Employee Self Service User Guide

Contents

1. Overview

1.1. Purpose of the Guide

The purpose of this document is to provide detailed guidance on Employee Self Service in CoreHR, this includes:

- Employee Dashboard which allows employees to carry out certain tasks such as leave requests, timesheet entries and expense claim submissions.
- Personal Profile which allows employees to access and amend some of their personal details.

2. System Access

2.1. Logging In

CoreHR can be accessed via any internet browser, however, we would suggest using Google Chrome.

CoreHR can be accessed using the following link

https://my.corehr.com/pls/coreportal_usngp

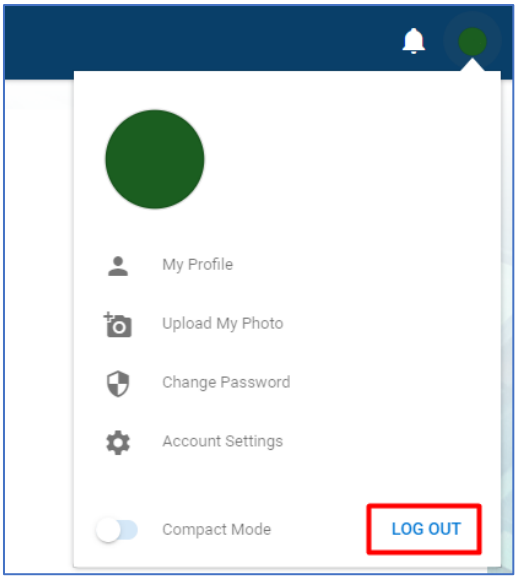
A username and password will be required to enable you to log into CoreHR, these will be provided to you by the United Synagogue HR team.

To log in:

- Enter your username
- Enter your password
- Click on the Sign In button

2.2. Logging Out

To log out of CoreHR, click on your initials in the top right-hand corner of the screen and select Log Out



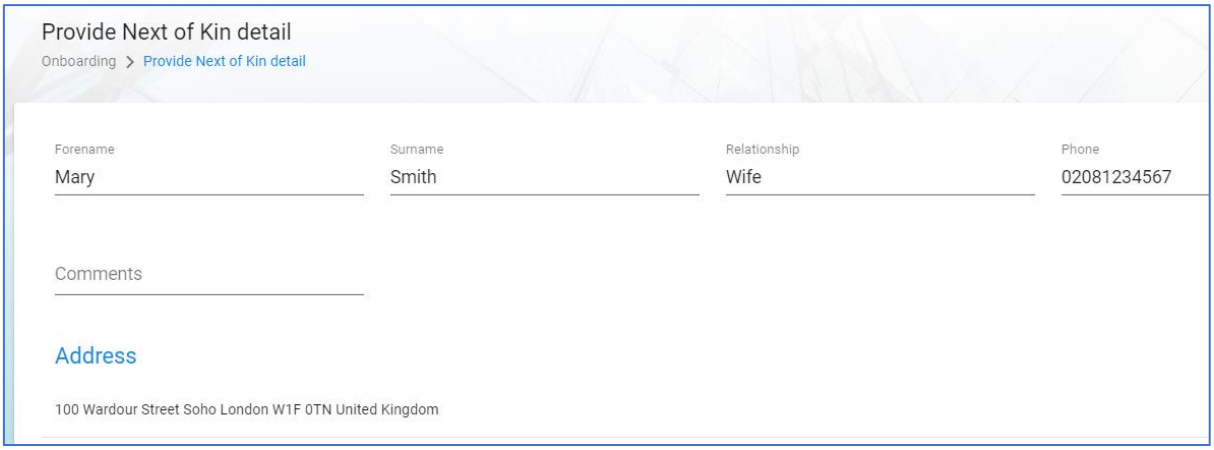
3. Onboarding

3.1. Onboarding Checklist

The first time you log in, you will be taken directly to an onboarding screen. This onboarding screen will appear each time you login, until all the checklist item statuses show as '**Completed**'.

To complete a checklist item:

- Click on the ⋮ button to the right of the item and select Start
- The relevant items Detail screen will open
- Review and update all fields as required
- Click on the Save button



When all checklist items are completed, you will be asked to confirm that all information you have entered is true and accurate then click on the '**Complete Onboarding'** button.

The Onboarding screen will no longer be displayed when you log in and you will be taken directly into the Employee Dashboard.

4. Employee Dashboard

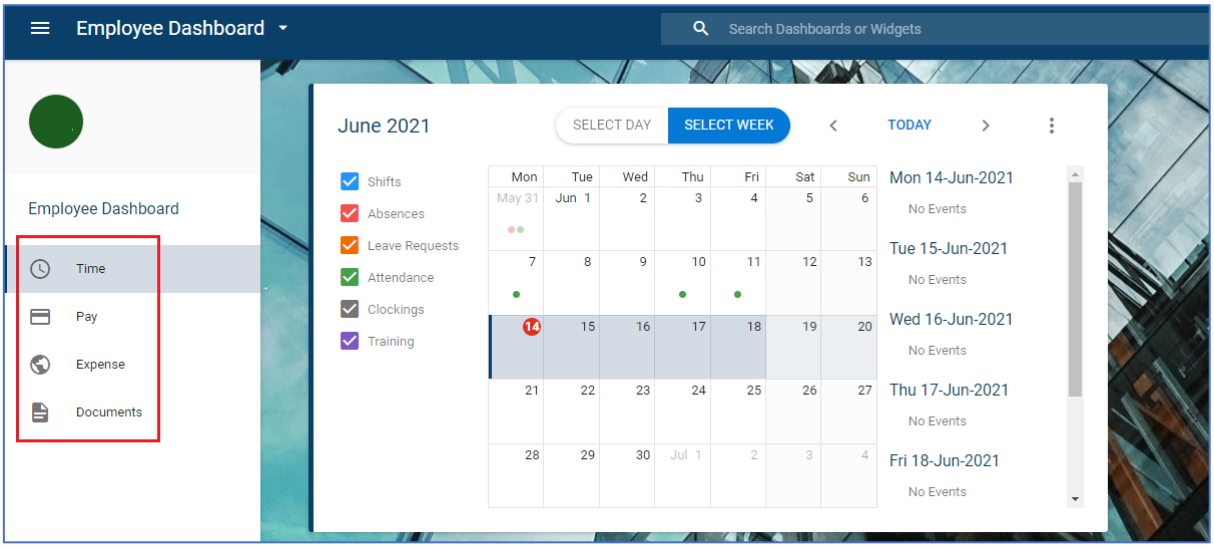
4.1. Overview

Once you have logged into CoreHR, you will be taken to the Employee Dashboard.

If you have not completed the onboarding checklist, the Employee Dashboard can be accessed by clicking '**Onboarding**' and selecting '**Employee Dashboard'** from the drop-down menu.

The employee dashboard is split into 4 individual areas, these are:

- Time
- Pay
- Expense – NEW!
- Documents

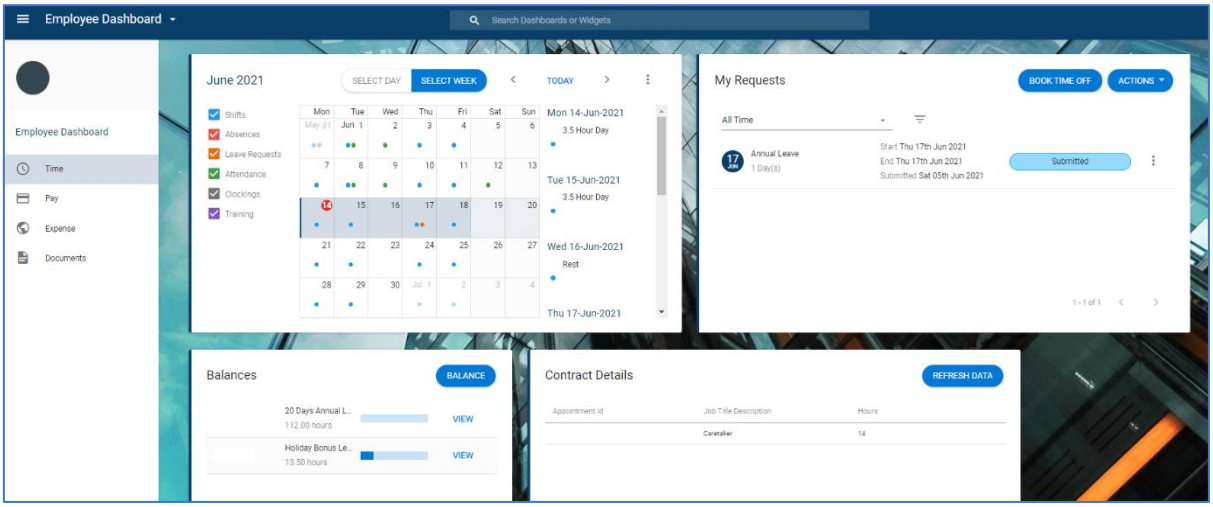


5. Time

5.1. Overview

The Time area is split into 4 sections, these are:

- Calendar
- My Requests
- Balances – please note: Balances relate to Annual leave entitlement(s)
- Contract Details



5.2. Calendar

The Calendar allows you to view your work schedule and absences.

Please note, the Calendar includes a tick box for the following additional features which are not currently in use:

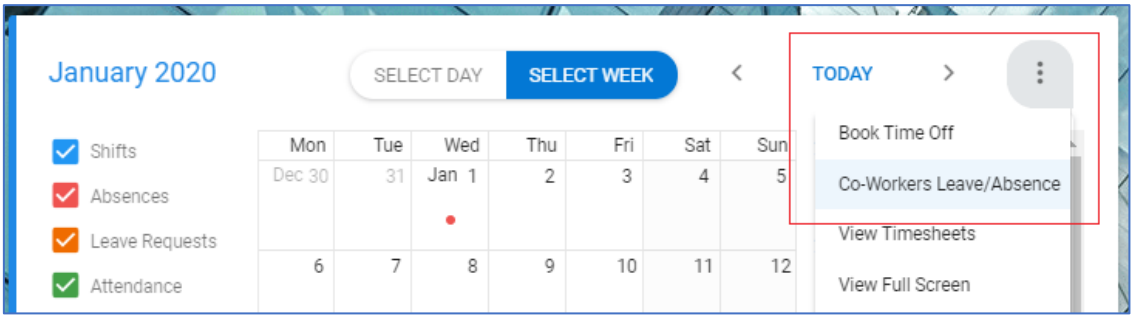
- Attendance
- Clockings
- Training

Viewing Co-Workers Leave/Absence

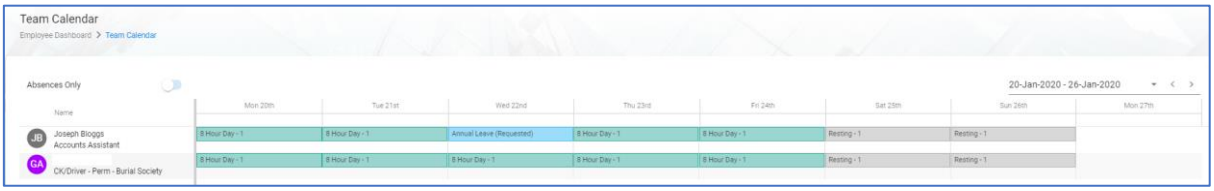
The Team Calendar allows you to view the working schedules within your team and leave.

To view the Team Calendar:

- Click on the ⋮ button on the Calendar section and select Co-Workers Leave/Absence

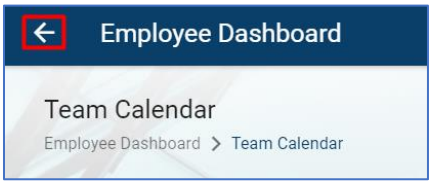


- The Team Calendar will now open and you are able to view when your co-workers are scheduled to work



Note
You can view different calendar periods by using the < > icons located in the top right-hand corner of the Team Calendar

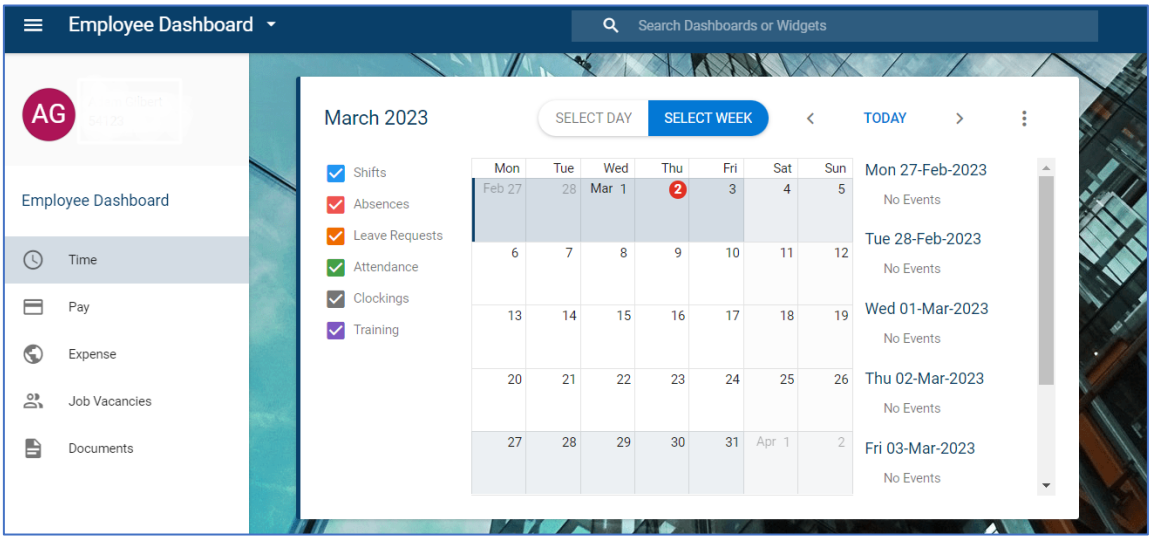
- Click on the back button to navigate to previous page(s)



5.3. Submitting Timesheets

Timesheets are accessed through the Calendar section:

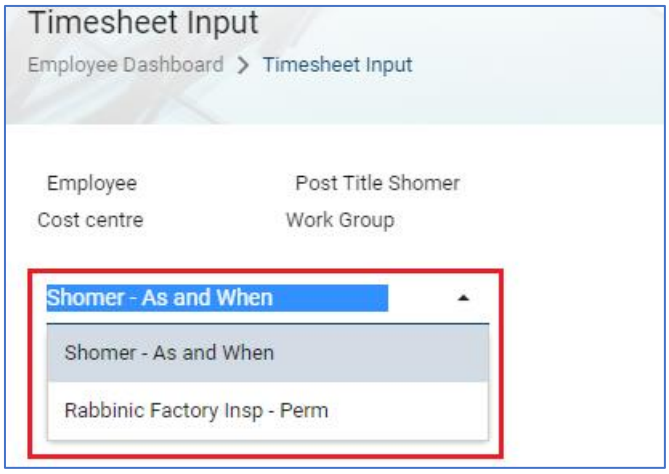
- Click on the ⋮ button on the Calendar section and select View Timesheets:



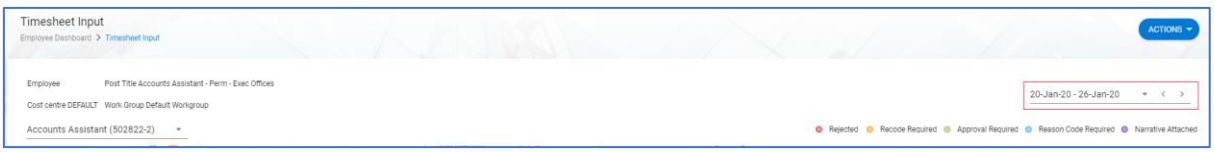
The Timesheet Input Screen will appear.

Note
If you have multiple roles within the organisation, you must ensure you are selecting the correct role before entering timesheet entries. Review the Contract Details section to confirm the Appointment ID for your relevant role, if required.

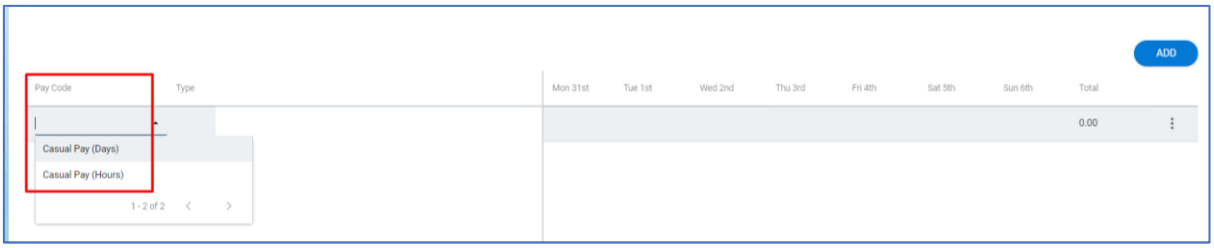
This step is only applicable if you have multiple roles:
Select the correct role to enter a timesheet entry against using the dropdown listing:



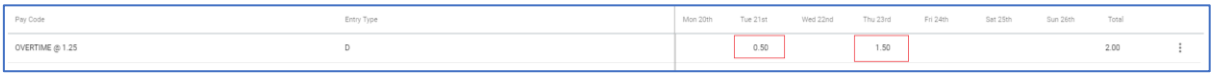
- Select the required time period using the < > icons:



- Click on the Add button
- Select the correct Pay Code from the dropdown listing:



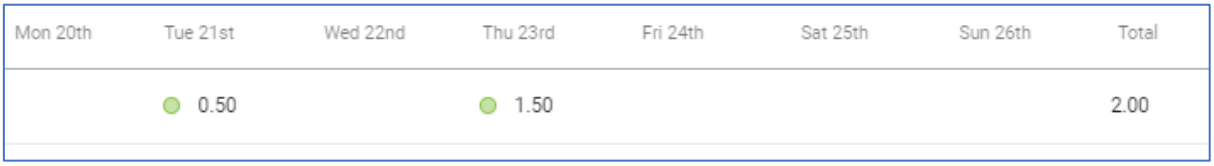
- Against each relevant day, enter the number of units (hours in most cases, unless the Pay Code states otherwise e.g. value)



- Click Save

Note
Clicking on the Save button at this point will submit all timesheet entries for approval. It is possible to edit the entries and submit again by overwriting any figure in the timesheet and pressing on the Save button again.

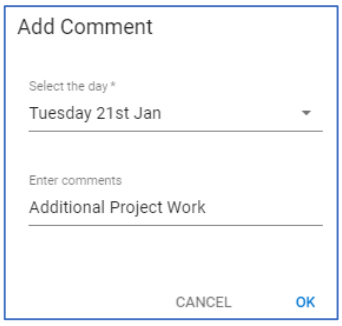
Once you have saved the entry and submitted the timesheet for approval, you will notice the entries will become colour-coded – there is a key that details each colour and the stage it represents:



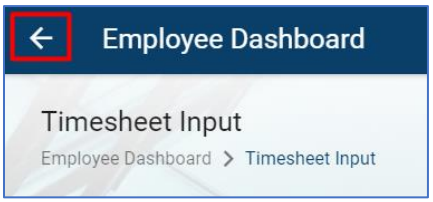
The 'Recode Required' and 'Reason Code Required' options are not applicable and will not be used.

Comments can be added to any timesheet entry:

- Click on the ⋮ button and select Add/View Comments
- Click Add button
- Select the relevant day from the dropdown listing
- Enter your comments in the Comments box
- Click OK



Click on the back button to navigate to previous page(s):

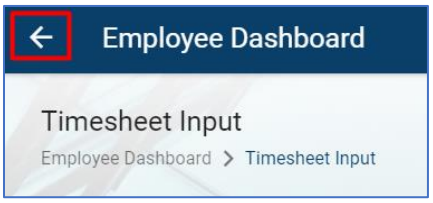


To edit a timesheet entry:

- Overwrite any existing entries in the timesheet or,
- Add in new entries to the relevant day(s)
- Click Save

Note
It is only possible to amend entries that have not yet been approved.

Click on the back button to navigate to previous page(s):



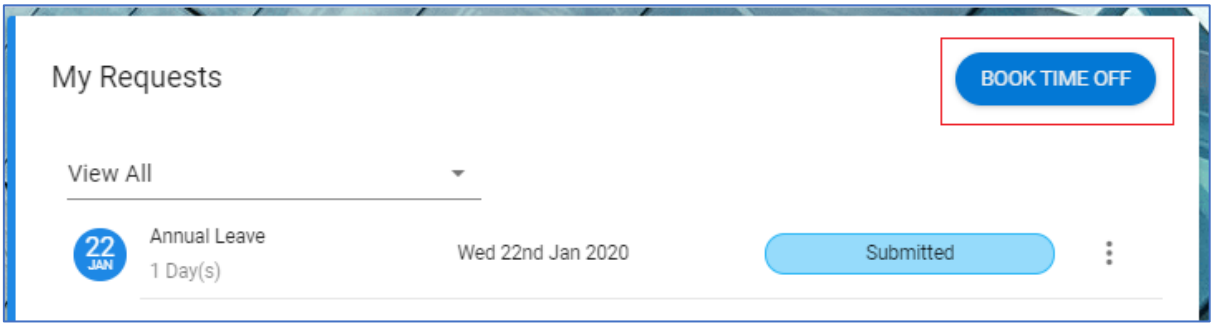
Note
Unlike other approvals within CoreHR, there are no email or system notifications associated with timesheet approvals. You will therefore need to log into the system to check whether your timesheet entry has been approved. Once a timesheet entry has been approved, the colour-coded indicator will disappear – this indicates the entry has been approved, whereas if the entry has a red indicator, your entry has been rejected. If supplied, the rejection reason will be available by clicking on the ⋮ button, then Add/View Comments.

5.4. Submitting Leave Requests

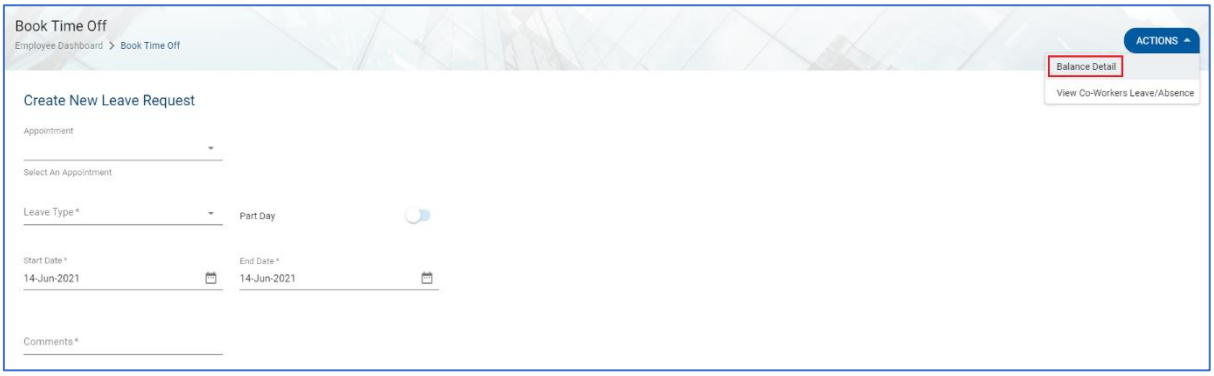
You can submit leave requests via the My Requests section.

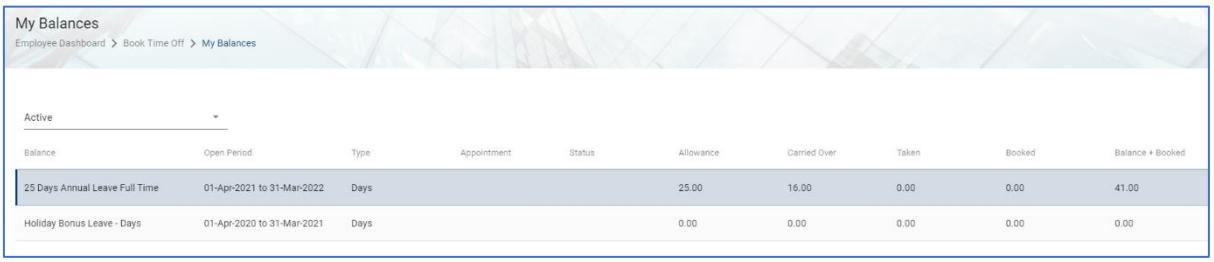
To submit a new leave request:

- Click the Book Time Off button



The Create New Leave Request screen displays. You can view a full breakdown of your leave balance by clicking Actions, then Balance Detail:

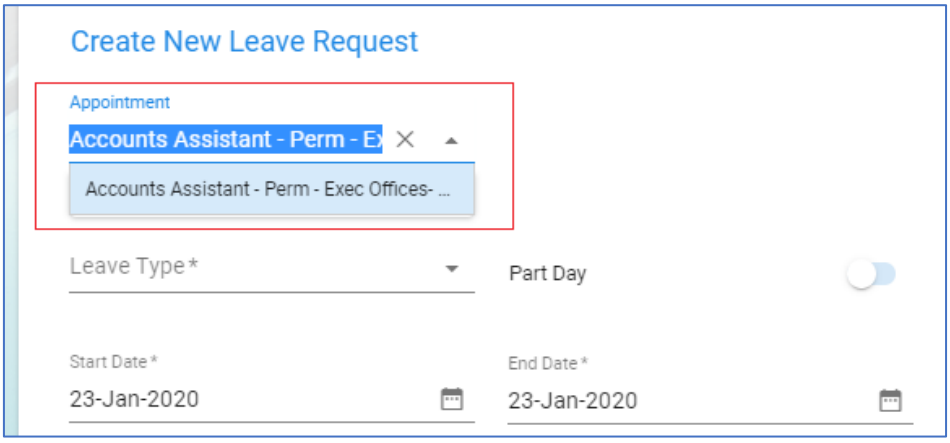




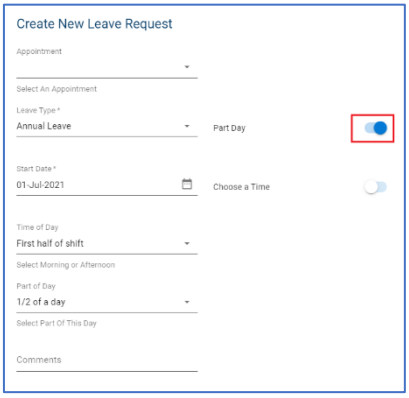
Submitting a Leave Request

Note
If you have multiple roles within the organisation, you must ensure you are selecting the correct role before entering any leave

This step is only applicable if you have multiple roles
Select the correct role to enter leave against using the dropdown listing



- Select the applicable Leave Type from the drop-down list



- For a Part Day request:
  - Click on the Part Day switch
  - Enter the Start Date
  - Select the Time of Day from the drop-down list

- For a Full Day request:
  - Enter the Start Date
  - Enter the End Date

- Add Comments, if applicable
- Click Submit

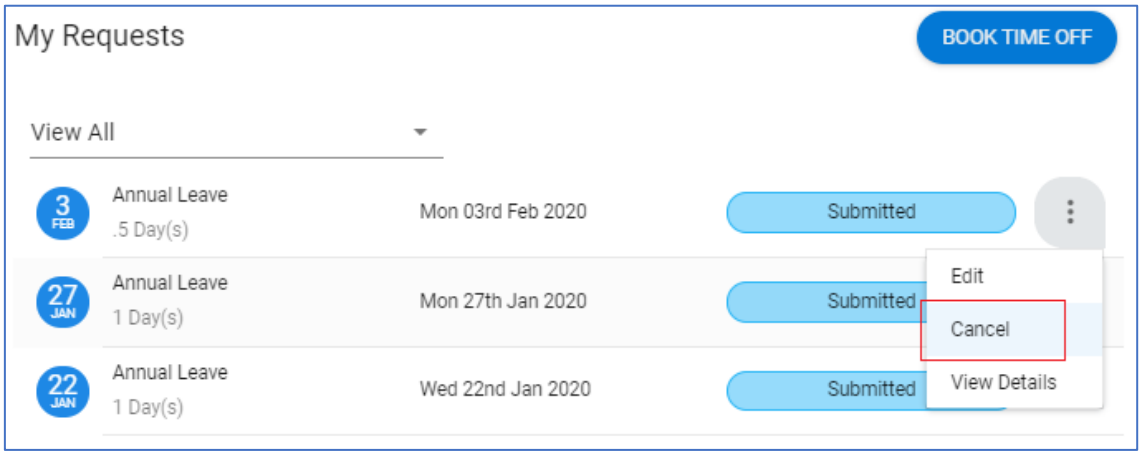
The annual leave request has now been submitted successfully and appears on the My Requests section with a status of submitted.

5.5. Cancelling a Leave Request

It is possible to cancel a past, current or future leave request, however, the leave request can only be cancelled if the status is 'Submitted'.

To cancel a leave request:

- Click on the ⋮ button on the applicable Leave Request
- Select Cancel



The leave request is now successfully cancelled, and a notification will be sent to the leave approver informing them of the cancellation.

Note
It is not possible to reverse Leave Request cancellations

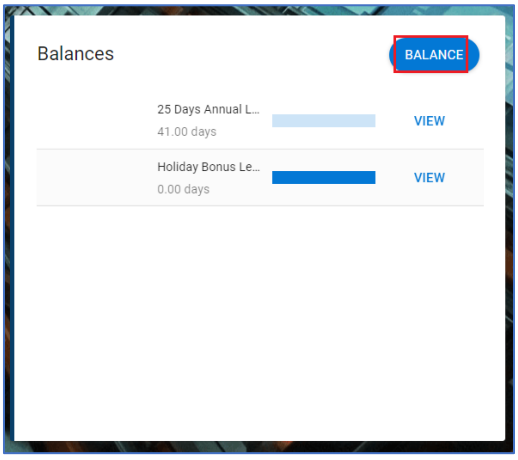
5.6. Viewing Balances

It is possible for you to view your balance information from the Balances section.

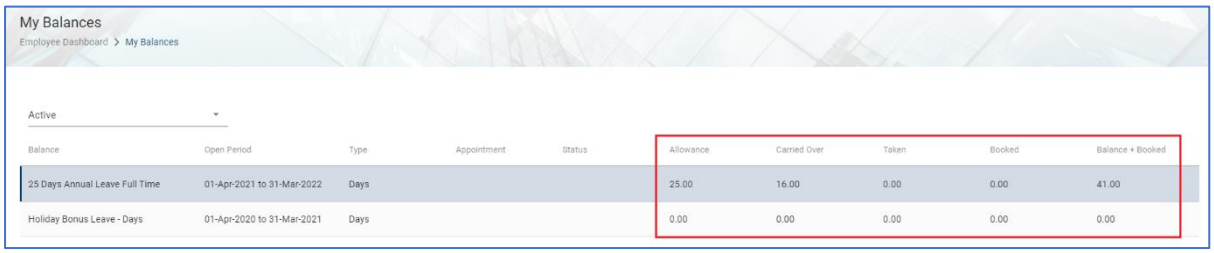
Note
If you have multiple roles within the organisation, each of your balances will display in the balance section. To view which role the balance applies to, click on 'Balance', or refer to the Contract Details section for clarification.

To view Balance information:

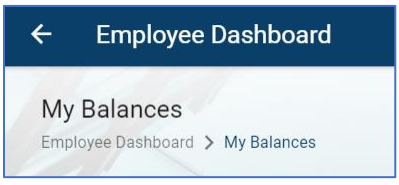
- Click Balance:



The My Balances screen displays information relating to each of the Balance Types:

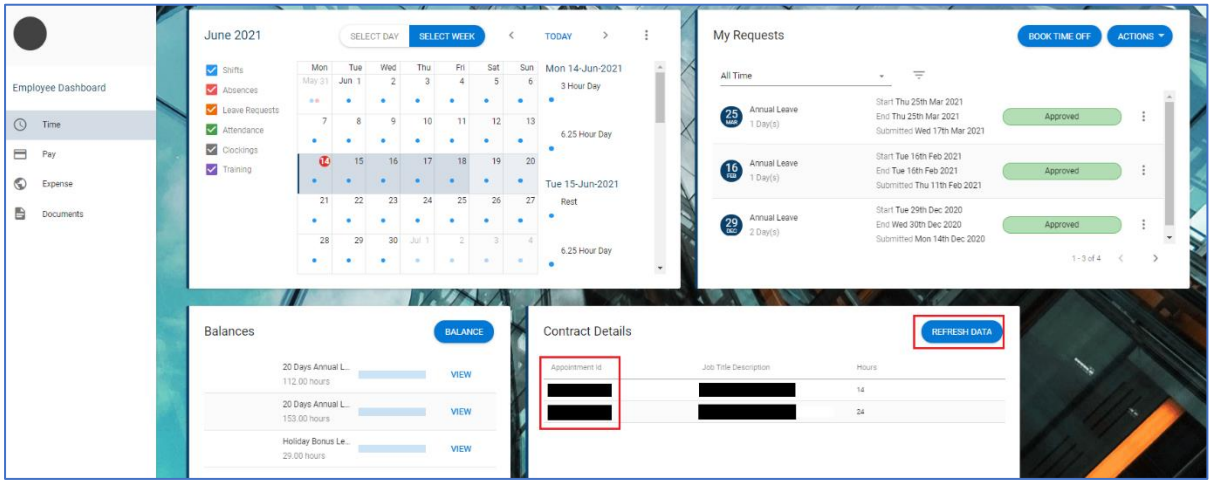


Click on the back button to navigate to previous page(s):



5.7. Contract Details

This section provides details of your appointment(s). This is particularly useful for employees with multiple roles to confirm the Appointment ID for their relevant role. As your details will not be automatically updated in this screen, please click the Refresh Data button.

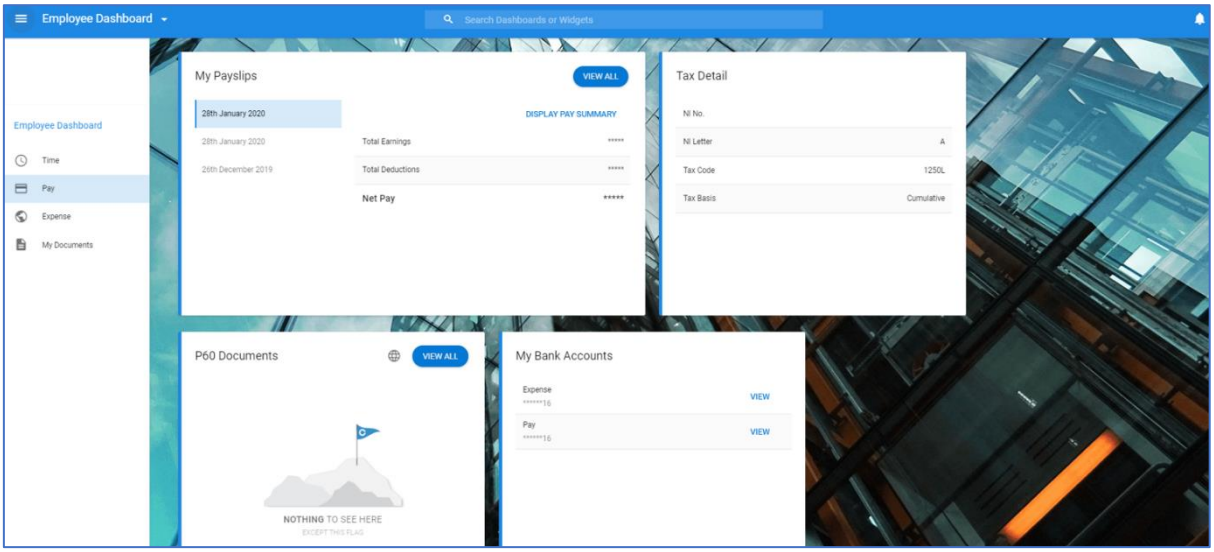


6. Pay

6.1. Overview

Pay is managed within the Pay menu bar option of the Employee Dashboard, which is split into 4 sections, these are:

- My Payslips
- Tax Detail
- P60 Documents
- My Bank Accounts

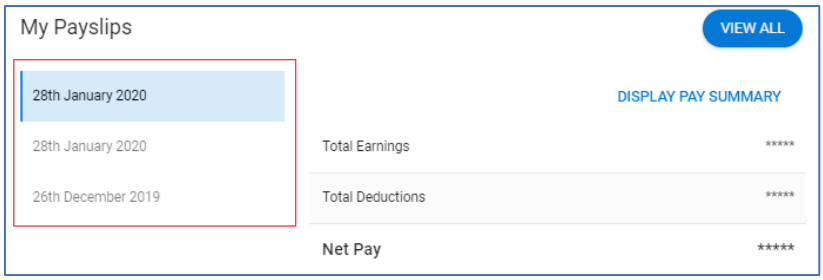


6.2. My Payslips

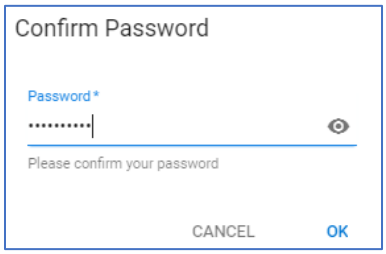
This section stores current and historical payslips, giving you the ability to view the information directly within the system.

To view a payslip:

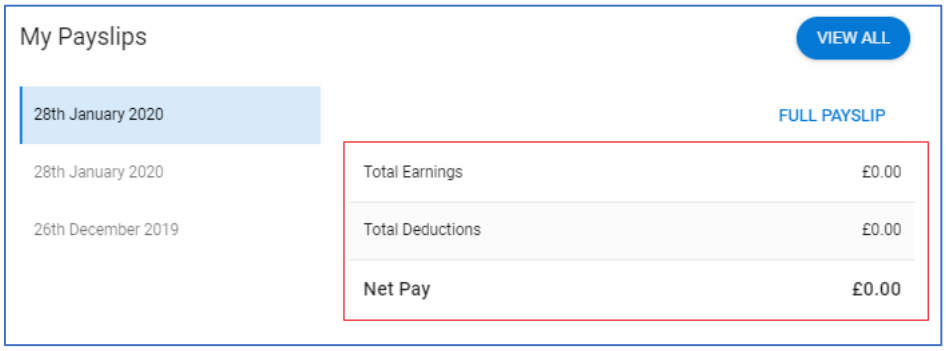
- Select the required payslip period from the listing on the left-hand side of the section



- Click Display Pay Summary and enter your CoreHR password to show your pay information

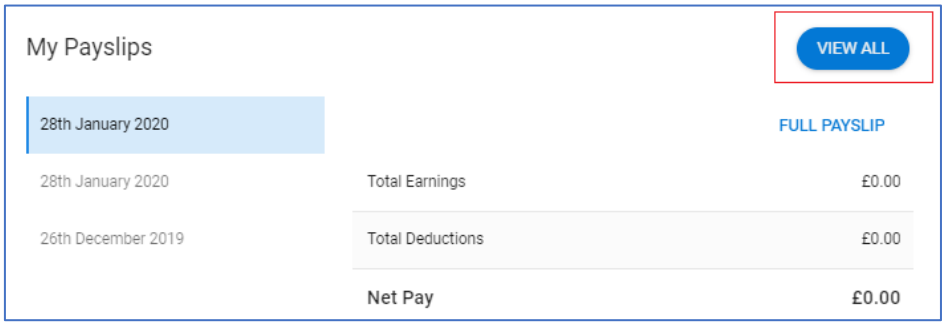


- You will now be able to view the summary details for the selected payslip



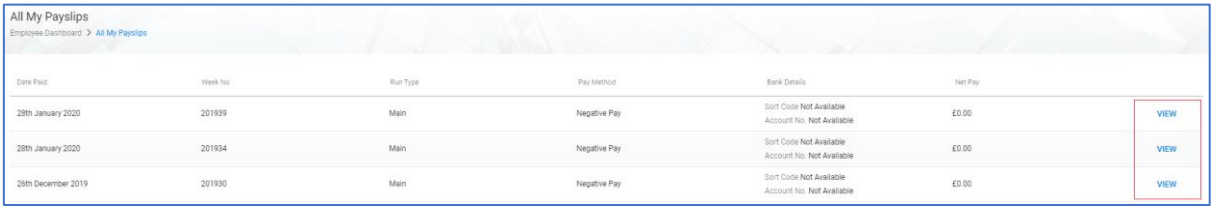
You can view an entire payslip with more detailed information.

- Click on View All



This will take you to the All My Payslips screen

- Click View next to the payslip you wish to view:



The full payslip will now be viewable on screen

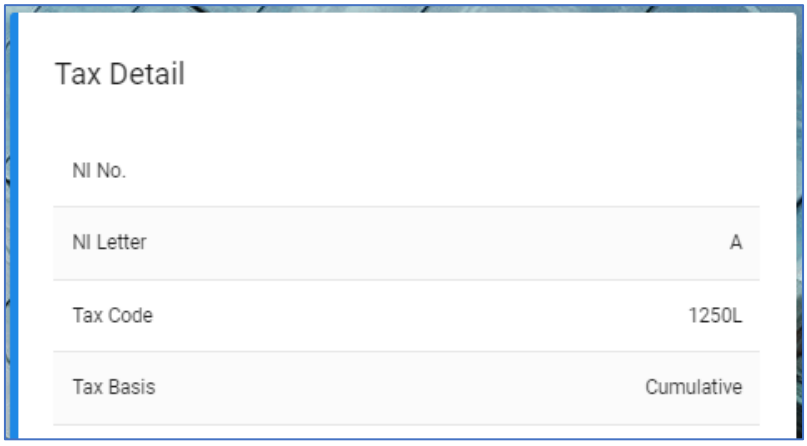
Note
The payslip is available to download as a PDF. This can be done by clicking on the Download PDF button in the bottom right-hand corner of the full payslip view

Click on the back button to navigate to previous page(s)

6.3. Tax Detail

The Tax Detail section is a summary overview of your personal tax information, this includes:

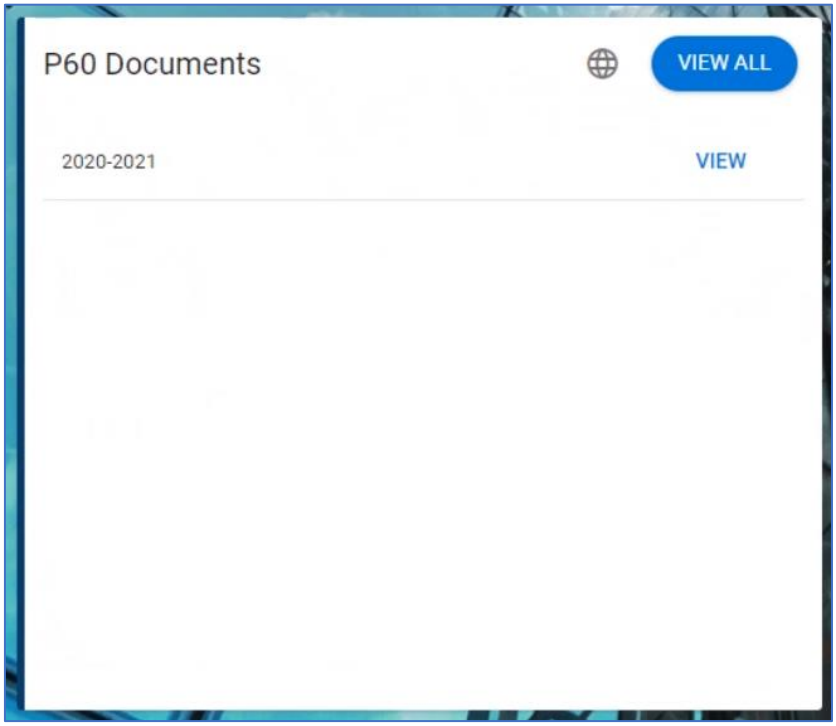
- NI Number
- NI Letter
- Tax Code
- Tax Basis



Note
This is view only; no changes to information can be made here

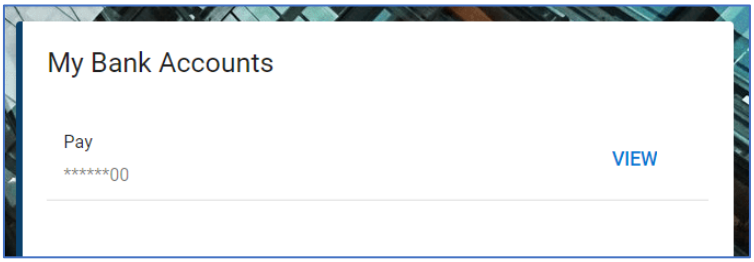
6.4. P60 Documents

This section displays P60 documents which you are able to view:



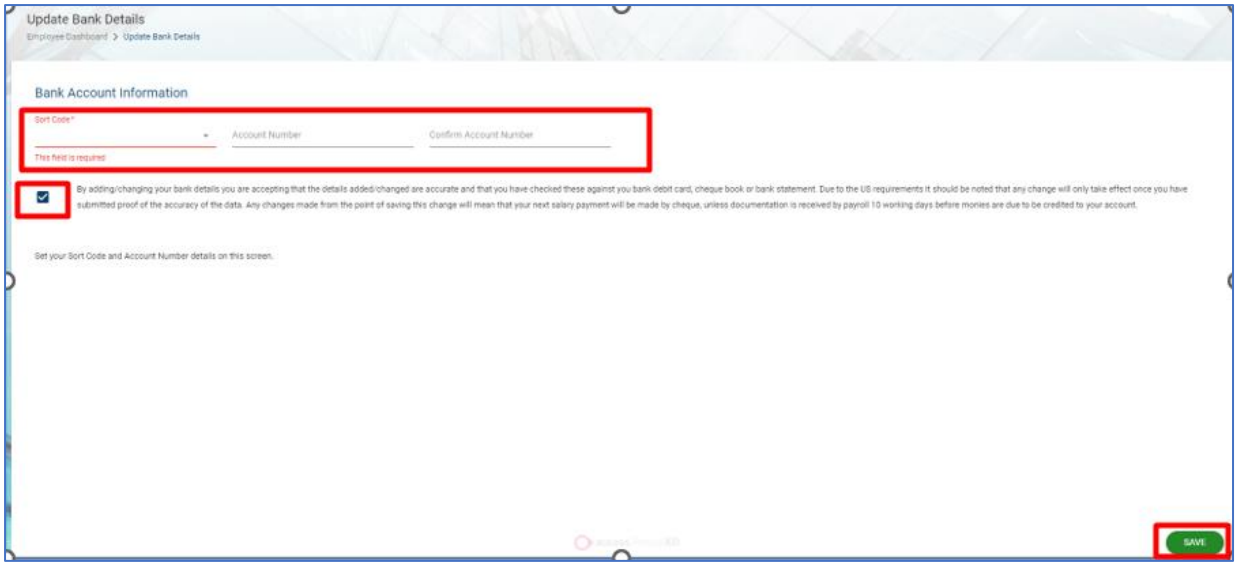
6.5. My Bank Accounts

This section displays your bank account information which allows you to update your bank account details.

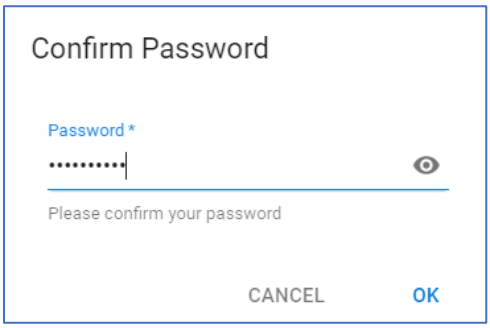


To update your bank account information:

- Click the 'View' button to open the Update Bank Details window
- Enter the bank details in the required fields
  - Enter your Sort Code and select from the pre-defined list
  - Enter your 8-digit Account Number
  - Re-enter your 8-digit Account Number
- Review and acknowledge the declaration.
- Click the 'Save' button



- The Reauthenticate window will pop up
- Enter the password for your CoreHR account and click the OK button



The bank details are now visible in summary form on the previous screen.

The Account Number is masked for security purposes.

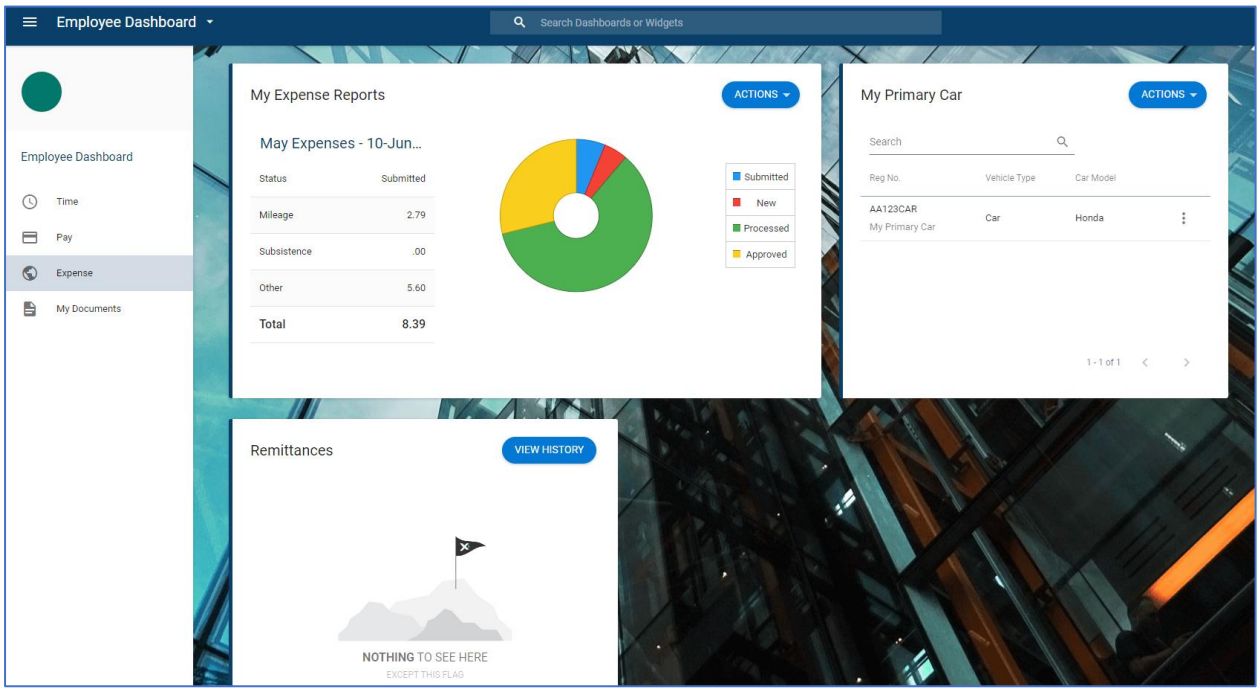
Note
By adding/changing your bank details you are accepting that the details added/changed are accurate and that you have checked these against you bank debit card, cheque book or bank statement.
Due to the US requirements it should be noted that any change will only take effect **once you have submitted proof of the accuracy of the data**.
Any changes made from the point of saving this change will mean that your **next salary payment will be made by cheque, unless documentation is received by payroll 10 working days before monies are due to be credited to your account.**

7. Expenses

7.1. Expense Overview

Expenses are managed within the Expense menu bar option of the Employee Dashboard, which are split into 3 sections:

- My Expense Reports
- My Primary Car
- Remittances



7.2. My Expense Reports

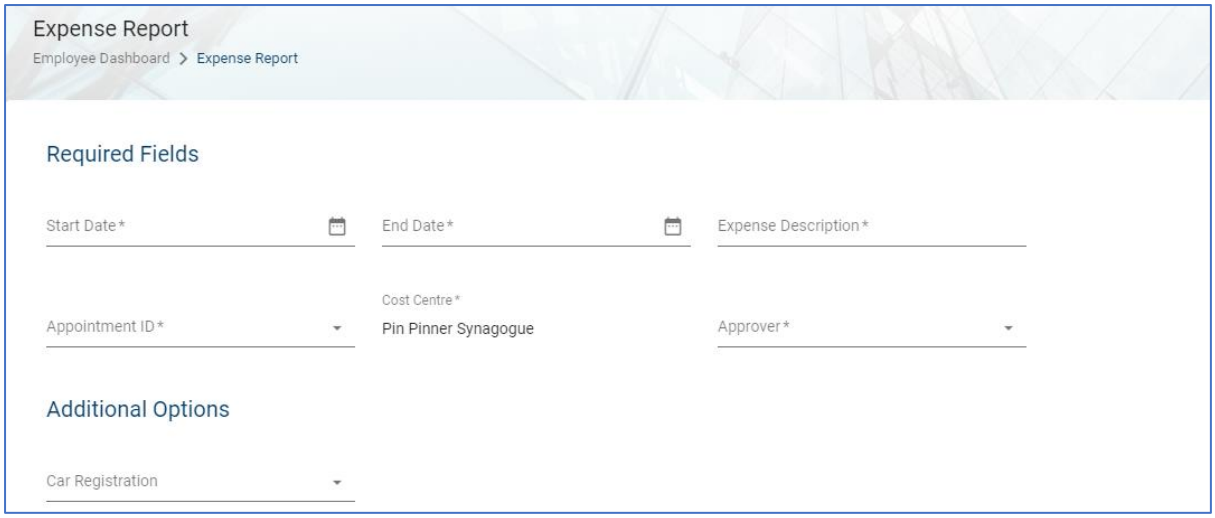
The My Expense Reports section is used to create and manage your expense claims.

An expense report is like a claim form; the first step is to create the report and you can then add the individual items to the report before submitting. An expense report could relate to a specific event/trip, or it could be for a period of time e.g. May Expenses.

To create a new expense report:

- Click 'Actions' and select 'New Expense Report'

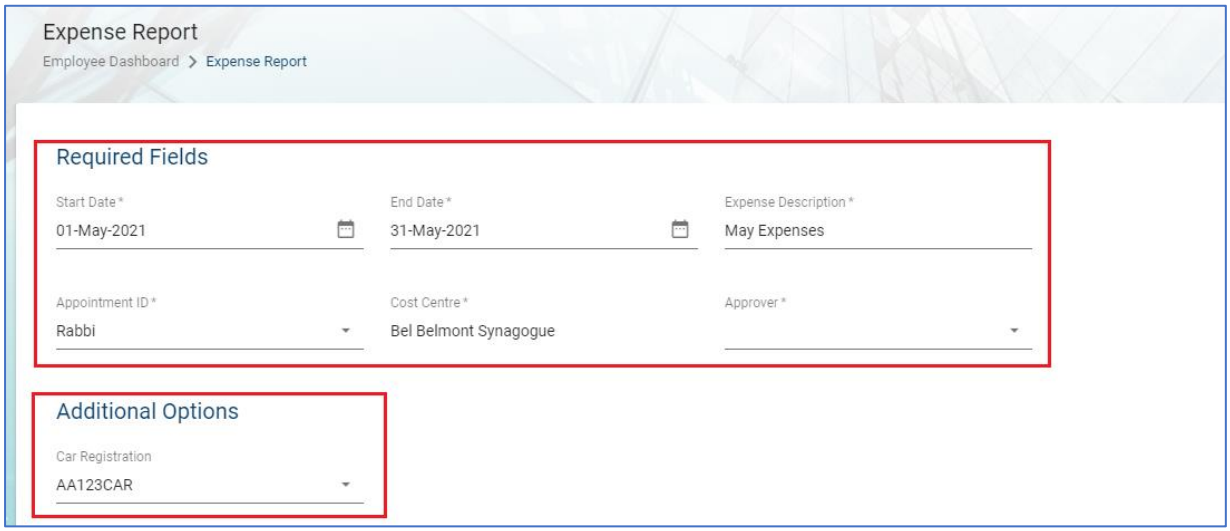
The Expense Report screen opens:



Some of the details will be automatically populated, for example, cost centre, approver and car registration (if your car is already recorded).

- Update all fields under Required Details
  The * for each indicates that these are mandatory and are required to create the claim
- Update the Additional Options
  If you are submitting a mileage claim, you should select your Car Registration from the dropdown list.

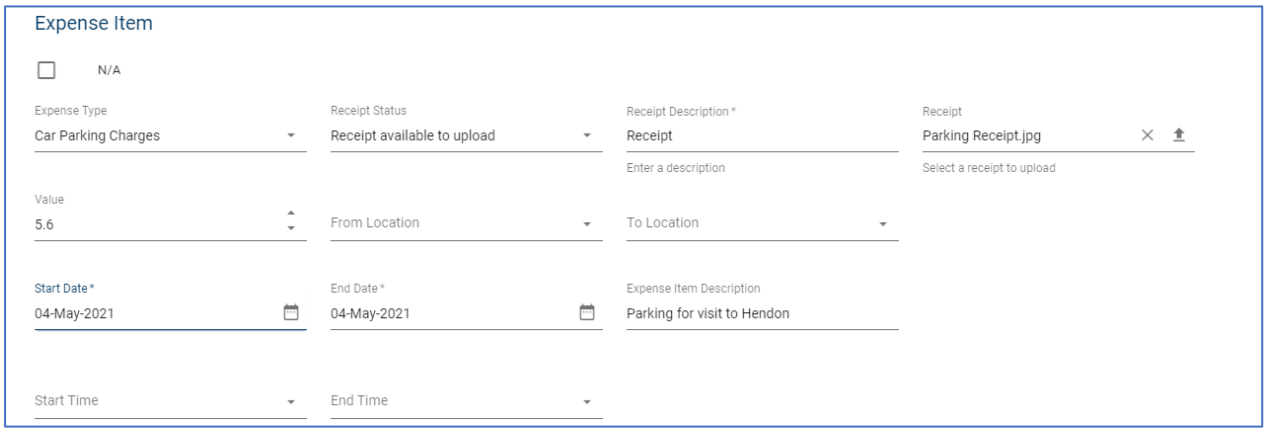
Note
In order for an individual to be able to submit mileage, you first need to go through the one-off process of registering your car details via CoreHR (see point 7.3.). Any company cars will already be set up.



- Click Save to create the claim

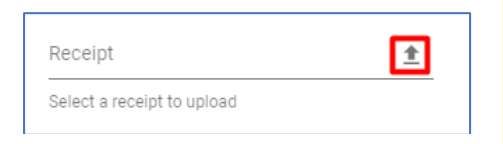
Note
You must save the claim before you are able to enter any individual expense items.

- Scroll to the Expense Items section, this is where you will be required to add the individual expense items. Click New Expense Item and the Expense Details screen opens.
- Select the Expense Type from the dropdown menu and enter the details for the expense item. The items required here will differ depending on the expense type selected.
  Please see below for further instructions on specific expense items.

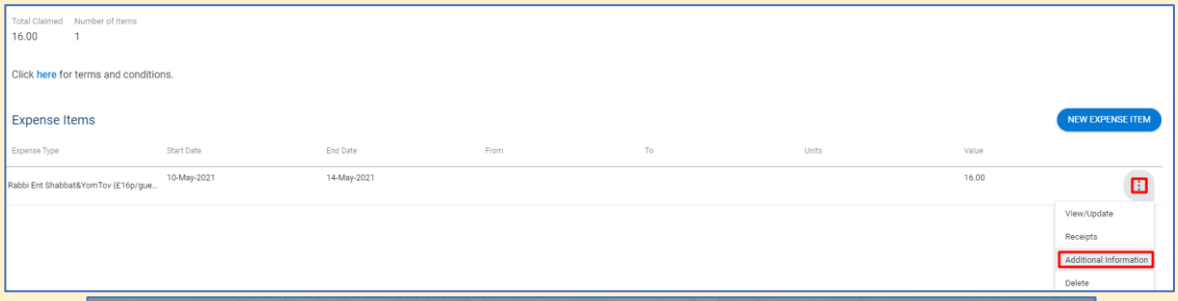


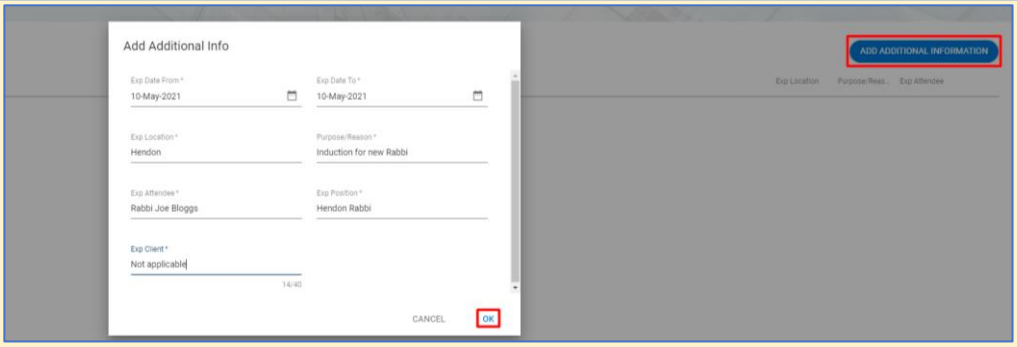
Note

- **Receipted items:** for certain expense items e.g. Car Parking Charges, you are required to upload a receipt. To upload a receipt:
  - Click on the arrow upload icon

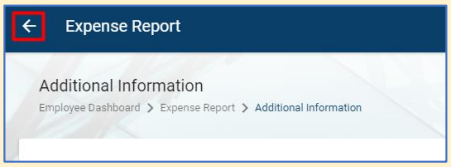


  - This will open an explorer window for you to find and select the document you wish to upload to your form, then click 'Open' to upload the file. ** If the receipt is not available, select 'No receipt available' within the Receipt Status dropdown and provide the reason**
- **Mileage claims:** ensure you populate the 'Distance' and 'From/To Location' fields. Please note, if claiming expenses via the CoreMobile App, there is a character limit of 30, therefore you will need to abbreviate these fields.
- **Start/End Time:** please leave blank.
- **Rabbi Entertainment** (applicable for Rabbinic Staff only): when saving your Expense item, you will be required to provide details of your guests in order to submit your Expense Report:
  - Within the Expense Report, click on the ⋮ button for the Rabbi Entertainment item(s) and select 'Additional Information'
  - Click 'Add Additional Information' and populate the fields, as applicable, then click 'OK'.
  - NOTE - there is a 50-character limit within the 'Attendee' field. Where you have more than 3-4 guests, you should instead upload the guest list within the Expense Item as a receipt file following the steps above. Please still complete the 'Additional Information but refer to the attachment within the Attendee field.
    Note: all fields are mandatory on the Additional Information screen. Where not relevant, please enter 'Not applicable'.



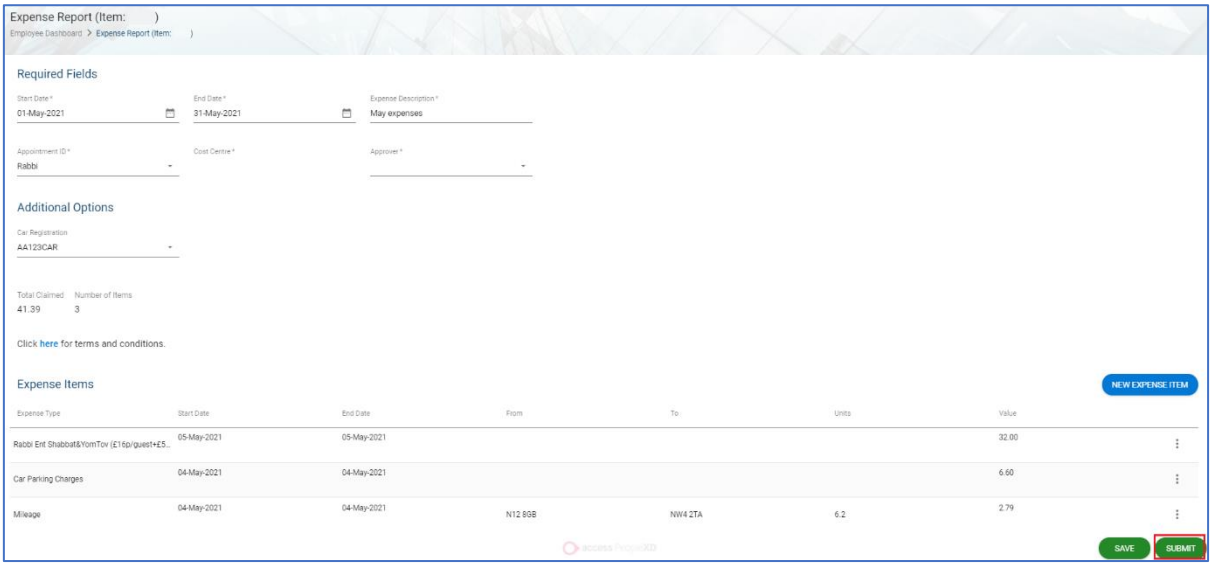


Once complete, to return to the Expense Report, click on the back arrow:



- To add further items to the Expense Report, click ‘Save’ and ‘Add New’.
- Once all items are added, click ‘Save’.

  The screen closes and you are returned to the main Expense Report screen. The item(s) are listed under the Expense Items. The Total Claimed and Number of Items fields are updated to reflect the latest entry.
- Please note the system looks for duplicate entries, therefore if you have entered the same expense type and same date it will ask you to provide a ‘duplicate reason’ – You will need to enter the reason e.g. Multiple trips for Mileage claims.
- Once all items have been added, and you are ready to submit your expense report, submit the claim for approval by clicking Submit.



Note
If you are not ready to submit your report, you can click Save and come back to the report later. The draft Expense Report is available within ‘My Expense Reports’. Click **Actions**, then **Manage this Expense** or **Manage All Reports**. You can continue adding expense items to a report as required. Once you are ready, submit the report by clicking **Submit**.

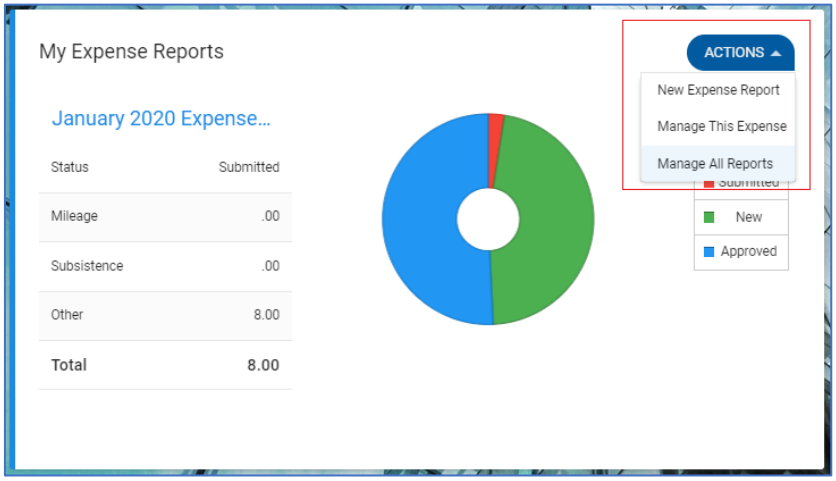
- Click Yes on the Accept Declaration prompt

The status is updated to Submitted and the expense is sent for approval.

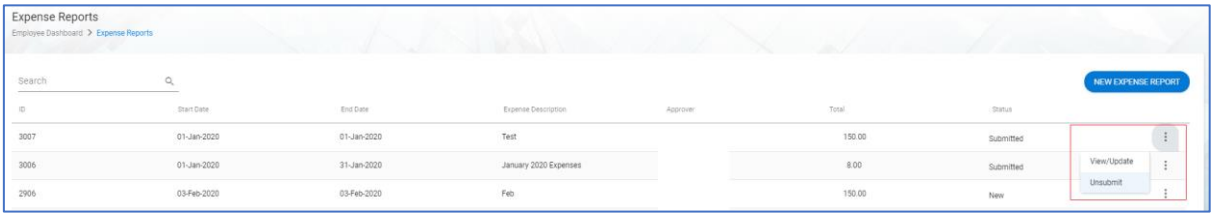
Note
Once in the status of Submitted, it can no longer be edited, but can be unsubmitted

To un-submit an expense claim:

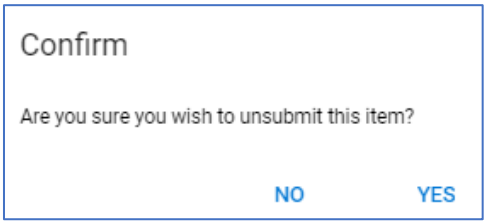
- Click on Actions and select Manage All Reports



- Click on the ⋮ button next to the relevant claim
- Select Unsubmit



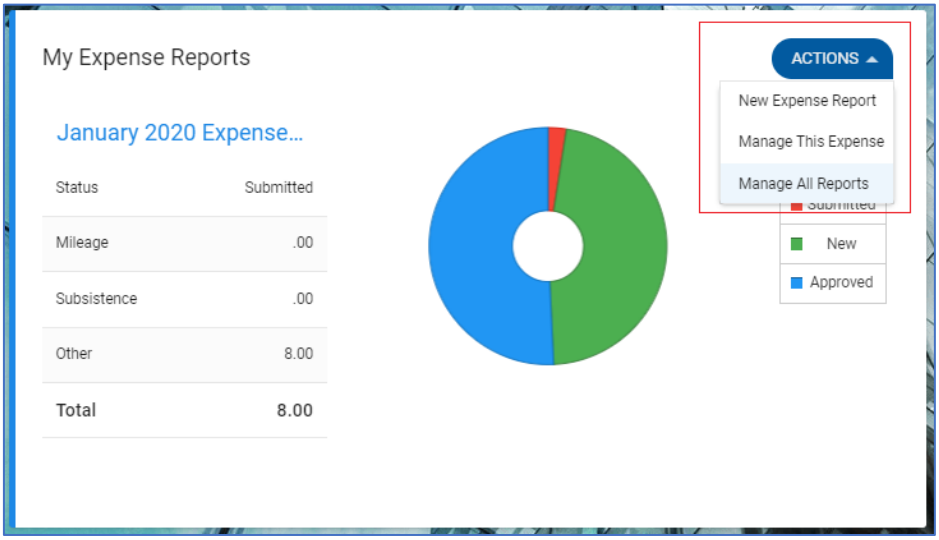
- Click Yes to confirm



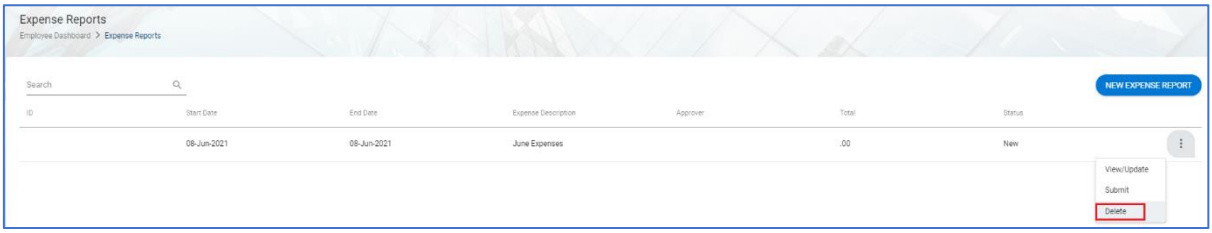
The status is updated to New and you can edit, submit or delete the Expense Report, as required.

To delete an Expense Claim:

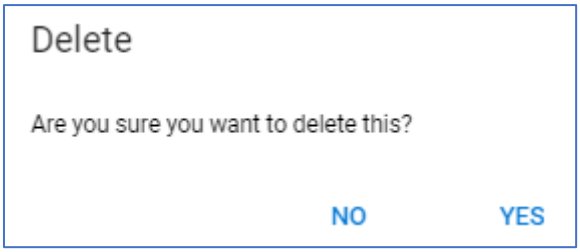
- Click on Actions and select Manage All Reports



- Click on the ⋮ button next to the relevant claim
- Select Delete

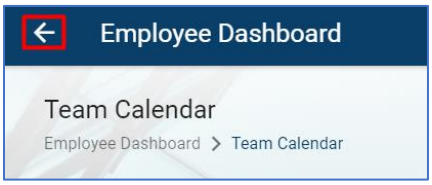


- Click Yes to confirm that you want to delete the form



The expense report will be deleted and no longer available for update or submission.

- Click on the back button to navigate to previous page(s):



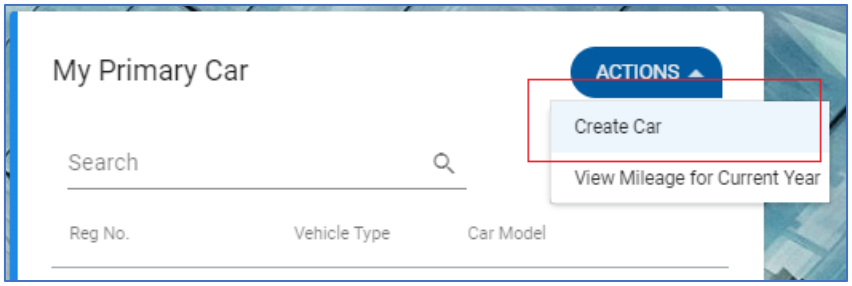
7.3. My Primary Car

Employees are required to set up their private car details on CoreHR to claim for mileage. This is required to determine the value of the expenses based on the car type, mileage to date and allowance rates, as detailed in the Expense Policy.

Note
Company cars are not to be entered here; they will already be set up.

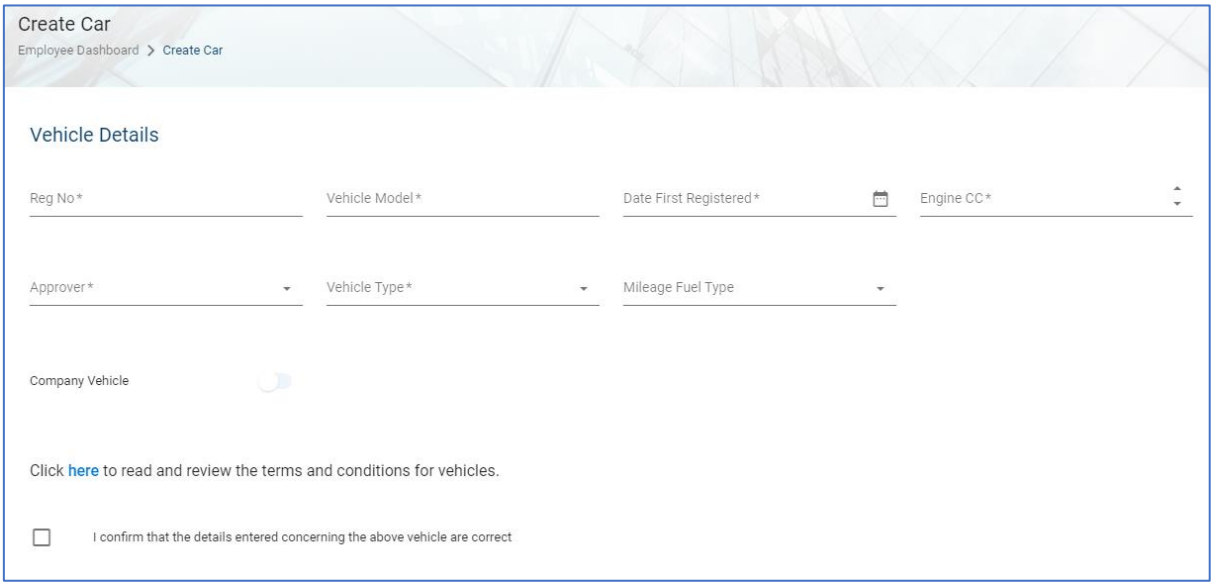
To set up a new private car:

- Click **Actions** and **Create Car** from the My Primary Car section
  (Any cars already set up on the system will appear in this section)

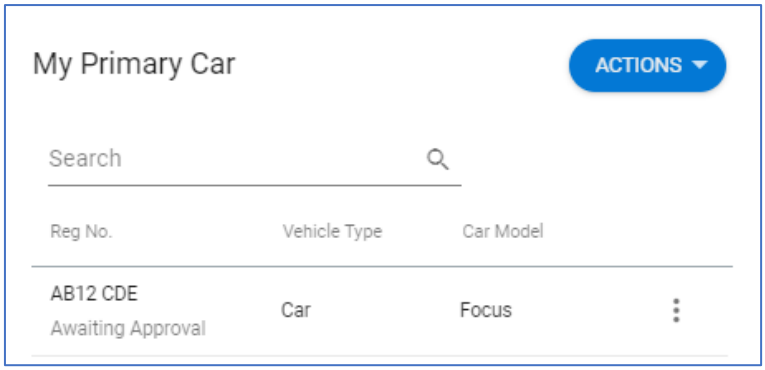


The Create Car screen appears

- Provide all details required
  Mandatory fields are marked with a *



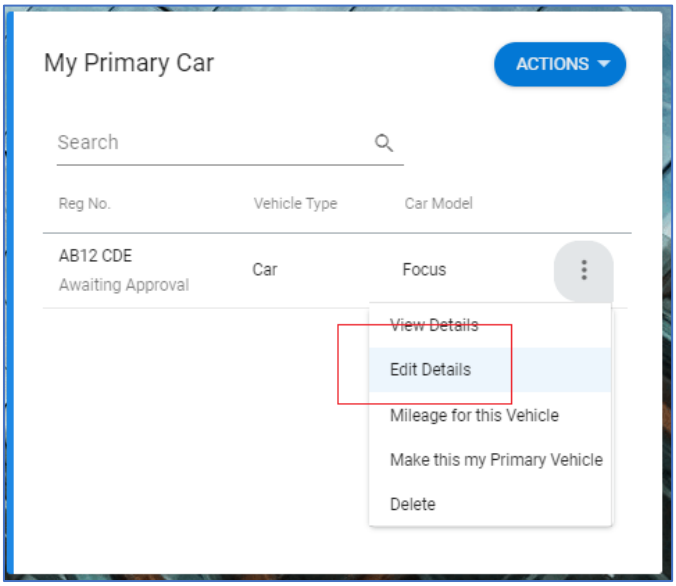
- Review the terms and conditions and tick the box to confirm
- Click Save
- The new car is listed on the My Primary Car section as Awaiting Approval



Note
Once the car details have been entered/set up, it is sent for approval. You cannot submit a claim using this car, until it has been approved.

To edit your car details:

- For the required car, click the ⋮ button and select Edit Details



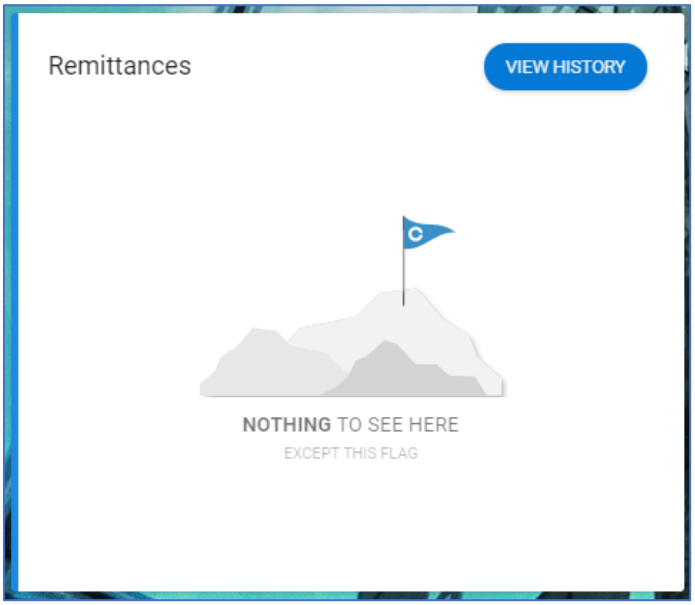
- Update the details as required and click Save
  (The car is re-submitted for approval and you cannot submit a claim using this car, until it has been approved.)

7.4. Remittances

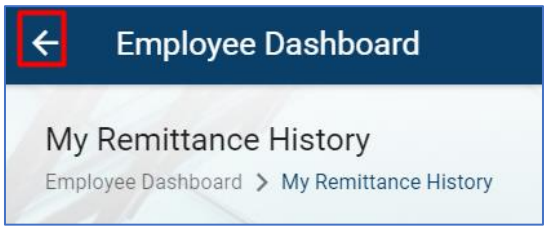
You can review your processed expense claims via the Remittance section.

To view:

- Click View on a remittance item to review the details of the processed payment
- To review historic remittances, click on View History and then select the appropriate remittance by clicking View



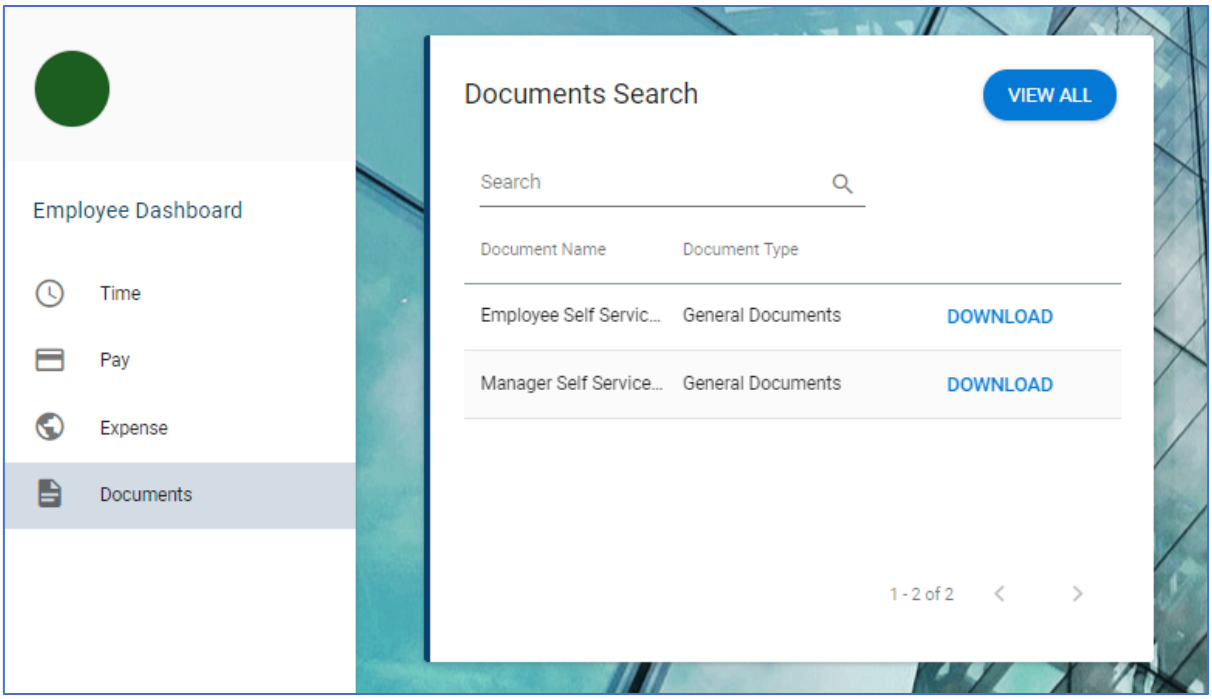
- Click on the back button to navigate to previous page(s):



8. Documents

8.1. Download Documents

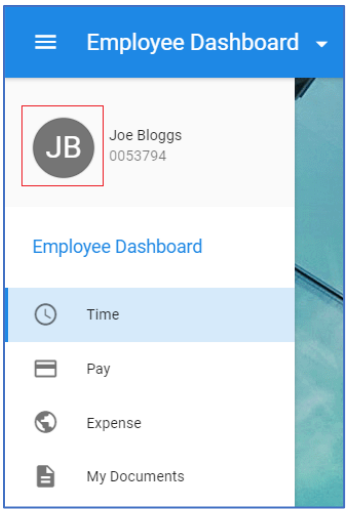
In the Documents section, you can view the Self Service User Guides by clicking the Download button next to the relevant document.



9. Personal Details

9.1. My Profile

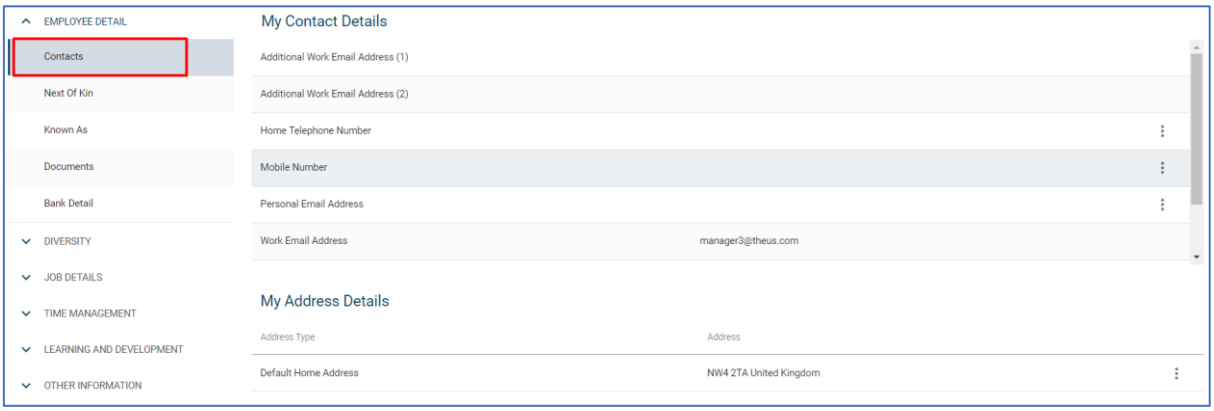
To access your personal information, from within the Employee Dashboard screen, click on your initials in the top left-hand corner of the screen:



10. Employee Details

10.1. Contacts

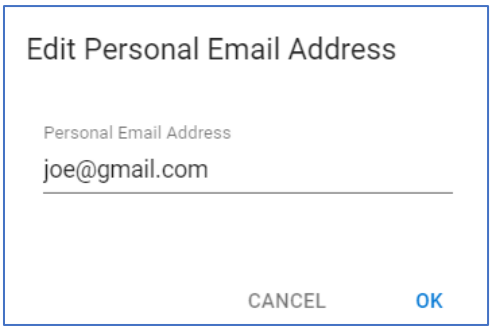
The Contacts section provides the ability to view and update key contact and address details for you.



To edit any of your contact details:

- Click on the ⋮ button and select Edit

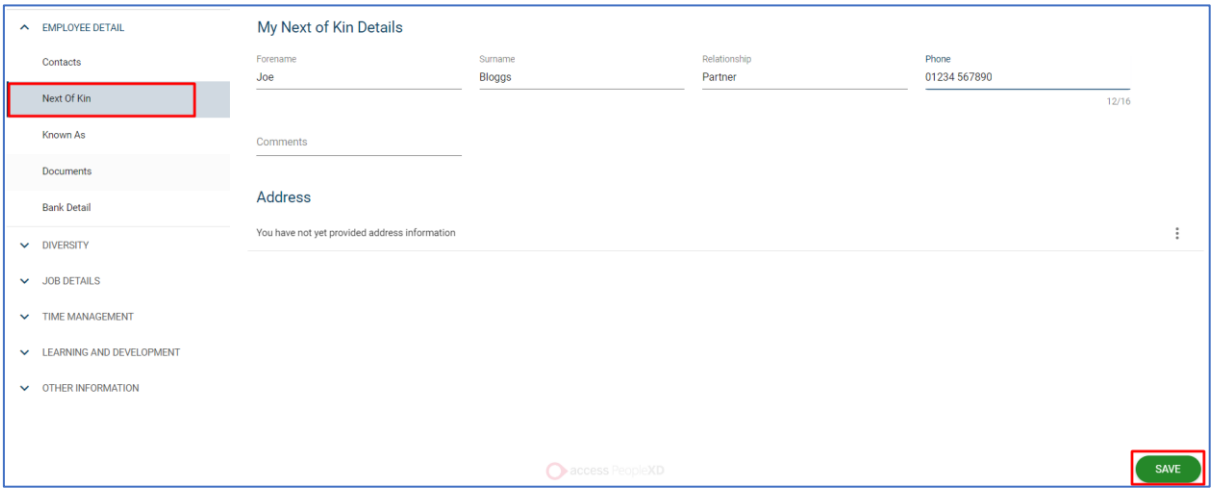
The Edit Contact Info screen opens:



- Update the contact information
- Click OK
  The contact details will be updated

10.2. Next of Kin

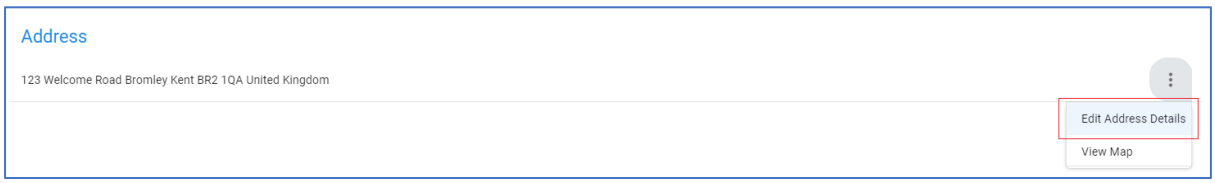
Select Next of Kin from the Employee Detail menu bar item. The Next of Kin screen allows you to record personal information for one next of kin.



To add or edit the next of kin details, enter the information in the required fields and click Save

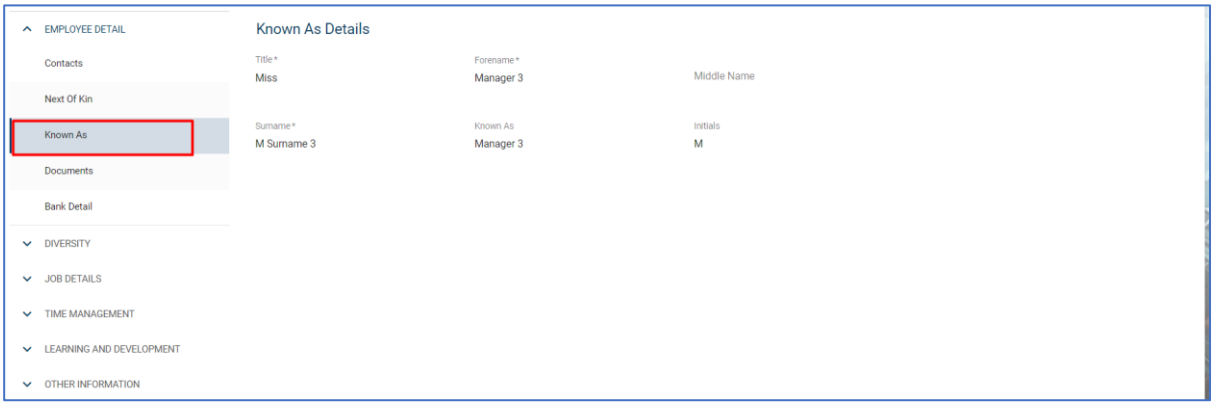
To record an address for the next of kin:

- Click on the ⋮ button in the address section and select Edit Address Details
  The Edit Address Details screen opens.
- Select the Country from the predefined list.
- Enter the address details.
- Click Save.



10.3. Known As

Select Known As from the Employee Detail menu bar item. This section allows you to view your Known As information which is view only; no changes to information can be made here.

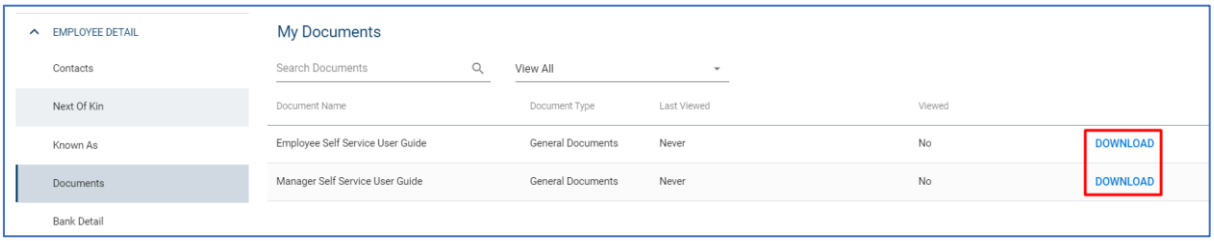


10.4. Documents

Select Documents from the Employee Detail menu bar item. This allows you to download and view any documents that are available.

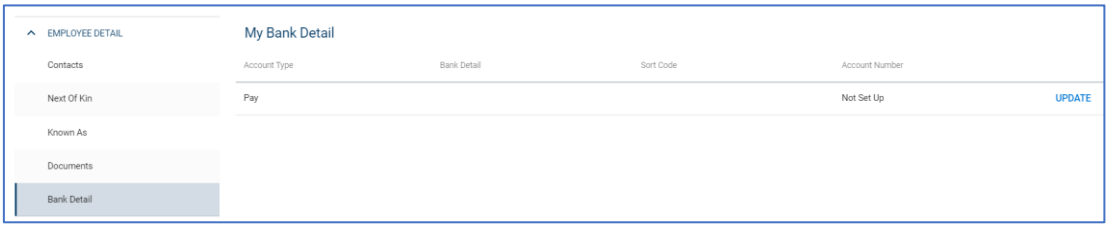
To view a document:

- Click Download next to the relevant document



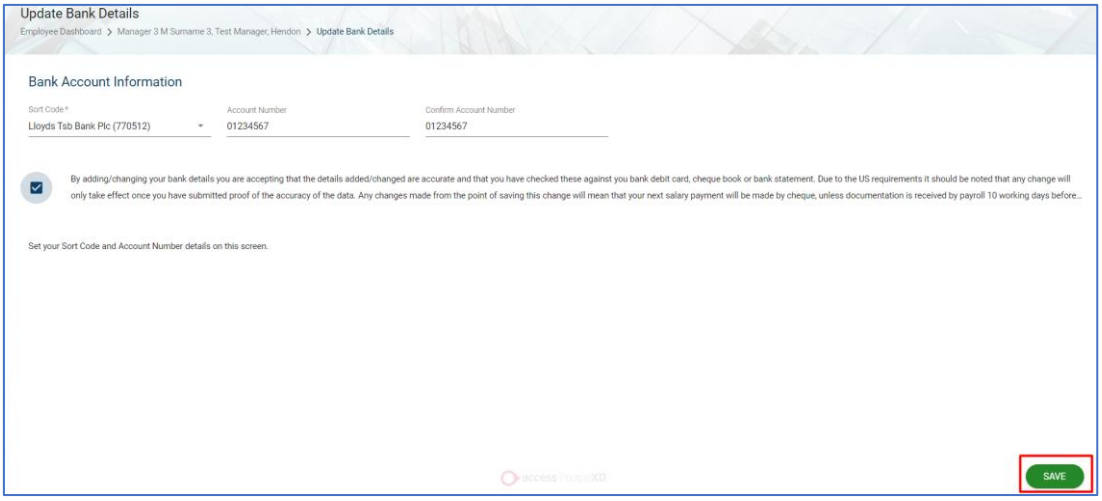
10.5. Bank Details

Select Bank Details from the Employee Detail menu bar item. This section allows to view and update your bank account details.

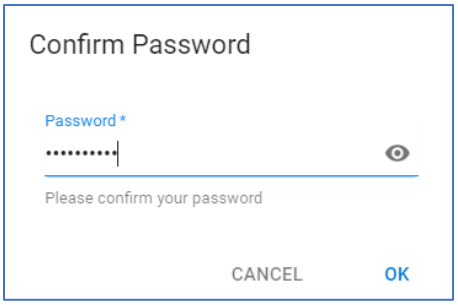


To update your bank account details:

- Click the View button to open the Update Bank Details window
- Enter the bank details in the required fields
  - Enter your Sort Code and select from the pre-defined list
  - Enter your 8-digit Account Number
  - Re-enter your 8-digit Account Number
- Review and acknowledge the declaration.
- Click the Save button



- The Reauthenticate window will pop up
- Enter the password for your CoreHR account and click the OK button



The bank details are now visible in summary form on the previous screen.

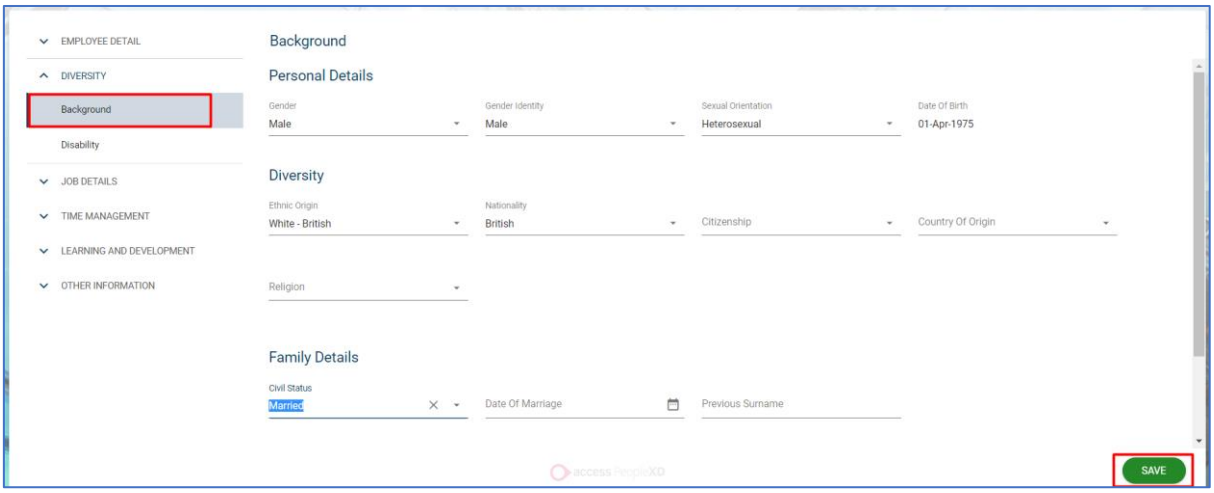
The Account Number is masked for security purposes.

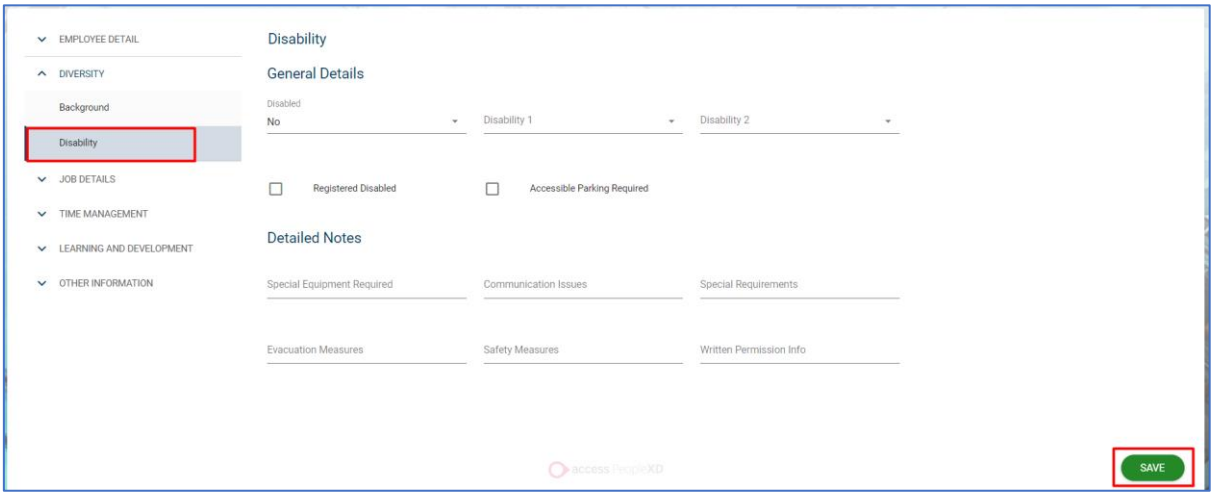
Note
By adding/changing your bank details you are accepting that the details added/changed are accurate and that you have checked these against you bank debit card, cheque book or bank statement.
Due to the US requirements it should be noted that any change will only take effect **once you have submitted proof of the accuracy of the data**.
Any changes made from the point of saving this change will mean that your **next salary payment will be made by cheque, unless documentation is received by payroll 10 working days before monies are due to be credited to your account.**

11. Diversity

11.1. Background/Disability

Select Background and/or Disability from the Diversity menu bar item. These sections allow you to view, enter or amend diversity information.





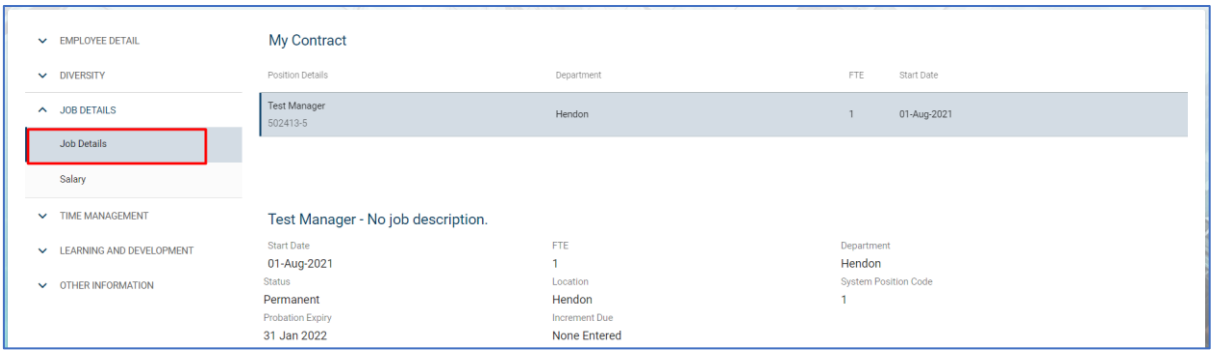
To add or update the details:

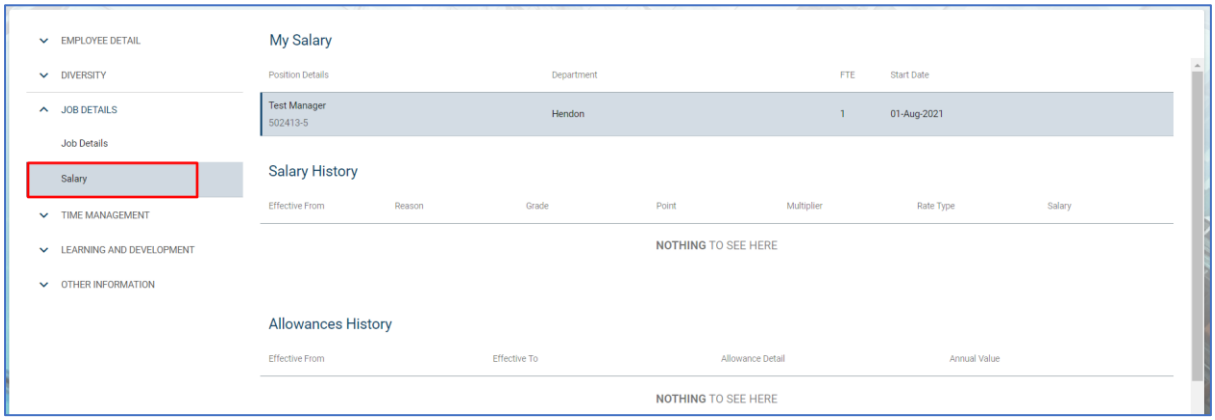
- Update any field as required.
- Click Save

12. Job Details

12.1. Job Details

Select Job Details from the Job Details menu bar item. This section allows you to view details of your contract(s). This is a view-only screen.

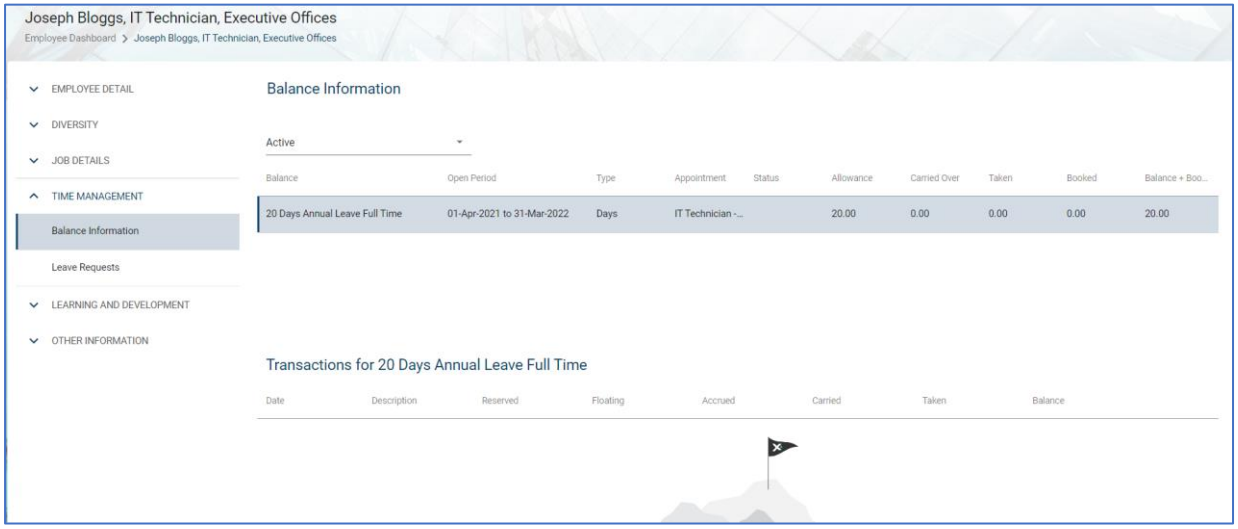


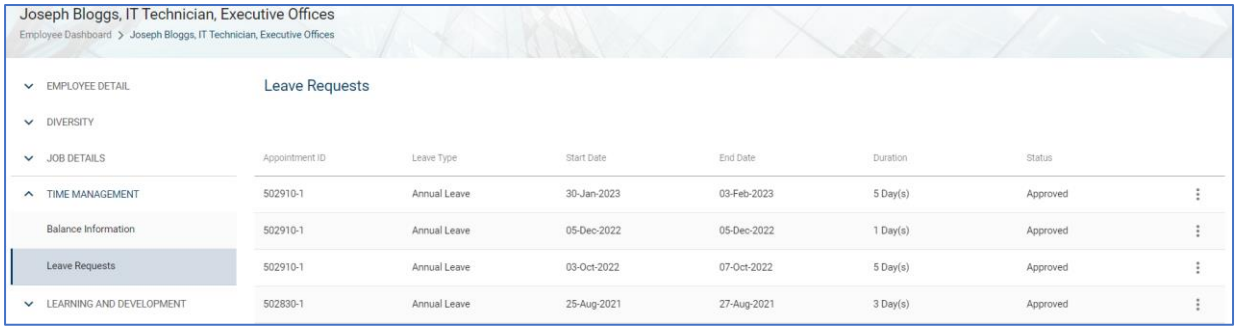


13. Time Management

13.1. Balance Information/Leave Requests

Select Balance Information and/or Leave Requests from the Time Management menu bar item. These sections allow you to view your balance information and leave requests. These are view-only screens. To request leave, please refer to the Time section above.



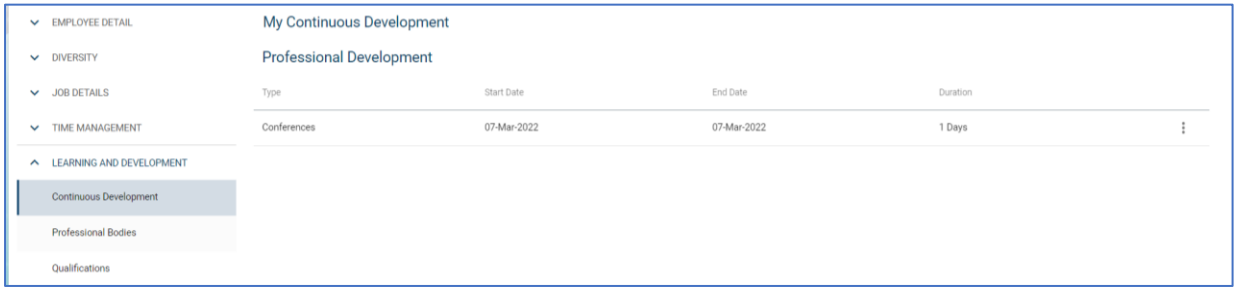


Click on the ⋮ button for a leave request to view any Comments.

14. Learning and Development

14.1. Continuous Development/Professional Bodies/Qualifications

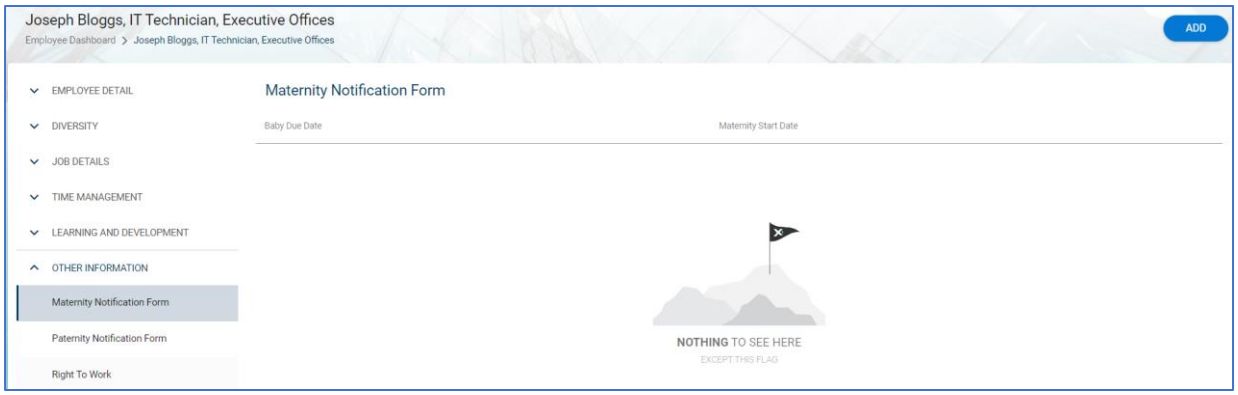
Select the relevant section from the Learning and Development menu bar item. These sections allow you to view any details that been input relating to your Learning and Development. These are view-only screens.



15. Other Information

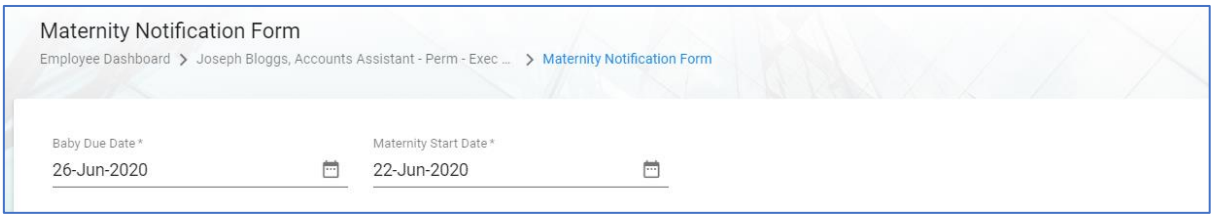
15.1. Maternity Notification Form

Select the Maternity Notification Form from the Other Information menu bar item. This section allows you to create and submit a Maternity Notification Form

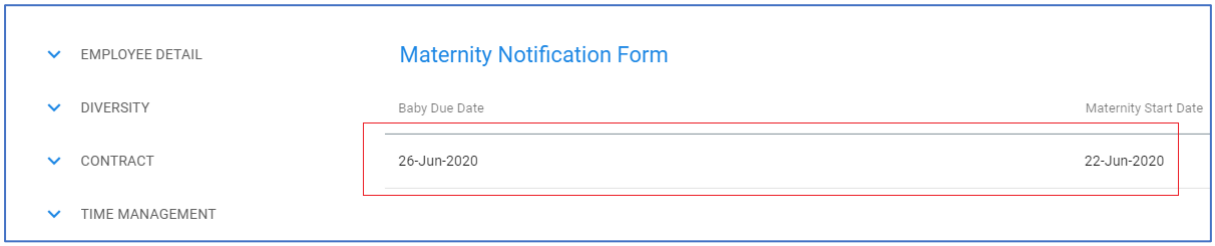


To create a new maternity notification:

- Click the Add button
  The Maternity Notification screen will appear
- Update all fields as required
- Click the Save button to create the notification



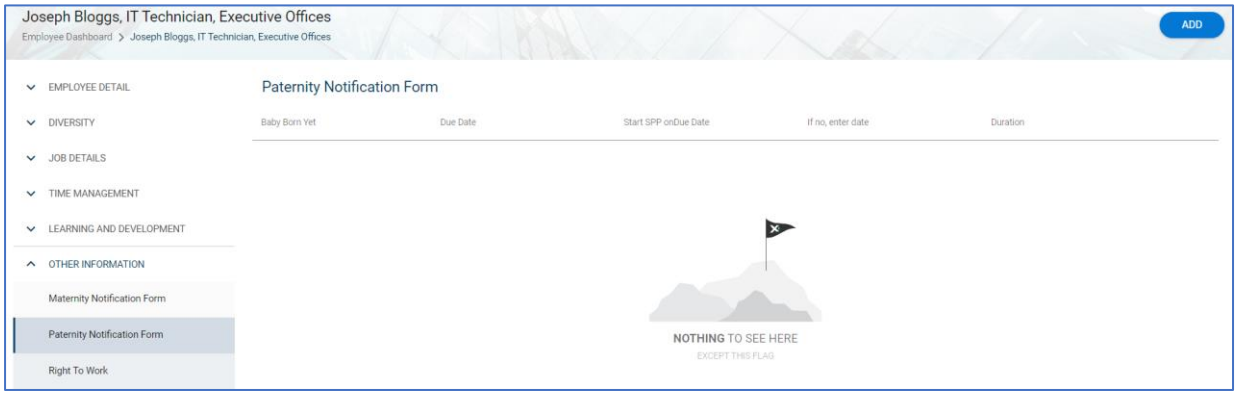
The notification will be sent directly to the HR team.



Note
If you need to amend your Maternity Notification Form, please contact the HR team instead of updating the form directly in the system.

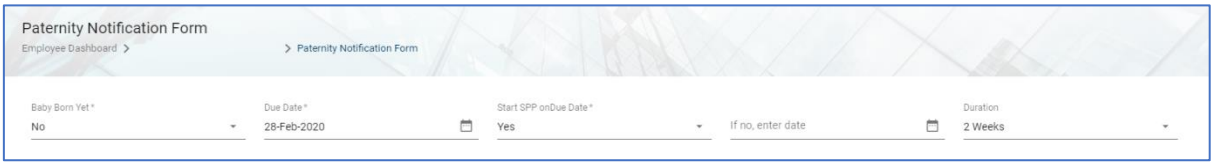
15.2. Paternity Notification Form

Select the Paternity Notification Form from the Other Information menu bar item. This section allows you to create and submit a Paternity Notification Form.

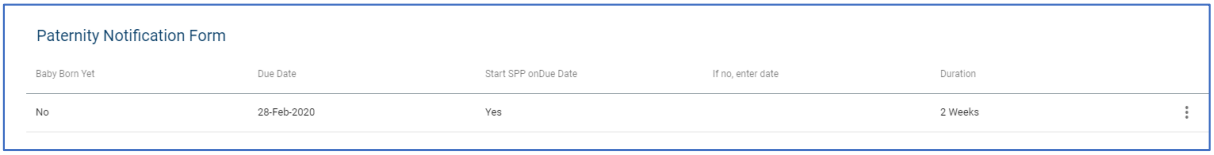


To create a new paternity notification:

- Click the Add button
  The Paternity Notification screen will appear
- Update all fields as required
- Click the Save button to create the notification



The notification will be sent directly to the HR team.



Note
If you need to amend your Paternity Notification Form, please contact the HR team instead of updating the form directly in the system.

15.3. Right to Work

Select Right to Work from the Other Information menu bar item. This section allows you to view your Right to Work details. This is a view-only screen.