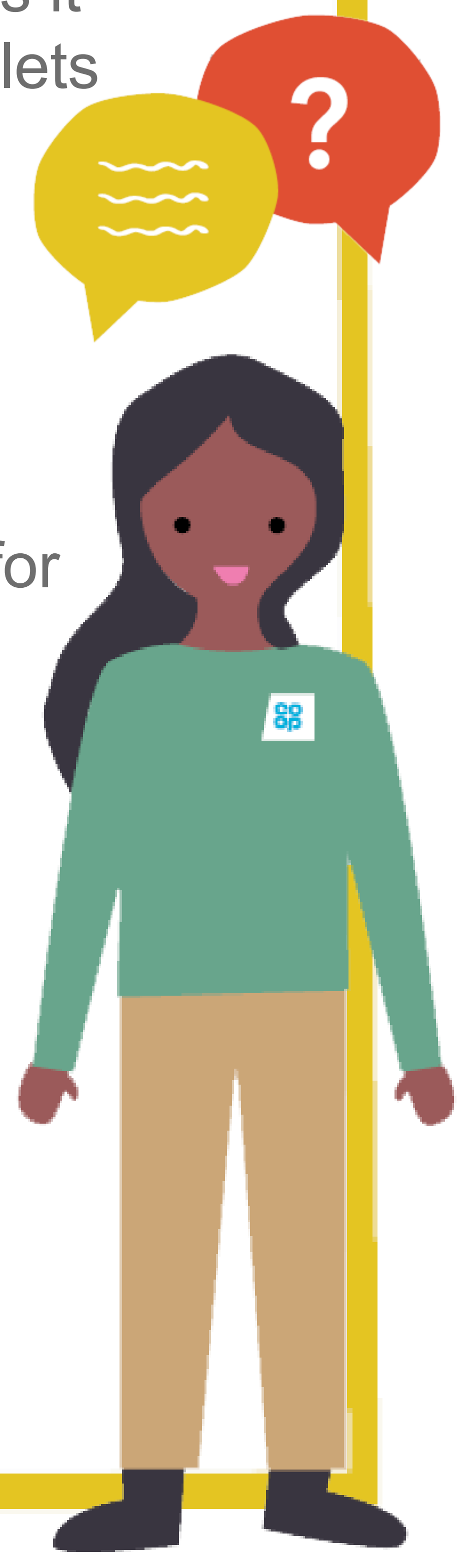
It means that you will be able to view and manage your own and your teams HR data online. It will make tasks like transferring colleagues, approving leave requests and processing new starters and leavers easier than ever!

And 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 will also find some 'What if's' 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):

http://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 will see on the MyHR homepage

About Me

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

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

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

My Team

My Team is where you will manage your colleagues employment information i.e. Transfers, Location, Salary Changes, Work Hours etc.

Tools

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

You will 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 are only a click away!

To do this navigate 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, CSFMS, The Co-operative Pensioner**

Division – **Division** is the first level that starts to divide down the separate areas of our business, examples of divisions are **Retail Division, Consumer Services, CSFMS, Corporate Functions and General Insurance**

Sub Division – **Sub Division** breaks the Divisions down further, for example General Insurance break downs into options like **GI – Operations, GI – Distribution and Marketing**

Business Unit – A **Business Unit** is a unit of an Enterprise that performs one or many business functions. GI – Distribution and Marketing breakdown to options like **GI – Sales and Service, GI – Claims**

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

MyHR Terminology

There are some phrases that are hardwired in to 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

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

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

1. From your homepage select **About Me**, and then **My Account**
2. Scroll down the page until you come to the **Rule and Approvals Delegated to Others** section
3. Click on the **Approvals Delegated** to other tab
4. Click on the **+** icon to add an approver
5. Enter a **Role Name** in to the field (i.e absence approval)
6. Use the calendar icon to select **Start** and **End Date**
7. Select a **Category** from the drop down

Manager - this will give the colleague access to approve things like promotions and transfers

Compensation - this will give the colleague access to approve things like allowances

Global Absence Approval - this will give the colleague access to approve absence requests including holidays

WorkForce Structures (Position & Job) – this access is only available for HR users

Time and Labour - this will give the colleague access to approve overtime

Talent - This will give the colleague access to goals and performance reviews

8. Click on the arrow in the **Delegate to** field, click **search** and type in the username (employee number) of the colleague you would like to delegate approval to double click on the correct name and click **Ok.**
9. Click **Ok**
10. Repeat this process if you'd like to delegate more than one category to a colleague
11. Scroll back to the top of the page and click **Save**

Revoking Approval

1. Follow **steps 1-3** to navigate to the **Approvals Delegated** tab
2. Click on the approval line you would like to revoke to highlight it, click on the **X** icon
3. A warning will appear, click **Yes**
4. Scroll to the top of the page and click **Save**

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What if

I forget to delegate approval before I take annual leave?

External New Starters

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, 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 share their information and transfer them to the new manager.

To do this follow the steps below:

Sharing the colleagues information

1. From the homepage select **My Team,** then **Team Details**
2. You will now see all colleagues who report in to you, identify the leaver and click on the **orange arrow icon** to the right of their name
3. From the drop down select **Personal and Employment** and select **Information Sharing**
4. Click on **Share Information**
5. Click on the arrow in the **recipient field,** select **Search**
6. Enter the name of the new manager (surname, first name) in to the **Name** field and click **Search.** From the list displayed, select the correct name and click **Ok**.
7. Select **Next** and then **Submit**

Change of manager

1. From the homepage select **My Team,** then **Team Details**
2. You will now see all colleagues who report in to you, identify the colleague transferring out 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 Manager**
4. Using the calendar icon select the **Change Manager Date** (the date you would 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) in to the **Name** field and click **Search**
8. From the list of managers displayed, select the correct one and click **Ok**
9. Select **Review** to double check the changes you are about to make, if they are correct, 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?

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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.

What if…

I can't see my internal new starter?

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Transfers In and Promotions

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

If your colleague sits within customer facing – sales and service they will also be transferred to you by the Academy Manager at the end of their Academy training.

You now need to update their employment information. You can also use these steps to promote a colleague.

To do this follow the steps below:

1. From the homepage select **My Team,** then **Team Details**
2. You will now see all colleagues who report in to 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. Use the drop down to select a **Transfer Reason.** For promotions select Career Progression
5. To find the colleagues new **Business Unit** click on the search arrow and select **Search,** type in the business unit you are looking for and select **Search**, select the correct unit from the list and select **Ok**
6. Repeat step 6 for the **Position**, Grade and Location will be auto populated based on the selected position. **It important that you select the correct position for your department**
7. Enter the **Working Hours** and select if they are a **Manager**
8. The manager section should be correct, when you have finished select **Next**
9. Choose **Propose New Salary** and enter the new salary in to the **New Salary** field

Salary Calculator – For part time salaried colleagues - You must click on the calculator icon to bring up the salary calculator, type in the full time equivalent salary in to the annualized salary field, the calculator will then work out the new salary (pro rated) based on the hours of work you entered on the previous page

10. You can also allocate allowances by clicking on **Award Compensation** (see allowances section for step by step guidance)
11. Select **Next**, and then **Next** and **Submit**

Tips, tricks and more

It is extremely important that you check and update the work schedule for your new colleague as this is what drives their pay. To do this see the Managing Work Schedule section of this guide or **click here.**

If a colleague has moved from a **premium pay** area to non premium pay area you need to remove the allowance. To do this see the Managing Allowances 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?

My colleague has a -2 next to their employee number?

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Change Location

If a colleagues' location of work changes, you'll need to update this in MyHR.

To do this, follow the steps below in Transfers in page. When you update the position it will automatically update the location.

If you need to then you can manually change this at this point:

1. Navigate to the **location field**, click on the **arrow icon** to the right of the field and select **Search**
2. Use the field to search for the new location, select the location from the list generated and click **Ok**

Tips, tricks and more

The location refers to the geographic location of the role i.e. a store, branch, depot or floor of an office building/floor.

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 can't find the location I am looking for?

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Change Working Hours

When new, transferred and existing colleagues change their working hours you need to update this in MyHR . At the same time you can update the salary to reflect the hours change

To do this, follow the steps below:

1. From the homepage select **My Team,** then **Team Details**
2. You will now see all colleagues who report in to 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
5. Navigate to the **Working Hours details** section
6. Enter the new number of hours in the **Working Hours** field
7. Click **Next**

You can now amend the actual salary to reflect the new working hours. The system will automatically amend the salary, you need to overwrite this to reflect the actual salary amount. Choose Propose New Salary and then...

8. Enter the **new salary (the actual salary and not FTE)** or **rate per hour**

Next to the salary adjustment field you will see a calculator icon, you can click on this and enter the annualised salary (full time equivalent), the system will then calculate the actual salary for part time colleagues for you.

9. Click **Next**
10. Click **Submit**
11. This has now been sent to your manager for approval

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, or **click here.**

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.

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 have updated the working hours and not the work schedule?

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Managing Work Schedules

If a transferred or existing colleague changes their work schedule, you need to update this in MyHR. You will 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 will now see all colleagues who report in to 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 work schedule combination that matches the colleagues work pattern*, start by typing the colleagues contracted hours (ie. 22hrs) in to the name field and click **Search**
7. You will now see a combination of schedules, for example 22hrs_5day_0_4_4_4_4_4_0. To the right is a table explaining what this combination means

Contact Hours	No of working days	Sun hrs	Mon hrs	Tues hrs	Wed hrs	Thurs hrs	Fri hrs	Sat hrs
22	5	0	4	4	4	4	4	0

8. 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 of all work schedules
11. Click **Review**
12. Click **Submit**
13. 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** – **Customer facing colleagues schedule needs to reflect their contracted hours spread over 7 days i.e. 35hrs_7days_5_5_5_5_5_5_5.**

What if

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

My colleagues are customer facing what schedule would I enter?

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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 will now see all colleagues who report in to 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 will 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 (pro rated) for part time colleagues.

1. Click on the **calculator icon**
2. Add the full time salary in to the **Annualised Salary** field and select **Ok**
3. The system will then add in the colleague's actual salary based on the working hours
4. If you amend the hours of work the actual salary will be automatically updated

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?

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Entering Allowances

Colleagues will not 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** 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, call out, premium) allowance
8. You will now be asked for the **Value** this could be amount, salary percentage or weekly allowance dependent on the plan you have 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 will see them listed on this screen
3. To delete an allowance click **X** on the relevant line

Tips, tricks and more

You can enter allowances such as;

- Job aid payment
- Standby allowance
- Call outs
- Local weighting
- Premium allowances

What if

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

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Approving Contractual Changes

Manager of Mangers

When your direct reports have made any contractual changes to one of their team members you will 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. Click on the **Human Capital Management** tab
4. Select the notification that requires your approval. The notification will read something along the lines of **'Tasks require your attention'**
5. Check the details the colleague has submitted and click either **Approve** or **Reject.**

Examples of some contractual changes you will 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 would 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?

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Sickness
Holidays
Paid/Unpaid Leave
Career Break
Paternity
Overtime Entry
Approvals

Managing Sickness

When a colleague notifies you of their sickness absence you need record it in MyHR.

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 will now see all colleagues who report into you, identify the absent colleague and click on the **orange arrow** to the right of their name
3. From the drop down select **Absence** and then **Manage Absence Records**
4. Use the **+** to add a new absence record
5. From the drop down select the **Absence Type,** in this case **Sickness**
6. Use the calendar icon to enter the **start date** and **end date** of the absence

Note: For short term absence, enter the absence when the colleague has returned, after you have completed the back to work interview. For long term absences enter the start and end date on the fit note.

Important - If it's a customer facing colleague you may need to overwrite the duration of the absence as the working schedule does not accurately reflect the hours your colleague works on any one day. To do this select **Advanced Mode** and amend the **Duration** of each days absence

7. From the drop down select an **Absence Reason** (i.e. flu)
8. Select **Submit**

Amending Long Term Absence

If a colleague receives another fit you need to open the existing absence in MyHR and amend the end date.

1. Follow **steps 1 – 3** to the left to navigate to the absence records
2. Find the relevant absence and click on the date to open the record
3. Use the calendar to enter the new **End Date** which is shown on the fit note
4. 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 will see that the status has now changed to withdrawn

What if

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

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Holiday entry on behalf of colleagues (non customer facing only)

You can enter holidays on behalf of your colleague if they aren't able to do this themselves, you can also update and delete holidays submitted by colleagues.

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

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You will now see all colleagues who report in to 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 **+** 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
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 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 will see that the status has now changed to withdrawn

Tips, tricks and more

Customer facing colleagues will continue to manage holiday via the Resource Planning Team.

What if

I want to see the colleagues holiday entitlement?

My team are customer facing colleague how do they record holidays?

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Paid/Unpaid entry on behalf of colleagues

You can enter paid/unpaid leave on behalf of your colleague if they aren't able to do this themselves, you can also update and delete leave submitted by colleagues. As a manager you would also use the steps below to record AWOL (absent without leave).

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

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You will now see all colleagues who report in to 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 **+** 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 it's a customer facing colleague you may need to overwrite the duration of the absence as the working schedule does not accurately reflect the hours your colleague works on any one day, 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 will see that the status has now changed to withdrawn

Tips, tricks and more

Customer facing colleagues enter paid/unpaid leave in to MyHR.

What if

My team are customer facing colleagues how do they record Paid/unpaid leave?

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

Continue

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Career Break entry on behalf of colleagues

You can enter career breaks on behalf of your colleague if they aren't able to do this themselves, you can also update and delete requests submitted by colleagues.

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

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You will now see all colleagues who report in to 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 **+** 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 will see that the status has now changed to withdrawn

Tips, tricks and more

Customer facing colleagues enter career breaks into MyHR.

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?

Continue ❯

Paternity entry on behalf of colleagues

You can enter Paternity Leave on behalf of your colleague if they aren't able to do this themselves, you can also update and delete requests submitted by colleagues.

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

1. From the homepage select **My Team**
2. From the dropdown select **Team Details**
3. You will now see all colleagues who report in to 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 **+** 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 will see that the status has now changed to withdrawn

Tips, tricks and more

Customer facing colleagues enter paternity leave into MyHR.

What if

My team are customer facing colleagues how do they record Paternity Leave?

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

Continue ❯

Overtime Entry (non customer facing only)

You can enter overtime in to the system for your colleagues using the allowance section of the system.

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** 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. additional payments)
7. From the drop down select the **Option** (i.e. plain time, double time)
8. You will now be asked for the **Number of Hours**
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 will see them listed on this page
3. To delete an allowance click **X** on the relevant line

Tips, tricks and more

Customer facing colleagues will continue to manage overtime via the Resource Planning Team.

Continue ❯

What if

My team are customer facing colleagues, how is overtime entered?

Sickness
Holidays
Paid/Unpaid Leave
Career Break
Paternity
Overtime Entry
Approvals

Approving Absence and Overtime

Absence Approvals

When your team members have entered their absence in to MyHR, you need to authorise it.

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

1. From the homepage select **Tools**
2. From the dropdown select **Worklist**
3. Select the notification that requires approval. The notification will read something along these line of **'Approval of Absence request for 'Colleague Name' from 2016-08-28 to 2016-09-03'**
4. Check the details the colleague has submitted and click either **Approve** or **Reject**

You can add, amend and delete absences on behalf of a colleague, to do this see the **Absence Section** of this guide.

Overtime approvals (non customer facing only)

When your team members have entered their overtime in to MyHR you need to approve them.

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

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

Tips, tricks and more

You can also complete this task using the **bell notifications icon** from the taskbar.

Continue ❯

What if

My team are customer facing colleagues how do I approve absence and overtime?

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

Processing a Leaver

If a colleague has given you their notice or you have 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 will now see all colleagues who report in to 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 are happy with the details
11. Click **Save** and **Submit**
12. You will 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.

If the new starter is in customer facing – sales and service and fails to start the Academy Manger will process them as a leave in MyHR.

What if

I have processed a leaver by mistake?

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

I'm getting an error message when I am trying to process a leaver?

Continue ❯

Leaver Checklist

When you have 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 will now see all colleagues who report in to you, identify the leaver and click on the **Orange Icon** to the right of their name
3. From the drop down select **Manage Allocated Checklists**
4. Click on the name of the **offboarding checklist** to open the checklist details. Select **Edit** at the top of the page
5. You will see that there are a list of tasks that you need to complete at the bottom of the page, click on the **Pencil** 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 have completed the task. Use the calendar icon to enter **the Action Start Date** and **End Date** that you complete this task
7. When you have finished, select **Ok**
8. Repeat this process until you have completed all of the tasks in the Offboarding checklist, then click **Submit**
9. Click **Yes**
10. Click **Ok**

What if

Continue ❯

Mass Assignment Updates

The manager +1 can mass move colleagues to a new manager

Follow the steps below to do this:

1. From the homepage select **My Team**, and then **Team Details**
2. Click on **Orange 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 would like this change to take effect from
4. In the **Manage Direct Report Reason** field select the drop down **Change to Supervisor**
5. You will now see a list of direct reports below, in the field next to the colleague name you will see a proposed manager has been entered, if this is correct select **Save** and then **Submit** to make the changes. You can also use the check box next to the colleagues 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 in to 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 do not 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 are processing them as a leaver, see the leaver page in this guide

What if

Continue ❯

Processing a leaver

Leaver Checklist

Mass Updates

PILON

PILON (Pay in Lieu of Notice)

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

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

A colleague receives a week's pay for every week they are 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 in to MyHR

Below Grade E

- If a colleague is in their probationary period, 1 weeks pay is entered in to 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 would enter 6 weeks pay in to MyHR)

Before you can work out the colleagues entitlement you will 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 will 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 in to 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** 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 drop down select from the option PILON Tax and NI NR.
8. You will now be asked for the **Number of weeks** entitlement
9. Select **Ok**
10. Select **Continue**
11. Select **Submit**

Continue ❯

What if

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

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

Viewing Dashboards

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.

Continue

What if

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 in to 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 will now see their employment information including job. If you are still unsure what to select speak to your manager.

Continue ❯

If you can't find the answer to your question see the FAQ document on colleague hub. If you still need help, contact HR Shared Services on 0330 606 1001

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 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 will now see their employment information.
My colleague has a -2 next to their employee number	This mean that they have a dual assignment .This is usually because they are on secondment or that they work two different roles within the Co-op.
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 team are customer facing what schedule should I enter	For a customer facing colleague you need to enter a work schedule that spreads their contacted hours over 7days of the week, for example the work schedule for a 35hr colleague would be 35hrs_7days_5_5_5_5_5_5_5.
What if I want to update a colleagues salary outside of a review	You will 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

Continue ❯

If you can't find the answer to your question see the FAQ document on colleague hub. If you still need help, contact HR Shared Services on 0330 606 1001

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 will now see all the absences the colleague has taken including entitlements.
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 will now see the colleague's entitlement. To see remaining balance
My team is customer facing colleagues how do they record sickness and holidays	Colleagues will continue to request and record holidays via the Resource Planning Team, who download holiday information from Avaya and provide it to HR Shared Services for upload in to MyHR. Sickness still needs to be recorded in MyHR
My team is customer facing colleagues how do they record paid/unpaid leave /career break and paternity	Customer facing colleagues will record paid/unpaid leave, career break and paternity in MyHR, you can also do this on their behalf.
The wrong number of hours per day are being calculated by the system	Non customer facing colleagues – The absence hours are pulled from the work schedule, update this to reflect the colleagues working week to correct the number of hours calculated for the absence. Customer facing – This is due to the work schedule being applied across 7 days, you will 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 are customer facing colleagues how is overtime entered	Customer facing colleague continues to manage overtime via the Resource Planning Team.
My team are customer facing colleagues how do I approve absence and overtime	You will approve career breaks, paid/unpaid leave and paternity in MyHR. You will enter sickness into MyHR on your colleagues behalf this therefore does not need to be approved.. Holidays and overtime are managed and approved via the Resource Planning Team outside of MyHR.
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.

Continue ❯

If you can't find the answer to your question see the FAQ document on colleague hub. If you still need help, contact HR Shared Services on 0330 606 1001

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.
I'm getting an error message when I am trying to process a leaver	Contact HR Shared Services to remove the future dated changes before proceeding.
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 are 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 see the FAQ document on colleague hub. If you still need help, contact HR Shared Services on 0330 606 1001