

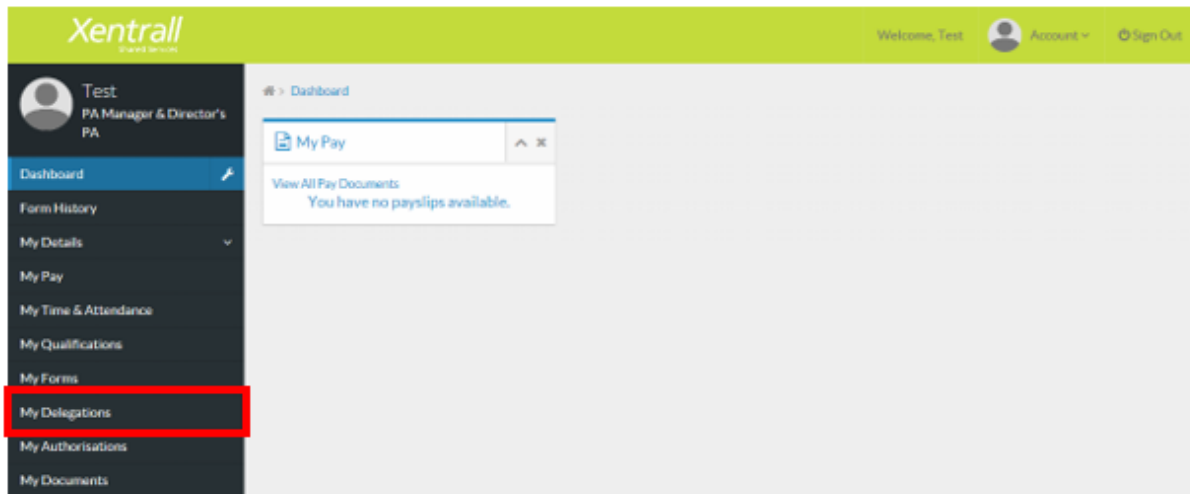
MyHR – My Delegations

Notes for users who have been delegated responsibilities

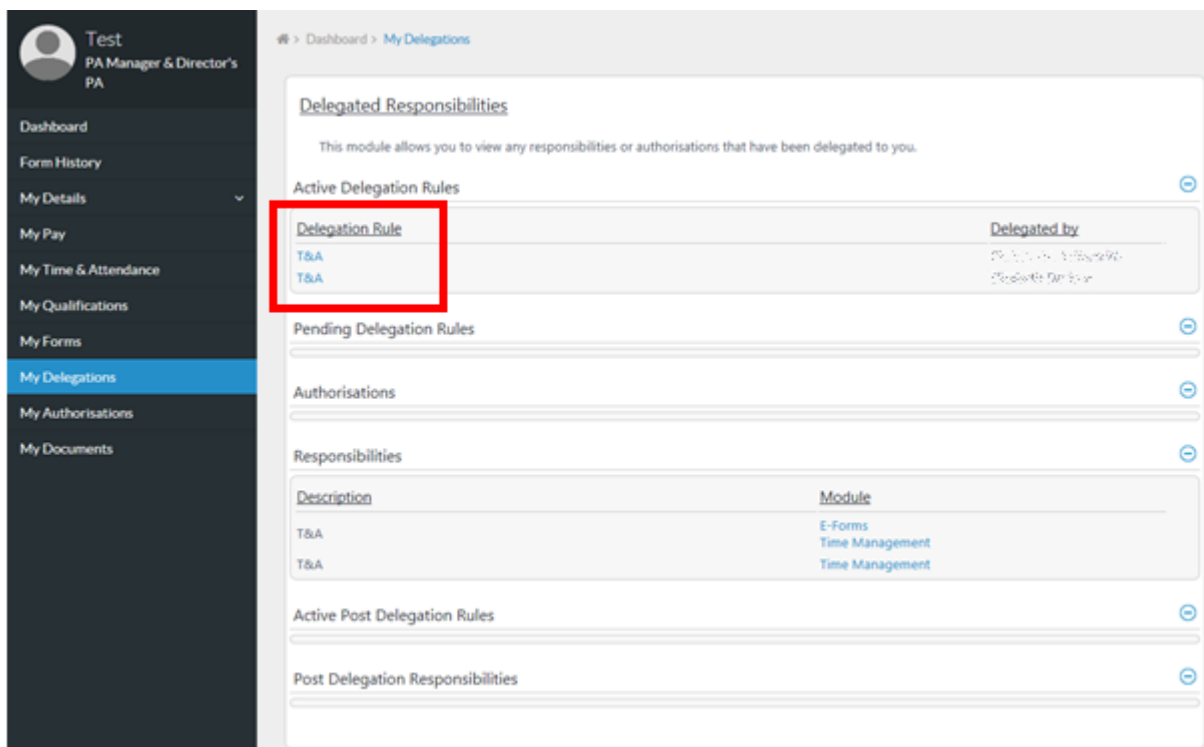
1. [To check if you have been delegated responsibilities](#)
2. [Time & Attendance](#)
3. [Appraisal's/PDR's](#)
4. [Document Storage](#)

1. To check if you have been delegated responsibilities

- * Log into MyHR.
- * Click on My Delegations



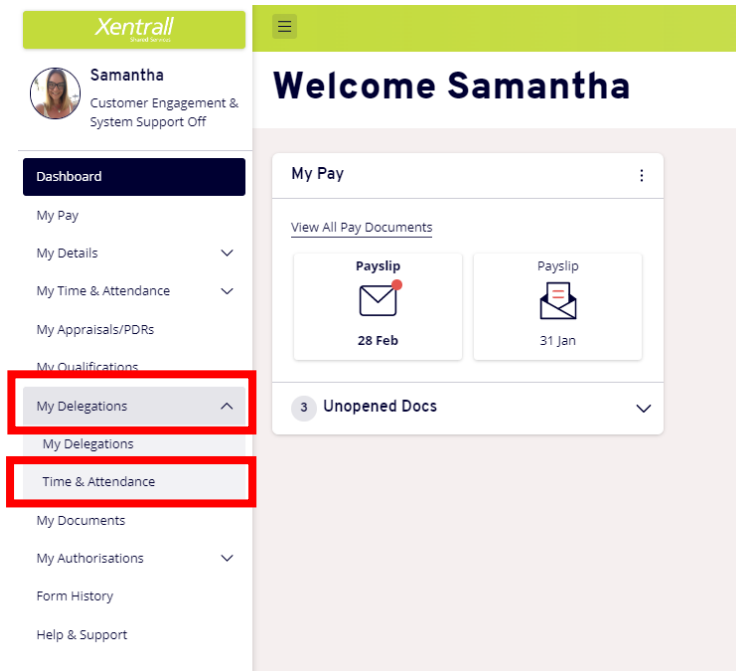
- * This will list any delegations that have been set up for you and by who.
- * To view full details of your responsibilities, click on the Delegation Rule link (*this is an information only screen*)



2. Time & Attendance

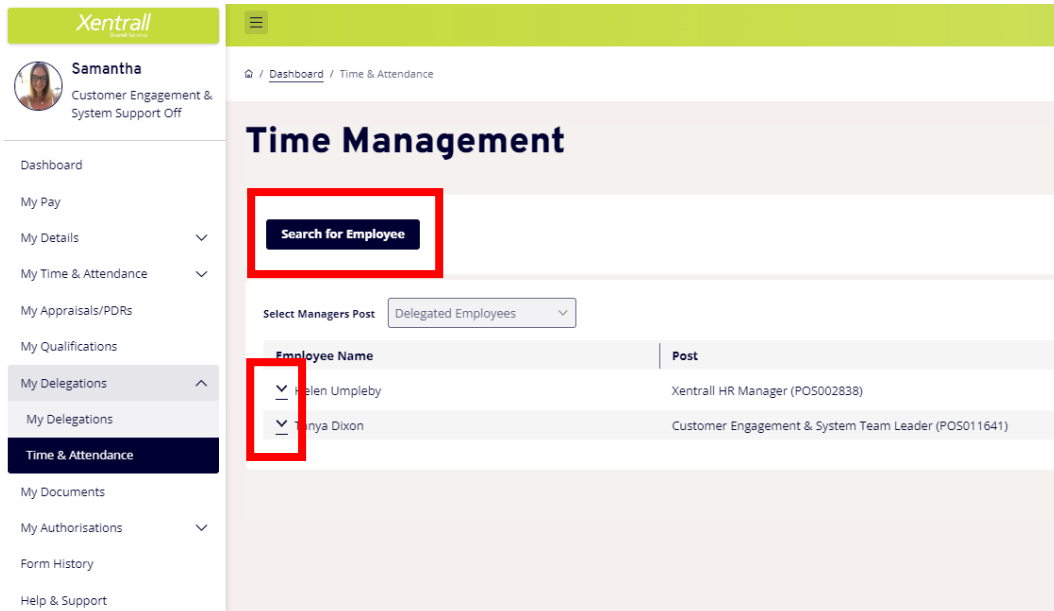
* Click on My Delegations

* Click on Time & Attendance

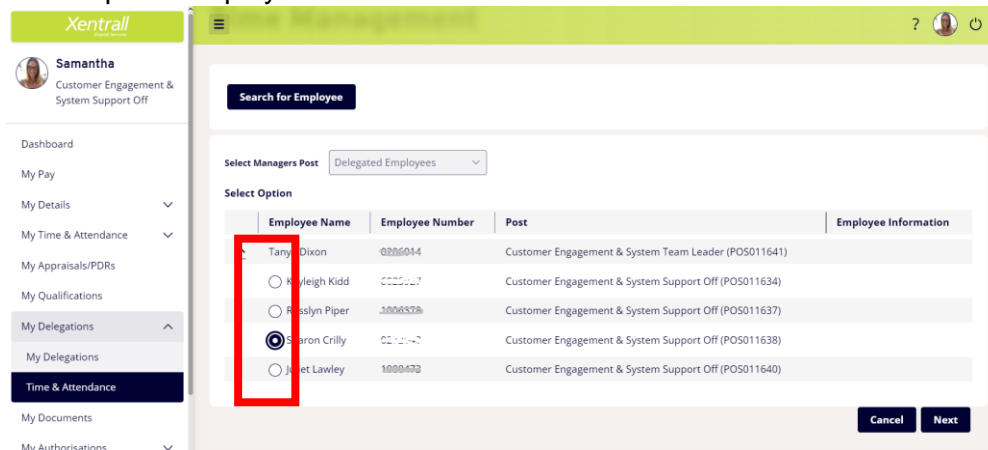


* If you have multiple delegations, you will see each managers name listed. Click the V to the left of their name, to open the staff list.

*Alternatively, use the Search for Employee button and type in the name to search

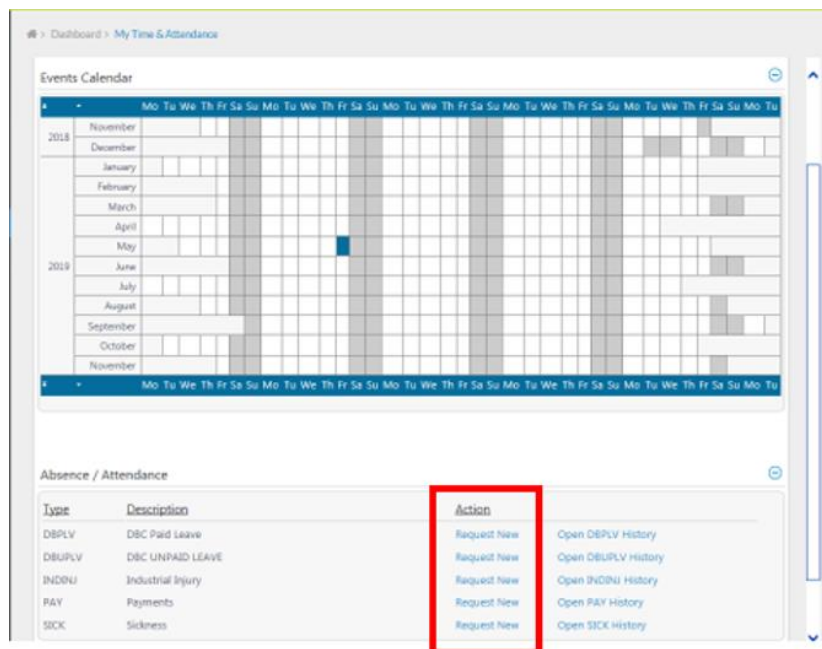


* Select the required employee



* Click Next (lower right corner)

* Using the links at the bottom of the calendar view, click Request New against the required absence



* This will open the entry screen (example below is Sickness)

* Complete the sickness entry form

- **Comments** – this is not mandatory and comments will not show on reports.
- **From** – If the employee is sick on the morning and returns on the afternoon you will tick the “1st half” / If the employee attended work for more than an hour on the morning, then went home, you will need to tick the “2nd half”.
- **To** – If the employee has already returned to work, enter the end date now. Enter the last day of sickness, not the day returned to work. *Select Open Ended until the employee actually returns to work.*
- **Reason / Reason Type / Cause / Cert Type** – Select from drop down list
- **Certificate Expiry Date** – enter the end date of the Drs note. If multiple Drs notes are received, overwrite this date with each new note.

Type: Sickness

Comments:

Dates: Full Day 1st Half 2nd Half Open Ended

From:

To:

Days

Total Time:

Reason:

Reason Type:

Cause:

Cert Type:

Certificate Expiry Date:

I confirm that an entry has been made in the Health & Safety Accident Book.

Return To Work Interview Date:

* Click Submit.

EDITING AN ABSENCE

You cannot edit the Absence Type.

e.g. If you have entered a Paid Leave and it should have been Sickness, you will need to delete the Paid Leave and re-enter the information under the Sickness category.

- Select "My Delegations"
- Select "Time & Attendance"
- Locate and select the required employee, then select "Next"
- Navigate to the required absence using the "previous" or "next" buttons along the top of the calendar.
- Right click on the SCK field, then select Edit
- Update the form as required
 - o Simply override the existing data using the calendar or drop down lists. You can do this at any time, even when the sickness is closed.
- Click Submit when complete. The form may take a minute to process and will return you to the calendar page when saved.

CLOSING AN OPEN ENDED SICKNESS

- Open the record to edit, as detailed above
- Move the date marker from Open ended, into Full day
 - o This will open the To date field, enter the **last day of sickness**

The image shows two side-by-side screenshots of a form. The left screenshot shows the 'From' date as 12/07/2022 and the 'To' date as an empty field. The radio buttons for 'Full Day', '1st Half', and '2nd Half' are unselected, while the 'Open Ended' radio button is selected. A red arrow points to the right screenshot, which shows the 'To' date as 13/07/2022 and the 'Full Day' radio button selected, with 'Open Ended' unselected.

- Click Submit when complete. The form may take a minute to process and will return you to the calendar page when saved.

ENTER FIT NOTE DETAILS

If you have entered an open-ended absence and record this as self-certified, you need to amend this when you receive a sick note.

- Open the record to edit, as detailed above
- Change the Cert Type to Fit Note
- Add the Certificate Expiry Date
 - o If multiple Fit Notes are received, override this date with each one. **DO NOT OPEN A NEW SICKNESS FOR EACH FIT NOTE.**

The image shows a form with three fields: 'Cause' with a dropdown menu showing 'NON WORK RELATED', 'Cert Type *' with a dropdown menu showing 'Fit Note', and 'Certificate Expiry Date' with a text input field containing '01/08/2022' and a calendar icon.

I confirm that an entry has been made in the Health &

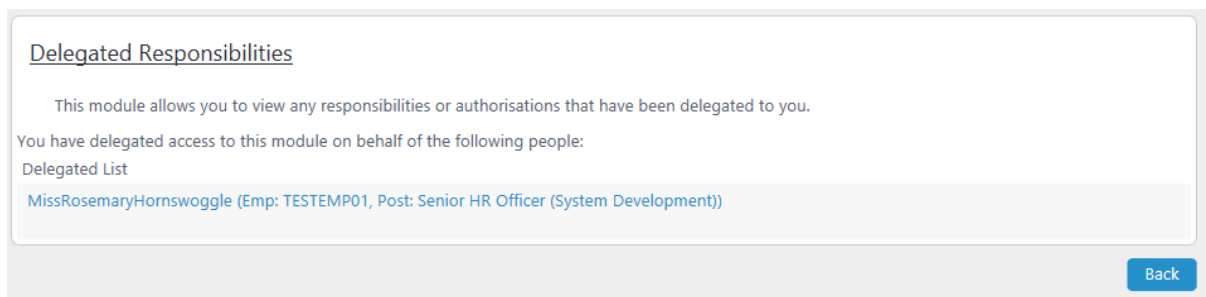
3. Appraisals

To log an appraisal for an employee.

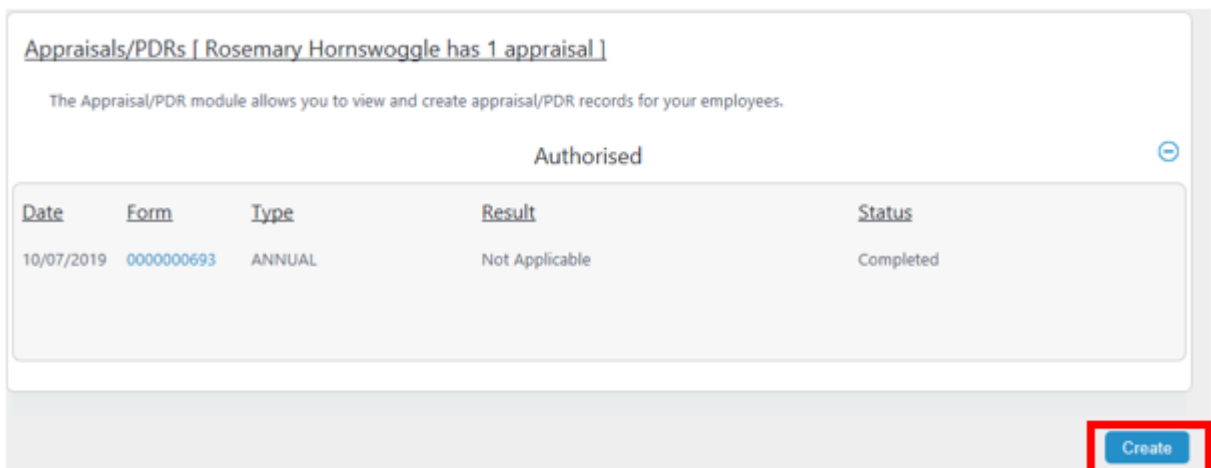
- * Click on My Delegations
- * Then click on the Appraisals/PDRs link



- * This will open a list of staff you can log appraisals for



- * Click on the Employees name



- * Existing appraisals will already be listed
- * Click Create to enter a new log

* Use the drop down menu's to complete the details, click Next

Appraisal Details

Please enter the appraisal details

Post

Type

Enter the date of the Appraisal/PDR

Appraisal Details

Please enter the appraisal details

Post

Type

Completion Date

Status

Result

Status – Select Complete

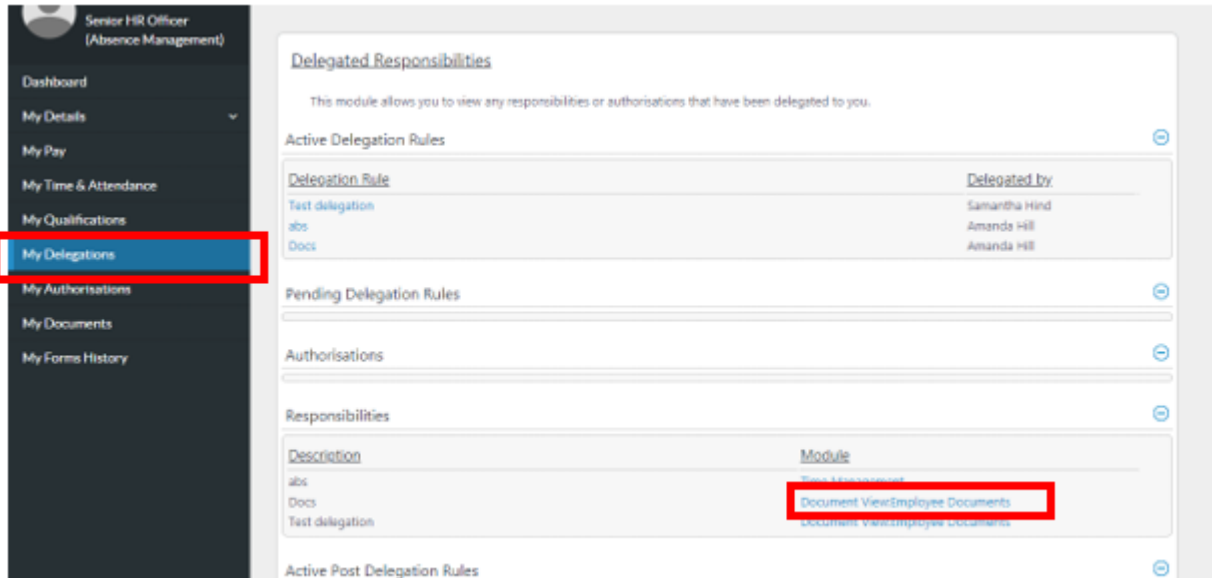
Result – Select Not Applicable

* Click Submit to complete

4. Document Storage

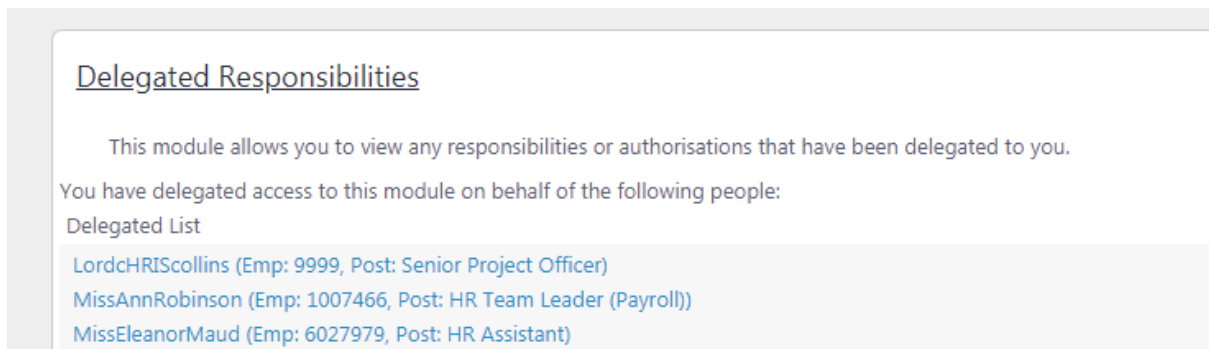
To add a document to an employees record ...

- * Click on My Delegations

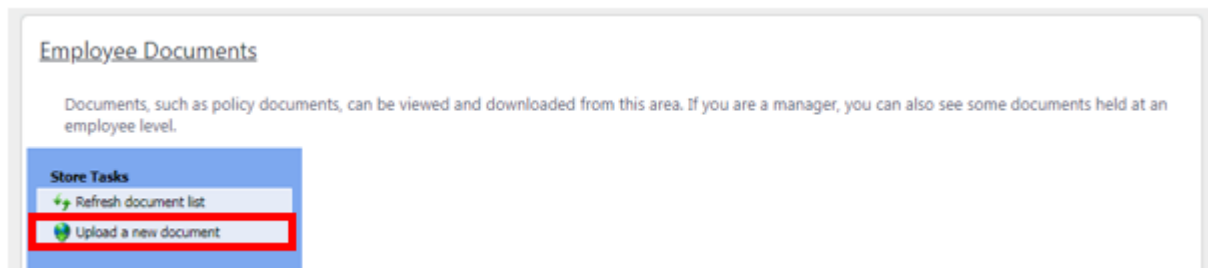


- * Under Responsibilities, click on Document View

- * This will open a list of employees you can save documents for



- * Click on the required employee



- * Click upload a new document

- * click Chose File and locate the document on your computer

Employee Documents

Documents, such as policy documents, can be viewed and downloaded from this area. If you are a manager, you can also see some documents held at an employee level.

Store Tasks

- Cancel upload

System Limits

- Maximum file size: 10 MB
- System storage remaining: 200 GB

File Details

File name: No file chosen

Category:

Comments:

- * The category will default to the only category you have access to
- * Click Submit
- * The document is now visible on the employee's record

Employee Documents

Documents, such as policy documents, can be viewed and downloaded from this area. If you are a manager, you can also see some documents held at an employee level.

Store Tasks

- Refresh document list
- Upload a new document

Absence & Medical Documents

- MyHR - Test Doc.pdf
Acrobat Document
28 KB

When saving Sick Notes: save as the duration of the note e.g. 01/05/2019 – 17/05/2019