HR SELF-SERVICE GO-LIVE GUIDE

This Go-Live Guide has been produced for departmental staff involved in HR administrative processes and, in particular, users of the CorePersonnel module. General information about HR Self-Service is available for all staff from the Staff Gateway page: www.ox.ac.uk/hrss.

The purpose of this document is to provide all the necessary information required to support staff with HR responsibilities during the launch of HR Self-Service. If you have a question that is not covered by this guide or the support material available online please email hrselfservice@admin.ox.ac.uk.

This document is also available from the HR Self-Service page of the Using HRIS website. Information contained in this guide will be incorporated into the Using HRIS webpages and QRGs over the coming weeks.

Contents

1   Launch dates

1.1   Employee Self-Service (ESS)

ESS will launch in three waves during the weeks commencing Monday 11 June and Monday 18 June. The planned launch dates are detailed below but could be subject to change:

- Tuesday 12 June 2018: UAS, Humanities and Social Sciences
- Thursday 14 June 2018: GLAM, MPLS and Continuing Education
- Monday 18 June 2018: Medical Sciences

An email will be sent to key contacts to confirm the successful launch for their department(s) and/or update them on any issues.

1.2   Manager Self-Service (MSS)

MSS is planned to launch in three waves, plus the 'Early Adopters'. The planned launch dates are detailed below but could be subject to change:

- 'Early Adopters' - w/c 11 and 18 June 2018 (in line with the ESS launch for your department – see above): Chemistry, Humanities Divisional Office, Medieval and Modern Languages, Paediatrics, Personnel and Related Services, Plant Sciences, Social Policy and Intervention
- Wave 1 – Monday 9 July 2018: UAS, Humanities and Social Sciences
- Wave 2 – Monday 30 July 2018: GLAM, MPLS and Continuing Education
- Wave 3 - Monday 20 August 2018: Medical Sciences

We will email key contacts with more information about the rollout of MSS including the process and timescales for verifying and updating your team and line management structures and the timescales for adopting the new processes for allocating Work Groups.

2   Communications to staff

HR Self-Service was first announced to staff in the Hilary Term 2018 issue of Blueprint. Targeted communication activities in the run up to and following launch include the following:

2.1   Communication toolkit

A communication toolkit was shared with key HR contacts and communications contacts in each department during the week commencing 21 May, for local onward dissemination. The toolkit aimed to raise awareness of HR Self-Service in the lead up to launch and included text for newsletters and standalone emails, and presentation slides.

2.2   Posters and postcards

During the week commencing 21 May posters and postcards promoting HR Self-Service were sent to key contacts and communications contacts for display in staff areas.

2.3 'All Staff' emails

To support local departmental messaging, two 'all staff' emails are scheduled:

1. An email from the Project Sponsor (Kate Blackmon, Associate Professor in Operations Management and Tutorial Fellow in Management Studies at Merton College) will be sent just before launch; and
2. An email from the Registrar will be sent approximately one month after launch, encouraging staff who have not yet done so to log in and check their data.

2.4 Payslip messages

A message promoting HR Self-Service will be included with payslips in June and July 2018. The 'call to action' will be to encourage staff to log in to the system and check their details are correct and up-to-date.

3 Your new Employee Dashboard

3.1 New menus and menu options

Once HR Self-Service is live and you have been granted access, when you log in to CoreHR your landing dashboard (which previously only held Staff Requests and/or your link to the Back Office) will now also serve as your own Employee Self-Service Dashboard. The menus available to you at the top of the page will depend on your access. In the example screenshot below, the individual has access to the full range of functionality, including the Manager Dashboard.
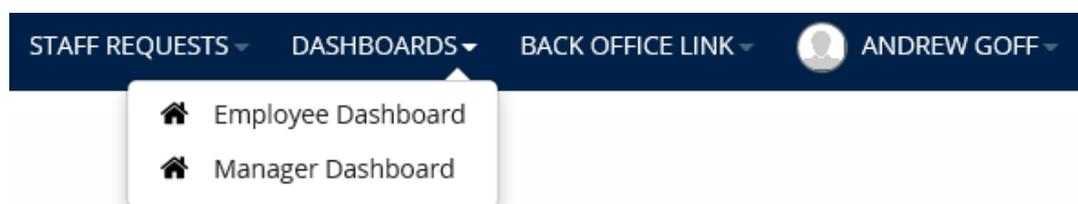
Please refer to the 'How to Guides' on the HR Self-Service Staff Gateway page for further guidance on navigating these new areas of the system.

3.2 Routes to logging in

As an HR user, you should continue to log in to CoreHR via the Using HRIS webpage. However, employees without HR responsibilities will be directed to the login button on the Staff Gateway page to access Employee and Manager Self-Service. Both options will take you into the system but we would encourage all HR users to log in via the Using HRIS webpage so that you don't miss important updates and news about the system which is relevant to you in your role.

4 User access

4.1 Employee Self-Service

4.1.1 Access for new eligible employees

HR Self-Service is available to all employees with a [CMS University of Oxford contract of employment](#). It is not accessible to non-employees, such as casual, agency or TSS staff.

Our current version of CoreHR does not allow us to automate the provision of access to new eligible employees. This will be manually assigned by the HRIS Support Centre. Eligible employees will need to be assigned an appropriate employment status (eg permanent, fixed-term), and be commenced on CoreHR, **before** they can be granted HR Self-Service access. If the [employee status](#) is initially recorded incorrectly, you should contact the HRIS Support Centre to ensure that the employee receives access. The expectation is that access for newly eligible employees will be granted within a maximum of four weeks of their appointment start date.

The employee will be alerted by email once their access to HR Self-Service has been granted, with a link to sign in. <u>Note</u>: A Single Sign-On (SSO) account is required to access HR Self-Service.

Although access will not be provided to <u>new</u> casual workers or non-employees, employees who move from an eligible appointment directly to an ineligible appointment will retain their access to Self-Service, to enable them to access their payslip history.

4.2 Manager Self-Service (MSS)

4.2.1 Assigning new eligible employees to a Work Group

In order for an employee to be visible to the relevant Self-Service Manager in the Manager Dashboard, all eligible employees must be assigned to a Work Group as part of the new appointment process in the CoreHR Personnel module. This involves selecting the correct Work Group from the drop down list in the **Work Group** field as highlighted in the screenshot below. All relevant appointing QRGs will be updated accordingly (once updated, a notification will be included in the HRIS Bulletin). Your departmental processes for managers to notify HR of new appointments/changes may need updating to include Work Group/team and consideration given to the best way of ensuring that staff involved in the appointing processes are aware of the names of your Work Groups.

An employee can be allocated to more than one Work Group provided they have separate appointment(s) set up in CoreHR for each job. An employee can only be allocated to one Work Group per appointment.

If an employee has two line managers as a result of working in two separate jobs (set up as separate appointments in CoreHR) each manager will only see the information related to that employee's role in their team. Where an employee has two managers for the same role (eg job share managers) both can be assigned as managers for that Work Group.

A CoreHR report will be made available to show Work Group allocations and who manages each Work Group. Details of the report will be provided prior to MSS go-live.

See Section 4.3 for further details about the timing of adopting this new step.

4.2.2 Requesting new / changes to Self-Service Managers

Once your department is live with MSS you will need to make sure you keep your line management and team structures up to date. Requests to set up a new 'Self-Service Manager' of a Work Group should be logged by completing a Service Request, a customised online form within HEAT (the IT Services Call Management System). The Service Request and accompanying guidance is accessible from the HRIS Service Catalogue page. Note that these requests must be approved by the Departmental Administrator/HAF or equivalent. The requestor will be asked to select the appropriate person from a list of names and this will be checked by the HRIS Support Centre before access is granted. The HRIS Support Centre will aim to process all requests for new Self-Service Managers within four weeks of receipt of an authorised request. The requestor will receive an email notification to confirm that the Service Request has been submitted, and an

email notification when the request has been completed. The requestor / manager will also receive a notification that their Manager Self-Service access has been amended.

We will keep this process under review and gather feedback to help identify any required improvements.

See for further details about the timing of adopting this new process.

4.2.3   Requesting a new Work Group / changes to an existing Work Group

Requests to create a new Work Group or make changes to an existing Work Group should be logged by completing a Service Request, a customised online form within HEAT (the IT Services Call Management System). The Service Request and accompanying guidance is accessible from the HRIS Service Catalogue page. The HRIS Support Centre will aim to process all requests for new Work Groups within an estimated two weeks of receipt of the request. The requestor will receive an email notification to confirm that the Service Request has been submitted, and an email notification when the request has been completed.

See for further details about the timing of adopting this new process.

4.2.4   Secondments

When an employee who is a Self-Service Manager takes up a secondment, they will continue to have access to their substantive team in MSS as well as their new team (if they have one) once the relevant MSS access has been added.

If it is not appropriate for an employee to retain a view of their team's records (ie Work Group) for their substantive post, departments will need to submit a Service Request (available from the HRIS Service Catalogue page) asking for the employee's MSS access to that particular Work Group to be removed. When the employee returns from their secondment, their department is able to submit a Service Request for them to be set up as the Self-Service Manager of that Work Group again. QRG CH14 on Managing Secondments will be updated with this guidance.

4.2.5   'Report To Manager' field

Once a Self-Service Manager has been assigned access to a Work Group, the 'Report To Manager' field on the 'Appointment details' screen for employees in that Work Group will be automatically populated with the name of that Self-Service Manager. This field is therefore no longer directly editable for users and any information contained in this field will be overwritten when your department's team and line manager data is uploaded.

4.3   Timing for adopting the new processes to support Manager Self-Service (MSS)

By the time Employee Self-Service is launched, all departments will have submitted their line management and team data to the project team. This data will be uploaded into CoreHR on a wave-by-wave basis and departments will be asked to run a report to check and verify the data before MSS access is granted to any of their designated Self-Service Managers. There will be a short window for departments to make/request updates and corrections before each wave goes live.

The project team be in touch with key contacts by email to ask them to capture staff changes made since the MSS data collection exercise. Key contacts will be asked to run a report of the department's team and line management structure which will output the data that was provided during the MSS data collection exercise. Departments will then be asked to make updates in the Back Office where they can, or to send these changes to the project team for action. Full details will be communicated to key contacts in due course.

You do not need to do anything different in the Back Office until your key contacts have received further guidance from the project team.

4.4 Leader and transfer process

Please note that the below information is supplementary to existing leaver and transfer processes.

4.4.1 An employee is transferring to a new appointment

In this instance, the receiving department should set up a new appointment in the CoreHR Personnel module and assign the appropriate Work Group. From the end date of the previous appointment the employee will no longer have visibility of the details of that appointment on their Employee Dashboard. If the employee is also a Self-Service Manager, the department from which the employee is leaving should complete a Service Request (available from the [HRIS Service Catalogue page](#)) to remove their manager access to the original Work Group.

4.4.2 An employee is leaving one of multiple appointments

The department from which the employee is leaving should end the appointment in the normal way. From the end date of the appointment the employee will no longer have visibility of the appointment details on their Employee Dashboard. If the employee is a Self-Service Manager, the department from which the employee is leaving should complete a Service Request (available from the [HRIS Service Catalogue page](#)) to remove their manager access to the original Work Group.

4.4.3 An employee is leaving the University

The employee's access will cease when their Single Sign-On is deactivated, 30 days from their end date. If the employee is also a Self-Service Manager, their manager access will be ended by the HRIS Support Centre as close as possible after their last day of employment. This process will be kept under review and will be revised to support the move to online-only payslips following the upgrade (planned for 2019).

4.5 Staff who don't have access to a work PC

Paper payslips will continue to be provided to all staff until HR Self-Service is made available outside of the University network (planned for 2019). During this time, employees without access to a PC at work are advised to contact their local HR team/administrator with enquiries about their HR record, or to make updates to their record. Departments should ensure that existing off-system processes for making these updates remain in place for use by staff without access to a work PC.

In readiness for the withdrawal of paper payslips, departments will be asked to consider ways in which they can support staff who are unable to access HR Self-Service to retrieve their online payslips. The project team, following liaison with the University's Information Security team, will be providing further guidance on the use of shared PCs for HR Self-Service.

5 Data changes made in Employee Self-Service (ESS)

All changes made by staff in ESS are immediately and automatically updated in CoreHR Back Office. Please encourage staff to update their data themselves where they are able to do so in Self-Service but make sure you maintain existing processes for staff who do not have access to a PC to request changes to their record. You may need to update departmental HR guidance, forms, and websites accordingly.

The PERDEP20 Monthly Changes report will be updated to include a separate tab with all changes that have been made by employees, with the exception of diversity data. You are advised to use this report to monitor, in particular, address changes and changes to DOB and gender (ie legal sex) as detailed in the sections below.

5.1 Changes to date of birth and gender data

Although the 'How To' guides and Data Guide advise employees not to update date of birth and gender (recorded in the Back Office as legal sex and required by HMRC and pensions providers), please note that these are editable fields in ESS. If you identify that an employee has changed one of these data items please contact them to obtain the necessary documentary evidence to verify the change.

5.2 Changes to address and emergency contact information

Home address (with the exception of country) and emergency contact fields are not mandatory in ESS, therefore there is a possibility that an employee could delete this information.

All employees who are subject to UK tax payments must provide a UK address whilst they work for the University. This is essential for HMRC and pension purposes.

Visa holders: The University is required to keep an accurate record of visa holders' address history, in case this is required by the Home Office. ESS does not require employees to enter an effective date when they update their address details. Therefore, employees who are visa holders are advised (in the HR Data Guide) to update their address details as soon as they have moved. Departments do **not** need to contact the Staff Immigration Team regarding residential address updates for visa holders, unlike changes of work address, which must be reported.

5.3 Bank details

At launch, users will be able to view their bank details in HR Self-Service but not update them. Later this year enhanced functionality is planned for release which will enable employees to update their bank details through Self-Service. Key contacts will be notified in advance of this

change and informed of the process to verify changes made to bank details. This information will also be communicated in the HRIS Bulletin.

5.4 Continuous service data

The HRIS Support Centre recently released a new set of functionality around continuous service dates in CoreHR, in order to improve the quality of continuous service data. This implementation was successful and has resulted in greater accuracy of continuous service dates within the system, based on automation of the University's continuous service eligibility rules which will be maintained in CoreHR going forward.

The HRIS Support Centre will soon be providing further guidance to departments on the use of the continuous service screen, particularly in relation to the 'Override Date' fields. They are also looking to facilitate a data cleansing exercise, in order to bring about the full benefit of these system changes, along with suggestions for changes in process to support the ongoing maintenance of this data.

In the meantime, there may be instances where an employee has incorrect continuous service data appearing on their ESS record. Where this is raised, please keep a note of the requested change and await further guidance from the HRIS Support Centre on the use of the Continuous Service screen. If you have queries relating to specific continuous service cases, please contact your HR Business Partner.

6   HRIS Data Service users

The HRIS Data Service will continue to make changes on behalf of departments that use this service as they do currently, except where employees are able to make updates themselves directly through HR Self-Service.

All relevant forms will be updated to include the 'Work Group' field. HRIS Data Service users should follow the same new processes for requesting new manager access and Work Group creation as all other departments (as described in sections 4.2.2 and 4.2.3).

HRIS Data Service users should run the PERDEP20_Monthly Changes report on a monthly basis and follow the guidance contained in section 5 regarding data changes. Requests for updates and corrections can be submitted using the usual forms. However, if you are receiving a high number of requests for updates from employees as a result of Self-Service, please email hrisdata@admin.ox.ac.uk to agree the best way of submitting these.

7   Data security

The Staff Gateway page includes a set of FAQs on data security. Please reinforce this to users in your communications about the system and ensure that you follow this guidance yourself when using the system.

8   Expected queries

The following section gives some guidance on likely questions that departments may receive from employees once Self-Service is launched.

8.1   "I haven't got access to HR Self-Service"

If an employee is not able to log on to the system via the log in button, please check the following:

- **Are they eligible for HR Self-Service?** All staff who have been issued with a CMS contract of employment with the University of Oxford should have access to HR Self-Service. However if the member of staff is a casual worker (including TSS), visitor, agency staff or is employed by one of the University's subsidiary companies, they will not be eligible for the service. Access will be provided on the basis of the Employee Status on the appointment – check that this has been recorded correctly in the Back Office and that the individual has at least one eligible appointment. If you need to update the Employee Status to an eligible one, please email hr.systems@admin.ox.ac.uk to make sure that the employee is then given access to Employee Self-Service.
- **Do they have a Single Sign-On account?** Find out more information about SSO, including what staff should do if they have forgotten their SSO, here. If an employee still needs help with their SSO, advise them to contact help@it.ox.ac.uk 01865 (6)12345.

8.2   "Some of the data on my HR record is missing or incorrect"

As this is the first time that most staff have had access to their HR record it is likely that they will spot errors or omissions. We recommend that you advise your employees, through your communications about HR Self-Service (see section 2) who to contact if they have queries about data items that they cannot update themselves. You may wish to set up a generic email address if you anticipate high levels of queries (for example if you know that job titles in the system may be missing or incorrect).

If you need advice on managing data queries, please contact hrselfservice@admin.ox.ac.uk until 31 July. Beyond this, all queries should be directed to hr.systems@admin.ox.ac.uk.

8.3   "Why is my continuous service data wrong?"

Whilst work is underway to improve the quality of continuous service data, there may be cases where this in incorrect in CoreHR and therefore appears incorrectly in HR Self-Service. Where this arises, please follow the advice in section 5.4.

8.4   "I'm a line manager. Why don't I have Manager Self-Service?"

Firstly, check that your department is live with MSS (see section 1.2). It may not have been deemed appropriate for a line manager to be assigned as the Self-Service Manager. This role is determined by the relevant HR representative, and can be changed if necessary. Speak to your key contact for HR Self-Service in the first instance to determine why the employee was not designated as a Self-Service manager. Follow the processes outlined in sections 4.2.2 and 4.2.3 if you need to request MSS access and/or a new Work Group.

9 Support for staff with HR responsibilities

9.1 Updated quick reference guides (QRGs)

All relevant QRGs will be updated to include guidance on allocating Work Groups. These will be shared with key contacts at the point of your department adopting Manager Self-Service (see the timetable in section 1.2). Once all departments are live with MSS the updated QRGs will be uploaded to the usual location on the Using HRIS webpages. Please continue to access QRGs from the HRIS webpage to ensure that you are using the latest version.

9.2 New and updated reports

The following reports will be made available/updated to support HR Self-Service:

1. PERDEP01: Staff in Post – updated to include the Work Group in which the employee's appointment sits
2. PERDEP20: Monthly Personnel Changes – updated to include a new tab to show changes made to data by employees through ESS within the date range selected
3. A new report (PERDEPXX: Work Groups & Report to Manager) to show the "reports to" structure in your department, ie all the Work Groups, with the members of each and the manager(s) of the Work Groups

We will let you know via the HRIS Bulletin when these new/updated reports are available.

9.3 Questions raised at briefings

Answers to questions raised by HR staff during the HR Self-Service Briefings in April/May 2018 can be found here. These also include answers to a variety of questions which may be raised by employees following launch.

9.4 Early life support

Until 31 July, please email queries relating to the following topics to hrselfservice@admin.ox.ac.uk:

- Design and functionality of HR Self-Service
- Manager access (note that manager access will be based on the data supplied by the department to the project team so please check this data before referring queries to us)
- Challenges relating to the volume or type of queries from staff
- Feedback on the new processes, guidance documents or Staff Gateway page

For support in using any aspect of CoreHR Back Office, contact the HRIS Support Centre by telephone or e-mail: Tel: 01865 (2)87900, e-mail: hr.systems@admin.ox.ac.uk

Users experiencing problems with their SSO credentials should contact the IT Service Desk: Tel: 01865 (6)12345, email: help@it.ox.ac.uk

Please note that the HRIS Support Centre is for CoreHR Back Office users only. Staff with general queries about HR Self-Service should not be directed to this team. See section 10 for details of where to direct staff queries.

10 Support for all staff

10.1 Staff Gateway page

All support materials for staff are hosted on the HR Self-Service Staff Gateway page. These include 'How To' guides, FAQs and an HRIS Data Guide. Employees are advised to contact their local HR representative with any questions relating to their HR record (see section 8 for expected queries).

Please note that the HRIS Support Centre is for CoreHR Back Office users only.

10.2 Single Sign-On

Users experiencing problems with their SSO credentials should contact the IT Service Desk:
Tel: 01865 (6)12345, email: help@it.ox.ac.uk