Manager Self Service User Guide

Contents

1. Overview

1.1. Purpose of this Guide

The purpose of this document is to provide detailed guidance on Manager Self Service in CoreHR.

This includes using the Manager Dashboard which allows a manager to manage approvals, maintain team information etc.

This guide outlines how you may:

- Access your team
- Approve or reject leave
- Record an absence
- Cancel leave on behalf of an employee
- View team schedules
- View balance information
- Approve timesheets
- Enter timesheets on behalf of an employee if required
- Approve expenses (305 & Burial only)
- Submit manager requests

This guide covers only the Manager's tasks within self-service, the Employees Users Guide provides details on how to access and maintain your own personal records.

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

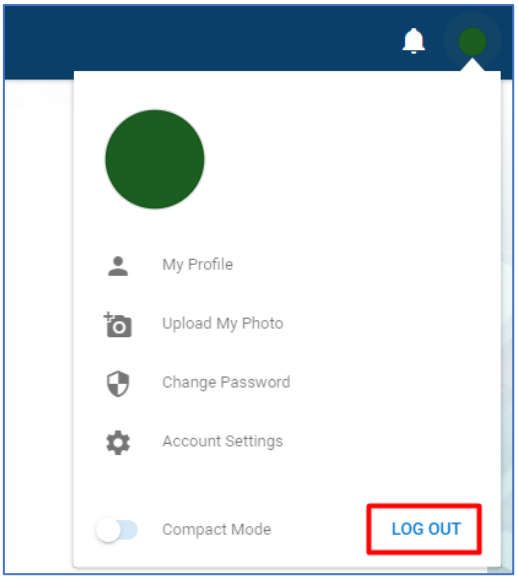
A username and password will be required to enable you to log into CoreHR, these will be provided to you by the United Synagogue HR team.

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



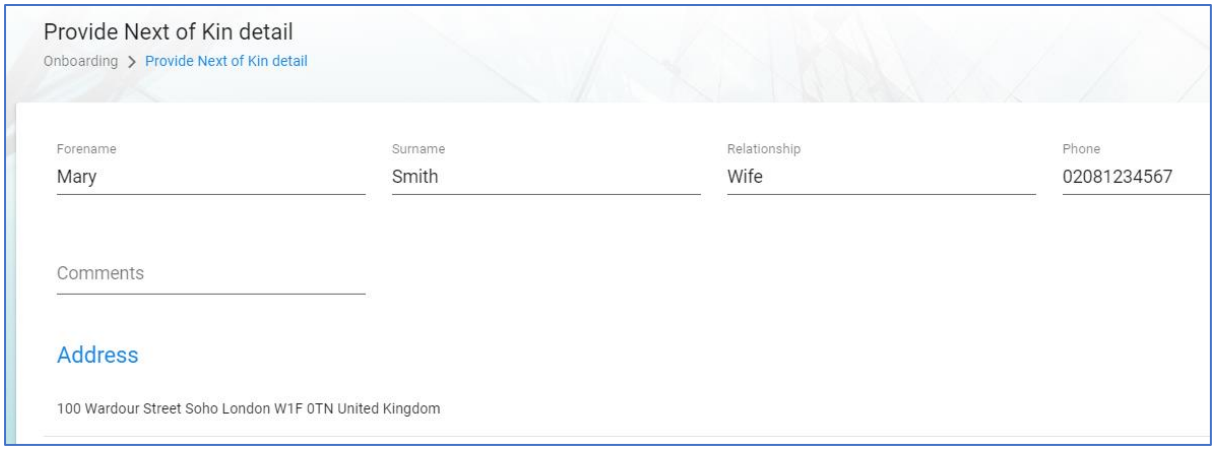
3. Onboarding

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. Manager Dashboard

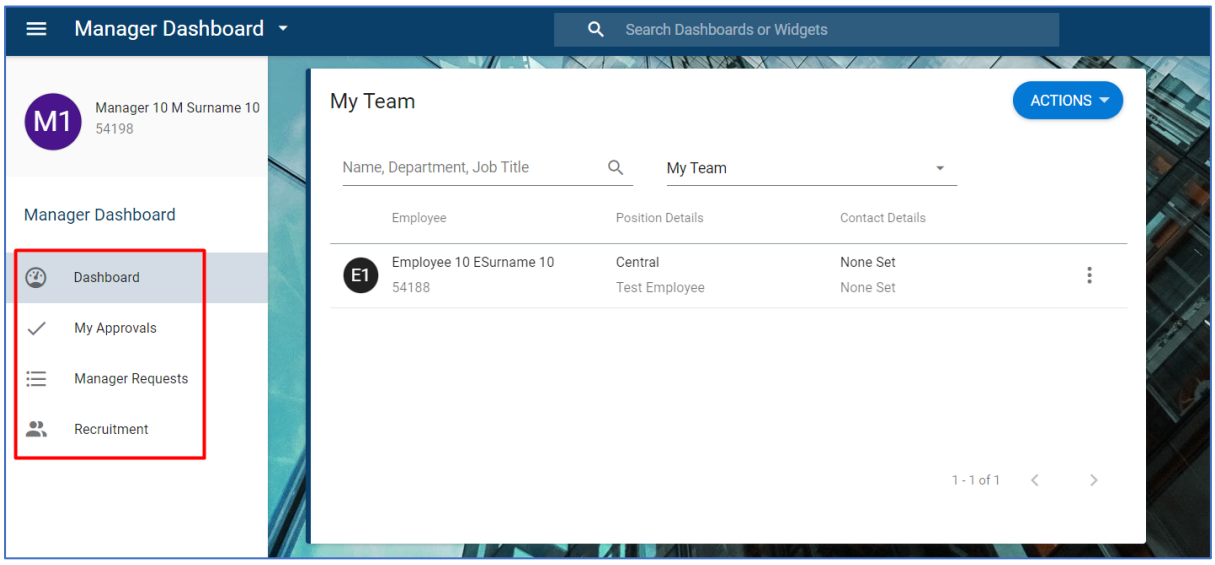
4.1. Overview

The Manager Dashboard is an area of the system dedicated to you as a manager and the functions you will be able to carry out via self-service, for example, accessing your team's information, approving or rejecting leave and expenses.

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

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

- Dashboard
- My Approvals
- Manager Requests
- Recruitment



Note
For guidance on Recruitment-related forms and activities, refer to the Recruitment User Guides.

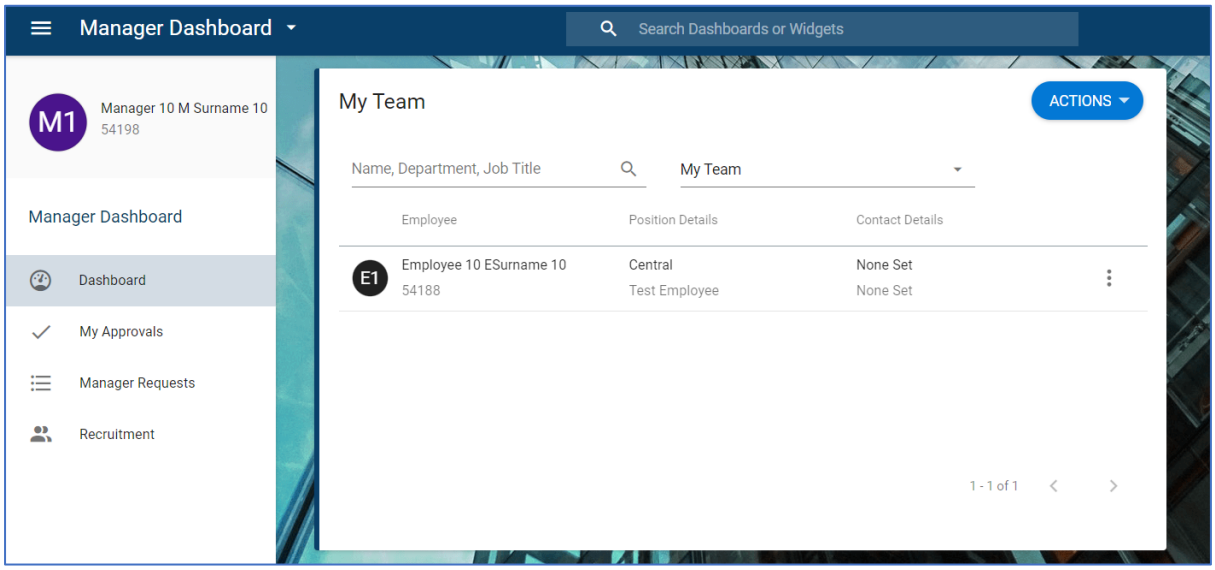
5. Dashboard

5.1. Overview

The Dashboard will enable you to view your team.

My Team allows you to view:

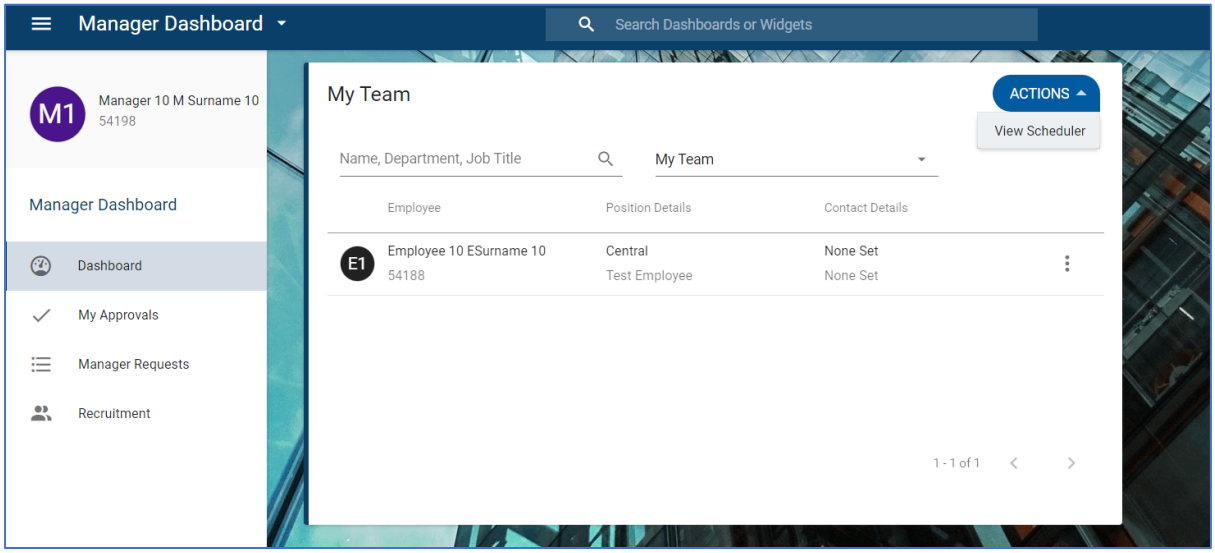
- Team Scheduler
- Employee's Profile



5.1.1. Team Scheduler

To view the Team Scheduler:

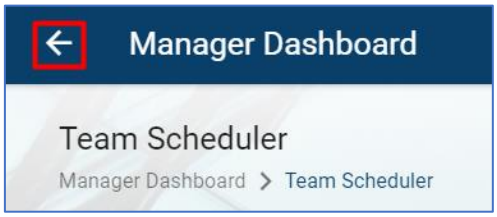
- Click on Actions and select View Scheduler:



- The Team Scheduler will display when your team are scheduled to work (i.e. work pattern) and any absences (i.e. leave or sickness).

You can view different calendar periods by using the < > icons located in the top right-hand corner of the Team Scheduler. You can also choose between a weekly or monthly view by selecting the relevant button.

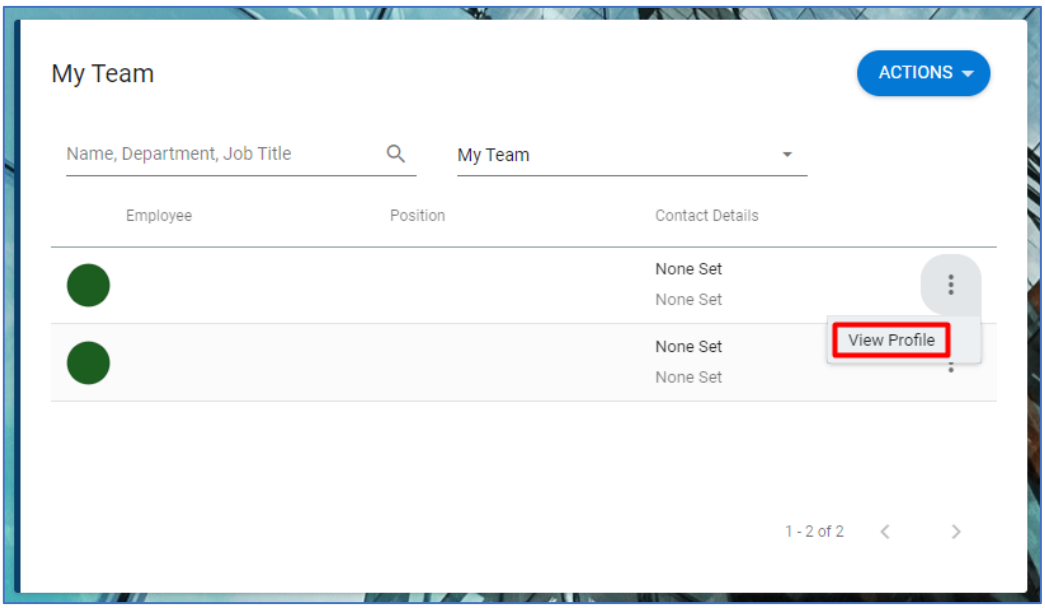
Click on the back button to navigate to previous page(s):



5.1.2. Employee's Profile

To view the employee's profile:

- Click on the ⋮ button next to the employee's name
- Select View Profile

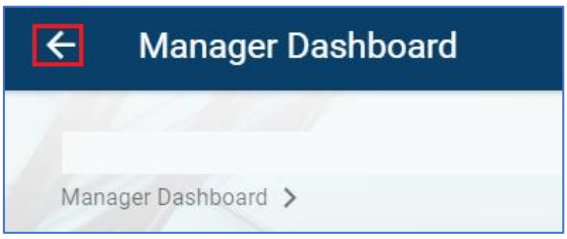


The employee's profile page will now open and you are able to view the following information:

- Employee Details.
- Contract
- Time Management (includes Leave Requests and Balances).
- Learning and Development.
- Manager Requests.

For further details on the Profile section, please refer to the Employee Self Service Guide.

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



5.2. Delegation

Managers are able to delegate access to other managers, if this is required please contact HR e.g. if you are on leave or sick.

6. My Approvals

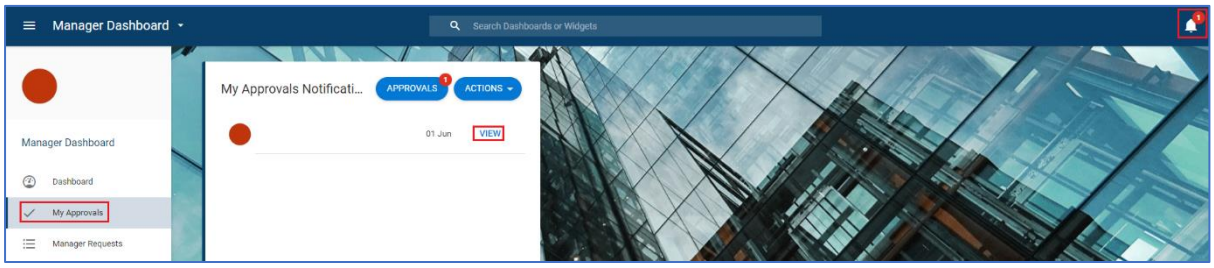
You will receive email notifications (as long as we hold a valid work email address for you) to approve employee requests e.g. expenses (applicable to 305 & Burial only) and annual leave.

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.

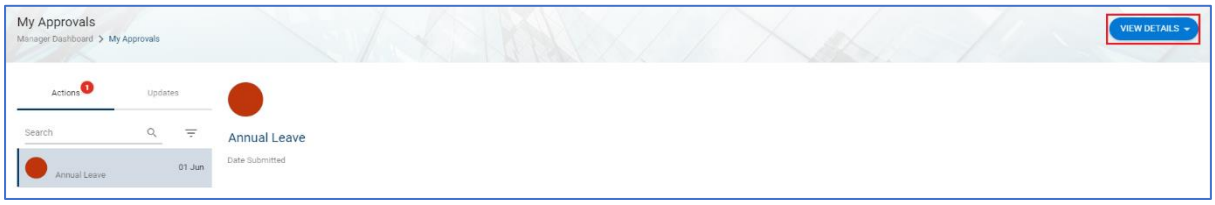
6.1. Accessing Approvals

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

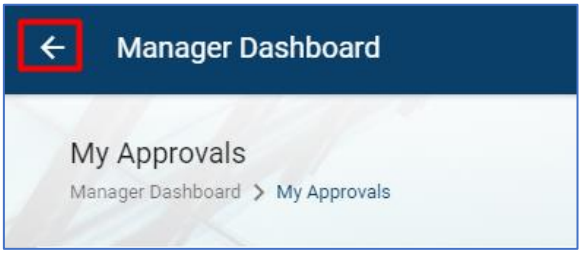
- Clicking on 'My Approvals' in the menu bar options and 'VIEW', **OR:**
- Click on the notification bell in the top right-hand corner and click the relevant notification.



The details of the request will appear on the screen. If you click on **'View Details'** you can see the leave balance of the employee, and also their co-workers leave/absences.

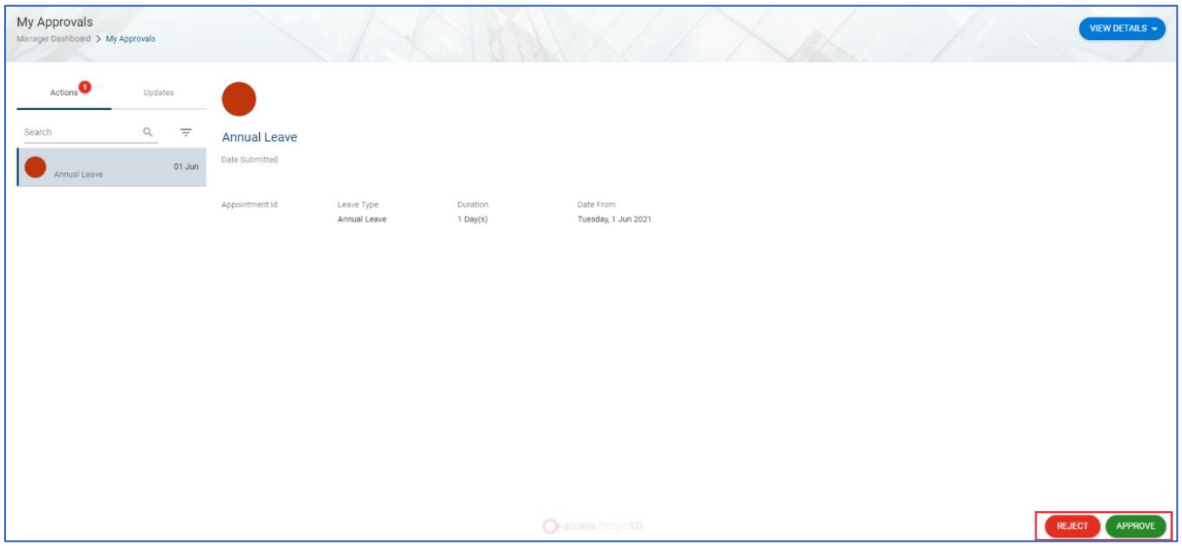


Click on the back button to navigate to previous page(s):



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 employee will be notified of.



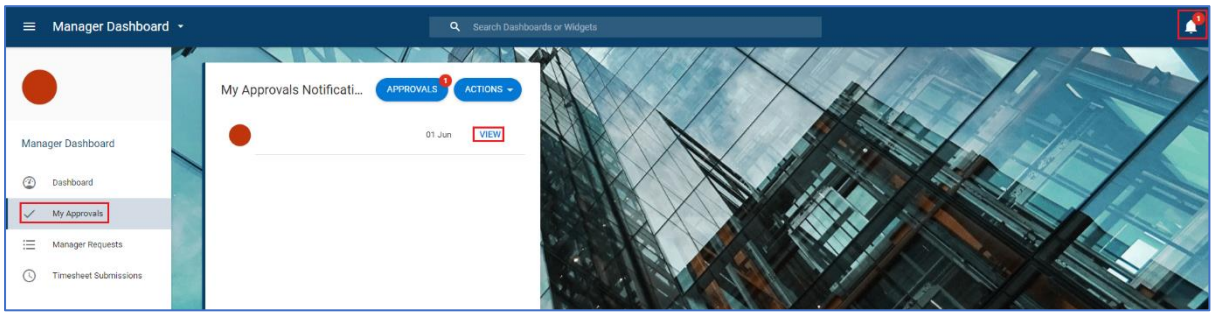
6.2. Approving Expenses (305 & Burial only)

For 305 & Burial staff, Line Managers are required to approve expenses.

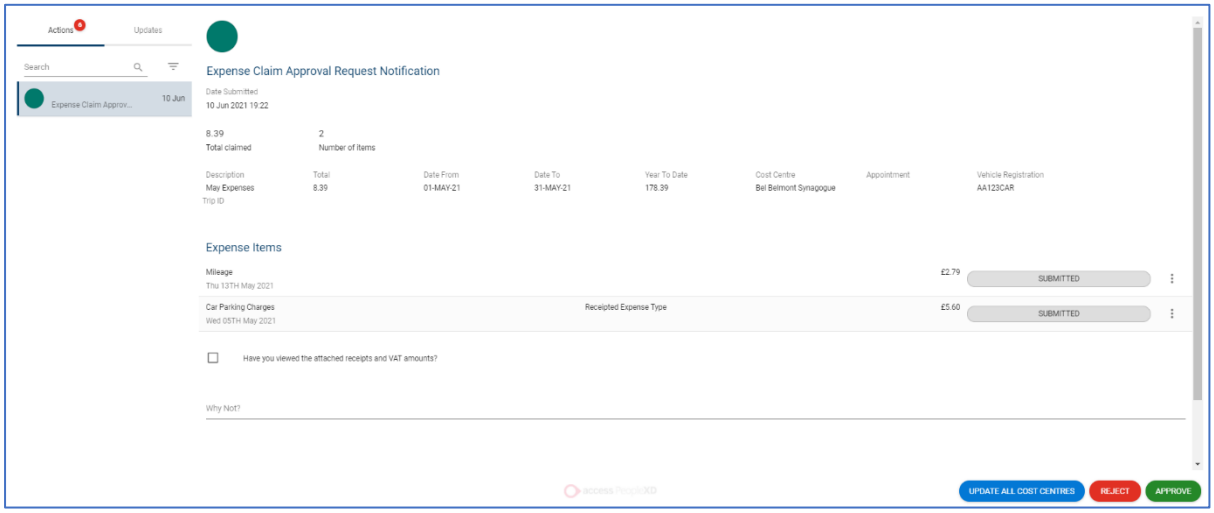
(For Synagogues, the FR is required to approve expenses. If applicable, please refer to the FR/Director Approval User Guide for further details).

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

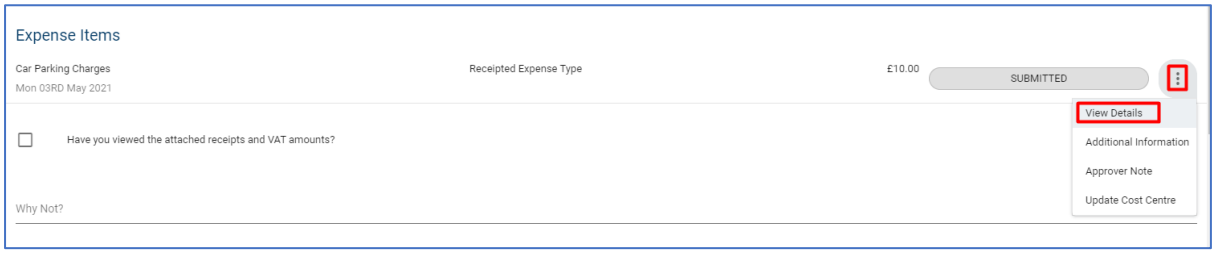
- Clicking on 'My Approvals' in the menu bar options and 'VIEW', **OR:**
- Click on the notification bell in the top right-hand corner and click the relevant notification.



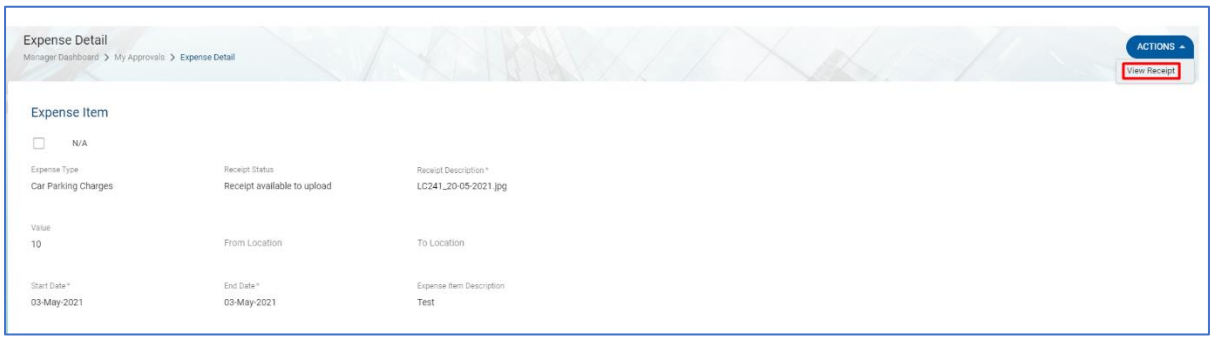
When you open the Expense Claim Approval Request Notification, you will be able to view the populated Expense Report plus the individual Expense Items.



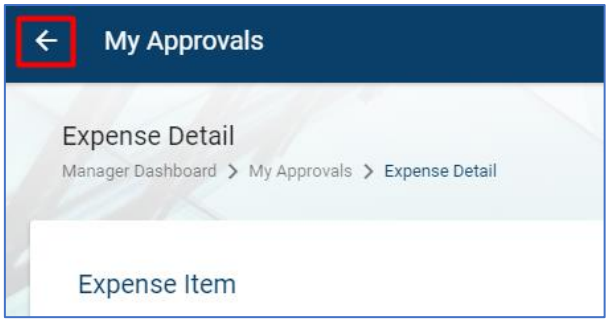
You can view the details of each item by clicking on the ⋮ icon and 'View Details':



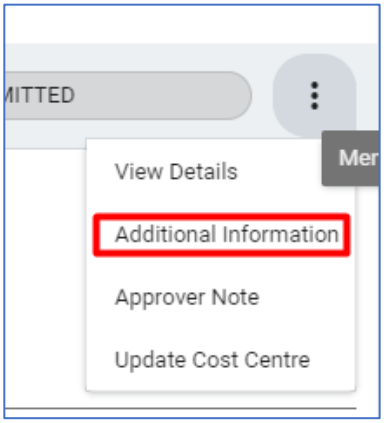
Within ‘View Details’ you can view the full details or each item. You are also able to view the receipt by clicking on ‘Actions’ then ‘View Receipt’:



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

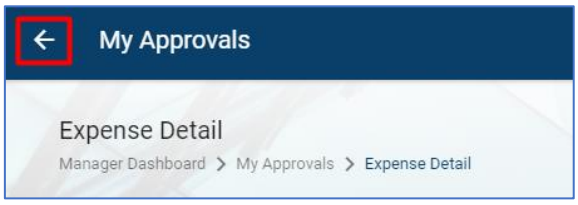


For Expense Items that require the employee to provide additional information, such as Rabbi Entertainment, these details can be viewed by clicking on the ⋮ icon and then ‘Additional Information’:

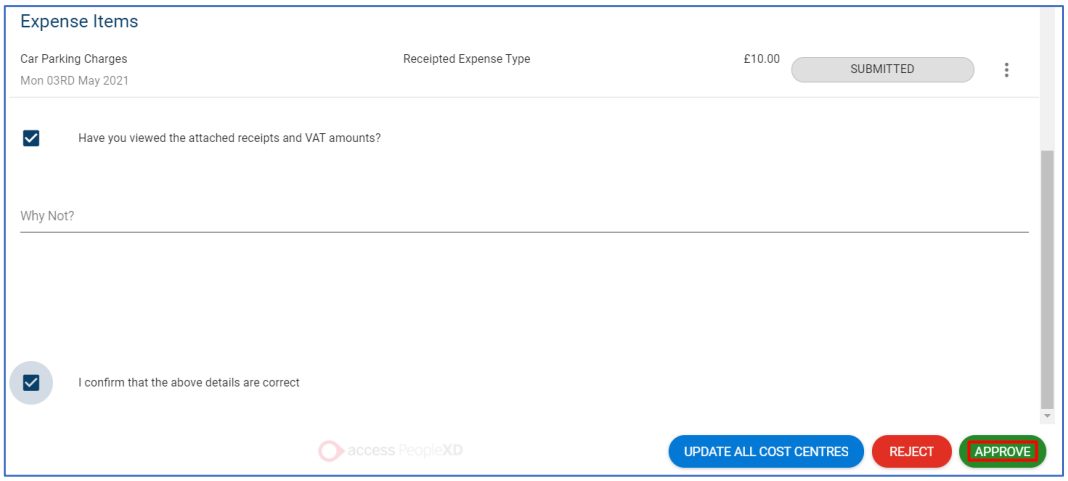


Due to character limitations within the Additional Information screen, Rabbis should upload the guest list within the Expense Item as a receipt file if there are more than 3-4 guests, referring to the attachment within the Additional Information:Attendee field.

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.

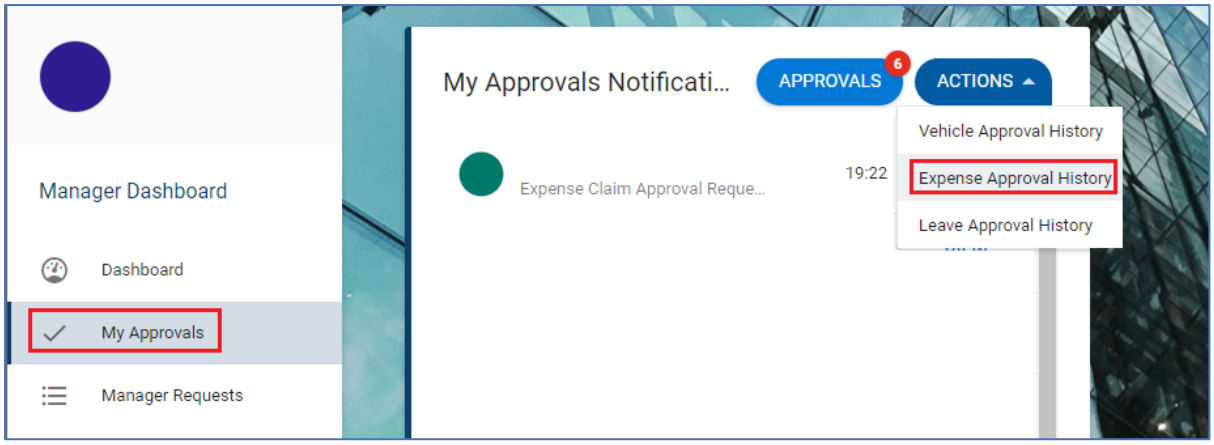
You will be unable to approve the Expense Report until both declarations have been completed.

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.

6.3. View Approval History

Once you have approved an item, it will no longer appear within your Approval Actions. You are, however, able to view items previously approved within the 'My Approvals' section by clicking 'Actions' and selecting the relevant option:



7. Manager Requests

A streamlined process which enables Managers and Administrators (if applicable) to submit requests is available, which replaces the following forms:

- Contract Variation Forms
- Leaver Forms

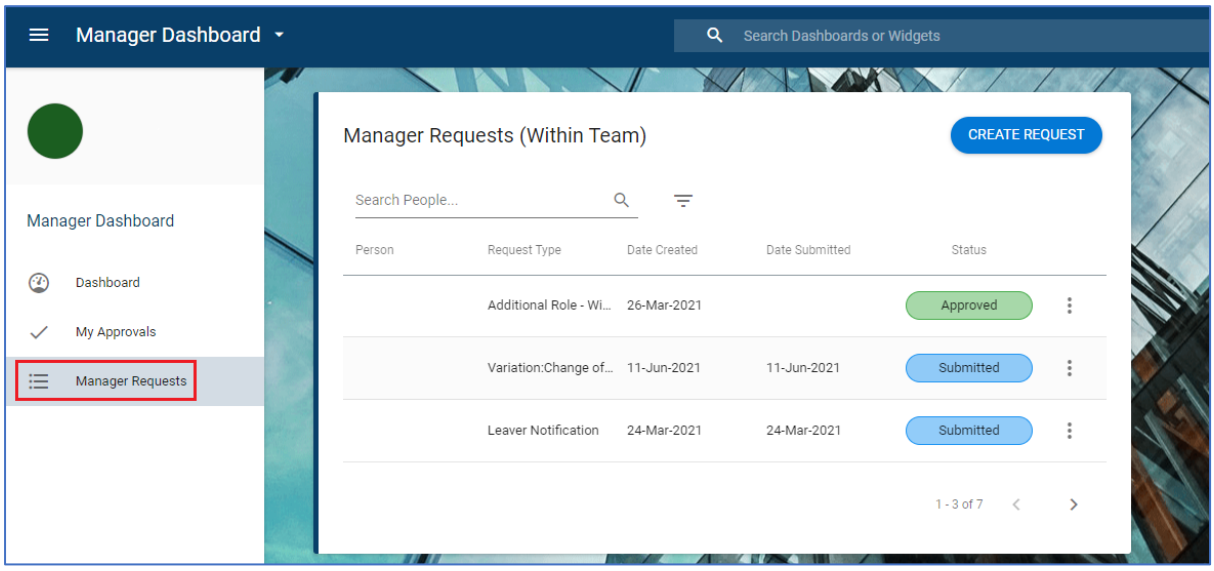
Note
For guidance on Recruitment-related forms and activities, refer to the Recruitment User Guides.

This process enables approvals to take place within CoreHR.

Note
The following processes will continue 'offline':

- Bonus
- Company Salary Reviews
- Compassionate/Bereavement Leave
- Time off in lieu (TOIL)

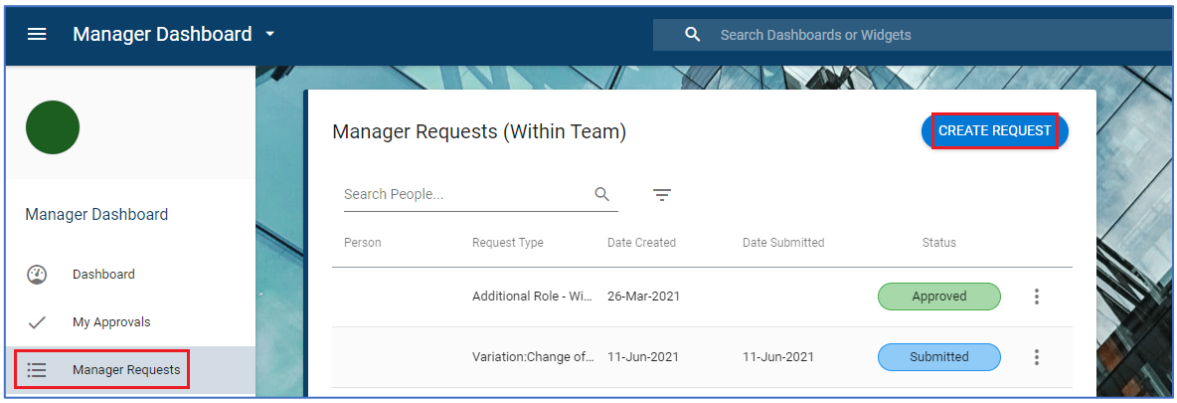
Manager Requests are accessed within the Manager Dashboard, by clicking on 'Manager Requests':



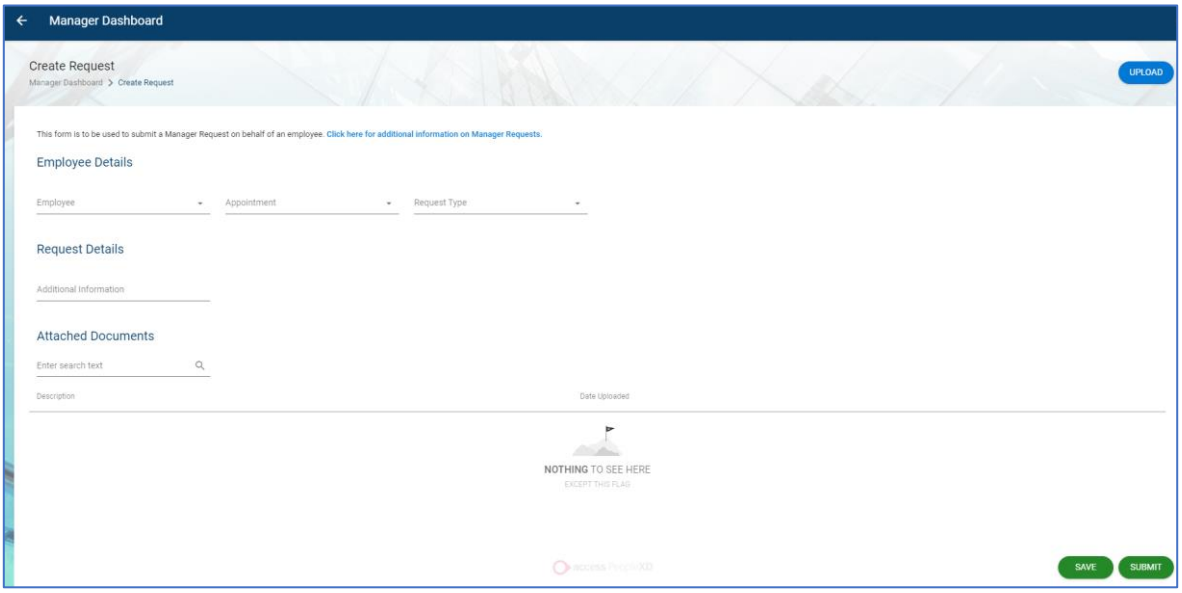
7.1. Creating a Manager Request (Within Team)

To create a Manager Request (Within Team):

- Ensure you are within the Manager Dashboard, click on 'Manager Requests'
- On the Manager Requests (Within Team) screen, click on 'Create Request':



Clicking on the 'Create Request' button opens the Create Request form:



We have provided a hyperlink within this screen, which is also available here, which directs you to helpful documents, including:

- Calculators (salary and term-time holiday)
- Guidance from your Management Accountant in relation to the Finance Department/Sub Department fields

To complete the request, select the employee from the employee drop-down list.

- If the employee has more than one role, ensure that the role your request relates to is selected in the Appointment field.
- Select the Request Type from the available drop-down list and complete the fields, referring to the guidance below.

7.1.1. Request Types: Manager Request (Within Team)

The request types available are discussed in the following section:

Request Type	**Can it be used for term-time employees?**	**Notes**	**Specific guidance**	**Required uploads** *Follow the steps outlined below in point 7.2.3*
Leaver Notification	Yes			Resignation letter/email
Resignation from One Role	Yes			Resignation letter/email
Variation: One off Payment	Yes	Used for one-off payments only. Contact your HR Business Partner regarding any bonus payments.		None required.
Variation: Change in Line Manager	Yes	To be completed by the current Line Manager, providing details of the New Line Manager.		None required.
Variation: Change of Contract Type	No – use 'Variation: Term Time'		Refer to the general guidance below for the following fields: • 'Pay Type' & 'Pay Amount' (for part-time employees) • 'Days&Hrs worked p/day' • 'Finance Department' • 'Finance Sub Dept'	None required.
Variation: Change of Hours	No – use 'Variation: Term Time'	The HR team will re-calculate the employee's salary based on the new hours provided.	• 'Hours p/day': If an employee does not work on a specified day, enter '0' hours in the relevant field. • 'Additional Information': if the same hours are not worked each week, provide details in this field.	None required.
Variation: Change of Job Title	No – use 'Variation: Term Time'	Used for changes to an employee's job title (and salary, if applicable).	• 'Pay Type' & 'Pay Amount': for part-time employees, refer to the general guidance below.	New Job Description (optional)
Variation: Change of Salary/Pay	No – use 'Variation: Term Time'		• 'Pay Type' & 'Pay Amount': for part-time employees, refer to the general guidance below.	None required.
Variation: Extension of Fixed Term	No – use 'Variation: Term Time'		Refer to the general guidance below for the following fields: • 'Pay Type' & 'Pay Amount' (for part-time employees) • 'Days&Hrs worked p/day'	None required.
Variation: Promotion	No – use 'Variation: Term Time'		Refer to the general guidance below for the following fields: • 'Pay Type' & 'Pay Amount' (for part-time employees) • 'Days&Hrs worked p/day' • 'Finance Department' • 'Finance Sub Dept'	New Job Description (optional)

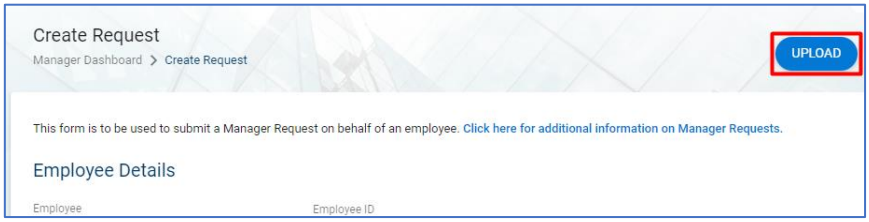
Request Type	Can it be used for term-time employees?	Notes	Specific guidance	Required uploads *Follow the steps outlined below in point 7.2.3*
Variation: Term Time	Yes	Used to process Contract Variations for Term-Time employees, except for: - One-off payments - Additional roles - Work pattern changes - Line Manager changes To fill in this form, you need to use the term time calculator which is available here.	• 'Type of Change': select the relevant option and populate the fields as required. • 'Additional Information': capture any additional relevant information where a specific field is unavailable e.g. location, line manager name, DBS Refer to the general guidance below for the following fields: • 'Days&Hrs worked p/day' • 'Finance Department' • 'Finance Sub Dept'	None required.
Variation: Work Pattern Change	Yes	Used when an employee's contracted hours remain the same, but the days and/or hours on which they work have changed.	• 'Hours p/day': If an employee does not work on a specified day, enter '0' hours in the relevant field. • 'Additional Information': if the same hours are not worked each week, provide details in this field.	None required.

7.1.2. General guidance for completing a Manager Request (Within Team)

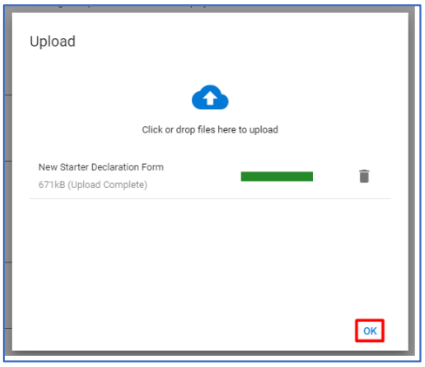
- For part-time employees:
  - 'Pay Type': select 'Full Time Equivalent (FTE) Salary'
  - 'Pay Amount': enter the full-time annual salary, not part-time. A calculator is available here.
- 'Days&Hrs worked p/day':
  - Required format: "Mon 5, Tue 5, Wed 5, Thu 5, Fri 0, Sat 0, Sun 0"
  - This information will impact time-off.
  - For 'As & When' employees, enter 'N/A'.
  - 'Additional Information': if the same hours are not worked each week, provide details in this field.
- 'Finance Department' and 'Finance Sub Dept': Refer to the further guidance available here. If you are unsure, contact your designated Management Accountant for clarification (if you are unsure who your Management Accountant is, refer to the Matrix available here).

7.1.3. How to upload an attachment?

- Certain requests require you to attach a document prior to submitting your request (detailed above).
- To attach a document to your request:
  - Save the relevant files within your drive
  - Click on the 'Upload' button in the top right-hand corner of your request form:



  - Then, either:
    - 'Drag and drop' the file you wish to upload, or:
    - Click on the arrow icon and select the document you wish to upload and click Open.
  - Click OK to upload your file.

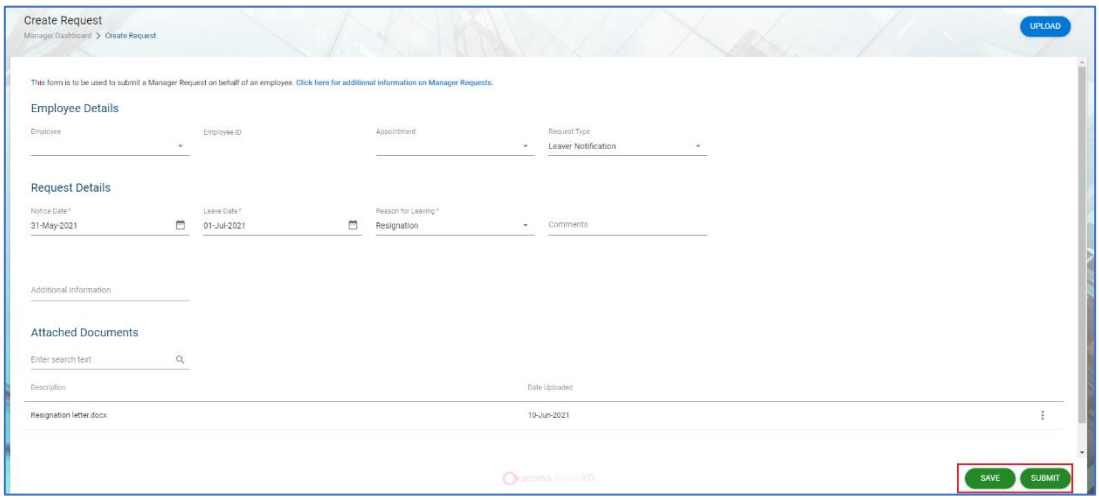


- You can attach multiple documents to a form, but these must be uploaded individually.

7.1.4. How to submit your request?

You can either:

- Submit your request for approval by clicking on the Submit button, or:
- If not fully completed, save your form to submit later by clicking on the Save button.



7.2. Manager Requests: Next Steps

- Any requests submitted will need to go through an automated approval process. Depending on the type of request submitted, this may require approval by your FR/Director, Management Accountant and/or designated HR Business Partner. The initiator will be kept informed of the approval progress via email throughout the process.

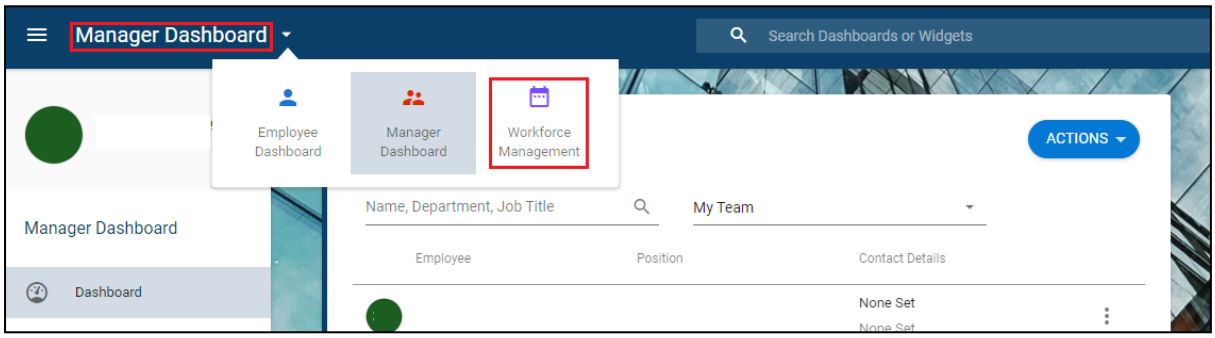
- At any stage in the approval process the request can be rejected by your FR/Director and/or HR Business Partner.

- If a 'Manager Request *(Within Team)*' is rejected, the initiator will be notified and will be able to edit the request and resubmit it for approval.

Note
It is not possible for an initiator to edit or cancel a request once it has been submitted. If you wish to cancel a request, you should contact the next approver (usually your FR or Business Partner, depending on the request type) and ask them to reject.

8. 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)
- Input timesheets on behalf of an employee (we recommend this is only used when an employee is unable to do so themselves e.g. they are not computer literate)

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

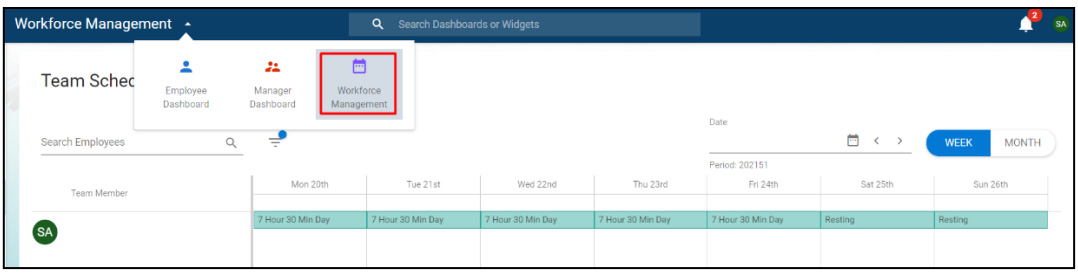
If an FR/Director is also an employee's line manager, they will need to complete both approval steps. This process is outlined in the FR/Director User Guide.

8.1. Timesheet approval as a Line Manager

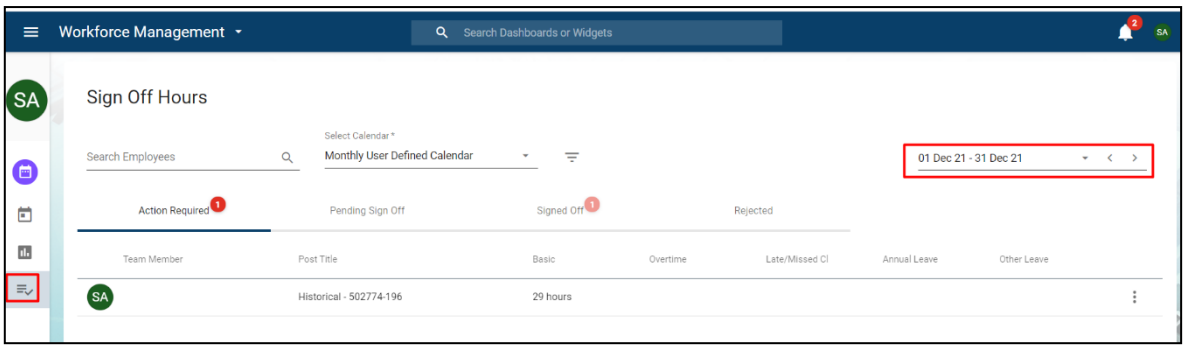
Note
Unlike other approvals within CoreHR, there are no email or system notifications associated with timesheet approvals. This is due to the potential high volume of timesheet entries. Timesheet approvers therefore need to be regularly checking CoreHR to action timesheets, particularly around payroll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

Follow these steps to action the first-stage Line Manager check and sign-off process:

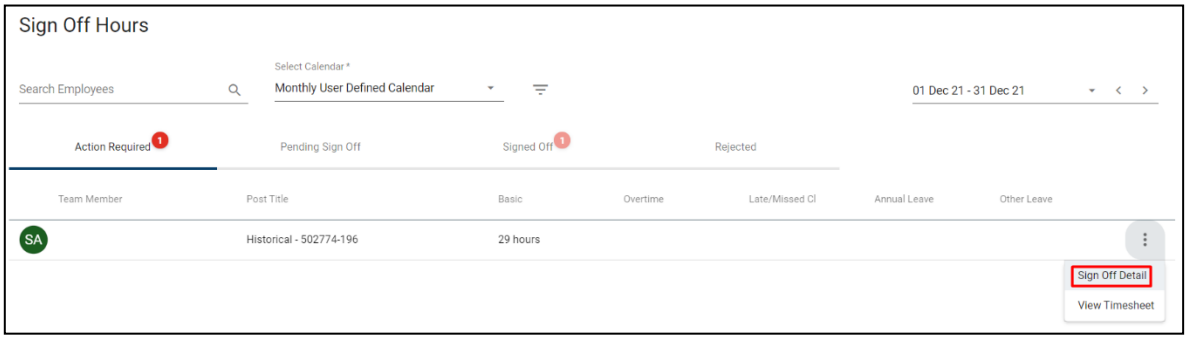
- Ensure you are in the Workforce Management Dashboard:



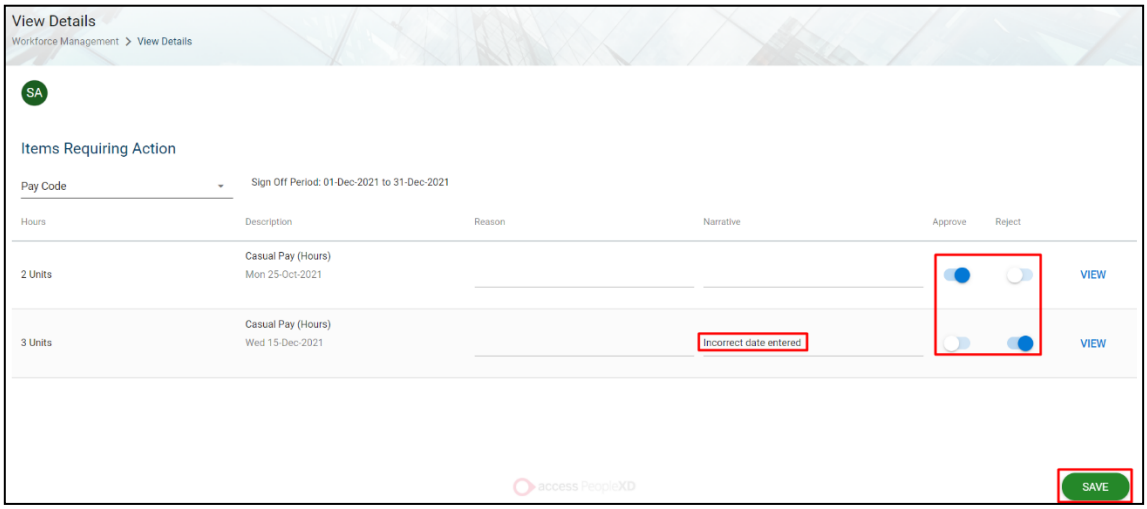
- Go to the 'Sign Off Hours' tab and select the correct period using the arrow icons to switch between the months (this will default to the current month):



- 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:



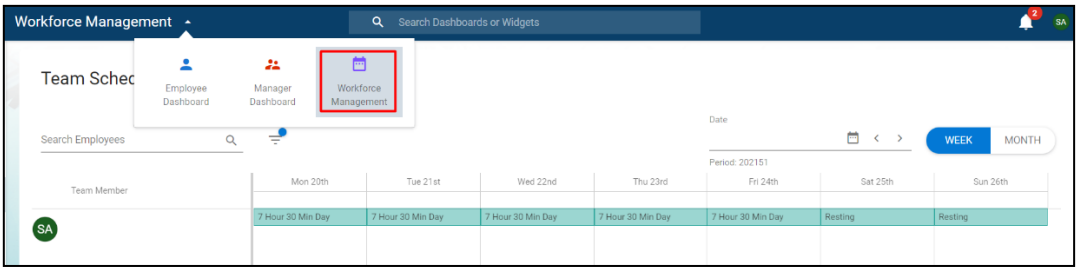
- The employee's timesheet will progress to the 'Pending Sign Off' tab, subject to the second-stage FR/Director approval, prior to being submitted to Payroll for processing.
- Repeat the above steps for each employee within the 'Action Required' tab, until all employees have progressed to the 'Pending Sign Off' tab.
- If an employee subsequently inputs new entries within the same period, their timesheet will revert to the 'Action Required' tab. The total number of hours will display in the 'Action Required' tab, but when you click on Sign Off Detail, you will only see the new entries to be Approved/Rejected.

8.2. Input timesheets on behalf of an employee

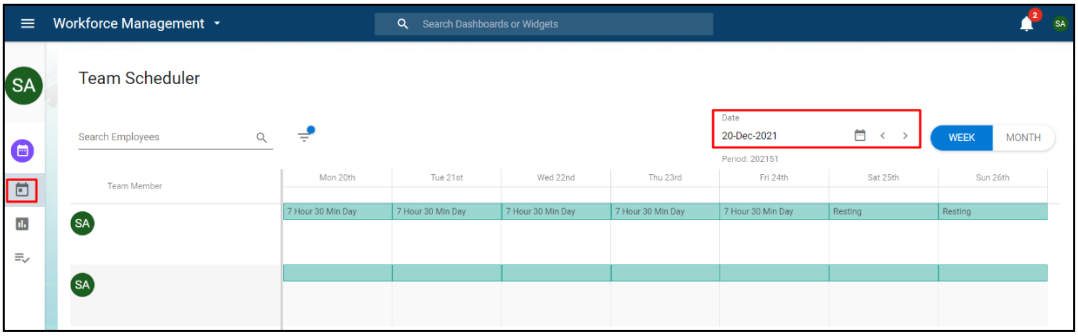
We recommend this is only used in extreme circumstances whereby an employee is unable to input timesheets themselves e.g. they are not computer literate.

Follow these steps to input timesheets on behalf of an employee:

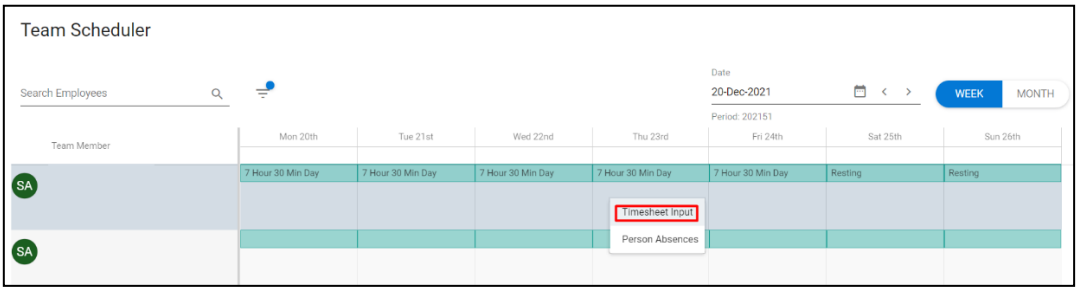
- Ensure you are in the Workforce Management Dashboard:



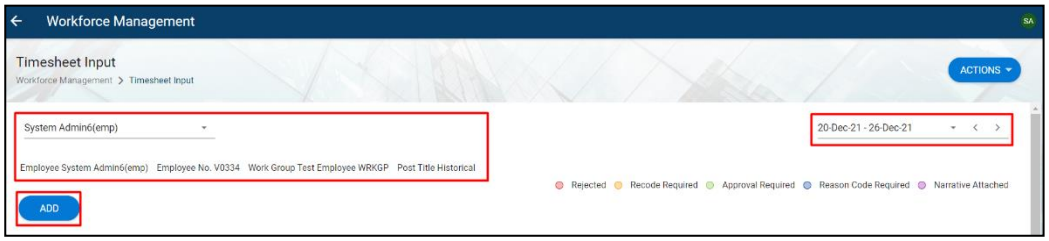
- Check you are in the 'Team Scheduler' menu bar option and select the correct period using the arrow icons to switch between the weeks (this will default to the current week):



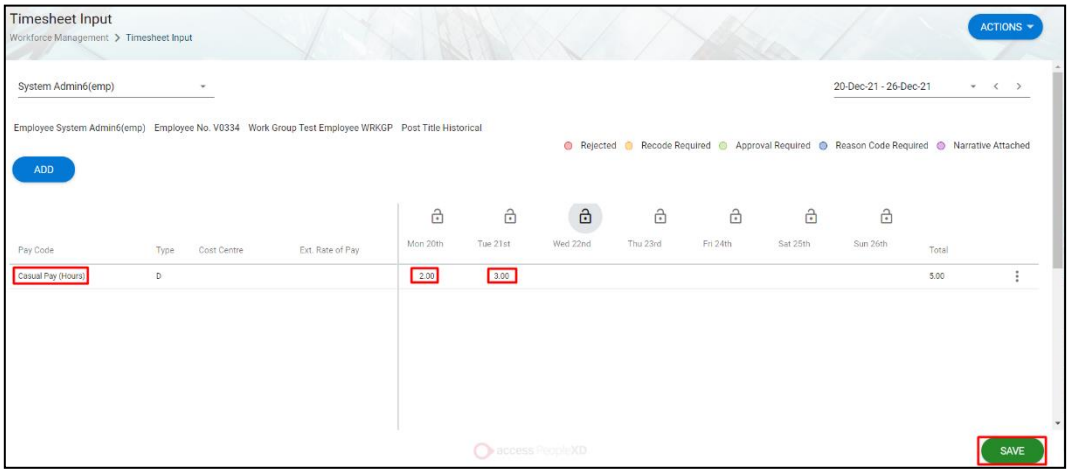
- To input a timesheet entry, **left click** on any day for the relevant employee and select 'Timesheet Input':



- The Timesheet Input screen will appear. Check you have the correct employee selected and you are entering time for the correct period. To input hours, click on the 'Add' button:



- Select the correct Pay Code from the drop-down list. Against each relevant day, enter the number of units (hours in most cases, unless the Pay Code states otherwise e.g. value, days or session) and then click Save.



- The hours have now been input and will process to the second-stage FR/Director approval.

Note
Where a manager inputs a timesheet on behalf of an employee, this will automatically skip the manager approval and go directly to the second-stage FR/Director approval.

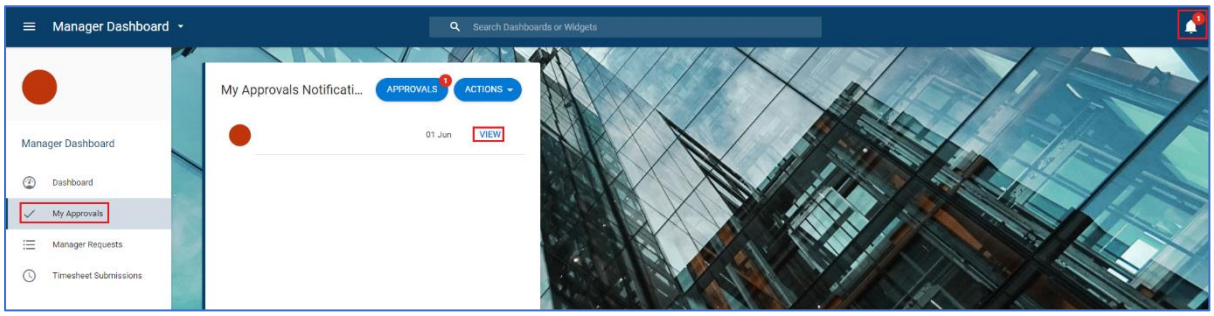
9. Approving Leave Requests

9.1. Leave Request Process

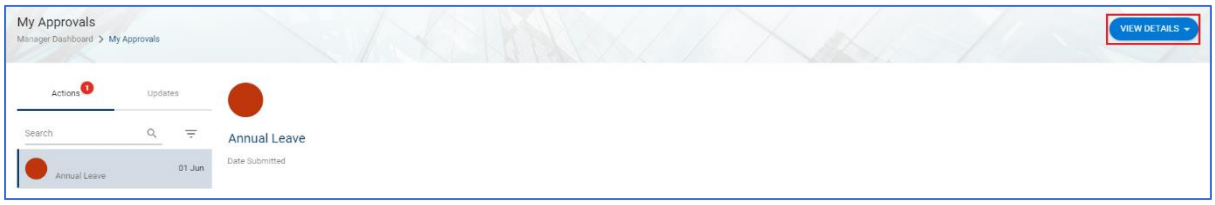
The Leave Request process within CoreHR enables an employee to submit a leave request, which is then approved by their line manager.

Once an employee submits a leave request, you will receive an email notification requiring your action within CoreHR. Approvals can be accessed via the Manager Dashboard in two ways:

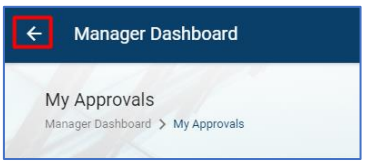
1. Clicking on 'My Approvals' in the menu bar options and 'VIEW', **OR:**
2. Click on the notification bell in the top right-hand corner and click the relevant notification.



The details of the request will appear on the screen. If you click on **'View Details'** you can see the leave balance of the employee, and also their co-workers leave/absences.

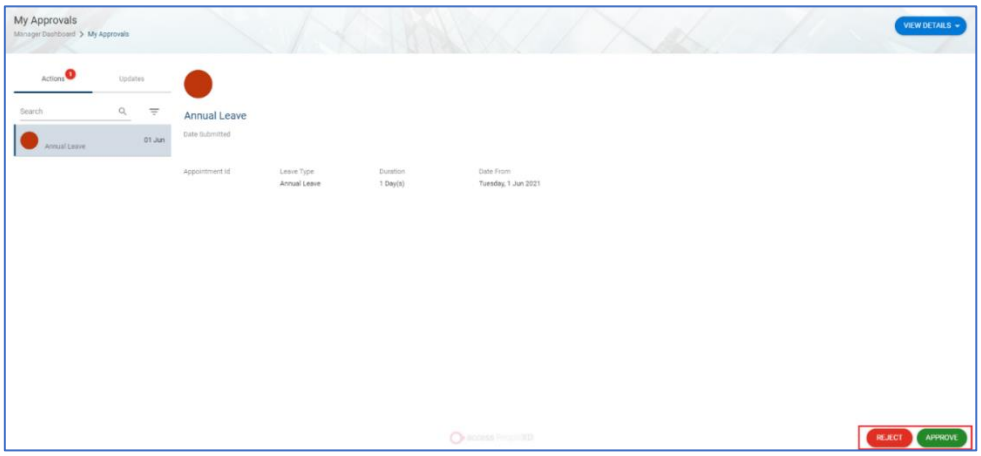


Click on the back button to navigate to previous page(s):



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 employee will be notified of.



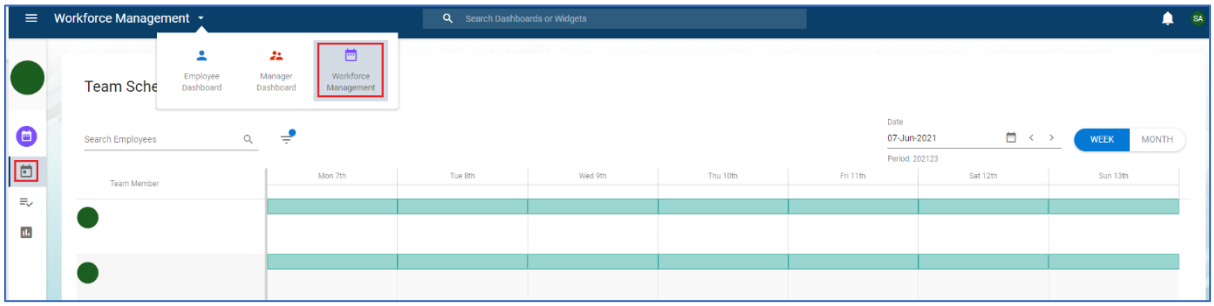
10. Managing Employee Absence

The Team Scheduler within CoreHR enables managers to enter and manage employee absences i.e. Annual Leave and Sick Leave.

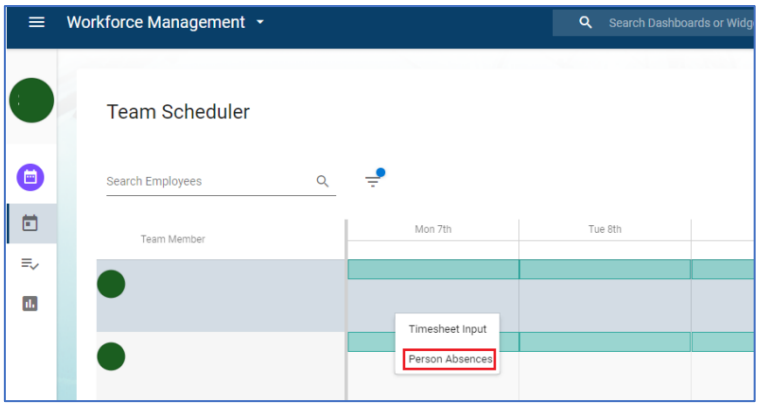
10.1. Team Scheduler Screen

Follow these steps to manage employee absence:

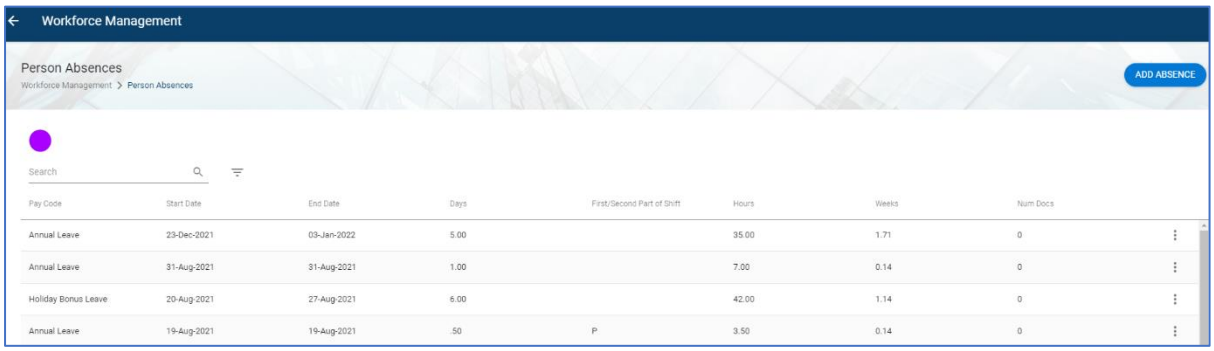
- Access the Workforce Management Dashboard and check you are in the 'Team Scheduler' menu bar option:



- Left click on any day for the relevant employee and select 'Person Absences':



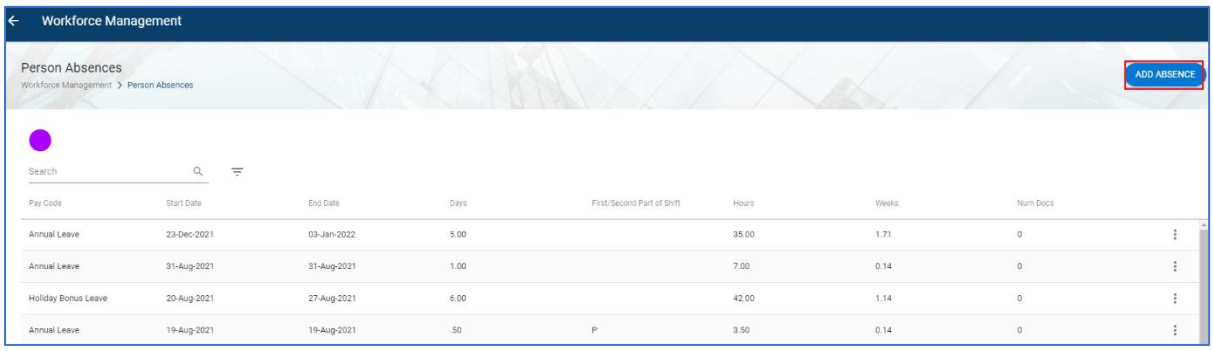
- The Person Absences screen displays which lists all the employee's absences.



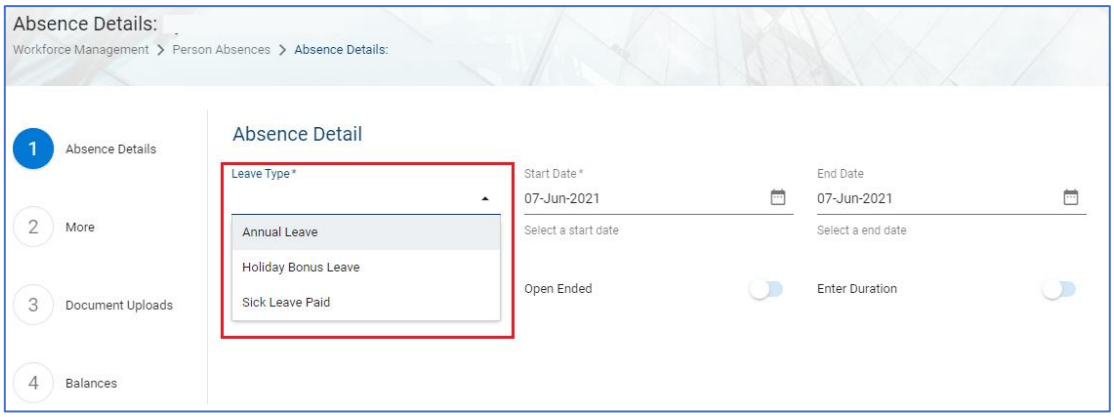
10.1.1. Add New Absence

To add a new absence for the employee:

- Click Add Absence.

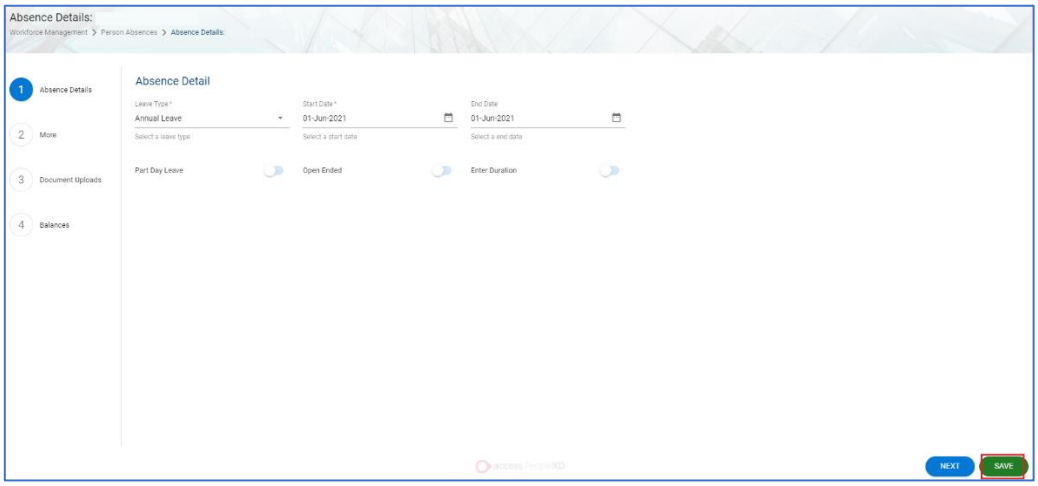


Within the Absence Details screen, select the Leave Type from the drop-down list:



For Annual Leave:

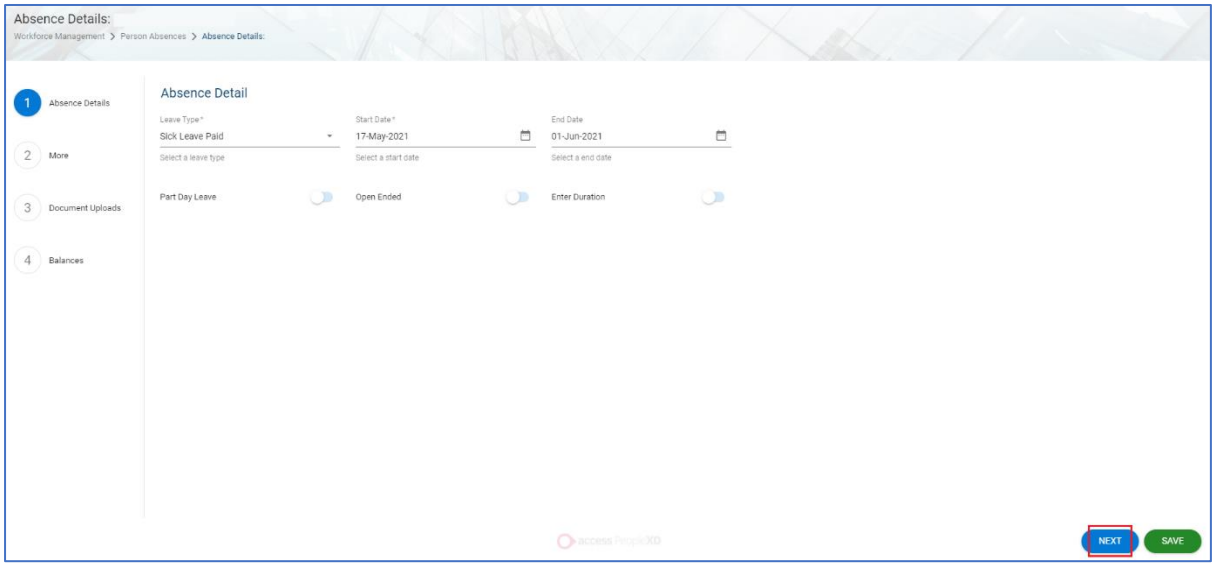
- Enter the Start Date.
- Enter the End Date.
- Specify if the leave is Part Day (only ½ day segments should be entered)
  Note: do not use the Open Ended and Enter Duration buttons.
- Click Save



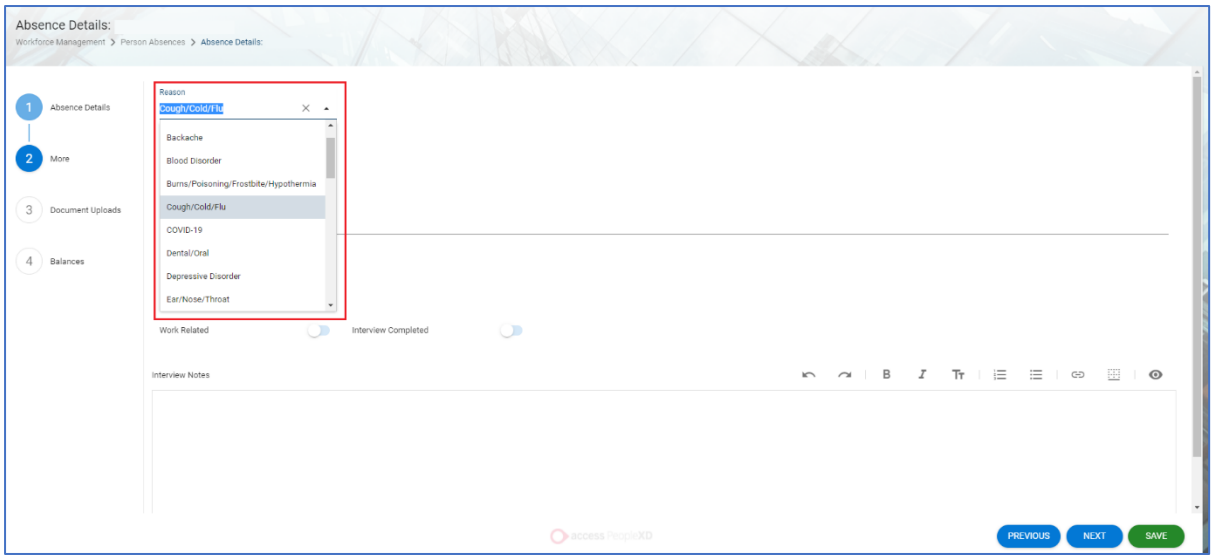
For Sick Leave:

Note: if the Sick Leave is 7 days or more, a Sick Note is required to be uploaded. If not received, please enter the Sick Leave as open ended.

- Enter the Start Date.
- Enter the End Date.
- Specify if the Sick Leave is Part Day (only ½ day segments should be entered) or Open ended
  Note: do not use the Enter Duration button.
- Click Next.

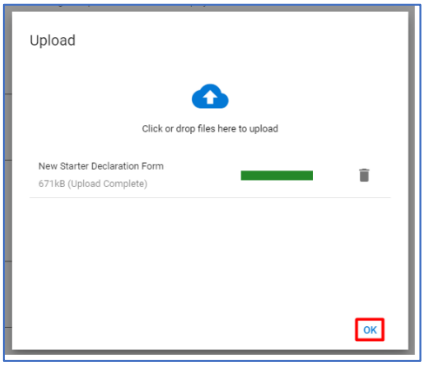


- Select the Reason for absence from the drop-down list.
- If required, enter any further information within the Narrative textbox.
- If the Return to Work Interview has been conducted, complete the relevant section. It is also possible to enter these details at a later stage.



- Once the Absence Details and More sections have been completed, click Save to enter the absence.

- If the absence is 7 days or more, you are required to upload a Sick Note before being able to save the form. To upload a Sick Note:
  - Click Next to access the Document Uploads screen.
  - Click add and populate the details of the Sick Note.
  - Tick the Supporting Documentation Received box.
  - Click Upload Document.
  - Then, either:
    - 'Drag and drop' the file you wish to upload, or:
    - Click on the arrow icon and select the document you wish to upload and click Open.
  - Click OK to upload your file.



  - You can attach multiple documents to a form, but these must be uploaded individually.
  - Then click Save.

Once supporting documentation, such as a Sick Note has been provided, it is possible to return and upload the supporting documentation.

- *To edit a record, click on the ⋮ icon and View/Edit absence details.*

The absence is now successfully saved and is visible on the Person Absences screen and the employee will be notified of the absence entry.