Employee Service Centre

myTeam

Buy and Bank Manager Guidance

Employee Service Centre

We aspire

BUY & BANK Leave Scheme – Manager's Authorisation Guide

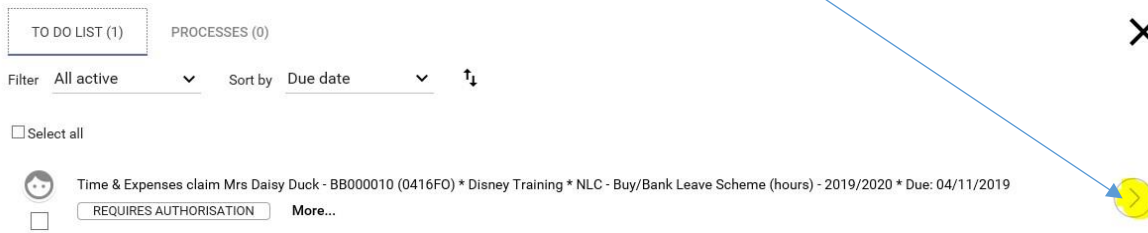**Employee Service Centre**

All reporting managers will receive an email communication confirming that an employee has made a Buy/Bank/Unpaid Leave request.

Managers should log into myTeam and view their To-do list to approve/reject employee's requests for Buy/Bank/Unpaid Leave.
Your To-do list shows all outstanding requests for leave, overtime, mileage and learning and buy & bank requests.

My to do list (1) / Processes (0)

Out of office today (Mrs Cinder   Ella, Mrs Daffy   Duck, Ms Tinker   Bell, Mrs Wonder   Woman)

Check out our new HR website, click here for info

myNL

To review the detail of any request, click on the arrow to the right of this request and you will be taken to the Buy & Bank claim for you to review the employee's request.

TO DO LIST (1)   PROCESSES (0)

Filter   All active   Sort by   Due date

☐ Select all

Time & Expenses claim Mrs Daisy Duck - BB000010 (0416FO) * Disney Training * NLC - Buy/Bank Leave Scheme (hours) - 2019/2020 * Due: 04/11/2019

[REQUIRES AUTHORISATION]   More...

Please note: You should only authorise a request if the employee meets the criteria as outlined by Policy. Click <u>here</u> for more information.

Employee Service Centre

You can Authorise/Not Authorise the request from this screen and click **SAVE**.

This will generate an email to the employee with your decision.

Authorisation status* [Authorised ▾]

Reason [   ]

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BUY/BANK/UNPAID LEAVE

PLEASE NOTE THAT THERE ARE STRICT CRITERIA WHICH MUST BE ADHERED TO, FOR ALL BUY/BANK/UNPAID LEAVE APPLICATIONS:

TO DO LIST (1)   PROCESSES (0)

Filter All active ▾   Sort by Due date

☐ Select all   **REDIRECT   ACTIONS**

Time & Expenses claim Ms Hannah

☑   [REQUIRES AUTHORISATION]

Alternatively, when you open your to-do list, you can tick any requests in your list and authorise or reject by using the **Actions** button at the top of the list and choosing Authorise or Not Authorise

Once actioned, the task will disappear from your to-do list. The employee will receive an email detailing the outcome.

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Authorisation Status: Not Authorised

If the manager is confirming to the employee that they are not authorising their request, then they should confirm the reasons for this to the employee.

There is a reason box where this information can also be typed for you to explain to the employee why you have not authorised their claim.
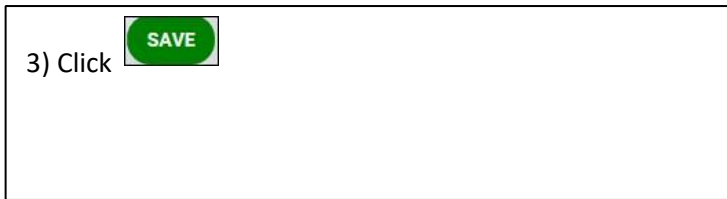
1) Select **Not authorised** from the pick list.

2) Then type in reason(s) for the rejection.

Authorisation status	Not authorised ∨
Reason	Enter reason

3) Click [SAVE]

Please note, the iTrent system functionality will only allow authorisation of claims (i.e. Buy & Bank Leave) when the payruns are open. A timetable of availability depending on the employee's pay cycle, can be found <u>here</u>.

If you authorise a claim when the payroll is closed, your to-do list will refresh and the claim will remain un-actioned. You will need to authorise the claim at a later date once the payrun is open.

Outwith the above, managers will be required to action steps detailed in (a) to (g) below:

a) **Ensure that the employee has worked at least one calendar year.**

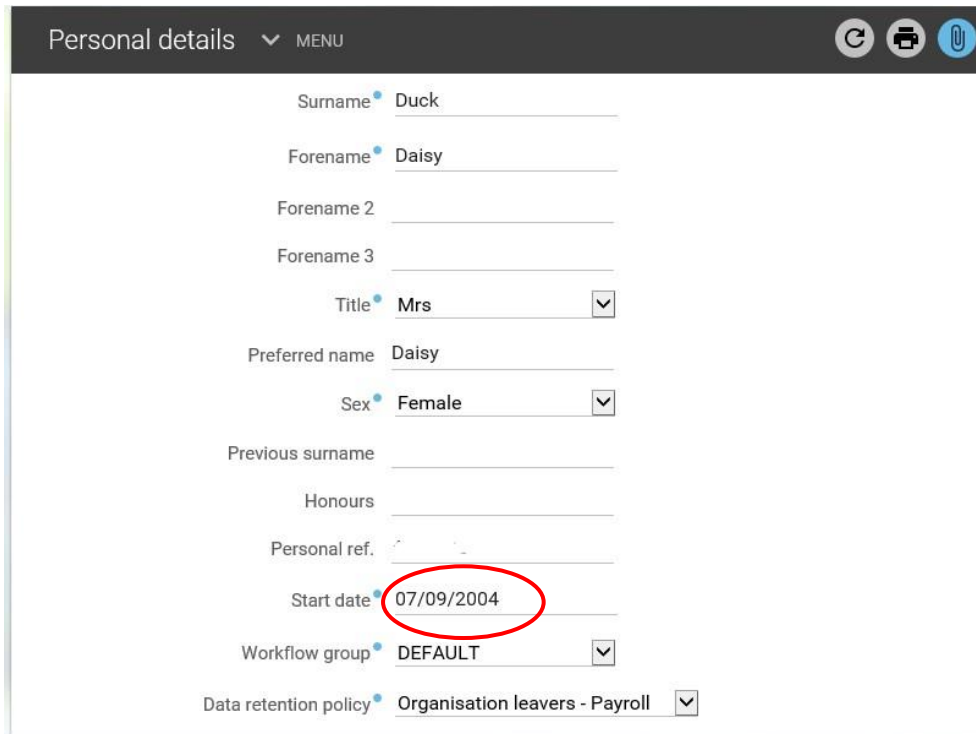You can check an employee's service on myTeam by clicking on [People] on the home page and select the employee from the left hand side:

Then select [∨ Personal Details] and ensure [Personal details] is selected: where the employee's start date will then be shown:

Personal details ∨ MENU

Surname	Duck
Forename	Daisy
Forename 2	
Forename 3	
Title	Mrs
Preferred name	Daisy
Sex	Female
Previous surname	
Honours	
Personal ref.	
Start date	07/09/2004
Workflow group	DEFAULT
Data retention policy	Organisation leavers - Payroll
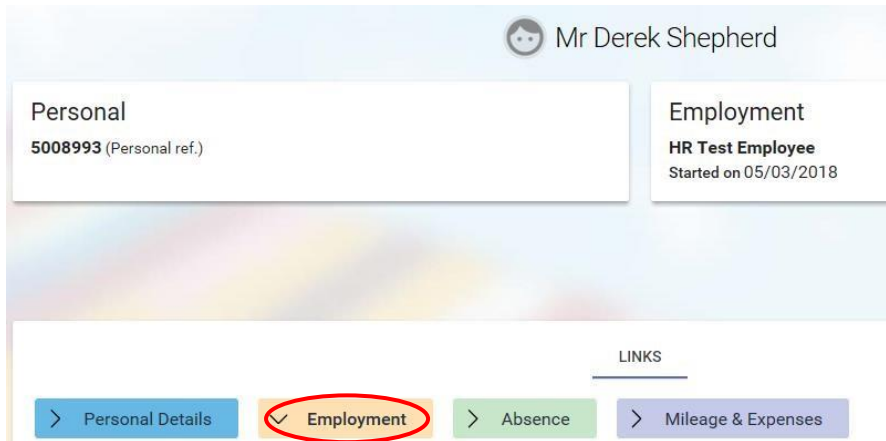
b) Ensure that hours requested does not exceed the contracted hours worked per week, per position. Contractual hours for the employee can be found under the Employment tab and selecting Hours & Basis

If the employee has more than one position you will need to ensure you select the correct you will see them here:

You will need to click on the relevant position that the employee has made the application against. If they have applied for all positions then you will need to repeat the following process for each one.

Then click on **Hours and basis**. You will then be asked to enter the effective date. You should use the current date

e) Confirm that the number of hours requested to be banked does not exceed the number of annual leave left in the holiday year.

Go to Absence Calendar, and **right-click** on any day in the applicable employee's calendar day.

Then select **Check holiday entitlement**:

You will then be given the screen below to view. The remaining annual leave entitlement (in hours) will appear at the bottom right hand corner:

Employment details

Position Employee Services Administrator - System A...

Period details

Holiday period dates 01/01/2018 - 31/12/2018

Length of service at relevant date 22 year(s) 11 month(s) 16 day(s)

Scheme name A/L NLC - Schedule A (Hours)

Membership dates 16/01/1995 -

Entitlement for period 364 hours (Adjustment)

From	To	Duration	Remaining entitlement
01/01/2018	02/01/2018	14	350
03/01/2018	05/01/2018	21	329
18/01/2018	19/01/2018	14	315
22/01/2018	23/01/2018	14	301
29/01/2018	31/01/2018	21	280
02/02/2018	02/02/2018	7	273
30/03/2018	30/03/2018	7	266
02/04/2018	02/04/2018	7	259
16/04/2018	16/04/2018	7	252
19/04/2018	20/04/2018	14	238
31/05/2018	01/06/2018	14	224
04/06/2018	06/06/2018	21	203
09/07/2018	13/07/2018	35	168
27/08/2018	31/08/2018	35	133
19/09/2018	20/09/2018	14	119
24/09/2018	24/09/2018	7	112
23/10/2018	23/10/2018	7	105
25/12/2018	25/12/2018	7	98
26/12/2018	26/12/2018	7	91

f) Please note that the only criteria for authorising Unpaid Leave is to ensure that the employee has not exceeded their weekly contractual hours in their claim

g) If you will be absent on holiday then you can re direct your tasks to another manager who will be able to authorise your teams requests by clicking on My task redirection

Then click on   New - My task redirection details
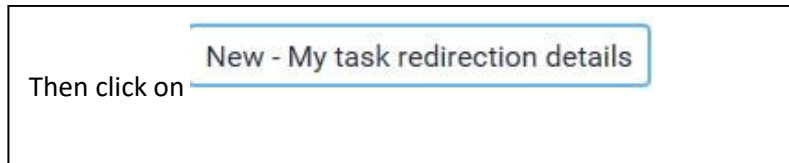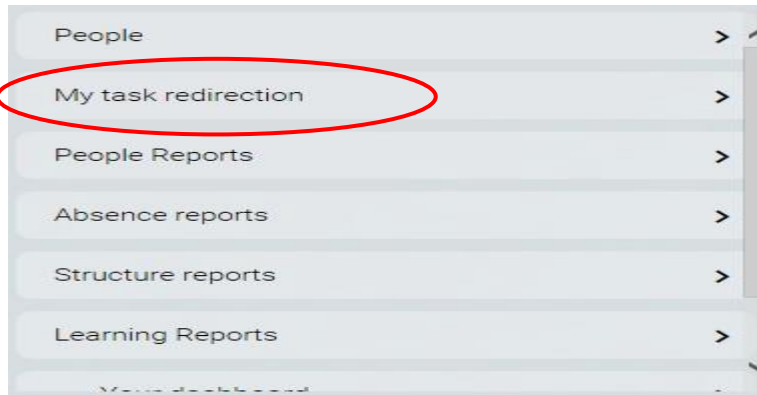
My task redirection details New ∨ MENU

Start date 01/11/2018
End date 09/11/2018
Process type Redirect all
Redirect to 5008993
Password ••••••••••••

SAVE

Enter the start and end date for your annual leave

Select the Process Type – Redirect All is shown in the example but there are other options available

Redirect to – Enter the surname or employee reference number of the manager you wish to receive your notifications

Enter your myTeam password

Click save

[END OF GUIDANCE NOTE]