FR/Director Approvals User Guide

Contents

1. Overview

1.1. Purpose of this Guide

The purpose of this document is to provide detailed guidance on how to approve or reject requests for the following:

- Manager Requests (formerly Variations and Leaver Forms)
- Vacancy Request Forms (formerly Vacancy Notification Forms)
- Expenses (Synagogues only)
- Timesheets

This guide outlines the approval activities required by FR/Directors. If you are also a Line Manager, you should refer to the Manager User Guides for further 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

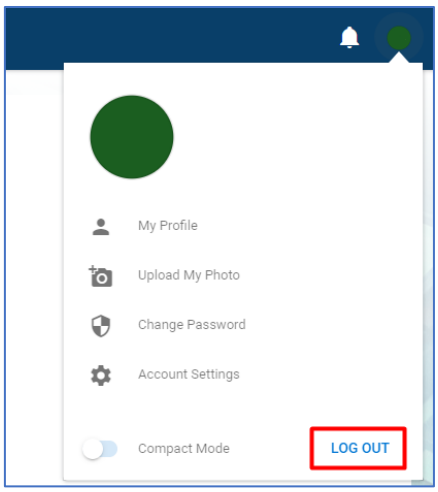
A username and password will be required to enable you to log into CoreHR, these will be provided to you by the United Synagogue HR team.

To log in:

1. Enter your username
2. Enter your password
3. 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



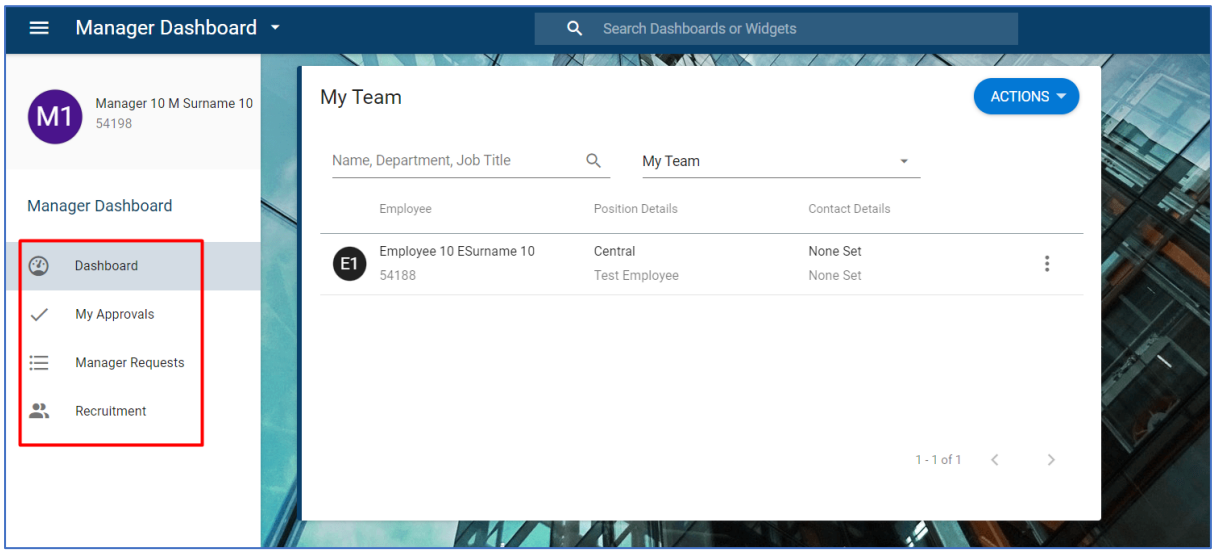
3. Manager Dashboard

3.1. Overview

The Manager Dashboard is an area of the system within which you can approve or reject requests and also view team information.

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

- Dashboard
- My Approvals
- Manager Requests
- Recruitment



4. My Approvals

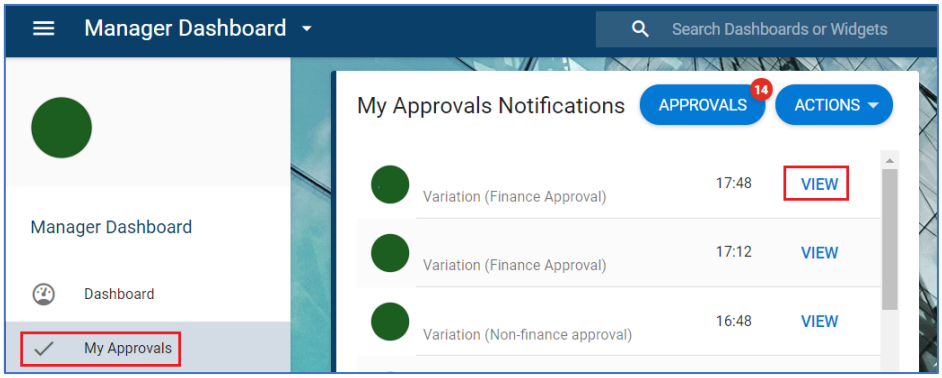
You will receive email notifications (as long as we hold a valid work email address for you) to approve employee requests e.g. expenses (applicable for Synagogues only), manager requests and Vacancy Request Forms.

Note
The timesheet approval process is handled separately, and you will not receive approvals or email notifications. Please refer to the Timesheet section below for further information.

4.1. Approving Manager Requests

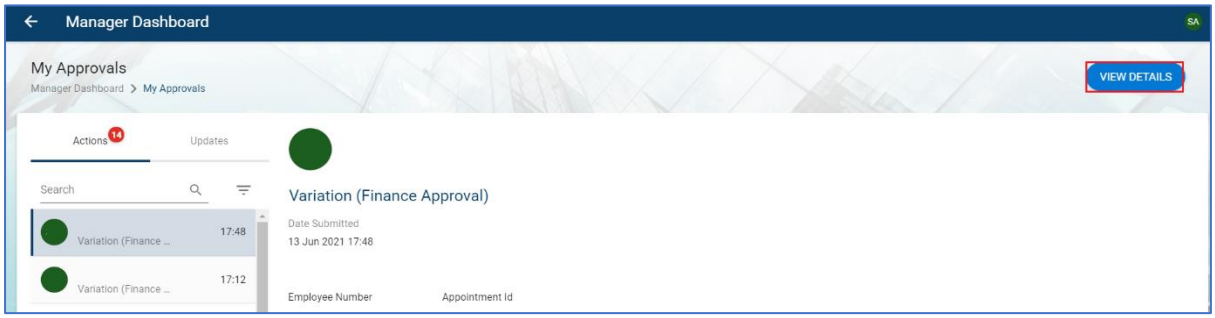
Approvals can be accessed via the Manager Dashboard in two ways:

- Clicking on 'My Approvals' in the menu bar options and 'VIEW', **OR:**
- Click on the notification bell in the top right-hand corner and click the relevant notification.

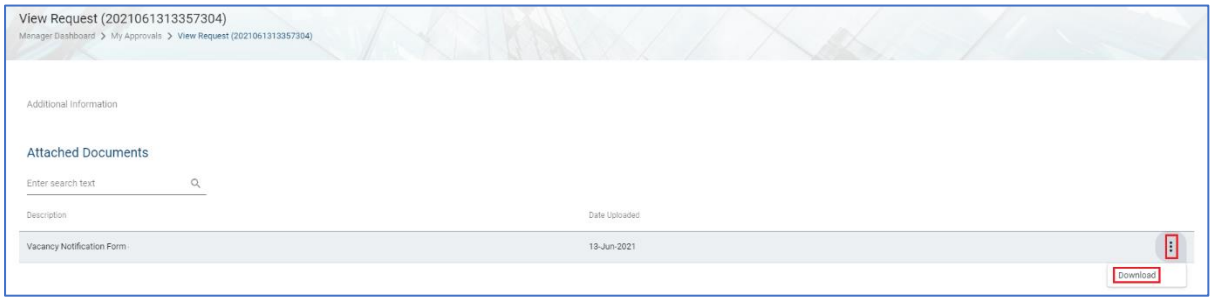


The details of the request will appear on the screen.

You should click on '**View Details'** to view the full details of the request and any attached documents.



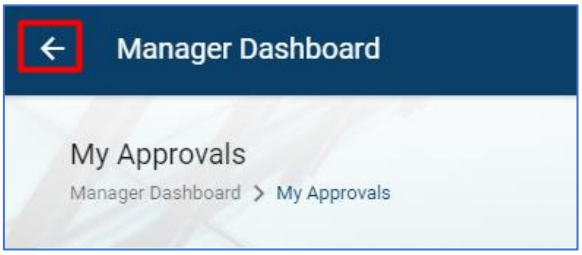
You can view and download any attached documents by clicking on the ⋮ icon and Download:



The following table outlines the required uploads for each of the Manager Request Types. You should reject the form if the initiator has not attached the required uploads:

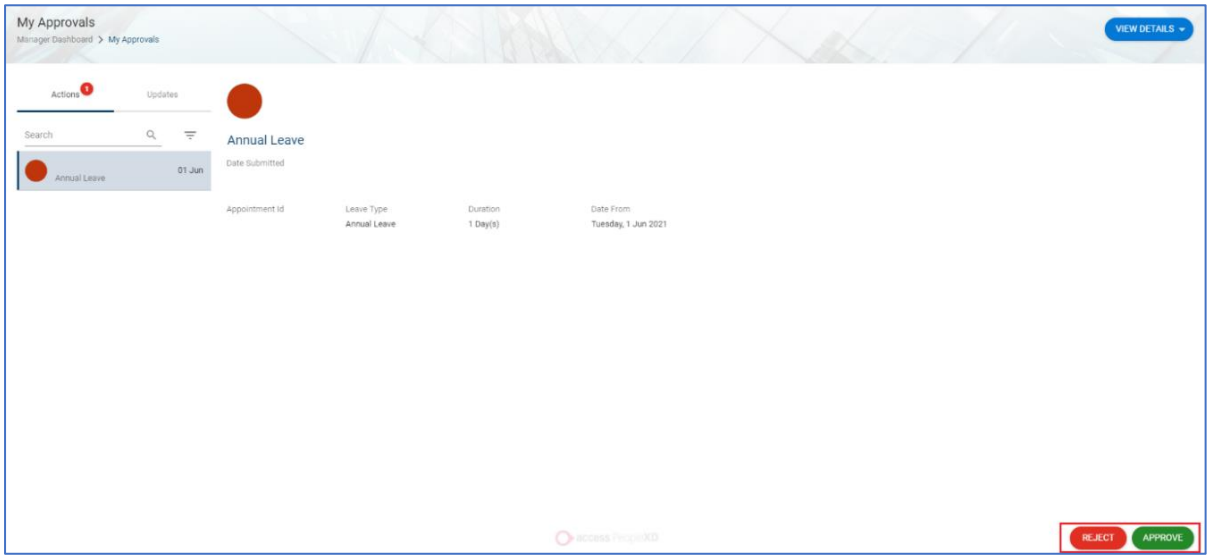
Request Type	Required uploads
Leaver Notification	Resignation letter/email
Resignation from One Role	Resignation letter/email
Variation: One off Payment	None required.
Variation: Change in Line Manager	None required.
Variation: Change of Contract Type	None required.
Variation: Change of Hours	None required.
Variation: Change of Job Title	New Job Description (optional)
Variation: Change of Salary/Pay	None required.
Variation: Extension of Fixed Term	None required.
Variation: Promotion	New Job Description (optional)
Variation: Term Time	None required.
Variation: Work Pattern Change	None required.

Once you have reviewed the form and any attached documents, click on the back button to navigate to the previous page(s):



To approve or reject a request, click on the relevant button.

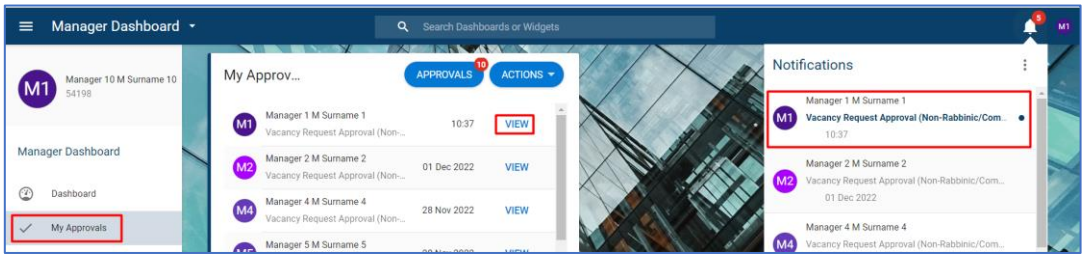
When rejecting a request, you will also be prompted to provide a reason which the initiator will be notified of and will have to amend the request and re-submit for approval, if applicable.



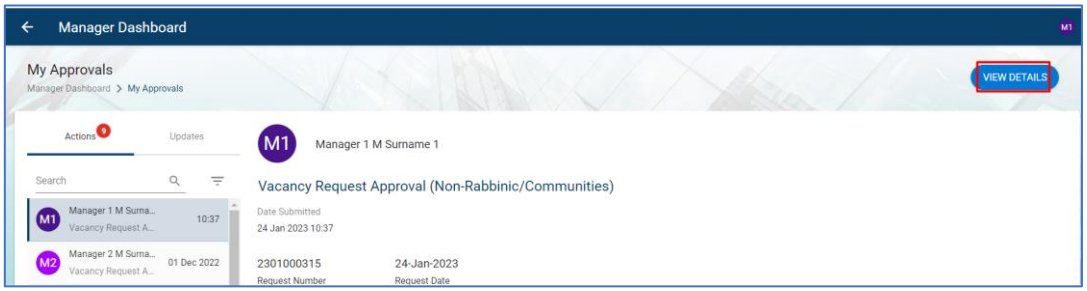
4.2. Approving Vacancy Request Forms (Non-Rabbinic)

The Vacancy Request Form replaces the previous Vacancy Notification Form, and will usually be initiated by the Hiring Manager, or the Synagogue Administrator, if applicable. The FR/Director is the first approver. The Approvals can be accessed via the Manager Dashboard in two ways:

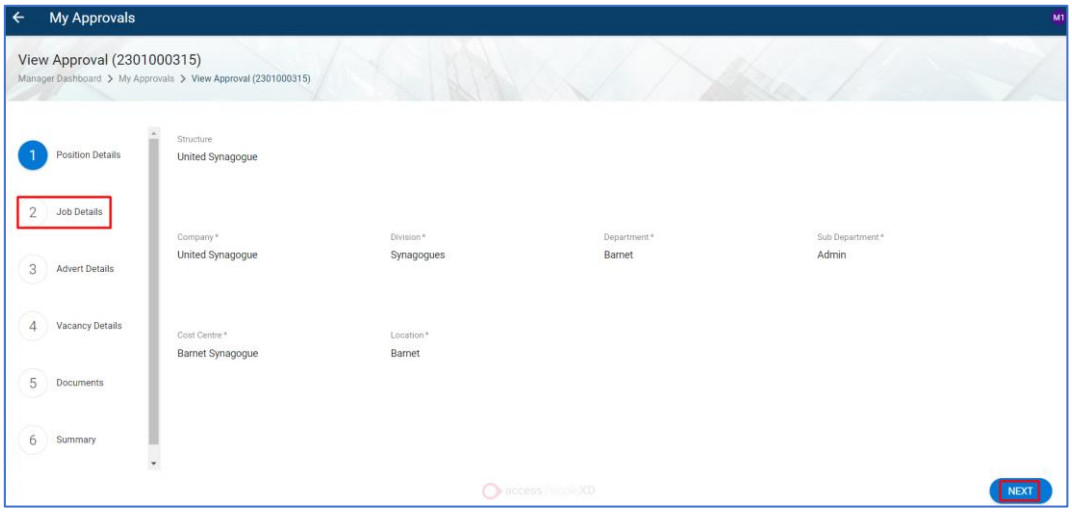
- Clicking on 'My Approvals' in the menu bar options and 'VIEW', **OR:**
- Click on the notification bell in the top right-hand corner and click the relevant notification.



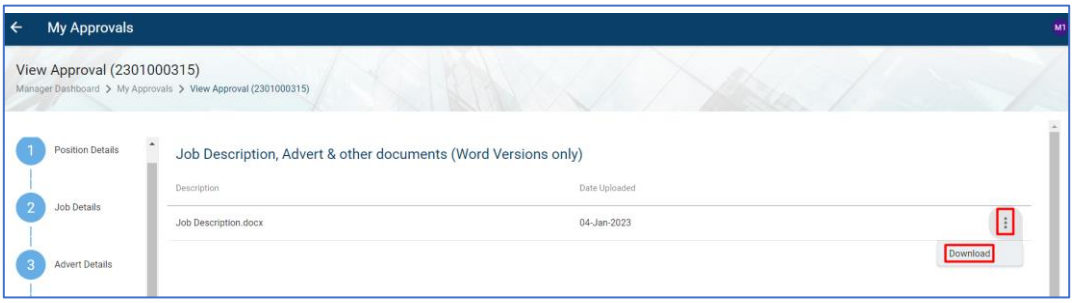
The details of the request will appear on the screen, click **'View Details'** to see the full details:



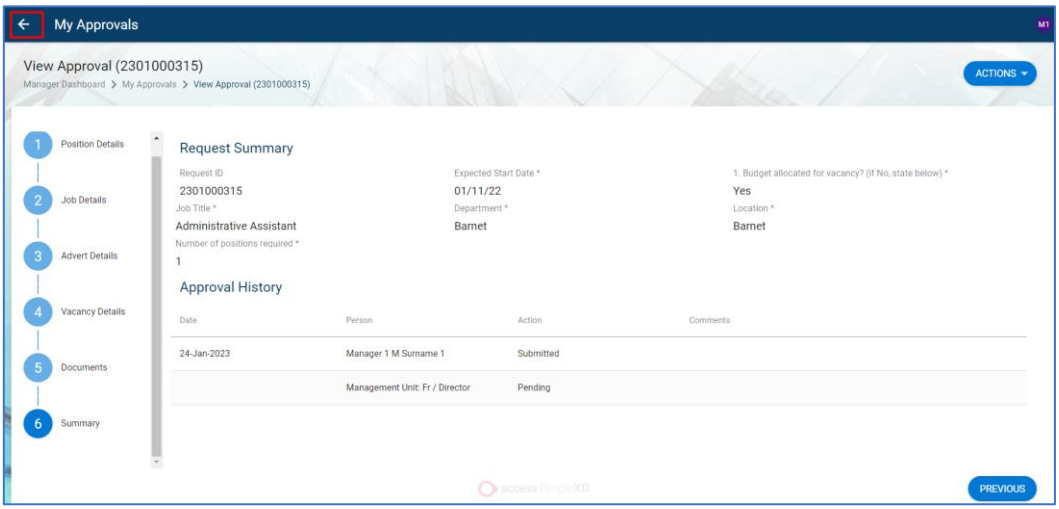
Review each of the sections by clicking on each heading or the 'Next' button:



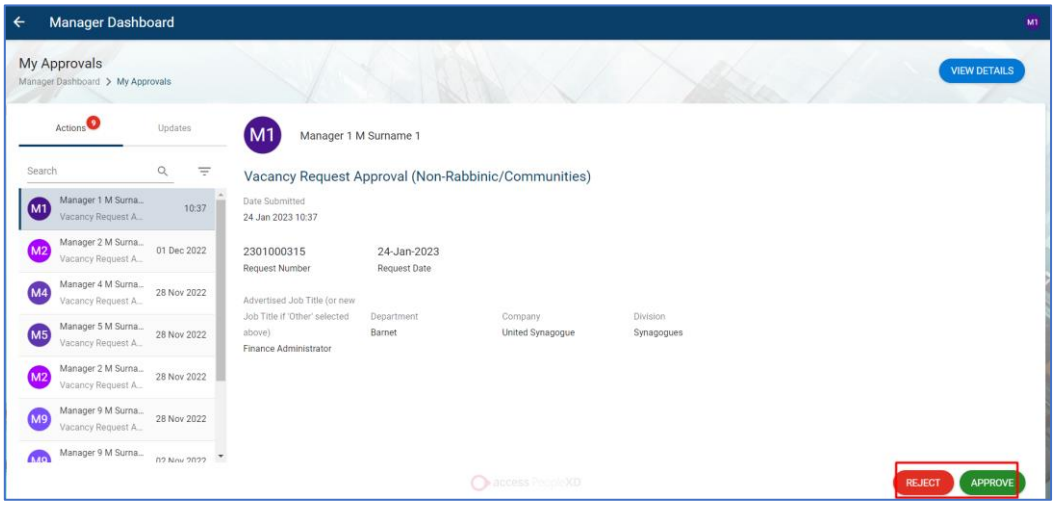
You can view and download any attached documents by clicking on the ⋮ icon and Download:



Once you have reviewed the form and any attached documents, click on the back button to navigate to the previous page:



To approve or reject a request, click on the relevant button:



When approving or rejecting a request, you will be prompted to provide a reason.

We would recommend that any minor changes are provided as approval comments, rather than rejecting the form for the initiator to re-submit.

If you reject the form, the initiator will be notified which will include your rejection comments. They can then copy the form, amend and re-submit for approval, if applicable.

Note
The Offer Approval Form replaces the Contract Request Form. The FR/Director is not required to approve this form, but they will be notified; this will include the name of the successful applicant and the salary, and this will be sent once the successful applicant has verbally accepted. If the Hiring Manager wishes to offer below or above the approved salary figure, they will first need to discuss and obtain further approval from the FR/Director and Management Accountant offline, prior to the verbal offer being actioned.

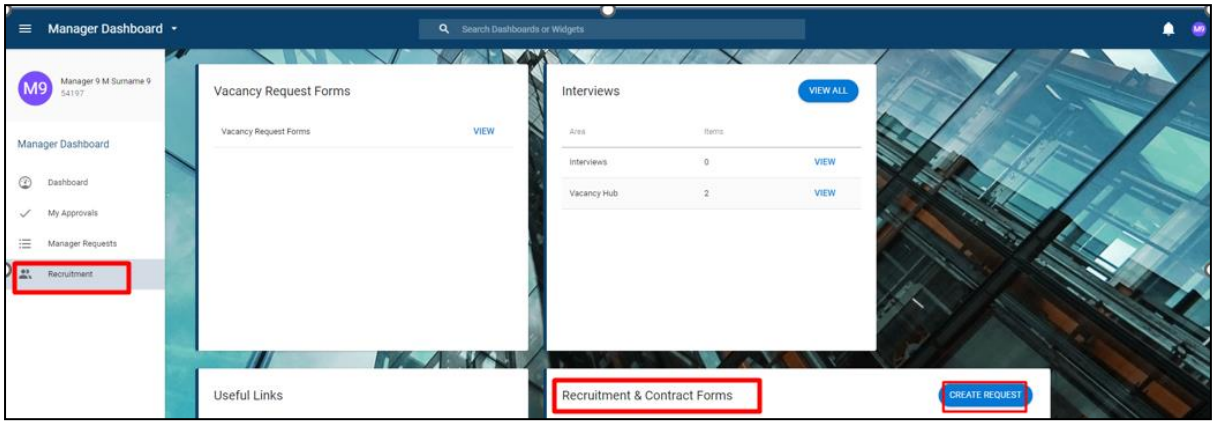
4.3. Submitting a Rabbinic Vacancy Request Form

The FR is responsible for submitting the Rabbinic Vacancy Request Form.

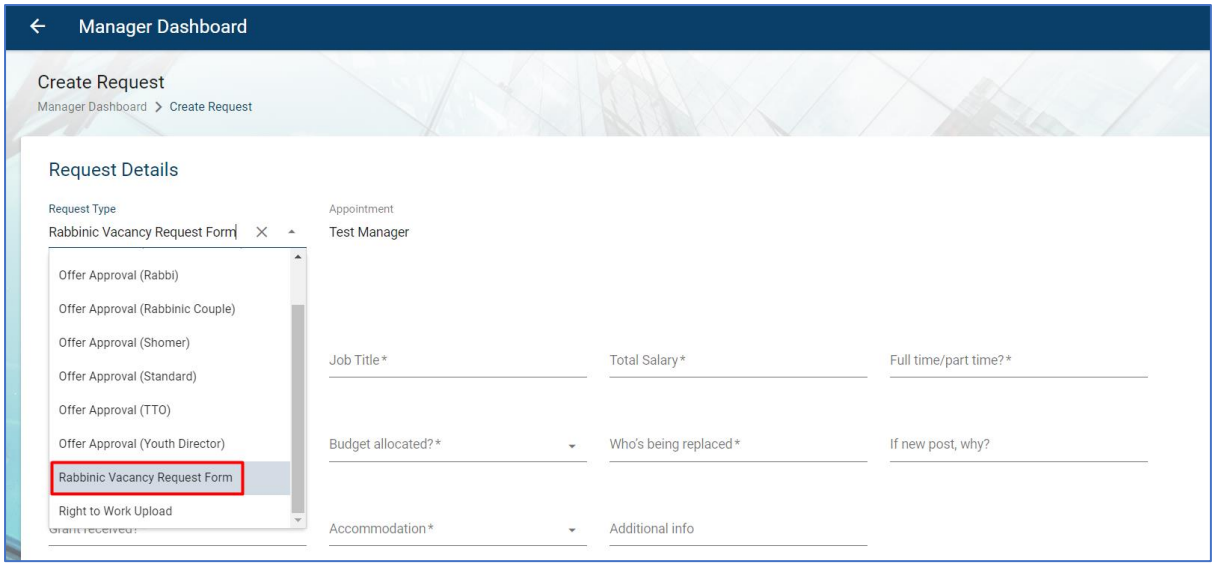
The first step for a Rabbinic Vacancy is for a discussion to take place between the FR, the Director of Communities and the HR Director. The next step is for the FR to submit a Rabbinic Vacancy Request Form within Core.

The Rabbinic Recruitment process is significantly different to the regular Non-Rabbinic Recruitment process; for Rabbinic Recruitment, the Vacancy Request Form is raised using the 'Recruitment & Contract Forms' section, not the usual 'Vacancy Request Forms' section:

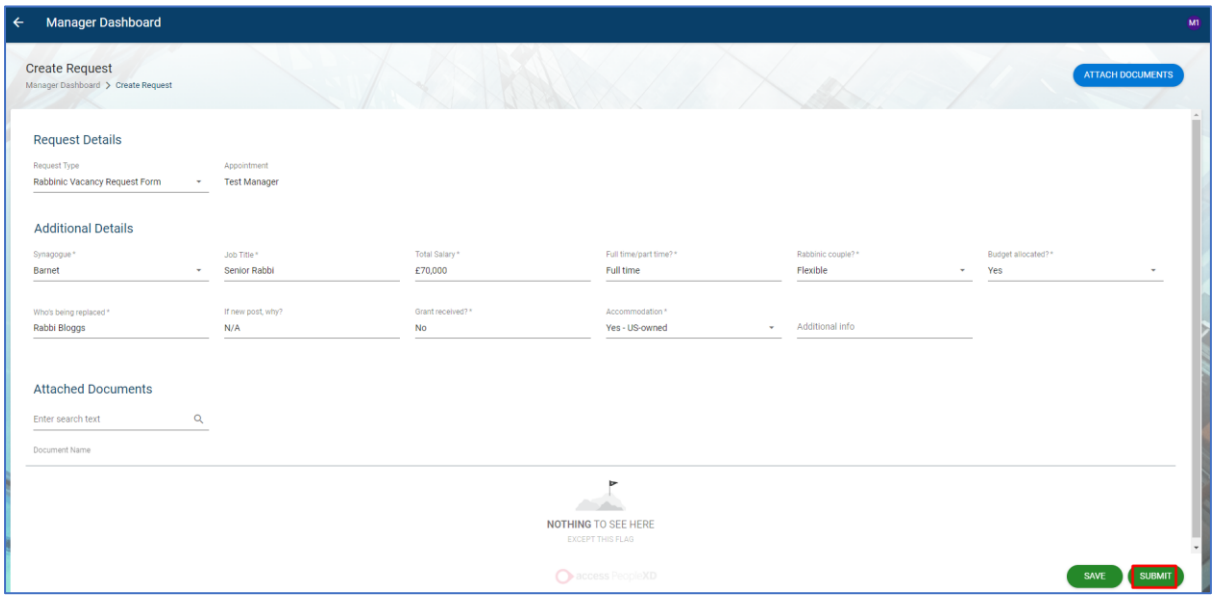
- Navigate to the Manager Dashboard, select the Recruitment tab and the Recruitment & Contract Forms section (you may need to scroll down to view this section)
- Click 'Create Request':



- Select the 'Rabbinic Vacancy Request Form' request type from the dropdown list.



- Populate all the fields and click ‘Submit’:



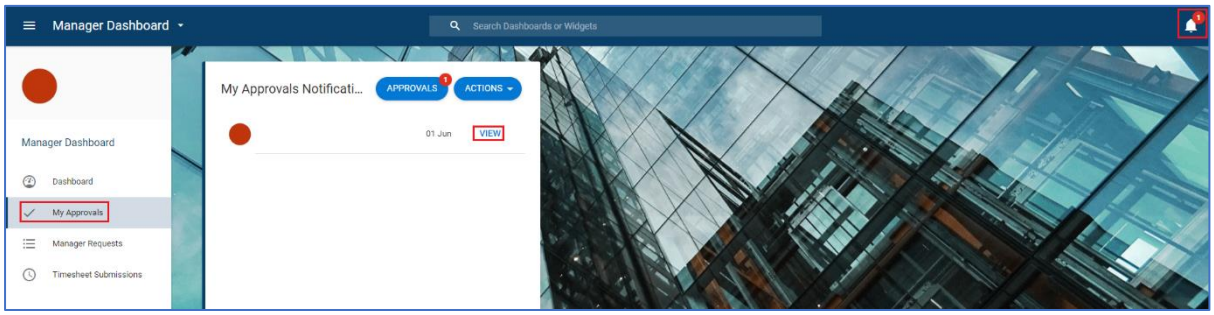
- Once submitted, the Rabbinic VRF will proceed to the next stages of approval (i.e. Director of Communities, Finance and HR Director). You will be kept informed via email of the approval progress.

4.4. Approving Expenses (Synagogues only)

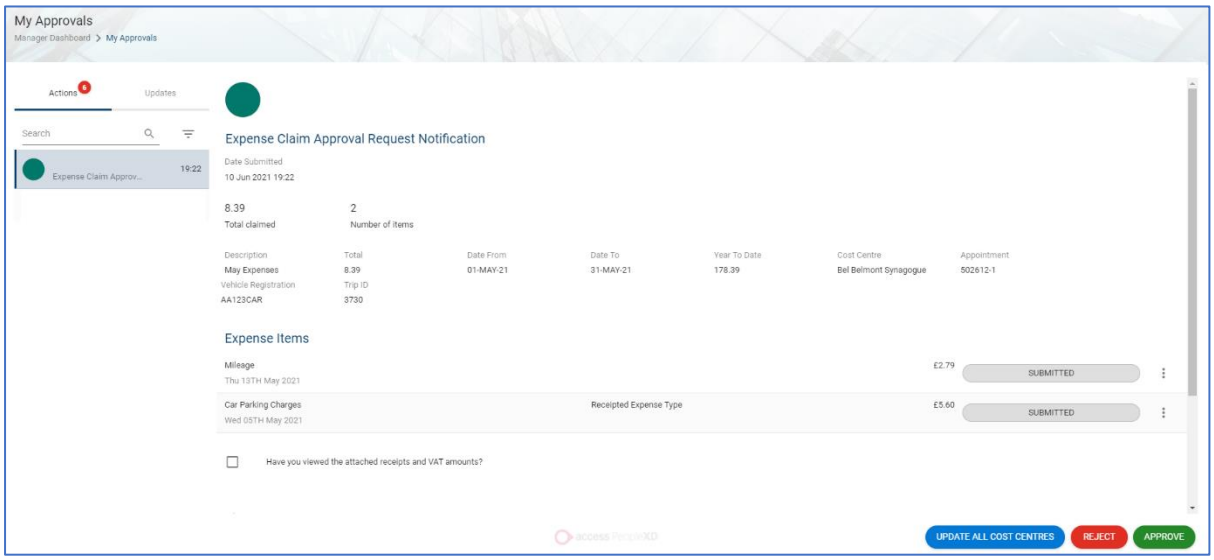
For Synagogue staff, FRs are required to approve expenses (for 305 and Burial, the Line Manager is required to approve expenses. If applicable, please refer to the Manager Self Service User Guide for further details).

Expense Approvals can be accessed via the Manager Dashboard in two ways:

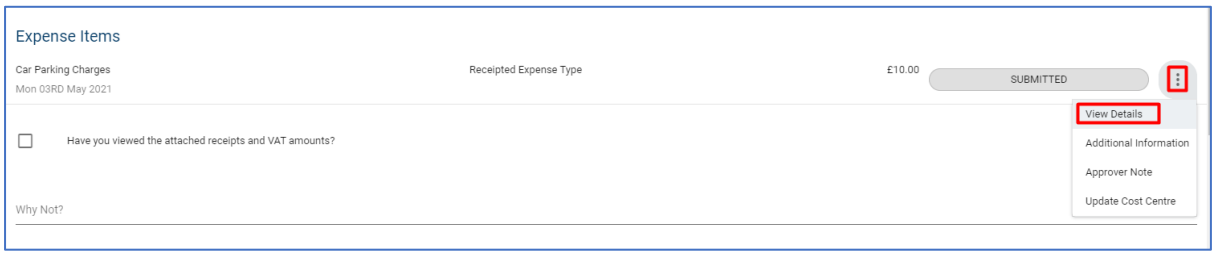
- Clicking on 'My Approvals' in the menu bar options and 'VIEW', **OR:**
- Click on the notification bell in the top right-hand corner and click the relevant notification.



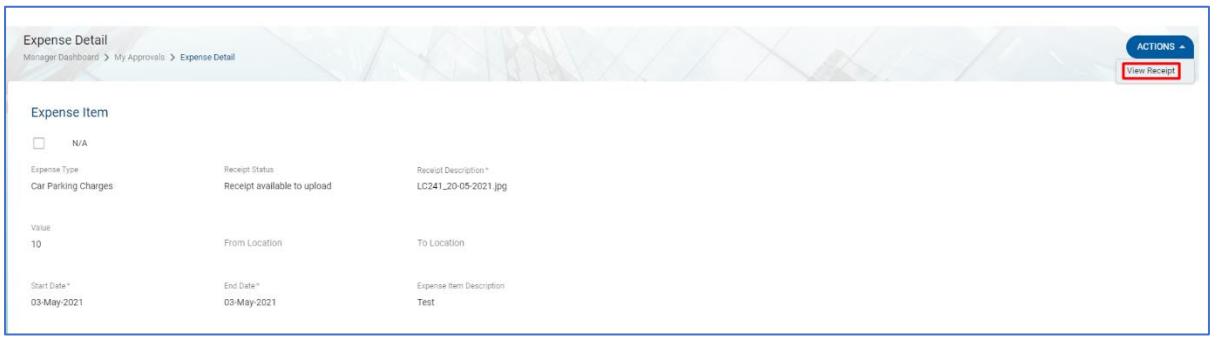
When you open the Expense Claim Approval Request Notification, you will be able to view the populated Expense Report plus the individual Expense Items.



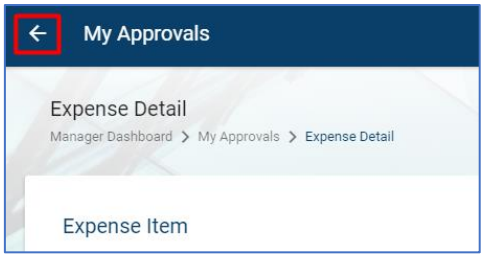
You can view the details of each item by clicking on the ⋮ icon and 'View Details':



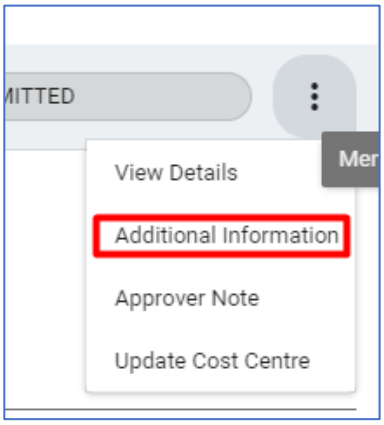
Within ‘View Details’ you are able to view the full details or each item. You are also able to view the receipt by clicking on ‘Actions’ then ‘View Receipt’:



To go back to the Expense Report, click on the arrow icon:

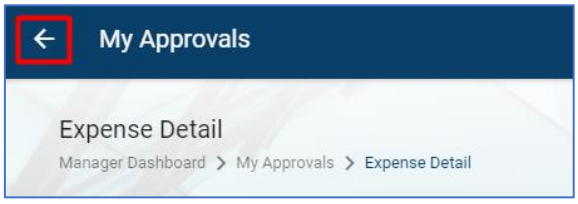


For Expense Items that require the employee to provide additional information, such as Rabbi Ententainment, these details can be viewed by clicking on the ⋮ icon and then ‘Additional Information’:

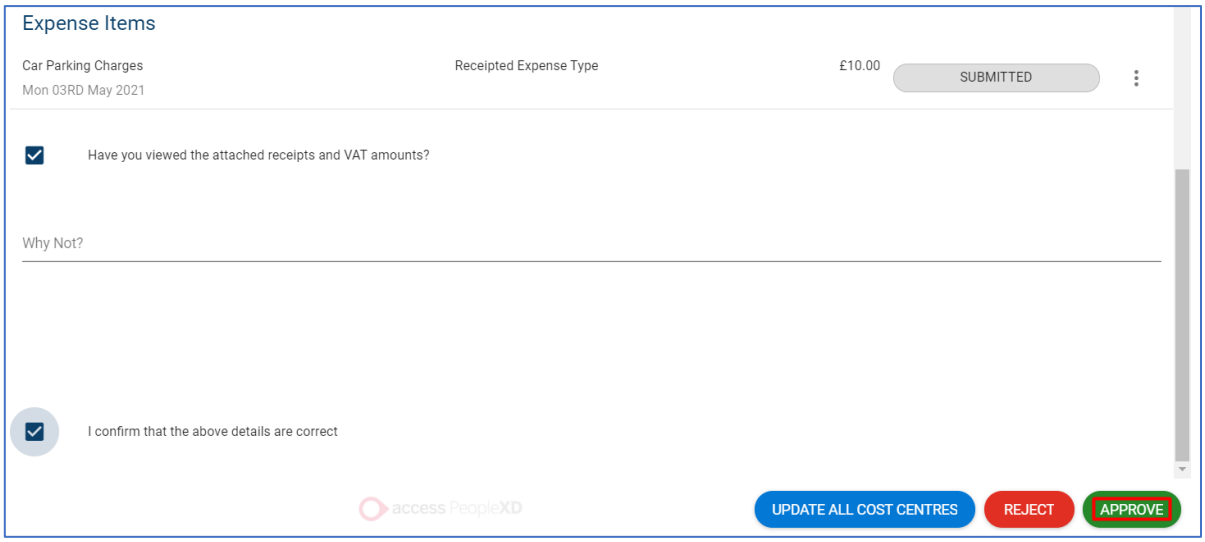


Due to character limitations within the Additional Information screen, Rabbis should upload the guest list within the Expense Item as a receipt file if there are more than 3-4 guests, referring to the attachment within the Additional Information:Attendee field.

To go back to the Expense Report, click on the arrow icon:



To approve the Expense Report, complete the two declarations and click ‘Approve’:



If you have been unable to review receipt(s), for example because the employee did not receive one, you should:

- Leave the first declaration unticked
- Provide further details within the ‘Why Not?’ text box, in line with the employee’s justification.

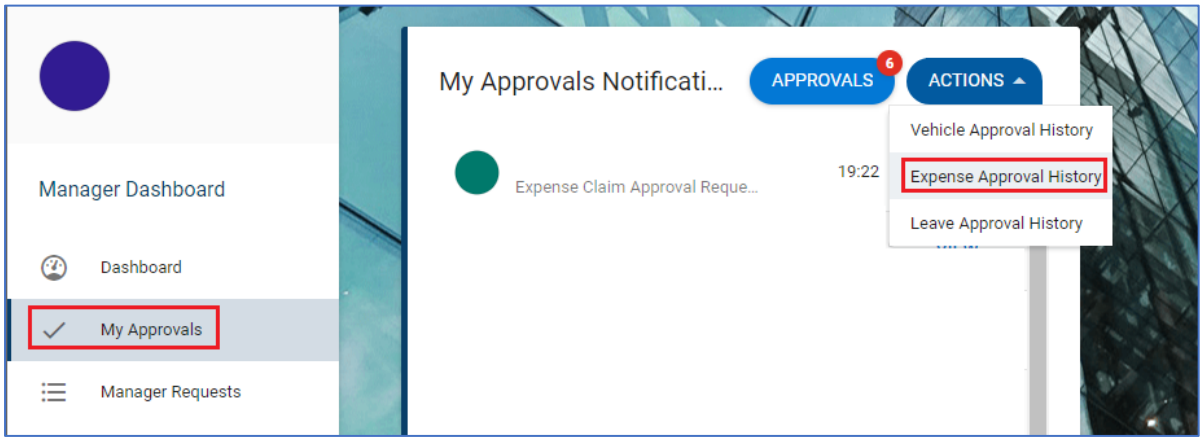
You will be unable to approve the Expense Report until both declarations have been completed.

To reject an expense claim:

- Simply click ‘Reject’
- Provide your rejection comments within the pop-up text box which will be provided to the employee.
  It is not possible to reject individual expense items; if there are any issues, you should reject the report and the employee can amend and re-submit.

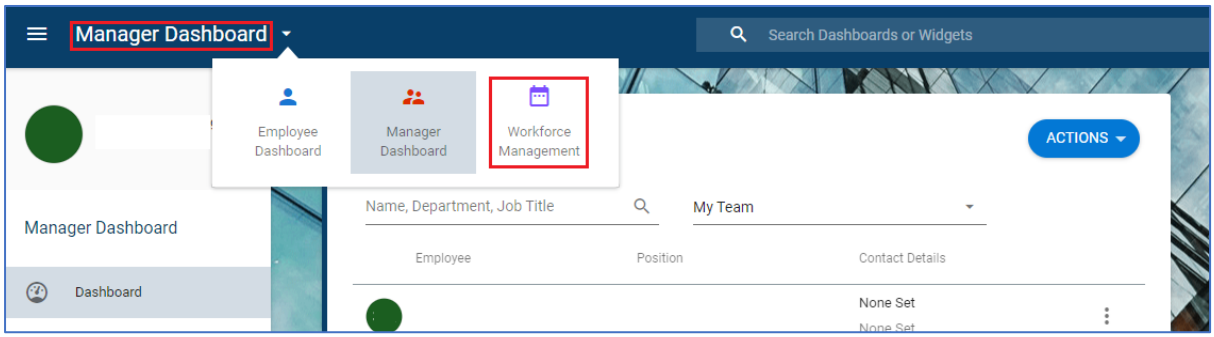
View Approval History

Once you have approved an item, it will no longer appear within your Approval Actions. You are, however, able to view approval history within the ‘My Approvals’ section by clicking ‘Actions’ and selecting the Expense option:



5. Timesheets

Timesheets are managed within the 'Workforce Management' dashboard:



Within Workforce Management, you can:

- View timesheets submitted by your employees
- Action timesheets (approve or reject)

Note
Timesheets are only required to be completed for non-contracted hours i.e. overtime and as-and-when hours.

There is a two-step timesheet approval process:

1. Line Manager
2. FR/Director

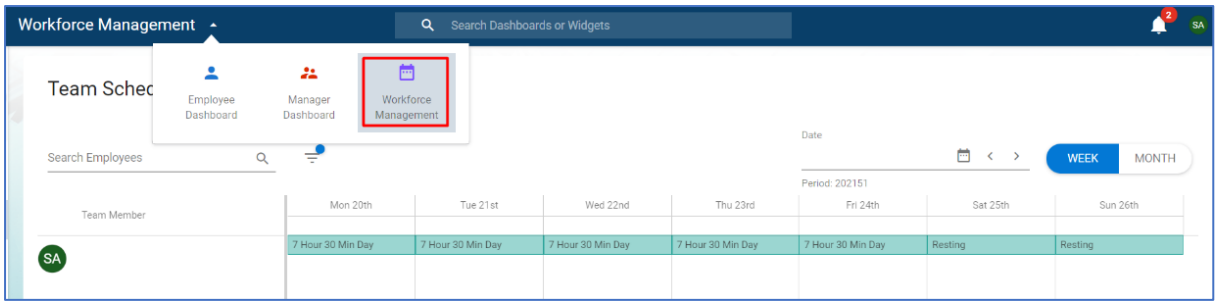
If an FR/Director is also an employee's line manager, they will need to complete both approval steps. This process is outlined below.

5.1. Timesheet approval as an employee's FR/Director

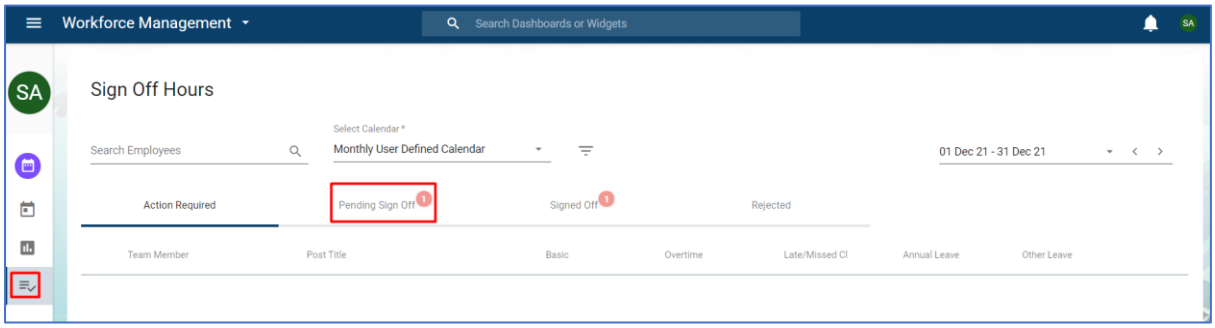
Note
Unlike other approvals within CoreHR, there are no email or system notifications associated with timesheet approvals. This is due to the potential high volume of timesheet entries. Timesheet approvers therefore need to be regularly checking CoreHR to action timesheets, particularly around payroll deadline periods. However, reminders will be issued by the Payroll department prior to the payroll deadline.

Follow these steps to action the second-stage FR/Director check and sign-off process:

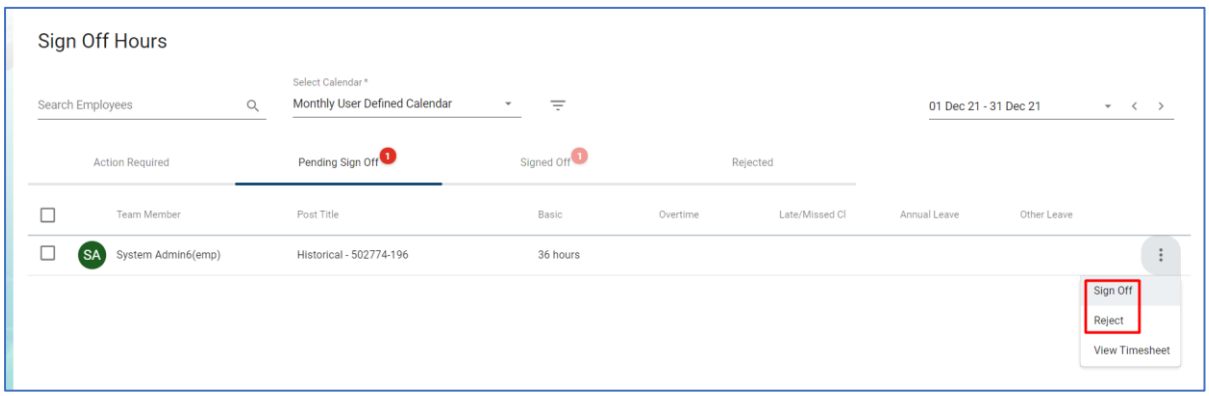
- Ensure you are in the Workforce Management Dashboard:



- Go to the 'Sign Off Hours' tab and navigate to the 'Pending Sign Off' tab:

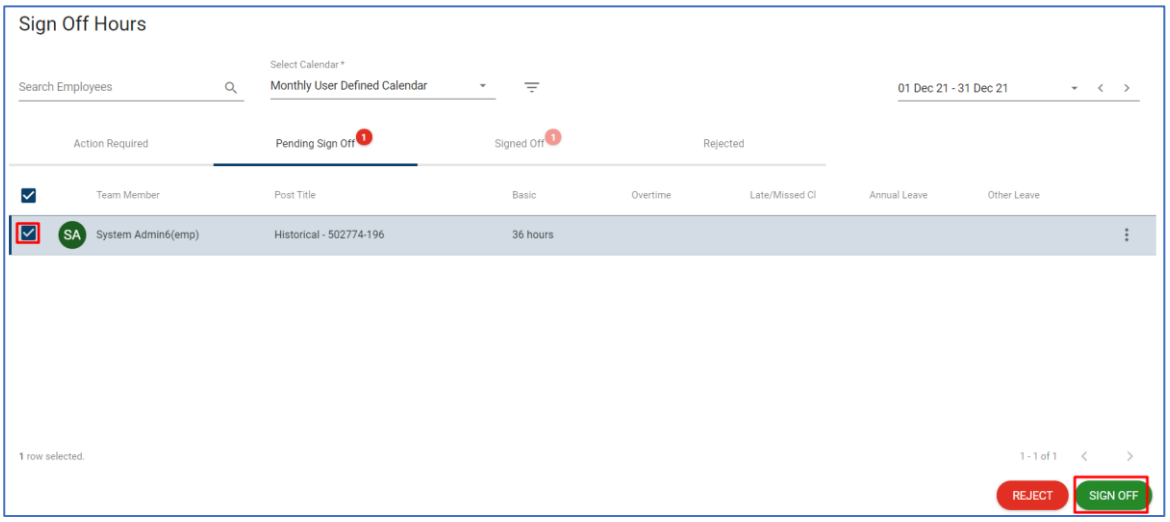


- Review any entries under the 'Pending Sign Off' tab (those within the 'Action Required' tab await line manager approval).
- To approve individual records, click on the ⋮ icon and then select either 'Sign Off' or 'Reject':



- Repeat these steps for each employee within the ‘Pending Sign Off’ tab until there are no pending timesheets.

- It is also possible to Sign Off all timesheets in bulk:
    - Tick the record(s) to be actioned.
    - Click ‘Sign Off’:



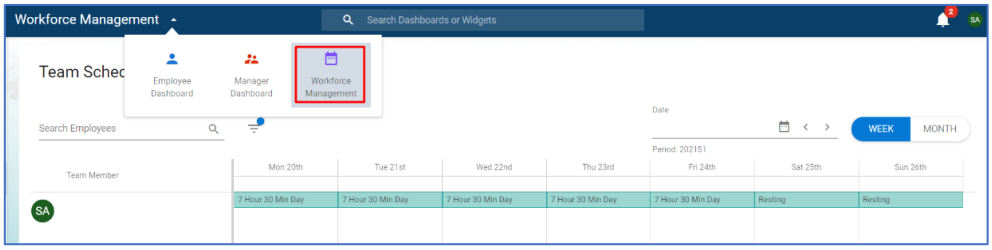
- Once Signed Off, the record(s) will move to the ‘Signed Off’ tab and will be submitted to Payroll for processing.

- If an employee subsequently inputs new entries within the same period, their timesheet will move back to the ‘Action Required’ tab, awaiting Line Manager sign off, and the new total number of hours will display. You will need to repeat the previous steps once the Line Manager has actioned their approval.

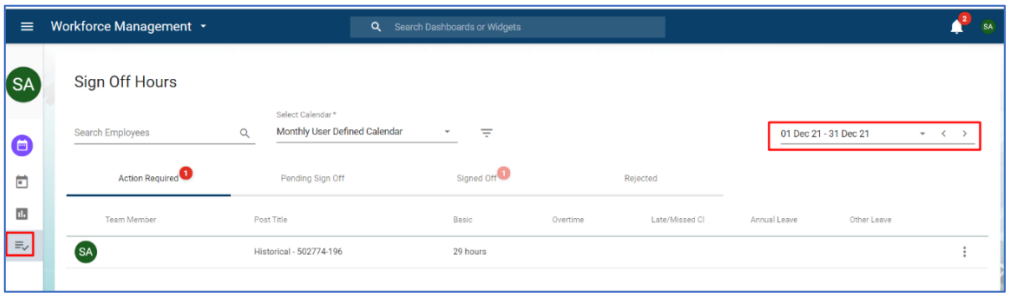
5.2. Timesheet approval as an employee's Line Manager and FR/Director

Follow these steps to action both stages of the timesheet check and sign-off process (Line Manager and FR/Director):

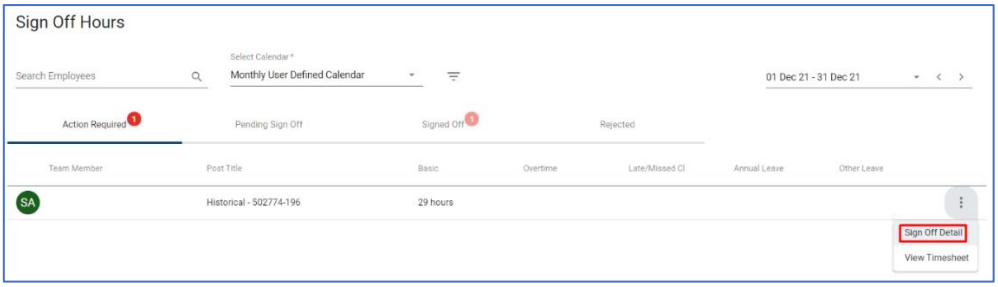
- Ensure you are in the Workforce Management Dashboard:



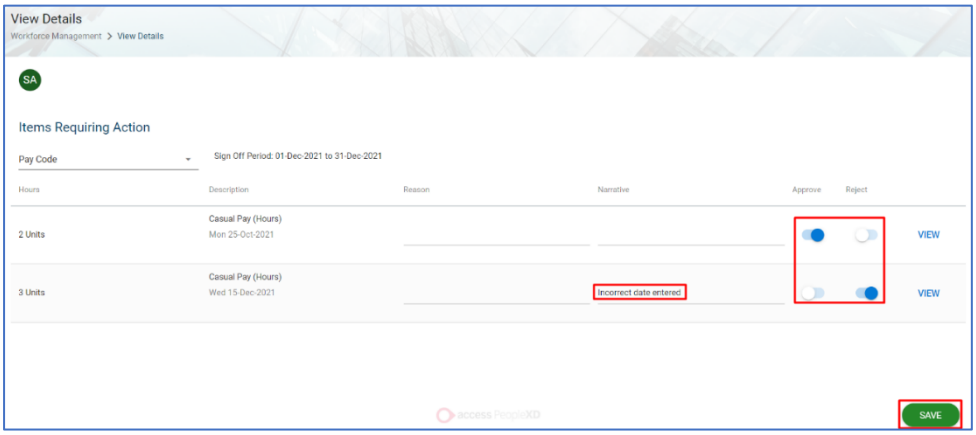
- Go to the 'Sign Off Hours' tab and select the correct period using the arrow icons to switch between the months (this will default to the current month):



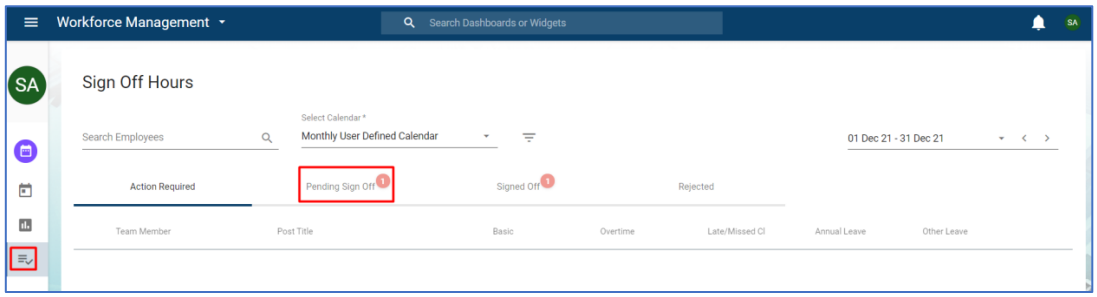
- **As Line Manager**: Review any entries under the 'Action Required' tab. Click on the ⋮ icon and then 'Sign Off detail' to view the timesheet details:



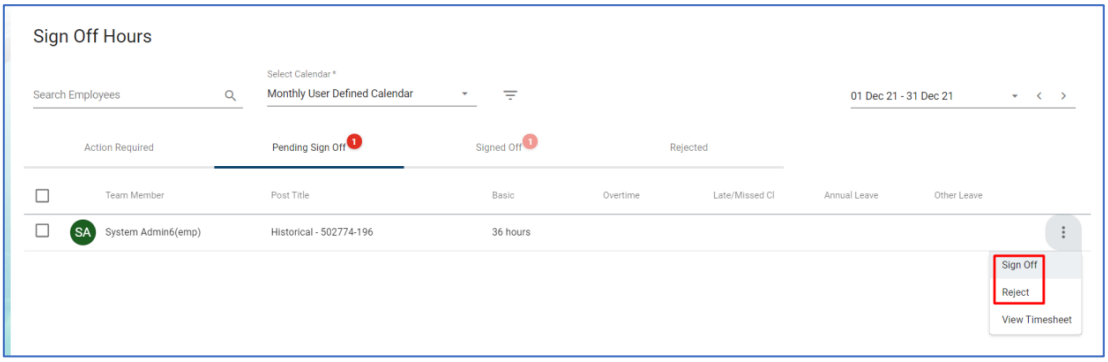
- To approve or reject, click on the relevant button for each entry. You can use the Narrative field to provide a rejection reason which is then viewable by the employee. Once all entries have been approved or rejected, click Save:



- If approved, the employee's timesheet will progress to the 'Pending Sign Off' tab.
  As FR/Director: navigate to the 'Pending Sign Off' tab:

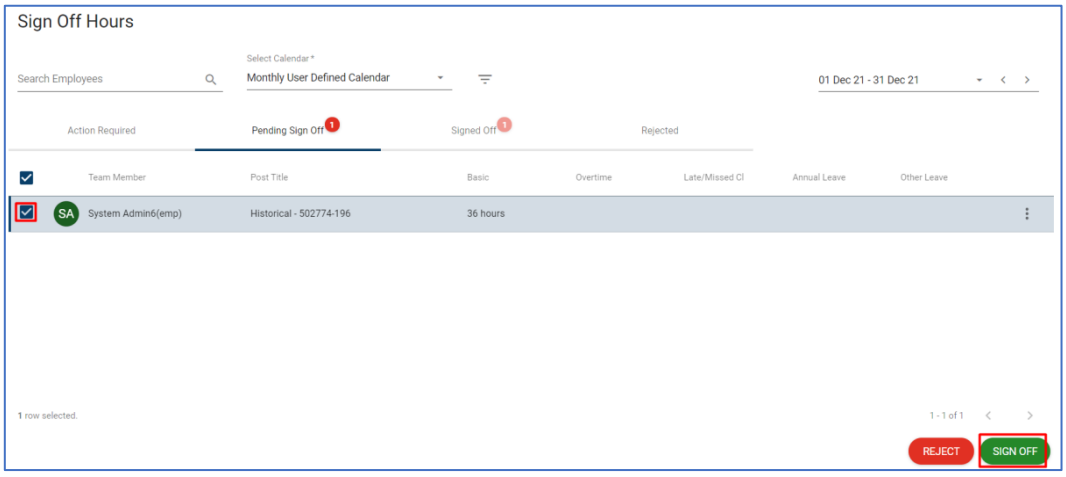


- Review any entries under the 'Pending Sign Off' tab. To approve individual records, click on the ⋮ icon and then select either 'Sign Off' or 'Reject':



- Repeat these steps for each employee within the 'Pending Sign Off' tab until there are no pending timesheets.

- It is also possible to Sign Off all timesheets in bulk:
  - Tick the record(s) to be actioned.
  - Click 'Sign Off':



- Once Signed Off, the record(s) will move to the 'Signed Off' tab and will be submitted to Payroll for processing.

- If an employee subsequently inputs new entries within the same period, their timesheet will move back to the 'Action Required' tab, awaiting Line Manager sign off, and the new total number of hours will display. You will need to repeat the previous steps.