MyHR – My Delegations

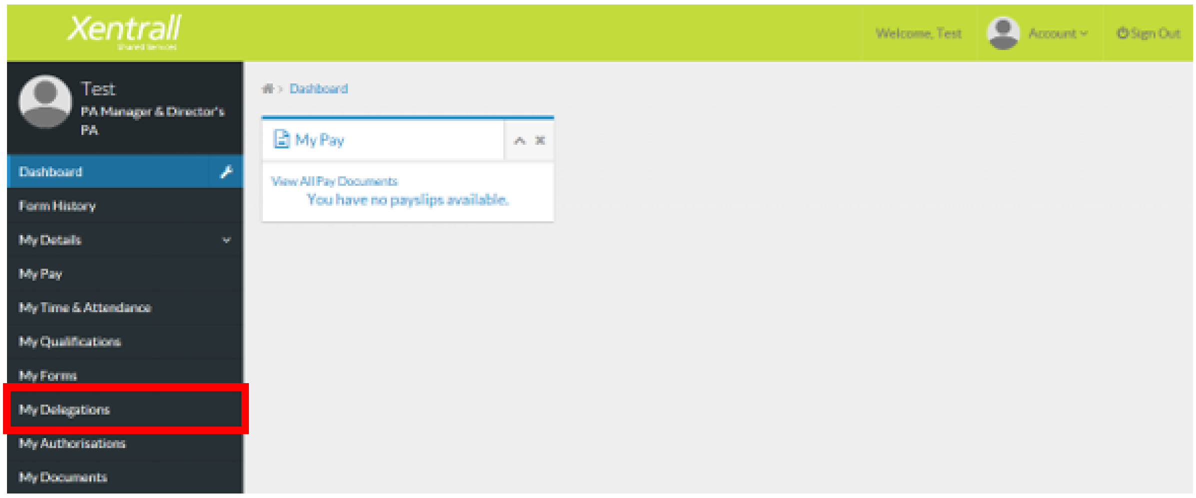
Notes for users who have been delegated responsibilities

Updated: March 2023

1. To check if you have been delegated responsibilities

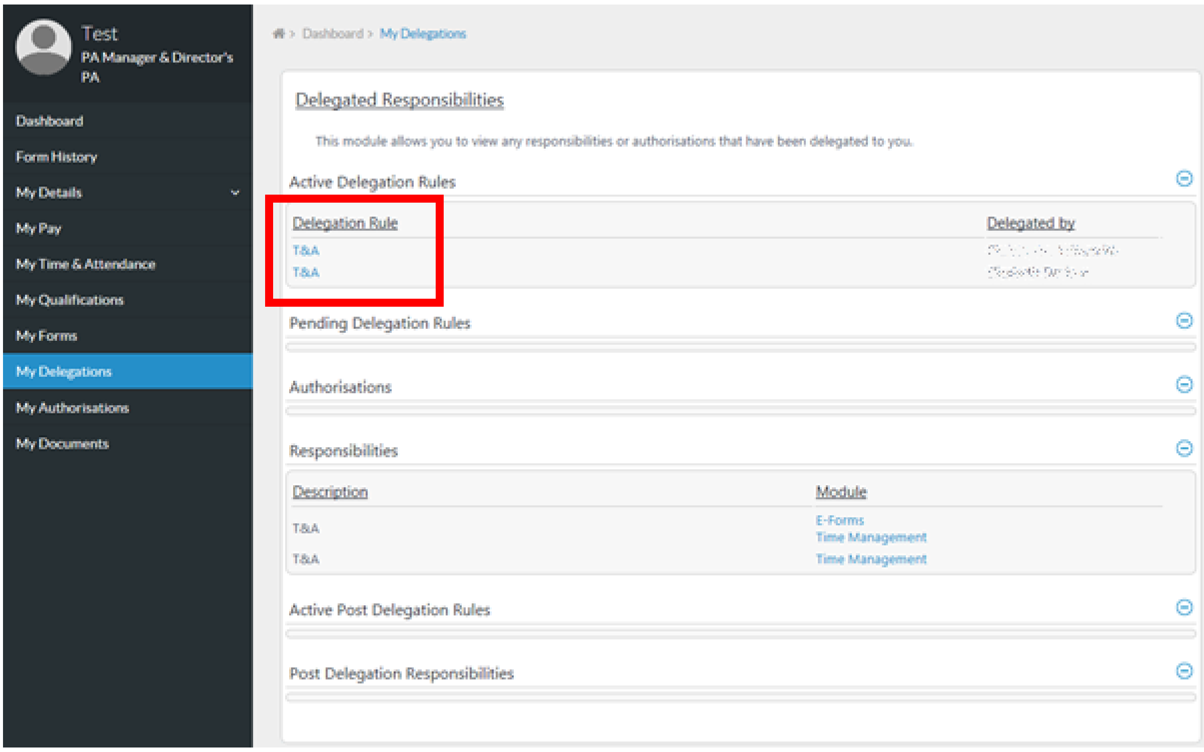
* Log into MyHR.

* Click on My Delegations



* This will list any delegations that have been set up for you and by who.

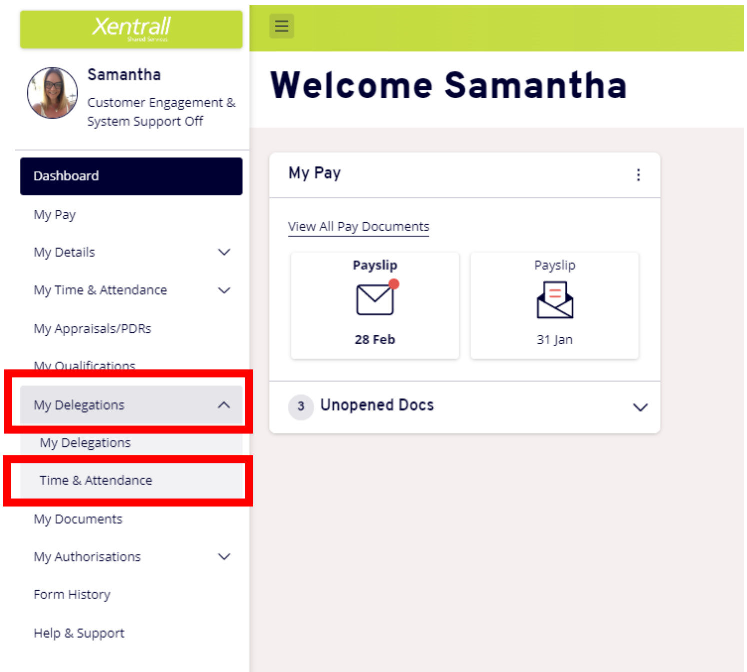
* To view full details of your responsibilities, click on the Delegation Rule link (*this is an information only screen*)



2. Time & Attendance

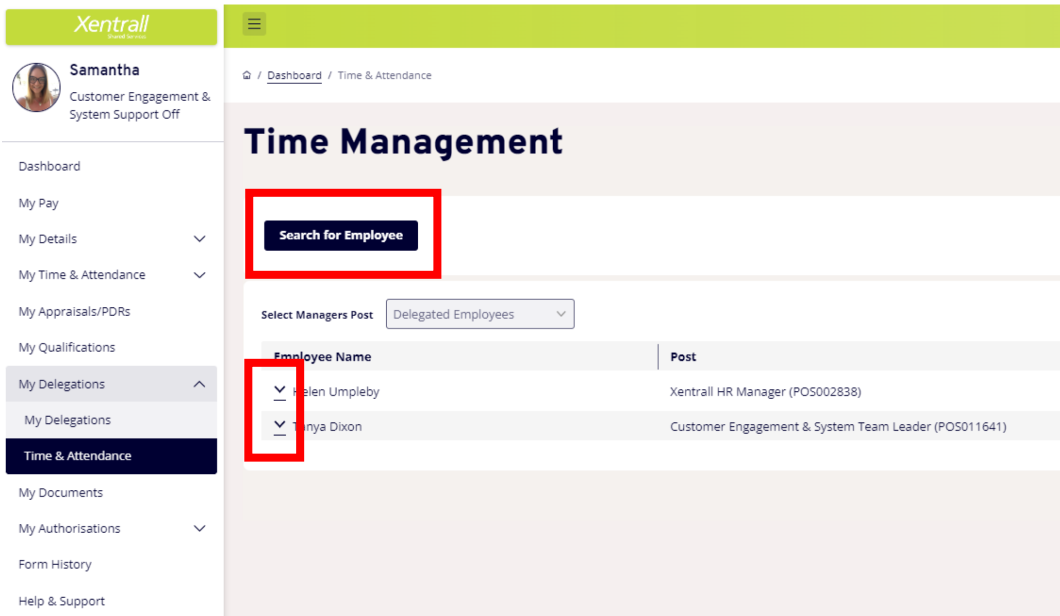
* Click on My Delegations

* Click on Time & Attendance

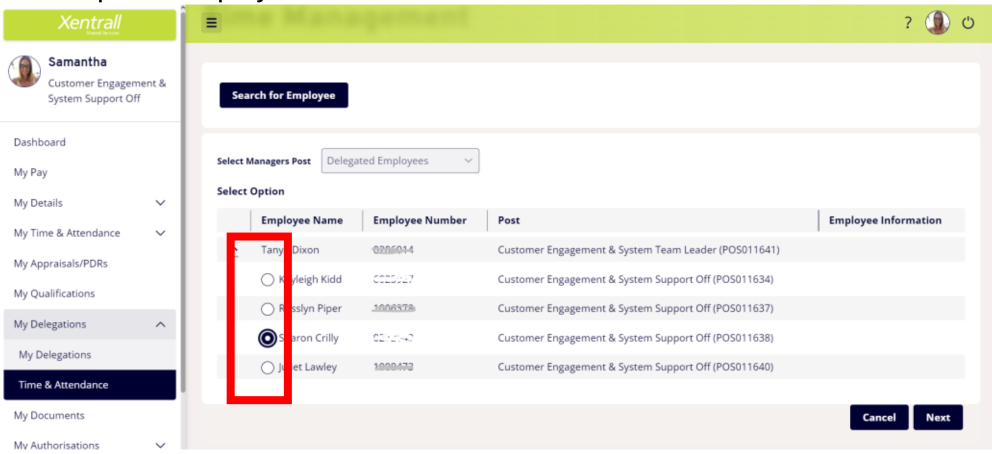


* If you have multiple delegations, you will see each managers name listed. Click the V to the left of their name, to open the staff list.

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

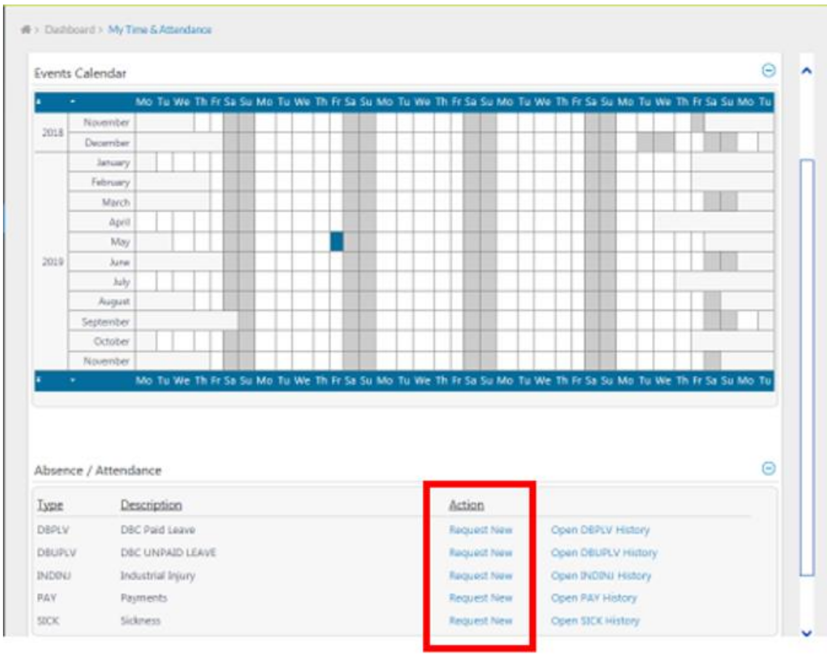


* Select the required employee



* Click Next (lower right corner)

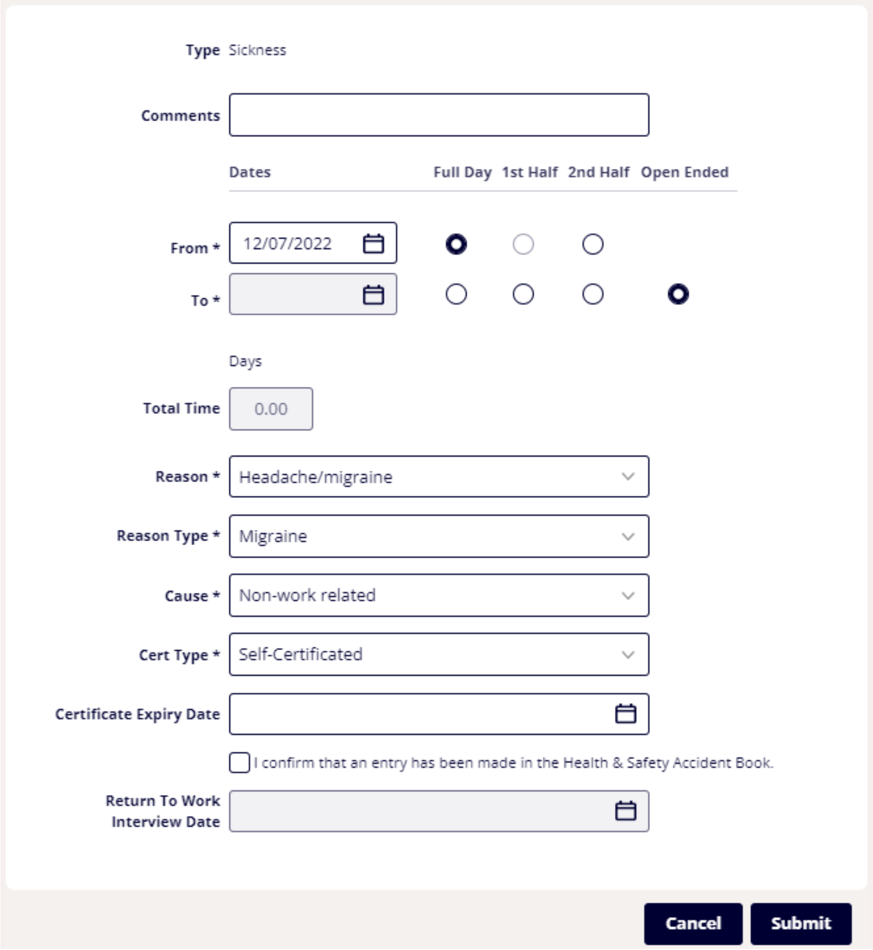
* Using the links at the bottom of the calendar view, click Request New against the required absence



* 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 <u>last day of sickness</u>, 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.



* 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
    - 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

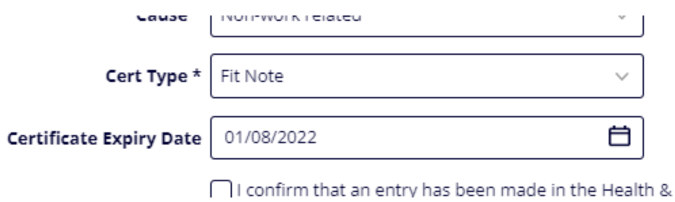
- Open the record to edit, as detailed above
- Move the date marker from Open ended, into Full day
    - This will open the To date field, enter the **last day of sickness**

- 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
    - If multiple Fit Notes are received, override this date with each one. **DO NOT OPEN A NEW SICKNESS FOR EACH FIT NOTE.**

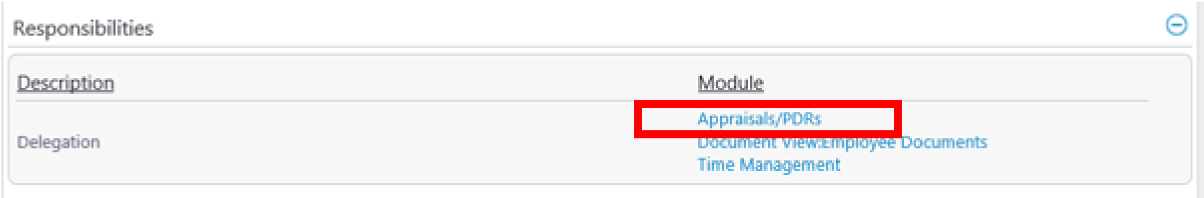


3. Appraisals

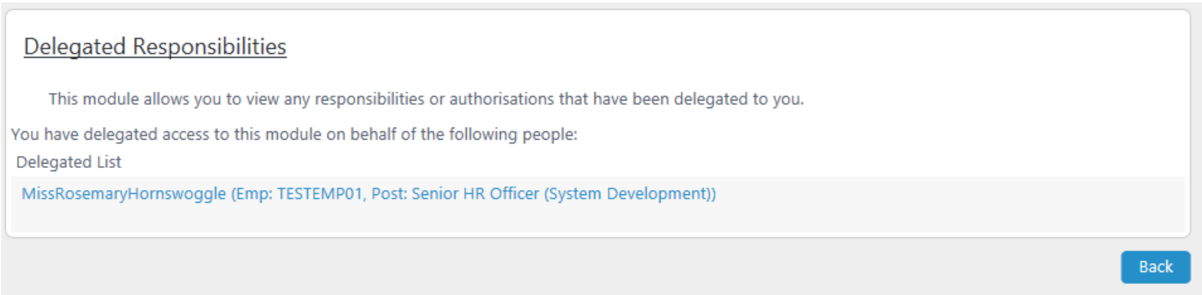
To log an appraisal for an employee.

* Click on My Delegations

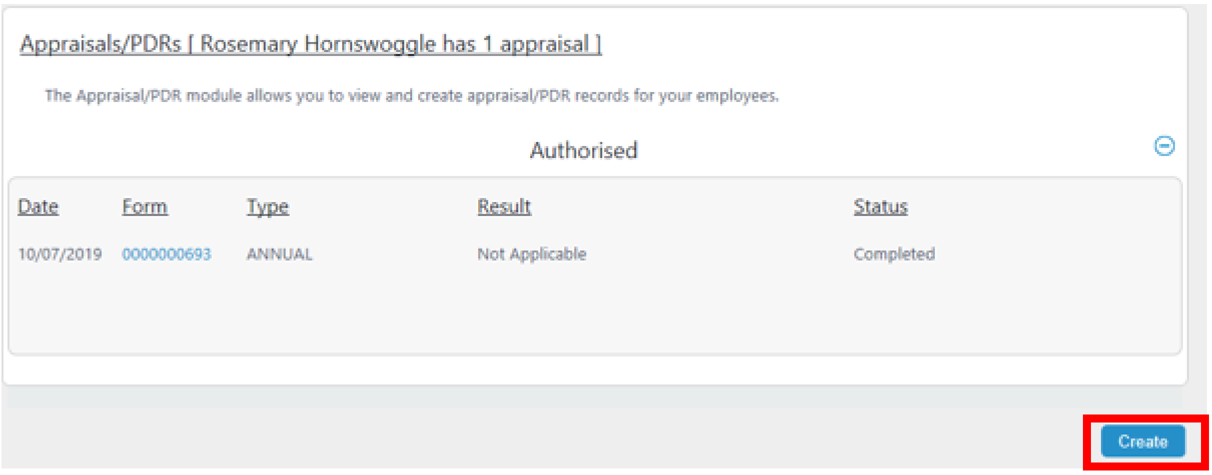
* Then click on the Appraisals/PDRs link



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



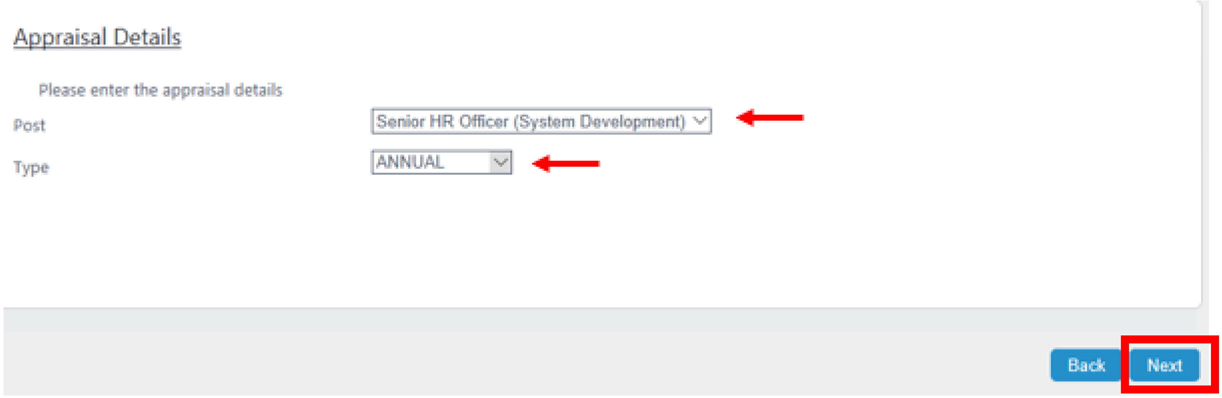
* Click on the Employees name



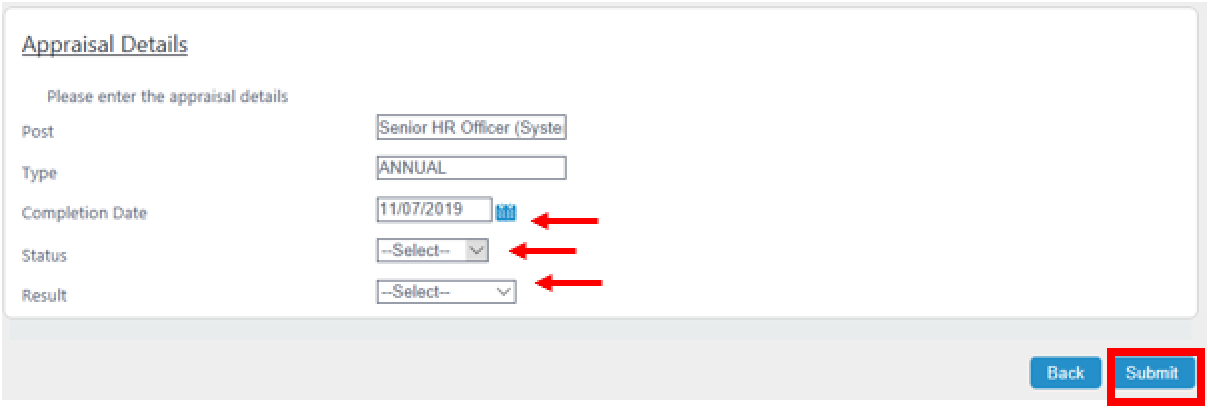
* Existing appraisals will already be listed

* Click Create to enter a new log

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



Enter the date of the Appraisal/PDR



Status – Select Complete

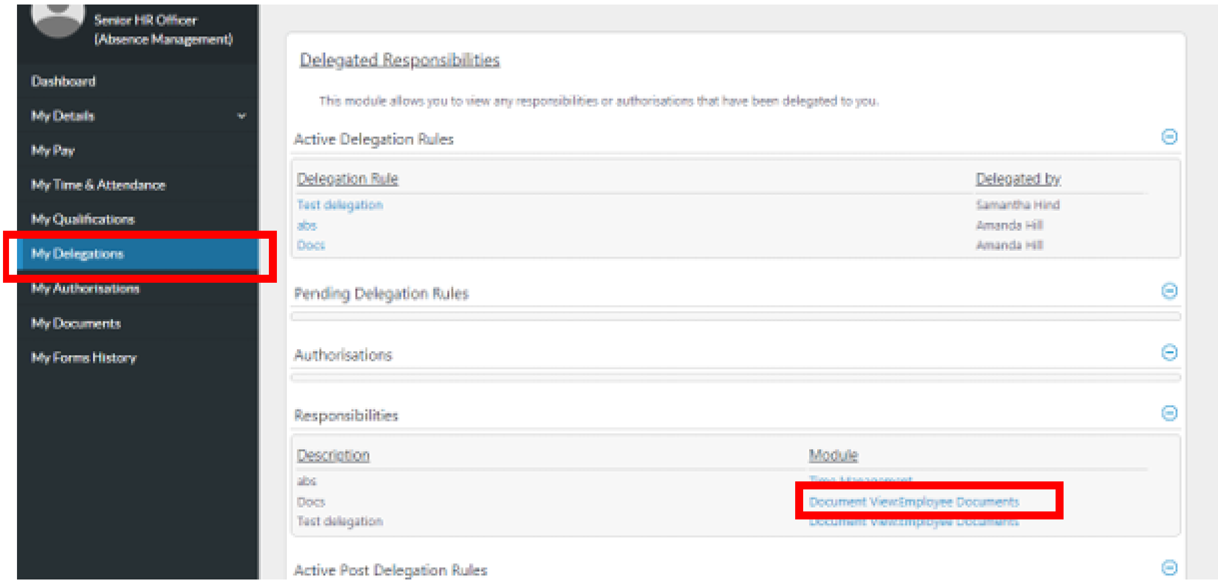
Result – Select Not Applicable

* Click Submit to complete

4. Document Storage

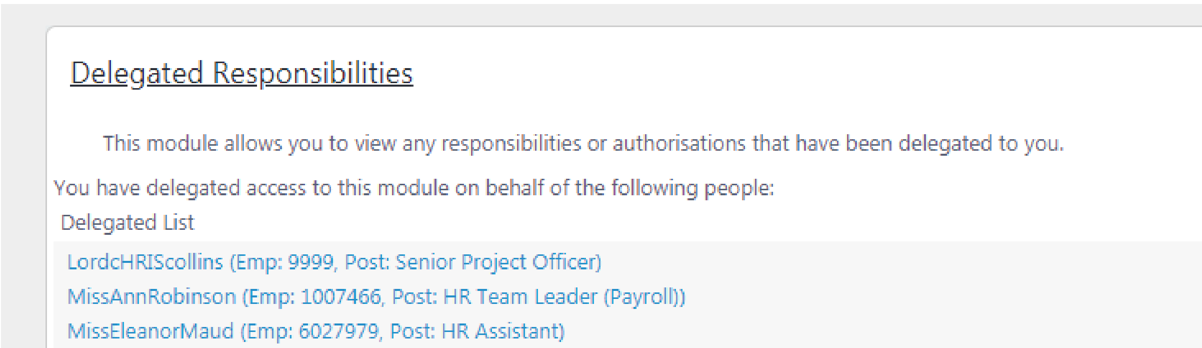
To add a document to an employees record …

* Click on My Delegations

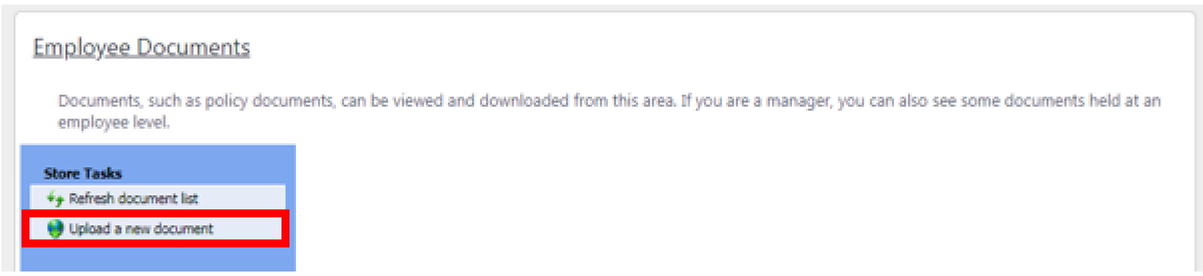


* Under Responsibilities, click on Document View

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

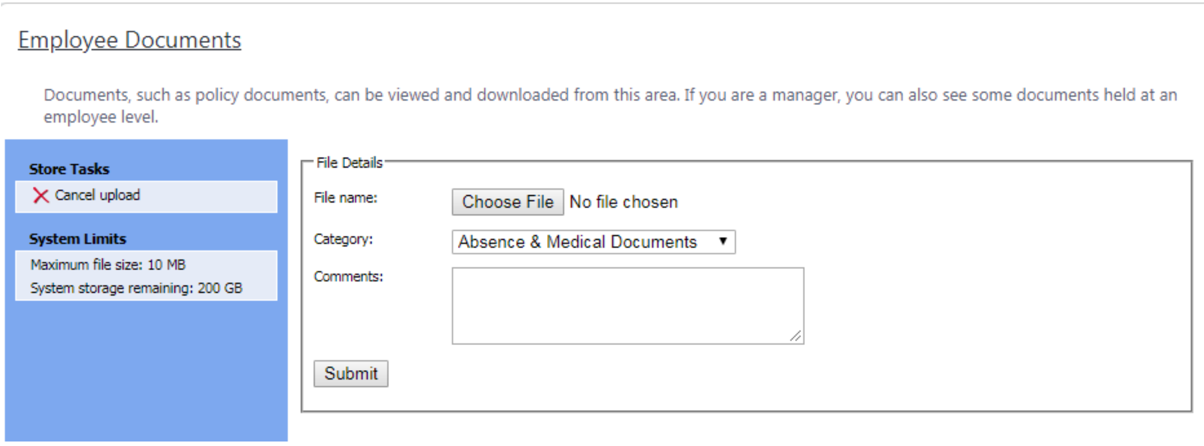


* Click on the required employee



* Click upload a new document

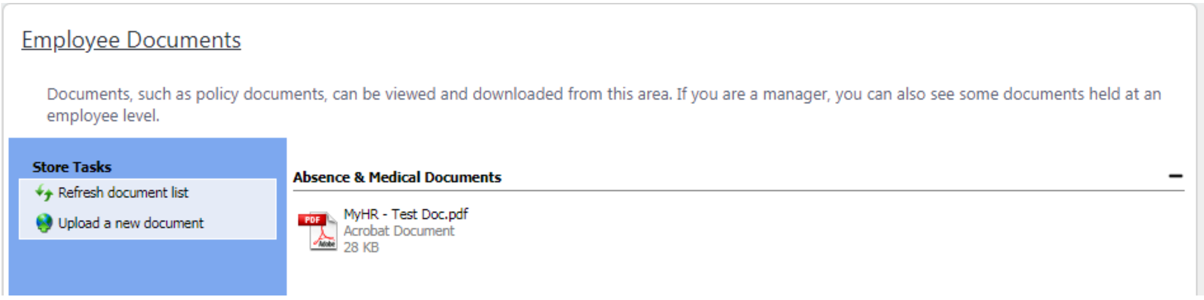
* click Chose File and locate the document on your computer



* The category will default to the only category you have access to

* Click Submit

* The document is now visible on the employee’s record



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