



PiP For My Team (Manager Self Service) 'Full' User Guide

Contents

Contents.....	2
Introduction.....	4
Accessing PiP	5
Logging on.....	5
Logging in to PiP For My Team for the first time.....	7
The Homepage	7
Viewing a task on your to do list	9
Authorising a task in your to do list	10
Sorting your tasks in your to do list	11
Amending the details of a request in the to do list	11
Process Matrix for PiP Tasks Requiring Authorisation.....	12
My Staff.....	15
Employment Information.....	19
Viewing a team member's current position.....	20
Changing the expected occupancy date for a team member	26
Changing the expected position date for a team member	28
Employment Changes Payroll Deadline Date.....	29
Changing the hours and working pattern for a team member	30
Changing the basis values	31
Changing the hours values	33
Changing a team members working pattern.....	35
Change a team members position	38
Make employee permanent.....	42
Schools - TLR's & Change of FTE.....	44
Submitting a TLR	44
Relinquishing a TLR	45
Change of FTE	46
Holidays	47
Viewing the balance of holiday entitlement for a team member	49
Annual leave request process map	51
Booking annual leave on behalf of one your team.....	52
Overriding a member of your teams holiday pattern	52
Viewing the holiday entitlement of a team member	53

Adjusting the holiday entitlement for one of your team members.....	55
Making a holiday adjustment process map	57
Other Absence (Special Leave)	58
Entering a special leave absence for one of your team members.....	58
Special Leave process map.....	60
Sickness	61
Viewing sickness absences for one of your team members	61
Creating a sickness absence for one of your team members	62
Overriding your team members sickness pattern	63
To do this, simply click on Sickness Pattern Override	63
Adding details of Doctors' certificates	64
Sickness absence process map	67
Accident at work process map.....	68
Time, Mileage & Expenses.....	69
Mileage & Expenses claims	69
Payroll Deadline Date.....	69
Authorising Claims	70
Viewing attachments submitted with claims.....	72
Re-directing a claim to another Reporting Manager.....	73
The Expenses link.....	76
View Expenses Claim	76
View Time & Expenses Attachment	77
Time and expense claim process map.....	79
Confirm Business Car Insurance.....	80
Adding a private vehicle for mileage claims and verifying insurance process map	81
Maternity, Paternity & Adoption	82
Maternity and Adoption KIT day process.....	90
Entitlement period.....	96
How to password protect a document:	98
Maternity absence process map	99
Adoption absence process map.....	100
Paternity leave process map.....	101
Leavers.....	102
Resignation details.....	102

Making an employee a leaver.....	104
Checking the remaining holiday entitlement when one of your team members leave	105
.....	106
Team members completing LTAs or moving to a new role within IoM Government....	106
Manager led leaver process map	108
End date position process map	109
End date position process in PiP (leaving one of multiple positions – resignation or retirement reason).....	109
Attachments.....	110
Creation of brand new position.....	111
Positions changes (creating additional positions, amending details and deleting positions)	111
Converting an existing position into a new position or Create an additional existing position process.....	114
Change of grade process.....	115
Ex-gratia and responsibility allowance process.....	116
Deleting a position or increasing or reducing the FTE hours of an existing position	117
Department of Education, Sport and Culture TLR process.....	118
Organisation restructure process.....	119
Help & Support.....	120
OHR support	120

Introduction

Welcome to **PiP** your new, accessible HR and Payroll system.

This PiP '**Full**' user guide is designed to support you with logging in and using **PiP For My Team** (Manager Self Service).

PiP For My Team enables you to manage your team more efficiently. When logging in you can see who in your team is in or out of the office and for what reason and you will also have access to your teams' personal, employment and absence information.

This guide includes detailed process maps and step by step instructions for each HR process.

Accessing PiP

You can access PiP For My Team in various ways:

- On a government networked PC e.g. a PC terminal in a government work location e.g. a ward at Nobles, Ellerslie Depot, St Andrews House etc
- On a government device e.g. tablet PC, iPad, smartphone
- On your personal device via Government remote access only e.g. tablet PC, iPad, smartphone
- On your personal computer or laptop via Government remote access only

You **do** however, need an e-mail address in order to access PiP

If you have a government device the PiP application will automatically appear as an icon on it when the system goes live.

If you want to use remote access via your own computer or laptop you will need to use the following website address:

https://pipformyteam/tlive_web

Save this as a favourite in your web browser to make it easier to access in future

As a line manager you will also have a login for the **PiP For Me (Employee Self Service)** portal for all your own personnel needs.

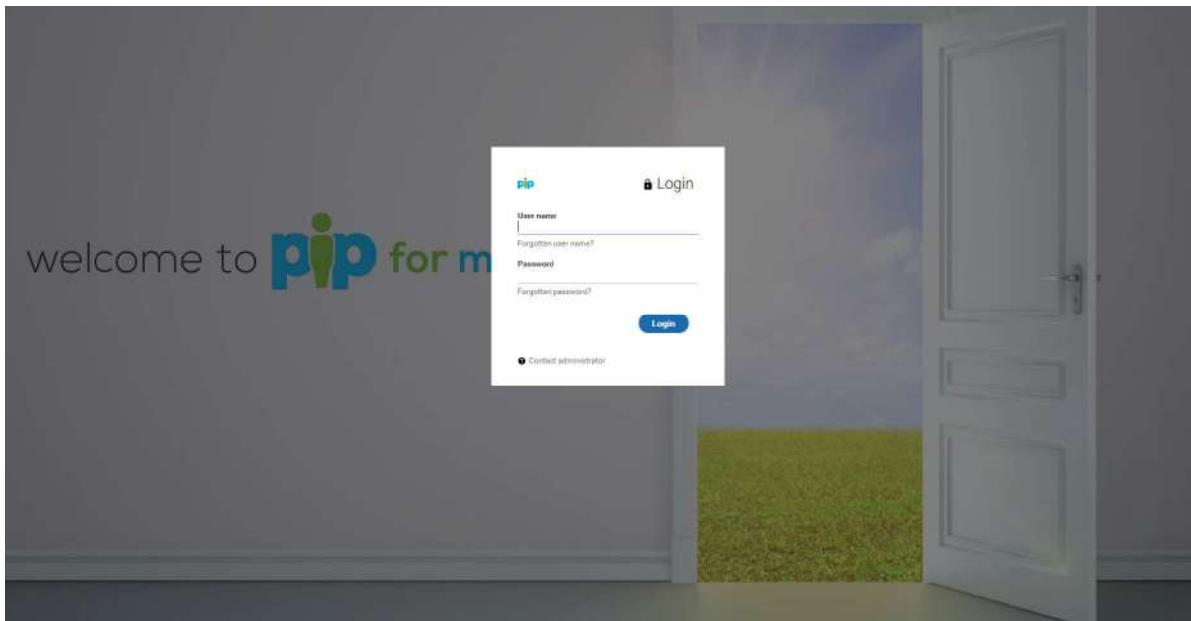
Logging on

You will be sent an email containing the URL link to access PiP. Your login details will be the same as your login you use to access the IOMG network.

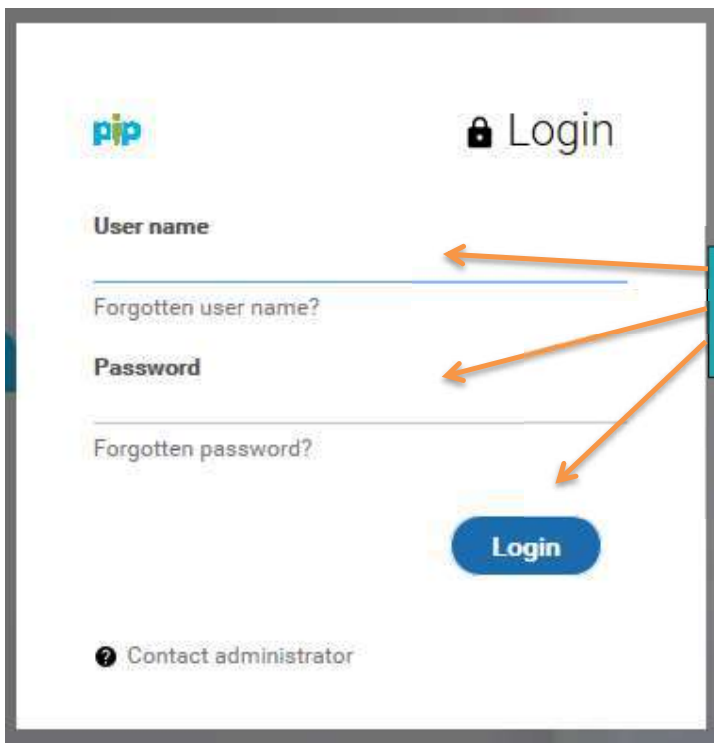
Any issues logging in please contact the PiP Helpdesk on 685999.

Please use Google Chrome as your web browser, if you use Internet Explorer you may experience error messages and slower performance.

This is the login screen for PiP For My Team:



Here's the login box:



Type your **Username** and **Password** in the fields opposite and then click the **Login** button

Logging in to PiP For My Team for the first time

When you log into PiP For My Team for the first time you should check the following information:

- **My Staff** – check your team is correct and all the staff who you line manage are visible under My Staff
- **Terms & Conditions** – check all your staff have the correct Terms and Conditions applied to them

If you find any details which are incorrect please contact the PiP Helpdesk Team on pipsupport@gov.im or call them on: 685999.

The Homepage

This is the PiP For My Team Self Service homepage:



The PiP For My Team dashboard is where you can access your teams' information, action key management tasks, manage your team's absence and access real time management information to enable you to manage your team more efficiently. You can also run reports and analytics on your staff from this screen.

Your to do list is also accessible from this screen.

Note: When navigating around PiP For My Team please use the links and menus within self-service to move from one screen to another. Do not use the back arrow at the top of your internet explorer/google/fire fox screen as this will cause a security warning to appear and you may have to log out and back in to the site.

Your To do list

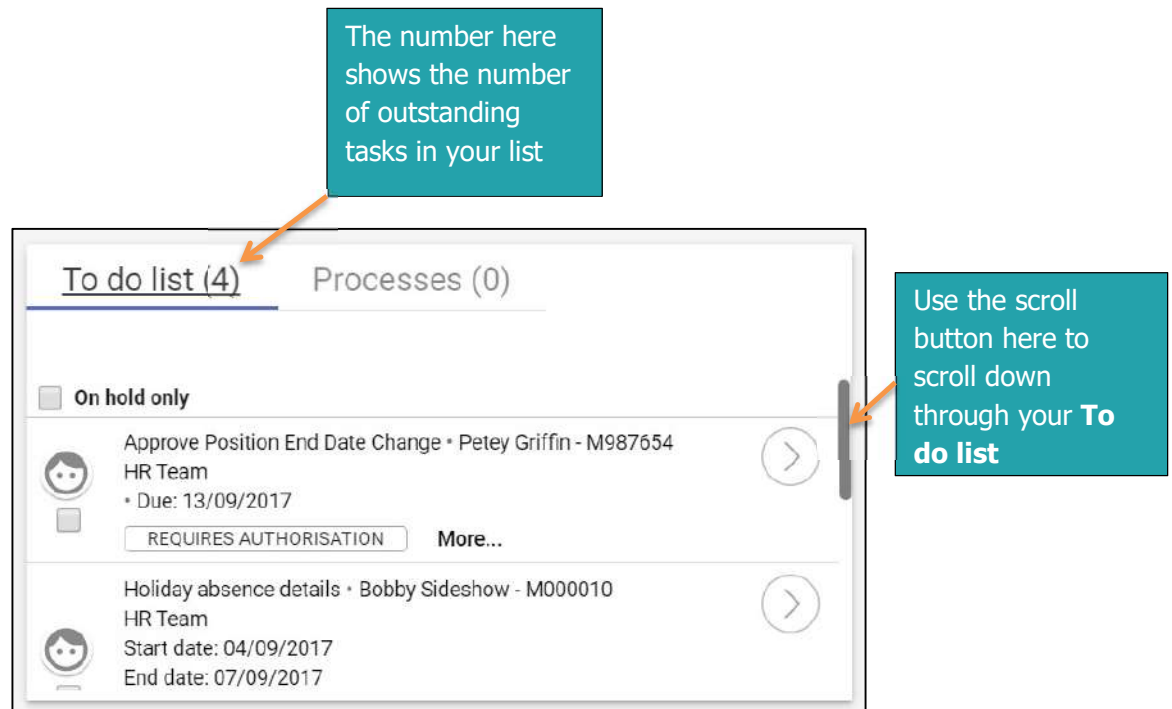
Part of your role as a line manager is to review and approve or decline the following requests and tasks from the team than you line manage:

- Annual leave requests
- Flexi leave requests
- TOIL requests
- Sickness absence
- Special leave requests – these should always be discussed and verbally agreed first before your staff member puts a request through on PiP
- Overtime claims (**N.B.** Overtime claims will be introduced at a later stage)
- Other time claims (allowances, additional hours etc. **N.B.** these claims will be introduced at a later stage)
- Mileage claims
- Business insurance
- Expenses claims

There may be other actions you need to undertake that appear as items in your To Do list that aren't generated initially by one of your team members. These could include, but aren't limited to the following:

- Changes in the hours and working pattern for one of your team
- Changes in the employment details for one of your team

This is your **To do list**:



The screenshot shows a 'To do list' interface. At the top, there are two tabs: 'To do list (4)' and 'Processes (0)'. Below the tabs, there is a checkbox labeled 'On hold only'. The list contains two items:

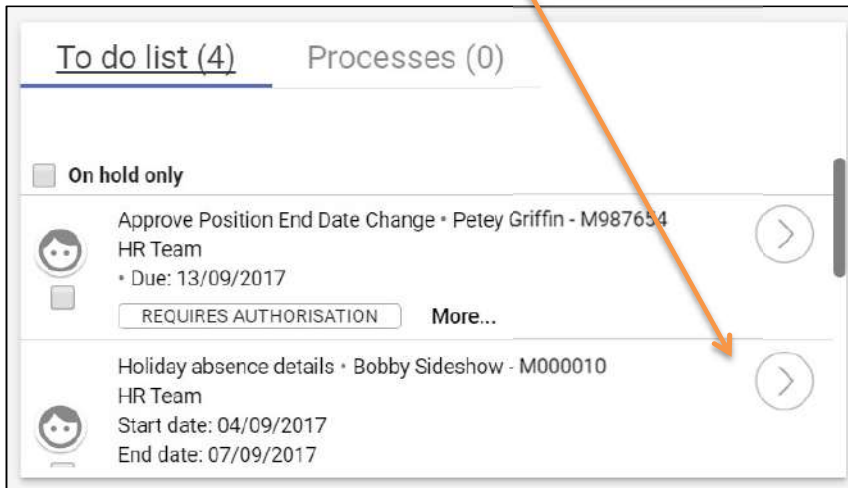
- Item 1:** Approve Position End Date Change • Petey Griffin - M987654
HR Team
• Due: 13/09/2017
Below the item is a button that says 'REQUIRES AUTHORISATION' and a 'More...' link. To the right of the item is a circular arrow icon.
- Item 2:** Holiday absence details • Bobby Sideshow - M000010
HR Team
Start date: 04/09/2017
End date: 07/09/2017
To the right of the item is a circular arrow icon.

Annotations with arrows point to specific parts of the interface:

- An arrow points from a text box to the '(4)' in the 'To do list (4)' tab, stating: 'The number here shows the number of outstanding tasks in your list'.
- An arrow points from a text box to the vertical scroll bar on the right side of the list, stating: 'Use the scroll button here to scroll down through your To do list'.


Viewing a task on your to do list


To view a task on your **To do list** simply click on it:



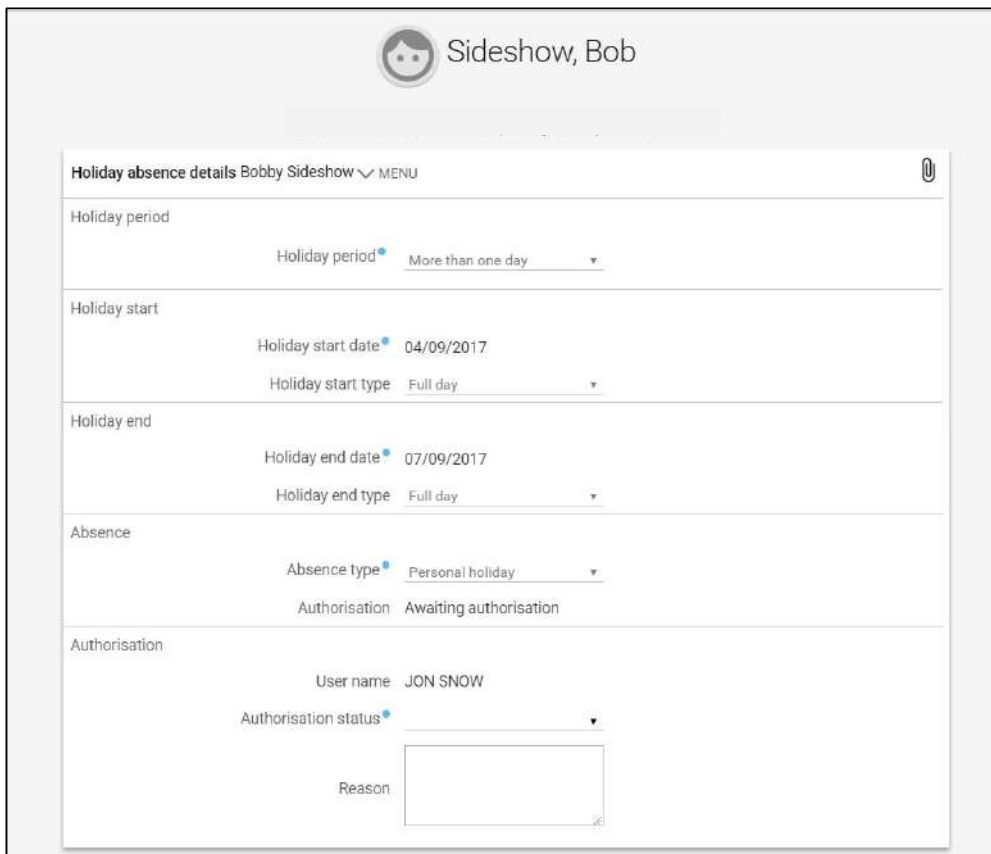
To do list (4) Processes (0)


☐ On hold only


 Approve Position End Date Change • Petey Griffin - M987654
HR Team
• Due: 13/09/2017
[REQUIRES AUTHORISATION](#) [More...](#)

 Holiday absence details • Bobby Sideshow - M000010
HR Team
Start date: 04/09/2017
End date: 07/09/2017

Your screen will now look like this:



 Sideshow, Bob

Holiday absence details Bobby Sideshow [MENU](#) 

Holiday period

Holiday period [More than one day](#)

Holiday start

Holiday start date [04/09/2017](#)

Holiday start type [Full day](#)

Holiday end

Holiday end date [07/09/2017](#)

Holiday end type [Full day](#)

Absence

Absence type [Personal holiday](#)

Authorisation [Awaiting authorisation](#)

Authorisation

User name [JON SNOW](#)


Authorisation status [\[Dropdown\]](#)

Reason

Authorising a task in your to do list

Within your To Do list simply tick the check box next to the task and click on **Actions – Authorised, Not authorised or on hold**


TO DO LIST (12) PROCESSES (0)

Filter: **Authorised** Due date 

Not authorised


On hold

ACTIONS

 Holiday absence details Bobby Sideshow - M00

☒ **REQUIRES AUTHORISATION** **More...**

You also have the ability to authorise an annual leave request once you have clicked on the task to view it in more detail.



Holiday absence details Bobby Sideshow MENU 

Holiday period
Holiday period: Full day

Holiday start
Holiday start date: 04/04/2018

Holiday end

Absence
Absence type: Personal holiday
Authorisation: Awaiting authorisation

Authorisation
User name: JON SNOW
Authorisation status: 
Reason: 

— Holiday balances

HR Business Partner - PSC CS Annual Leave Bands C - F				
Holiday period	Entitlement	Taken	Scheduled	Balance
01/08/2017 - 31/03/2018 (Part)	230.5 H	105 H	0 H	125.5 H
01/04/2018 - 31/03/2019	318.3 H	105 H	22.5 H	190.8 H
01/04/2019 - 31/03/2020	237 H	0 H	0 H	237 H

Click on the drop down list to select the authorisation status


For holiday requests there is a free text to add any comments.

Note: This message will not be visible to your team member, it is for your record only.

Click on Holiday Balances to view your team members remaining entitlement

Once a task has been actioned an email is sent to that team member confirming their request has been authorised, not authorised or put on hold.

Please note that if a task in your To do list isn't authorised by you within seven days it is automatically re-directed to your line manager.

N.B.: (Although the paperclip icon  appears in this screen, documents cannot be uploaded into PiP at this time, for the time being documents should continue to be managed following your current departmental processes).

Sorting your tasks in your to do list

You can sort the tasks in your to do list by using the **Sort by** and **Filter** tools:



Click on the drop down list to organise your to do list by tasks on hold, not authorised, task type, due date etc.

Amending the details of a request in the to do list

Should you need to amend the details of a task before approving you can do so (i.e. updating the end date of a sickness absence).

Click on the task to open the request in more detail and amend the details. We recommend that you have a conversation with your team member to discuss the reason for the amendment before authorising on PiP.

NB: Managers please note that if your team member also holds other positions within Government, you may receive workflow emails and possibly authorisation tasks for their other positions.

If you receive a workflow email for their other position which you do not manage, please check your 'To Do' list to see if you have also received an authorisation task.

If you have only received a workflow email and **have not** received an authorisation task, please disregard the email.

If you **have** received an authorisation task, please **do not click on the task** and simply **contact the PiP Helpdesk on 685999 or pipsupport@gov.im**. The PiP team will then check that the proper authorisations are actioned.

There will be a system update from the suppliers of PiP in the near future which will fix this issue, we appreciate your patience and cooperation until the update is made.

Process Matrix for PiP Tasks Requiring Authorisation

This matrix provides a breakdown of the type of tasks managers can expect to receive in their To Do list and what the process is should the manager not be available to action the task, for example if they are on leave.

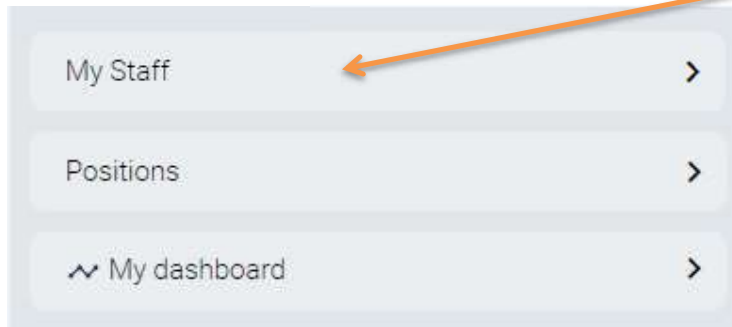
Task to be Authorised	Authorisation required	Who instigated the Action	What to do if the Authorising Manager is not there
Special Leave (Paid & Unpaid)	<ol style="list-style-type: none"> 1. The line manager 2. Manager's Manager 	Employee	<ul style="list-style-type: none"> • Leave authorisation task for 7 days to escalate in PiP. The Manager and/or Manager's Manager will approve the Special Leave request once they are back in the office (as applicable). • If the Employee's Special Leave date falls before the Manager and/or Manager's Manager is back in the office, the Employee's Special Leave can be agreed verbally by either the Manager or the Manager's Manager and PiP can be updated after the fact. • If the authorisation is urgent and cannot wait until the manager returns please contact the PiP Helpdesk 685999.
		Admin Role User	<ul style="list-style-type: none"> • Admin Role User to discuss the Special Leave with Manager and/or Manager's Manager when they are back in the office, the Managers can then take any action as necessary.
Sickness Absence	<ol style="list-style-type: none"> 1. The line manager 	Employee	<ul style="list-style-type: none"> • The Employee should still call in to advise their workplace of their absence for operational purposes. • The Manager/Supervisor who speaks to the Employee should advise the Employee that their Sickness Absence will be on hold in PiP until the Manager returns. • Leave authorisation task for 7 days to escalate to manager's manager in PiP. The Manager and/or Manager's Manager will approve the Sickness Absence request once they are back in the office (as applicable) • The Manager's manager can record the sickness absence for the employee in PiP For My Team

Annual Leave		Admin Role User	<ul style="list-style-type: none"> Admin Role User to discuss the Sickness Absence with Manager when they are back in the office, the Manager can then take any action as necessary.
	1. The line manager	Employee	<ul style="list-style-type: none"> Leave authorisation task to escalate within PiP. The Manager will approve the Annual Leave request once they are back in the office (as applicable). If the Employee's Annual Leave date(s) falls before the Manager is back in the office, the Employee's Annual Leave can be agreed verbally by either the Manager's Manager (or other appropriate manager within the reporting structure) and PiP can be updated after the fact.
Private Vehicle & Expenses	1. The line manager	Employee	<ul style="list-style-type: none"> Leave authorisation task for 7 days to escalate in PiP. The Manager will verify that the Employee has the required business car insurance and/or authorise their Expense claim once they are back in the office (if they are back within 7 days) or, After 7 days elapse the Manager's Manager can verify the insurance and authorise the task once it has been escalated to their Task List in PiP. The Employee can still enter expenses claims while waiting for their business car insurance to be verified. These won't be processed by Payroll until the Employee's business car insurance and/or Expense claim has been verified/authorised in PiP. (The Manager/Manager's Manager should contact their usual Accounting Officer prior to approving the Expense claim in PiP as necessary). The line manager can redirect the claim to another manager in their absence. Note Redirections should only be used for Mileage expense claims.

Employment Changes - changes to hours, changes to position, creating new positions etc.	1. Manager's manager	Manager	<ul style="list-style-type: none"> • If possible the Employment Change should be authorised and actioned before the Manager's Manager is on leave. • Leave authorisation task for 7 days to escalate in PiP. The Manager's Manager will approve the Employment Change request once they are back in the office (as applicable). • In extenuating circumstances where authorisation is urgent contact the PiP Helpdesk 685999.
--	----------------------	---------	--

My Staff

To view all the team members you currently line manage simply click on the **My Staff** button on the dashboard:



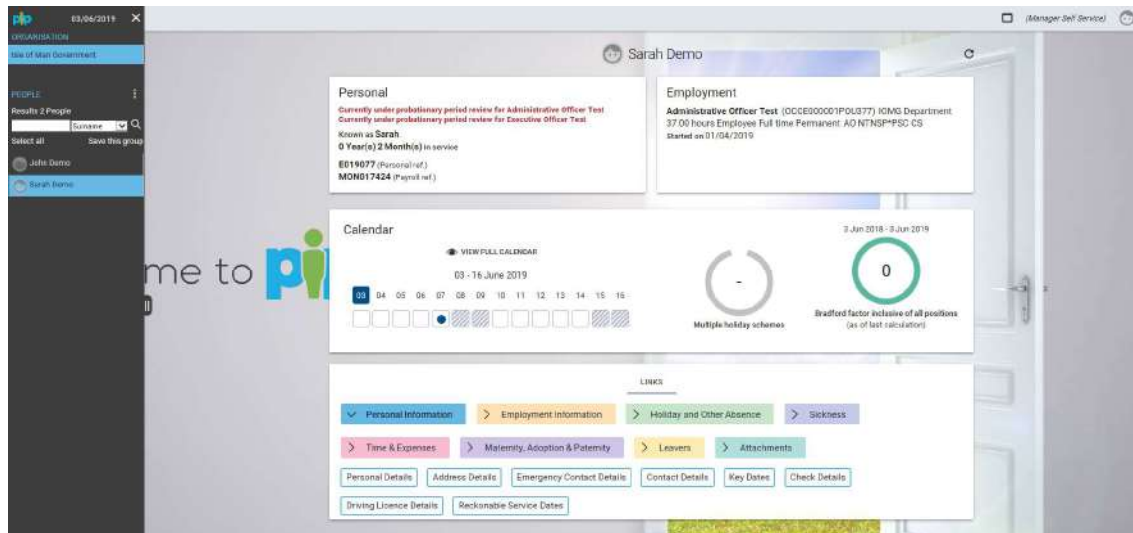
Your screen will now look like this:



A list of your direct reports will be displayed here. In order to view your reports up to 3 levels down, either search for the specific person using the search field or click on the magnifying glass and search all to bring up all your reports up to 3 levels below you.

If you hover your cursor over the name of one of your team members in the above list you will see a snapshot of their details in a pop-up box. To view more details about each of your team, including the balance of their annual leave and their current Bradford Factor score simply click on their name in the list.

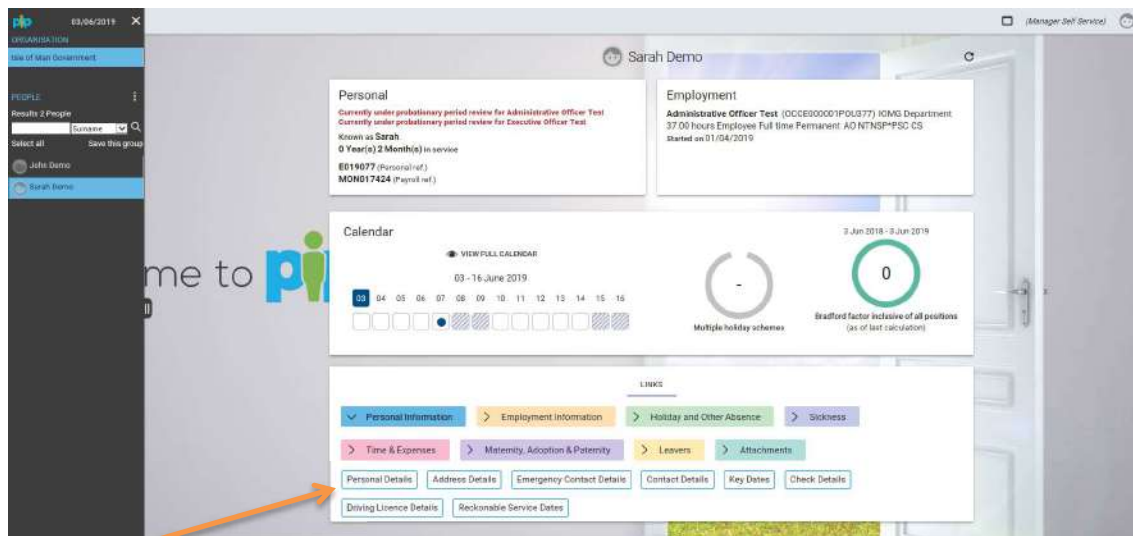
Your screen will now look like this:



Team Personal Information

To view the personal information of a member of your team first click on **My Staff** and then click on the team member's name.

Your screen will now look like this:

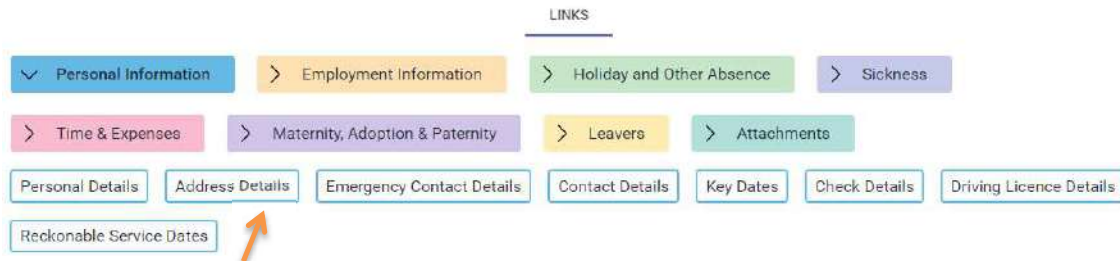


The **Links** section at the bottom of the screen defaults to all the options available to you as a line manager under the **Personal information** section.

Scroll down the screen to access the following options under **Personal Information**:

- Personal details
- Address details

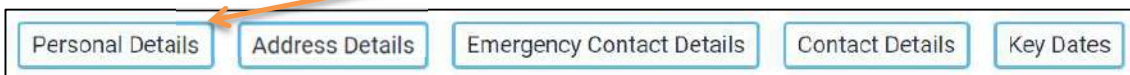
- Emergency Contact Details
- Contact Details
- Key Dates
- Check details (pre-employment checks)
- Driving licence details
- Reckonable service



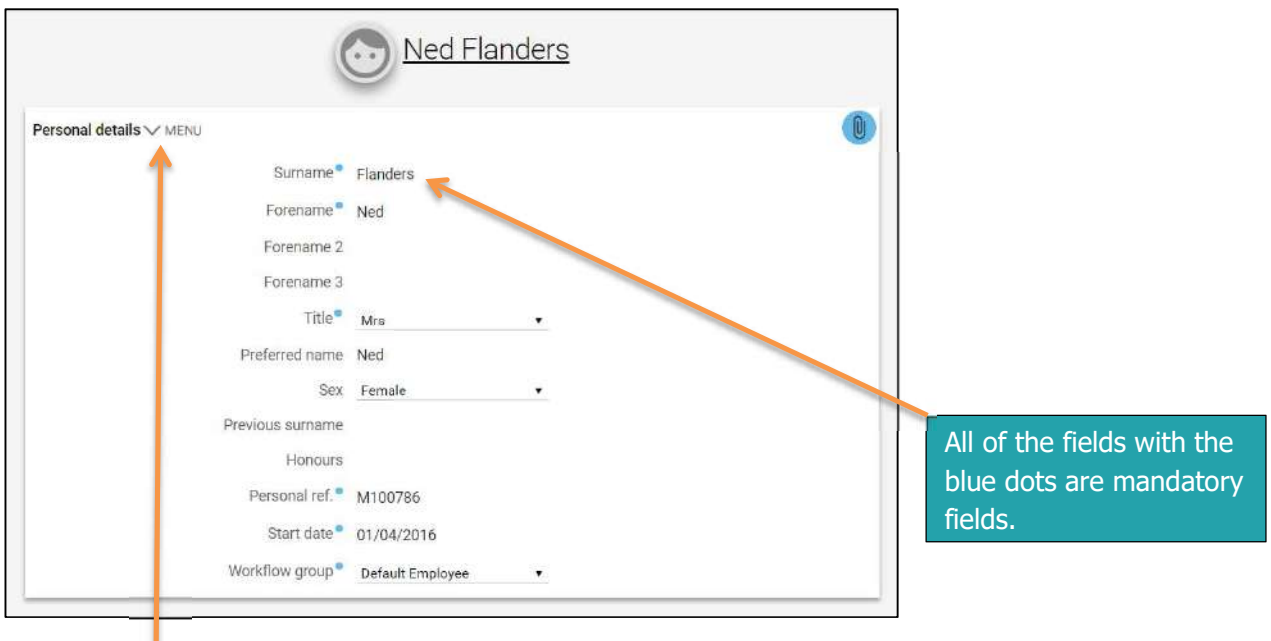
To access any of these options for your team member that you are currently looking at it, simply click on the tabs above.

Viewing the personal details of a team member

To do this, simply click on **Personal Details**:



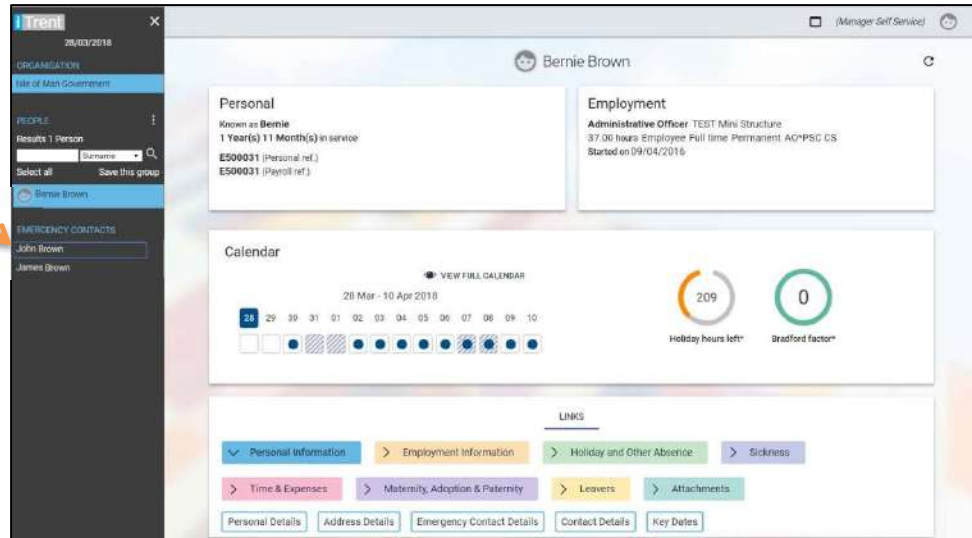
Your screen will now look like this:



Clicking on **Menu** allows you to access the other options under the **Personal Information** section without having to go back a screen on your browser.

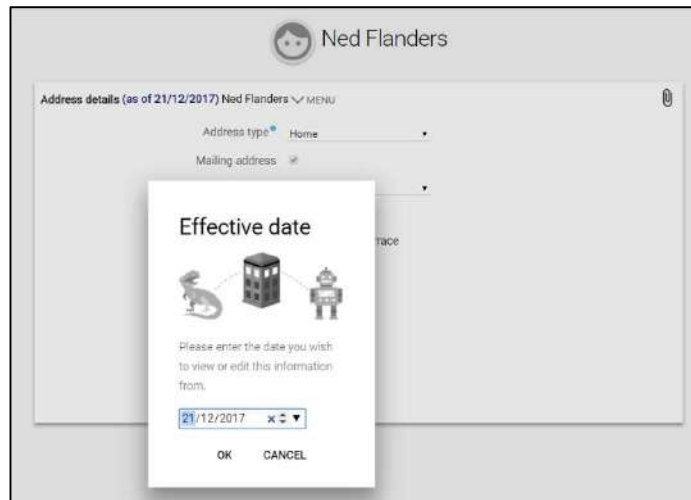
The same guide is made applicable for the other tiles, as they follow the same processes. However, some of the options may contain more than one account of information, for example this user has multiple emergency contacts and each can be accessed via the menu on the right.

To view the details for a particular emergency contact simply click on the name of that person from the list here.



Effective Date

When accessing personal information for your team, you may be prompted to fill out an effective date. You can also change the date if needed to gain the ability to attach future contracts to pay.



Confirm the date is correct then click "OK" to proceed.

Employment Information

The functions in this section replace the current paper forms that are used to change employment details e.g. OHR1 and OHR3 forms.

To view or amend the employment information of one of your team members first click on **My Staff** and then click on that team member's name.

Your will screen will now look like this:



LINKS

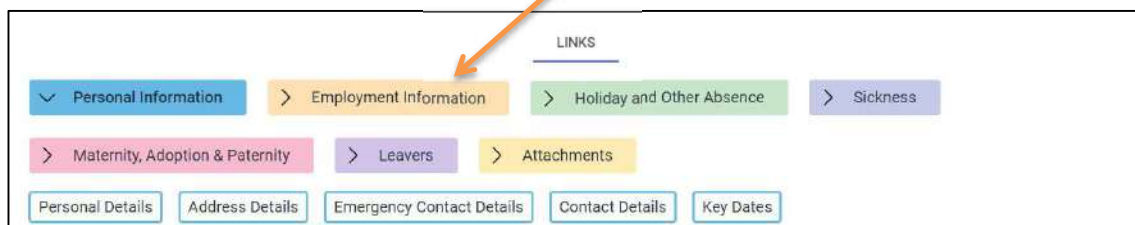
[Personal Information](#)
[Employment Information](#)
[Holiday and Other Absence](#)
[Sickness](#)

[Time & Expenses](#)
[Maternity, Adoption & Paternity](#)
[Leavers](#)
[Attachments](#)

[Personal Details](#)
[Address Details](#)
[Emergency Contact Details](#)
[Contact Details](#)
[Key Dates](#)
[Check Details](#)

[Driving Licence Details](#)
[Reckonable Service Dates](#)

The **Links** section at the bottom of the screen defaults to all the options available to you as a line manager under the **Personal information** section. To select the **Employment Information** section, simply click on the **Employment information** button:



LINKS

[Personal Information](#)
[Employment Information](#)
[Holiday and Other Absence](#)
[Sickness](#)

[Maternity, Adoption & Paternity](#)
[Leavers](#)
[Attachments](#)

[Personal Details](#)
[Address Details](#)
[Emergency Contact Details](#)
[Contact Details](#)
[Key Dates](#)

Your screen will now look like this:



LINKS

[Personal Information](#)
[Employment Information](#)
[Holiday and Other Absence](#)
[Sickness](#)

[Time & Expenses](#)
[Maternity, Adoption & Paternity](#)
[Leavers](#)
[Attachments](#)

[View Current Position Summary](#)
[Change Expected Occupancy End Date \(LTAs only\)](#)
[Change Expected Position End Date](#)

[Change Hours & Working Pattern](#)
[Change Working Pattern ONLY](#)
[Change Employees Position](#)
[Other Employment Change](#)

The following options are available to you under **Employment information**:

- View Current Position Summary
- Change Expected Occupancy Date (LTAs only)
- Change Expected Position End Date
- Change Hours & Working Pattern
- Change Working Pattern ONLY
- Change Employee Position
- Other Employment Change
- Make employee permanent

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Viewing a team member's current position

This is to view the current position only. You can't make any changes to any of the fields on the screen when you choose this option.

To do this, simply click on **View Current Position Summary**:



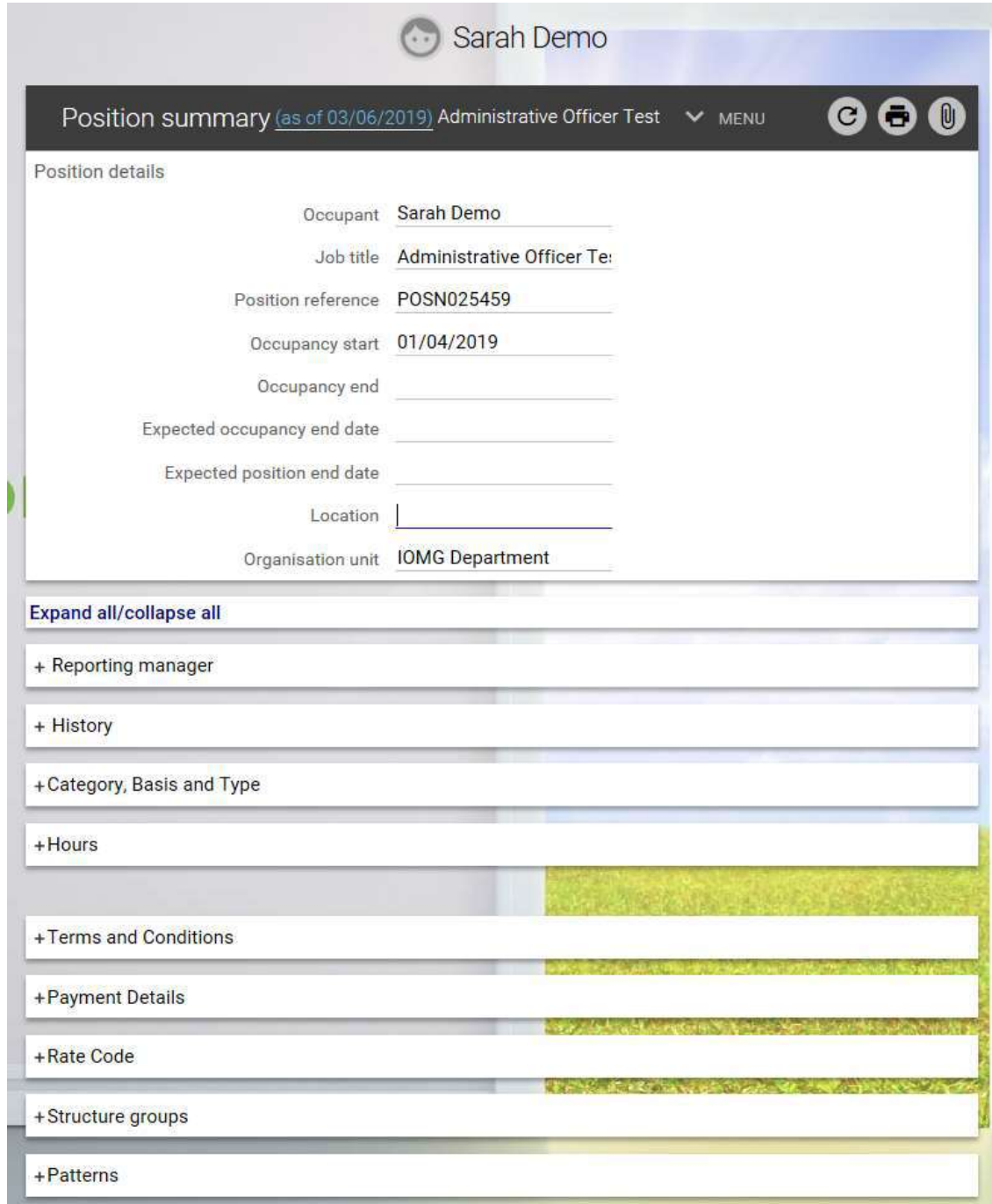
Your screen will now look like this:

If your team member has more than one position with Isle of Man Government and you line manage them for those positions, you will see their different positions listed here. To view the details of a particular contract simply click on it from the list.



Click **OK** on the above message. If you want to view position details for a previous position you can change the date here and click **OK**.

Your screen will now look like this:



Position summary [\(as of 03/06/2019\)](#) Administrative Officer Test ▼ MENU 🔄 🖨️ 📎

Position details

Occupant	Sarah Demo
Job title	Administrative Officer Te:
Position reference	POSN025459
Occupancy start	01/04/2019
Occupancy end	
Expected occupancy end date	
Expected position end date	
Location	
Organisation unit	IOMG Department

[Expand all/collapse all](#)

- + Reporting manager
- + History
- + Category, Basis and Type
- + Hours
- + Terms and Conditions
- + Payment Details
- + Rate Code
- + Structure groups
- + Patterns

Scroll down the screen to view all the other sections that you can view.

You can expand or collapse each of the sections individually by clicking on the **plus sign** for that category. Or you can expand and collapse all the sections at once by clicking on **Expand all/collapse all**.

If any of the details in this section are incorrect please contact OHR to have them amended. Please ensure you discuss this with your team member first.

Let's look at the **Position Summary** screen in more detail.

Position summary (as of 03/06/2019) Administrative Officer Test ^ LESS

View Current Position Summary Change Expected Occupancy End Date (LTAs only)

Change Expected Position End Date Change Hours & Working Pattern

Change Working Pattern ONLY Change Employees Position Other Employment Change

Position details

Occupant: Sarah Demo

Job title: Administrative Officer Te

Position reference: POSN025459

Occupancy start: 01/04/2019

Occupancy end:

Expected occupancy end date:

Expected position end date:

Location:

Organisation unit: IOMG Department

Position reference – this is the equivalent of the Oracle position number and is used for recruitment purposes and when making any changes to a specific position

Occupancy start – this is the start date for a particular person in that particular position.

Expected Occupancy end date – used for limited term appointments and fixed term appointments to show when that appointment for that person in that position is likely to end.

***N.B.:** the person's annual leave and sickness entitlements **will not** be pro-rated to their **expected** occupancy end date, these entitlements will only pro-rate once an **actual** end date has been saved against the person's occupancy in the position.

Expected Position end date – this is for the actual position as opposed to the expected occupancy end date. This date is for temporary positions.

Scrolling down the Position summary screen gives you more information about the position and how that position is structured e.g. working pattern and number of hours etc:

Expand all/collapse all

+ Reporting manager

+ History

+ Category, Basis and Type

+ Hours

+ Terms and Conditions

+ Payment Details

+ Rate Code

+ Structure groups

+ Patterns

Clicking on the + symbol will expand out each section.

Let's look at each of these in more detail:

– Reporting manager

Reporting manager Rob Demo

Reporting manager position Reporting Manager

Reporting manager unit IOMG Department

This should have your name as **Reporting Manager** and shows the line manager for the person you are looking at on PiP For My Team.

– History

Action date	Status	Authorisation status	Date authorised by	Authorised	Change reason	Authorisation reason
-------------	--------	----------------------	--------------------	------------	---------------	----------------------

The **History** section shows any changes that have been made to the post with the current person in that post. This doesn't show any changes that have been to the position itself e.g. changing a part-time position from part-time hours to full-time hours as a permanent change regardless of whether or not the person currently occupying that position works full-time or part-time.

– Category, Basis and Type

Status	Start date	End date	Type	Value
	01/04/2019		Basis	Full time
	01/04/2019		Category	Employee
	01/04/2019		Type	Permanent

Category – this is the status of the person currently occupying that position i.e. employee, committee member, board member; worker (for casual workers)

Basis – this is whether or not the position is part-time, full-time or term-time only

Type – this is the type of contract for that position i.e. permanent; limited term appointment; fixed term appointment

– Hours

Status	Start date	End date	Type	Value
	25/01/2018		Budget Hours	2000
	01/01/1900		Contracted Hours	37
	01/01/1900		FTE Hours	37
	26/03/2018		FTE value	1

Budget Hours – this is the number of hours per annum that are allowed for in the staffing budget for the position.

Contracted Hours – this is the number of hours the person occupying that position is currently working per week. This number cannot exceed the FTE Hours for the position e.g. if the FTE Hours are 22.2 the Contracted Hours could not be 37.

FTE Hours – this is the maximum number of hours that a person occupying that position can actually work in a week. Increasing FTE Hours needs to be done through the OHR PiP Helpdesk.

FTE value – this is how much of the full time equivalent that person is i.e. someone working 18.5 hours would have an FTE value of 0.5; someone working 37 hours would have an FTE value of 1.

– Terms and Conditions

Status	Start date	End date	Type	Value
	01/04/2019		OSP - Sickness	PSC NTNPS Sick Pay Scheme
	01/04/2019		OPP	PSC Civil Service Paternity Scheme
	01/04/2019		Business Mileage Off-Island	IoMG Off-Island Business Mileage Scheme
	01/04/2019		Personal Holiday	PSC NTNPS CS Annual Leave
	01/04/2019		OAP	PSC Civil Service Adoption Scheme
	01/04/2019		Flexi	Flexi
	01/04/2019		Bank holiday	Isle of Man Bank Holidays
	01/04/2019		OMP	PSC Civil Service Maternity Scheme
	01/04/2019		Business Mileage IoMG	IoMG Business Mileage Scheme
	01/04/2019		Special Leave - Unpaid	Special Unpaid Leave
	01/04/2019		TOIL	TOIL

Terms and Conditions are the conditions of employment for that position and are the conditions a person occupying that positions works under.

– Patterns

Status	Start date	End date	Type	Value
	01/04/2019		Allowance Pattern	7 Day Allowance Pattern
	01/04/2019		Working Pattern	37.00 M7:24 T7:24 W7:24 T7:24 F7:24 S0:00 S0:00

Patterns shows the working pattern for the person occupying that position i.e. the total number of hours worked per week followed by the amount of hours worked each day. The total number of hours worked per week is shown as a decimal (e.g. 20.5 for twenty hours and 30 minutes per week) and the amount of hours worked each day is displayed in hours and minutes (e.g. 7:24 for seven hours and twenty four minutes a day).

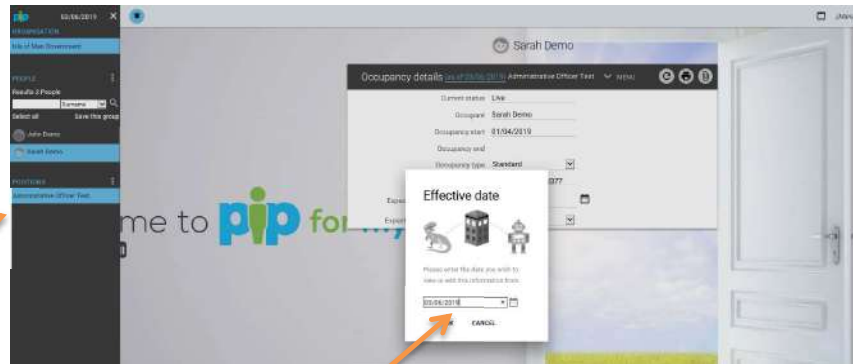
Changing the expected occupancy date for a team member

To do this, simply click on **Change Expected Occupancy Date**:



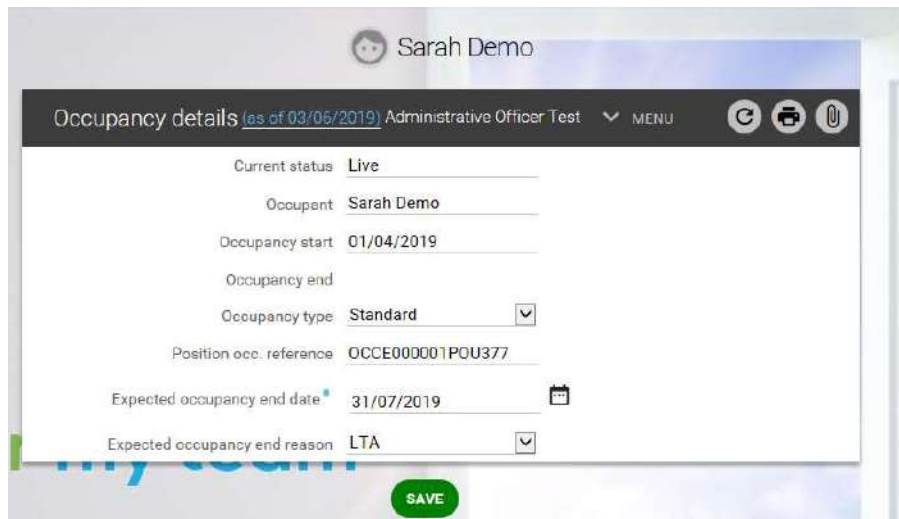
Your screen will now look like this:

If your team member has more than one current contract of employment with Isle of Man Government and you line manage them for those contracts, you will see their different positions listed here. To change the expected occupancy date simply click on the correct contract from the list.



In order to edit the information in this section you need to enter an **Effective date** here.

Your screen will now look like this:



If you need to change the occupancy type click on the drop down arrow under **Occupancy type** to choose from the following options:

- Standard
- Secondment
- Acting Up

Select the option you require from the list.

To change the Expected occupancy end date either type the date in the Expected occupancy end date field or click on the calendar to select the date you require.

To change the Expected occupancy end reason click on the drop down arrow under Expected occupancy end reason to select from the following options:

- Deliverable complete
- End of funding
- LTA
- Maternity cover
- Sickness cover
- Sideways move
- Substitution

When you have completed the changes you want to make click **Save**.

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

***N.B.:** Annual leave and sickness entitlements **will not** be pro-rated when there is only an **expected occupancy end date entered**, these entitlements will only pro-rate when an **actual** end date has been saved against the person's occupancy in the position.

Authorisation required: Please note that this change of expected occupancy end date will be sent to the Countersigning Manager (Manager's manager) for authorisation. Once approved, the OHR Recruitment and PiP Changes Team will be notified and they will issue a written confirmation to the employee.

NB: Managers please note that if your team member also holds other positions within Government which you do not line manage, you may still receive workflow emails and possibly authorisation tasks for their other positions.

If you receive a workflow email for their other position which you do not manage, please check your 'To Do' list to see if you have also received an authorisation task.

If you have only received a workflow email and **have not** received an authorisation task, please disregard the email.

If you **have** received an authorisation task, please **do not click on the task** and simply **contact the PiP Helpdesk on 685999 or pipsupport@gov.im**. The PiP team will then check that the proper authorisations are actioned.

There will be a system update from the suppliers of PiP in the near future which will fix this issue, we appreciate your patience and cooperation until the update is made.

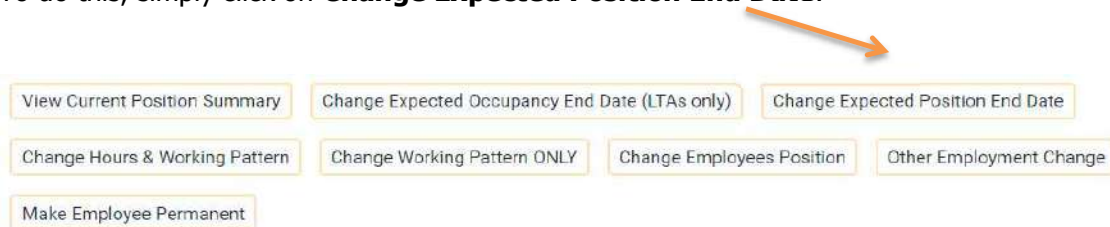
Changing the expected position date for a team member

You should use this option to end a limited term, fixed term or temporary contract or to change the expected end date for any of those types of positions.

If this position is for a limited term appointment or a fixed contract you will get a notification at 30 and 60 days prior to the end date so you can make a decision as to whether the position is to be extended or it is to end.

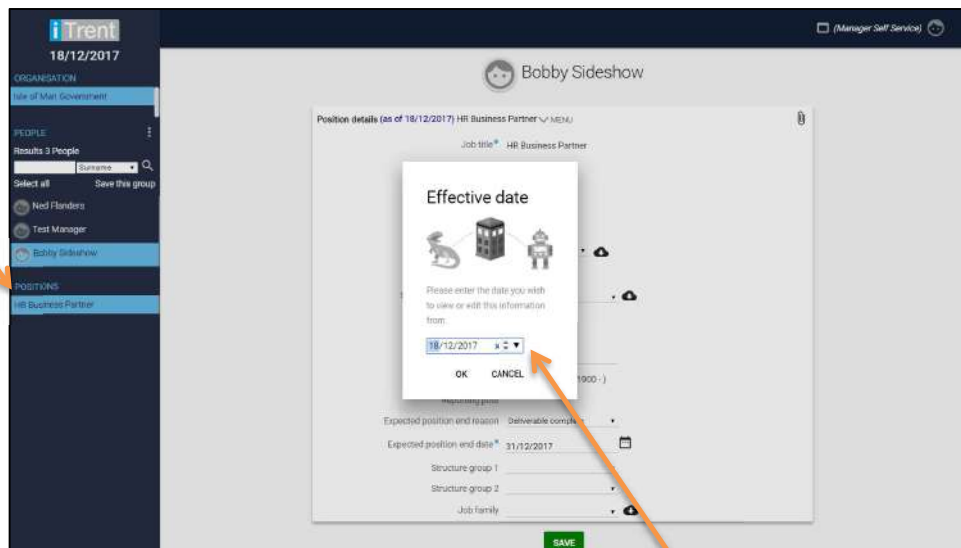
If the position is being extended you need to change the expected end date position and select a reason for the change.

To do this, simply click on **Change Expected Position End Date**:



Your screen will now look like this:

If your team member has more than one current contract of employment with Isle of Man Government and you line manage them for those contracts, you will see their different positions listed here. To change the expected position date simply click on the correct contract from the list.

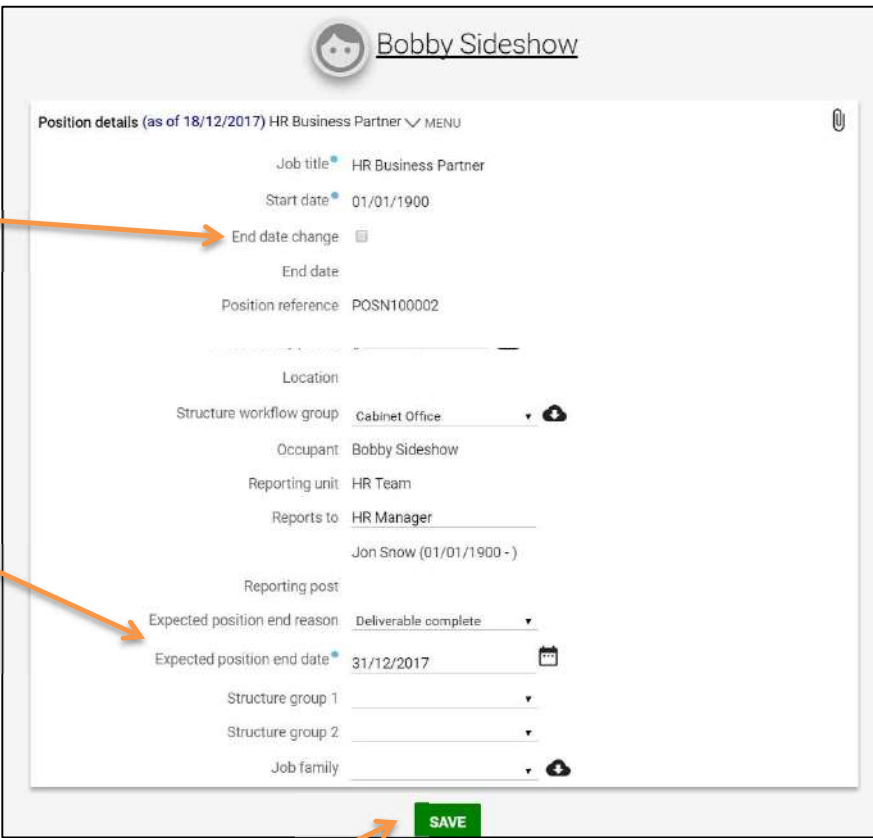


In order to edit the information in this section you need to enter an **Effective date** here.


Your screen will now look like this:


To add an actual end date to a position tick the **End date** change box and select the correct date from the calendar that appears when you tick the box


To change the **expected position end date** select the reason from the drop-down menu and either type the date here or click on the calendar to select the correct date



Position details (as of 18/12/2017) HR Business Partner ▾ MENU

Job title  HR Business Partner


Start date  01/01/1900

End date change 

End date

Position reference POSN100002

Location

Structure workflow group Cabinet Office ▾ 

Occupant Bobby Sideshow



Reporting unit HR Team

Reports to HR Manager

Jon Snow (01/01/1900 -)


Reporting post

Expected position end reason Deliverable complete ▾

Expected position end date  31/12/2017 

Structure group 1 ▾

Structure group 2 ▾

Job family ▾ 

SAVE

To save the changes you have made click **Save**.

Employment Changes Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Changing the hours and working pattern for a team member

It may be necessary on occasion to change the hours and working pattern for one of your team. You can change a person's hours up to the maximum number of hours that are allocated to that position, based on the FTE hours figure. As long as an increase of hours does not exceed the FTE hours figure for a position you can increase the hours in PiP without needing financial approval.

For example,

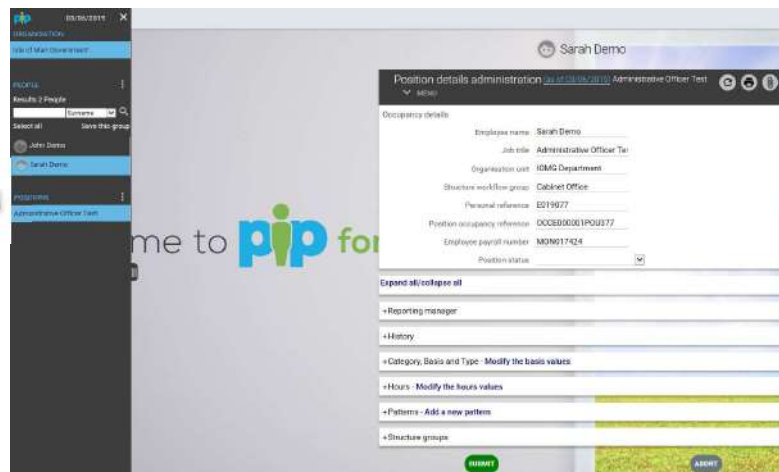
If you have a part-time member of staff, currently working 18.5 hours in a position that has an FTE hours figure of 22.2, you will need financial approval to increase their hours to more than 22.2 hours as there are implications for the staffing budget for changes that exceed the FTE hour figure.

To do this, simply click on **Change Hours & Working Pattern**:



If your staff member has more than one current contract of employment with Isle of Man Government all of those current contracts will be listed here. To view the details of a particular contract simply click on it from the list.

Your screen will now look like this:



On this screen there are two sections that you can modify to change the hours and working pattern for a team member:

- **Category, Basis and Type** – you can modify the basis values here
- **Hours** – you can modify the hours values here

Category, basis and type and Hours sit in the same screen.

- **Patterns** – you can add a new working pattern here

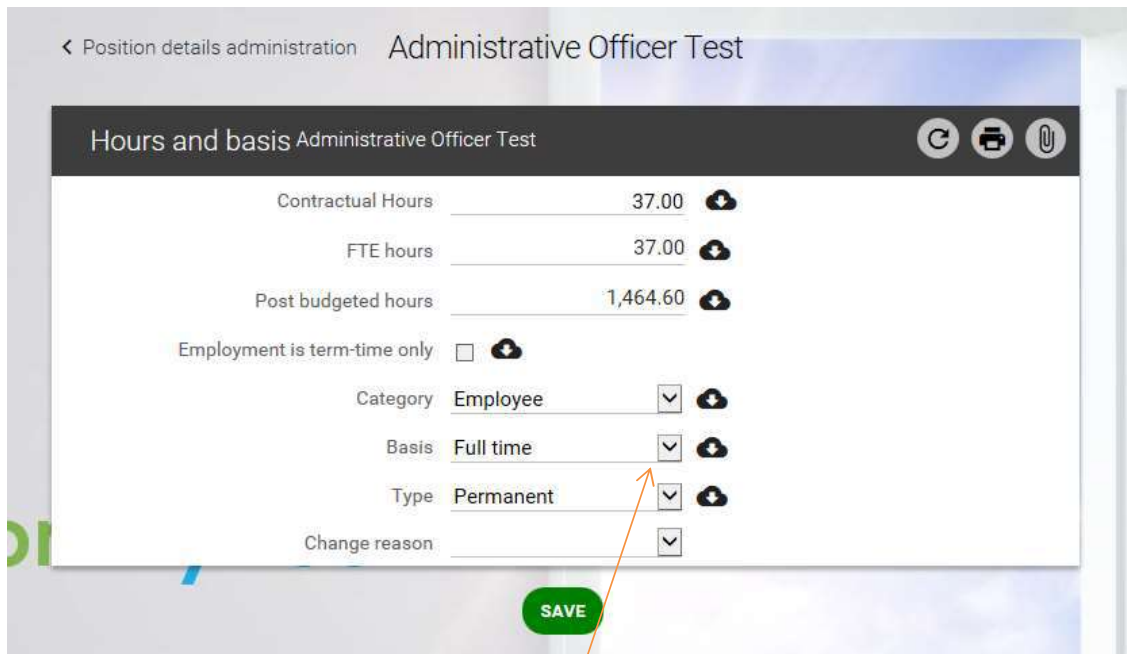
Payroll Deadline Date: With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Changing the basis values

To do this, simply click on the **Modify the basis values**:



Your screen will now look like this:



Click on the drop down arrow here to modify the basis values:

You can choose from the following options:

- Casual Hours
- Full Time
- Job Share
- Part Time

You need to give a reason for the change by clicking on the drop down arrow here:

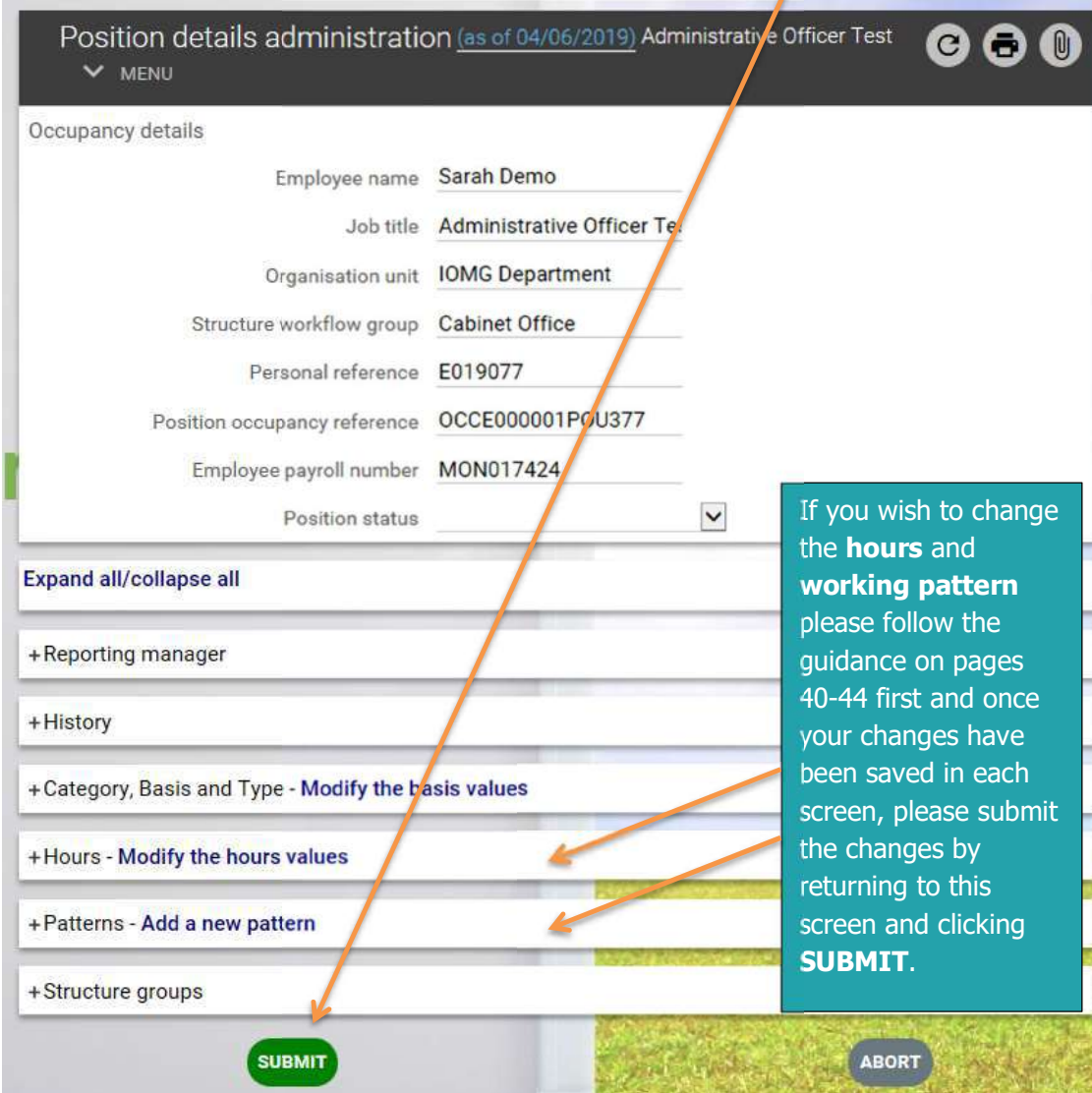


You can choose from the following options:

- Employee request
- Organisation change

To save your 'basis' changes click **Save**.

Please note that these changes will not be submitted until you have returned to the Position Details Administration screen and clicked SUBMIT.



Position details administration (as of 04/06/2019) Administrative Officer Test

MENU

Occupancy details

Employee name Sarah Demo

Job title Administrative Officer Test

Organisation unit IOMG Department

Structure workflow group Cabinet Office

Personal reference E019077

Position occupancy reference OCCE000001POU377

Employee payroll number MON017424

Position status ☐

Expand all/collapse all

+ Reporting manager

+ History

+ Category, Basis and Type - [Modify the basis values](#)

+ Hours - [Modify the hours values](#)

+ Patterns - [Add a new pattern](#)

+ Structure groups

SUBMIT **ABORT**

If you wish to change the **hours** and **working pattern** please follow the guidance on pages 40-44 first and once your changes have been saved in each screen, please submit the changes by returning to this screen and clicking **SUBMIT**.

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

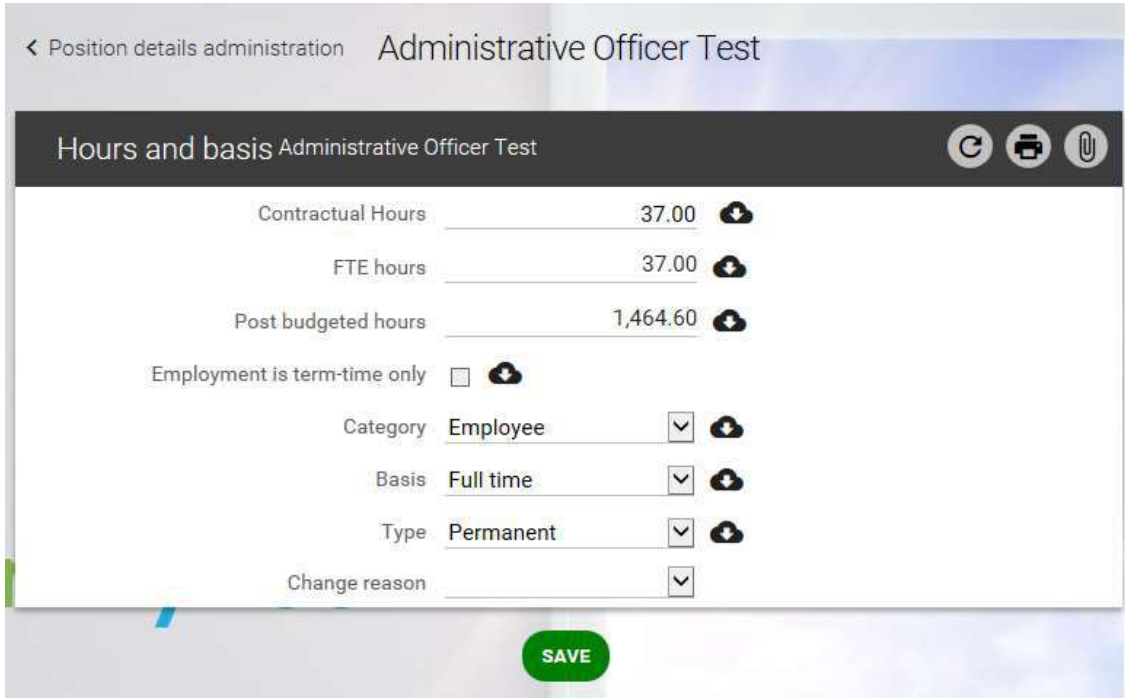
Changing the hours values

To do this, simply click on **Modify the hours values**:



+ Hours - **Modify the hours values**

Your screen will now look like this:



< Position details administration Administrative Officer Test

Hours and basis Administrative Officer Test

Contractual Hours 37.00

FTE hours 37.00

Post budgeted hours 1,464.60

Employment is term-time only ☐

Category Employee

Basis Full time

Type Permanent

Change reason

SAVE

To change the total number of working hours for a normal week type in the new value here:



Contractual Hours 37.00

You need to give a reason for the change by clicking on the drop down arrow here:



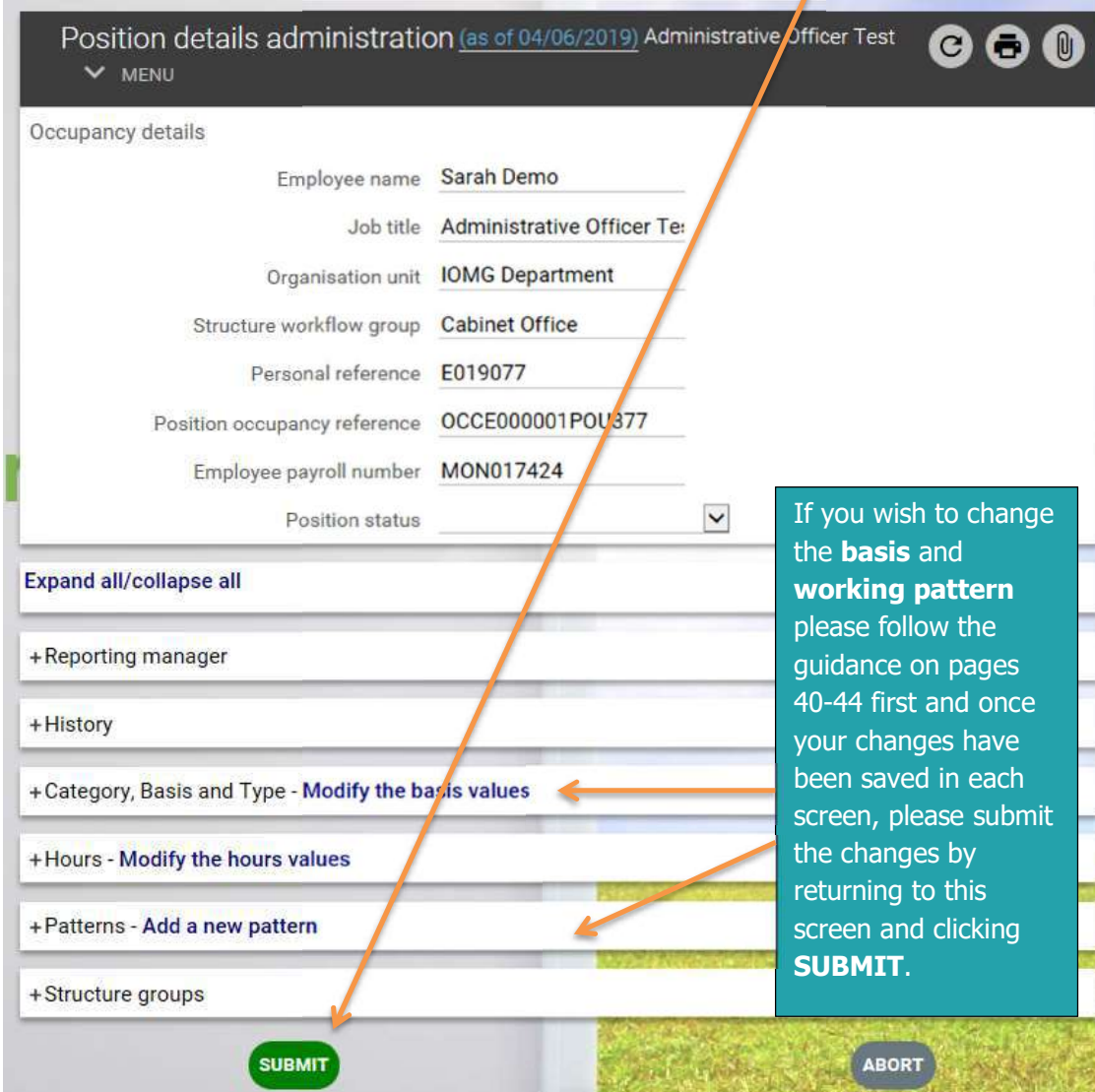
Change reason

You can choose from the following options:

- Employee request
- Organisation change

To save your changes click **Save**.

Please note that these changes will not be submitted until you have returned to the **Position Details Administration** screen and clicked **SUBMIT**.



The screenshot shows the 'Position details administration' screen for 'Administrative Officer Test' as of 04/06/2019. The 'Occupancy details' section includes fields for Employee name (Sarah Demo), Job title (Administrative Officer Te), Organisation unit (IOMG Department), Structure workflow group (Cabinet Office), Personal reference (E019077), Position occupancy reference (OCCE000001POU377), Employee payroll number (MON017424), and Position status (dropdown menu). Below this is an 'Expand all/collapse all' button and a list of expandable sections: '+ Reporting manager', '+ History', '+ Category, Basis and Type - **Modify the basis values**', '+ Hours - **Modify the hours values**', '+ Patterns - **Add a new pattern**', and '+ Structure groups'. At the bottom are 'SUBMIT' and 'ABORT' buttons. An orange arrow points from the 'SUBMIT' button to the top right corner of the screen. A teal callout box on the right contains instructions: 'If you wish to change the **basis** and **working pattern** please follow the guidance on pages 40-44 first and once your changes have been saved in each screen, please submit the changes by returning to this screen and clicking **SUBMIT**.' Two orange arrows point from this callout box to the 'Modify the basis values' and 'Add a new pattern' sections.

Payroll Deadline Date

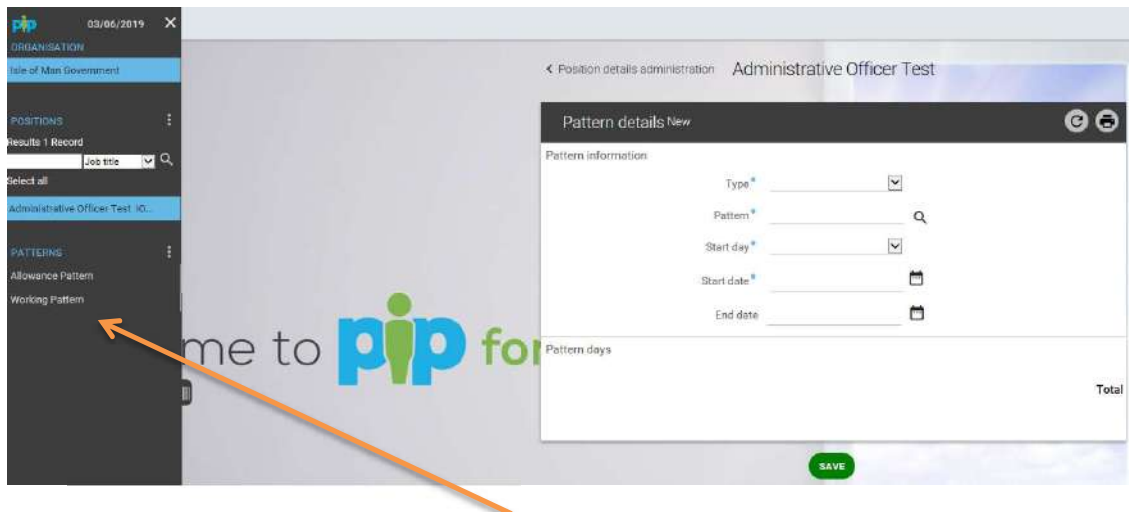
With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Changing a team members working pattern

To do this, simply click on **Add a new pattern**:

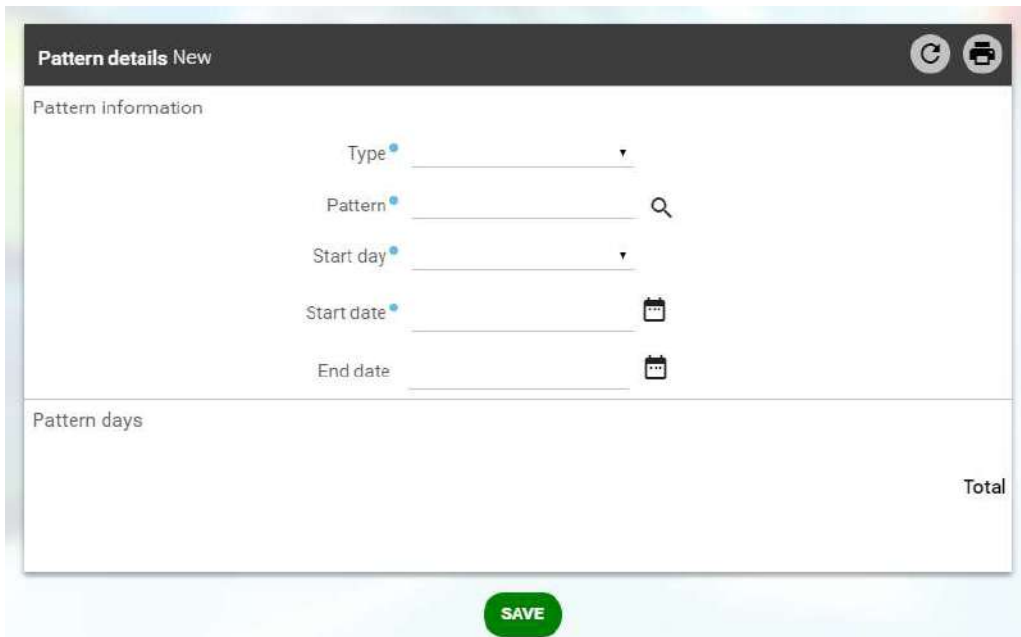


A new **Pattern details** screen will open. Your screen will now look like this:



The existing working patterns for your team member will show in a list here.

Work through each of the sections on this screen completing them as appropriate. The sections with the blue dots are mandatory.



Pattern details New

Pattern information

Type •

Pattern •

Start day •

Start date •

End date

Pattern days

Total

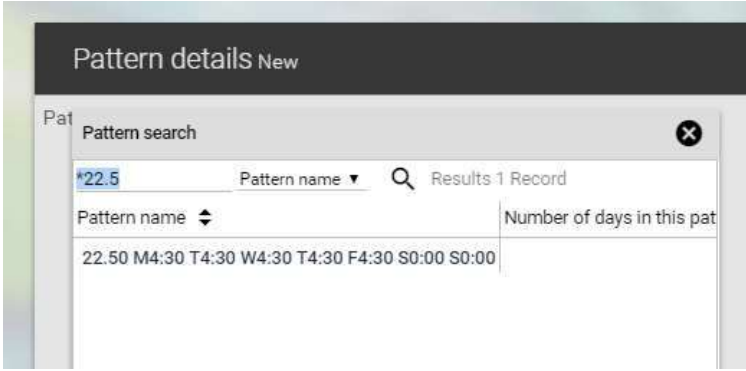
SAVE

Pattern details:

Type: Click on the drop down arrow and select **Working Pattern**.

Pattern field: Using the magnifying glass search for the pattern you want to add. The pattern names begin with the number of contracted hours of the pattern. You can either conduct a blank search to return all pattern result types or in the search field enter an * followed by the **number of contracted hours in decimals**. For example: ***22.5**

If there is not a suitable working pattern to choose from and you require a new one to be set up please contact the HR Changes team on 694303.



Pattern details New

Pat

Pattern search

*22.5 Pattern name Q Results: 1 Record

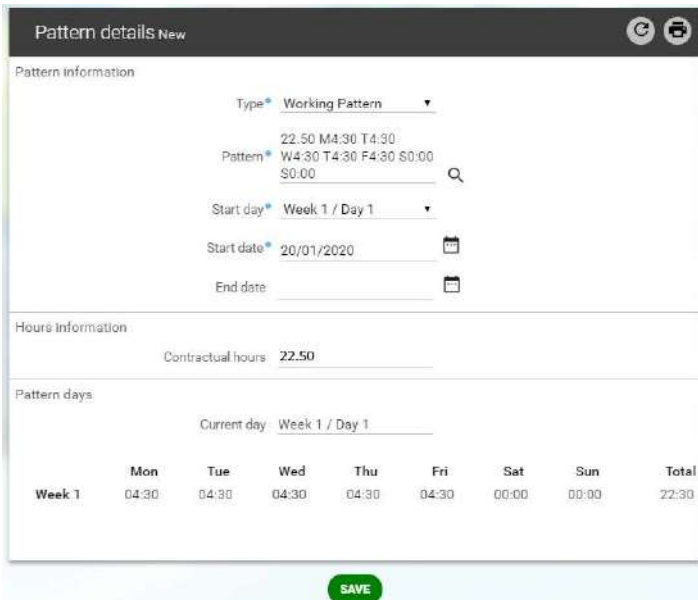
Pattern name	Number of days in this pat
22.50 M4:30 T4:30 W4:30 T4:30 F4:30 S0:00 S0:00	

Start day: Choose Week 1/Day 1

Start date: Choose the effective date the pattern is to start. You can type the date in this field or use the calendar to select the date

End date: If there is a definite end date for the pattern you can add this now or you can update the working pattern at a later date with the end date when it is known.

To save your changes click on **Save**. Your screen will now look something like this:



Pattern details New

Pattern information

Type* Working Pattern

22.50 M4:30 T4:30

Pattern* W4:30 T4:30 F4:30 S0:00 S0:00 Q

Start day* Week 1 / Day 1

Start date* 20/01/2020

End date

Hours information

Contractual hours 22.50

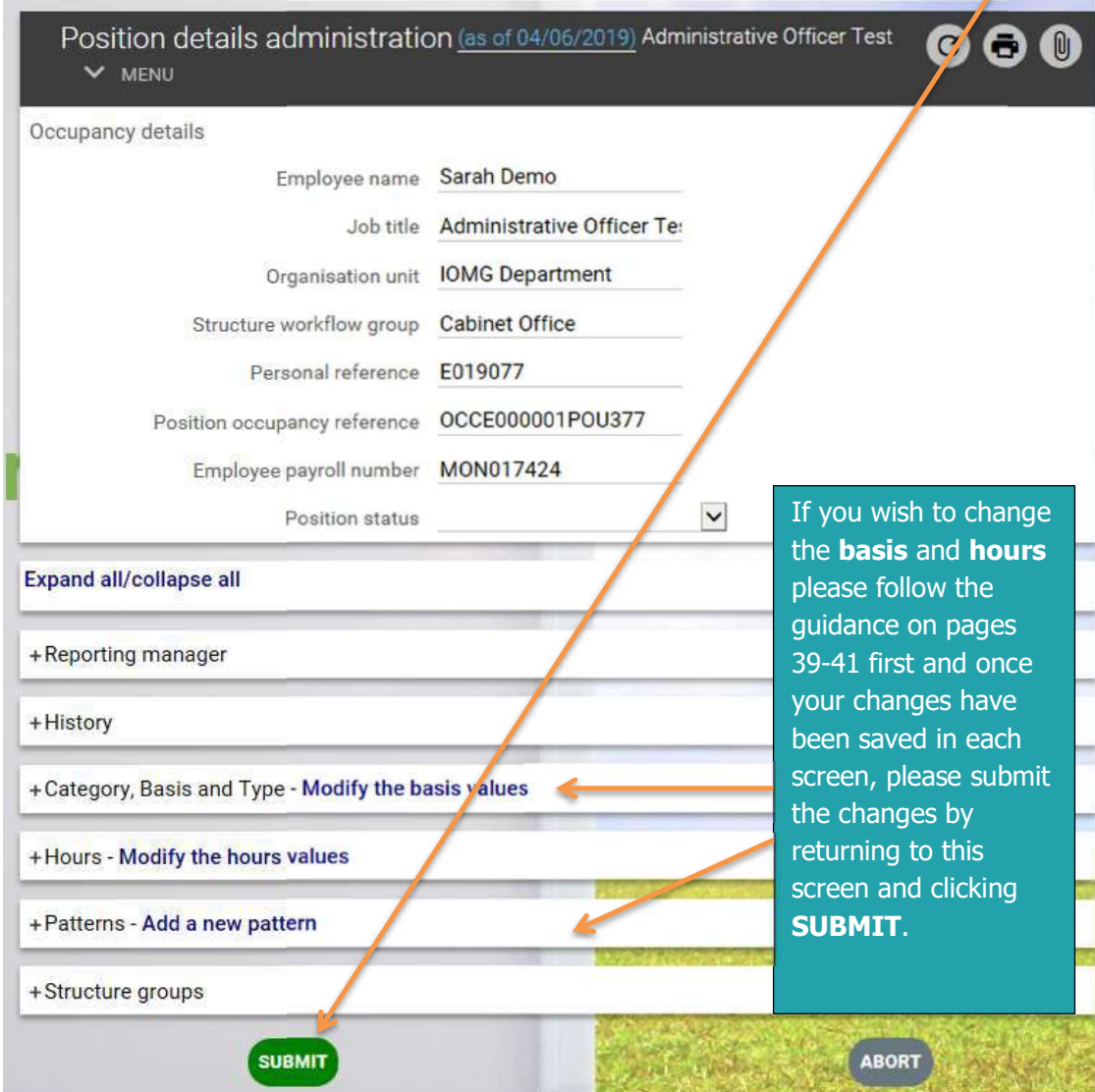
Pattern days

Current day Week 1 / Day 1

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	04:30	04:30	04:30	04:30	04:30	00:00	00:00	22:30

SAVE

Please note that these pattern detail changes will not be submitted until you have returned to the Position Details Administration screen and clicked **SUBMIT**.



Position details administration (as of 04/06/2019) Administrative Officer Test

▼ MENU

Occupancy details

Employee name Sarah Demo

Job title Administrative Officer Te:

Organisation unit IOMG Department

Structure workflow group Cabinet Office

Personal reference E019077

Position occupancy reference OCCE000001POU377

Employee payroll number MON017424

Position status ☐

Expand all/collapse all

+ Reporting manager

+ History

+ Category, Basis and Type - **Modify the basis values**

+ Hours - **Modify the hours values**

+ Patterns - **Add a new pattern**

+ Structure groups

SUBMIT **ABORT**

If you wish to change the **basis** and **hours** please follow the guidance on pages 39-41 first and once your changes have been saved in each screen, please submit the changes by returning to this screen and clicking **SUBMIT**.

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Change Working Pattern Only for your team member

If a member of your team is purely changing their working pattern without changing their hours you will need to update their working pattern through PiP For My Team.

To do this, simply click on **Change Working Pattern ONLY**



If there is not a suitable working pattern to choose from and you require a new one to be set up please contact the PIP Changes team on 694303.

Payroll Deadline Date

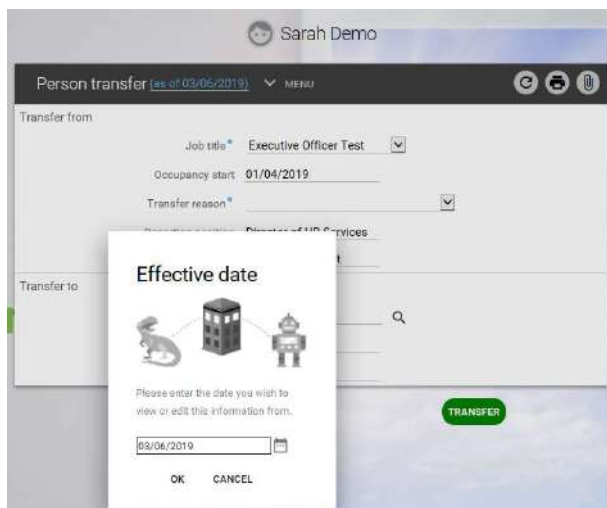
With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Change a team members position

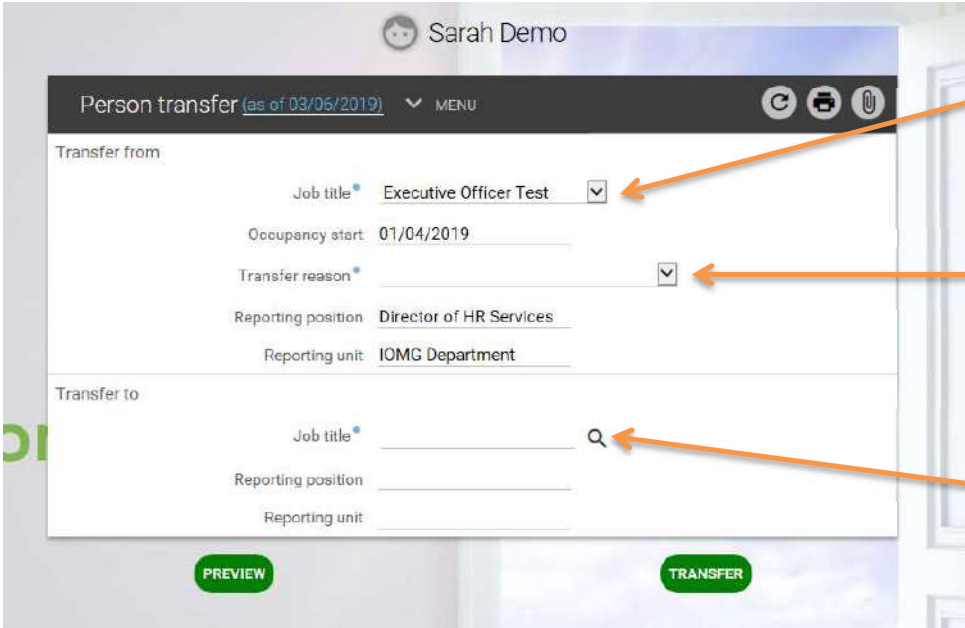
If a member of your team is moving to another position within your reporting line you can simply transfer them by clicking on **Change Employee's Position**



The following screen will open prompting you to enter an effective date:



Enter the date the transfer of positions is to be effective from and click **Ok**.



Sarah Demo

Person transfer (as of 03/06/2019) MENU

Transfer from

Job title* Executive Officer Test

Occupancy start 01/04/2019

Transfer reason*

Reporting position Director of HR Services

Reporting unit IOMG Department

Transfer to

Job title*

Reporting position

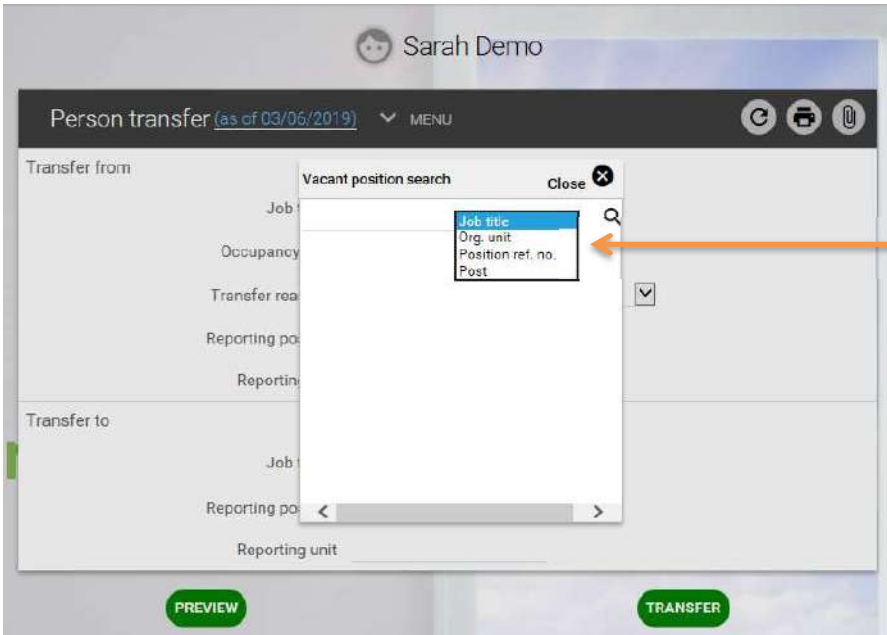
Reporting unit

PREVIEW TRANSFER

Select the position they are leaving by clicking on the drop down list.

Select the transfer reason from the drop down list.

Specify the position your team member is to move into to by clicking on the magnifying glass.



Sarah Demo

Person transfer (as of 03/06/2019) MENU

Transfer from

Job title*

Occupancy start

Transfer reason*

Reporting position

Reporting unit

Transfer to

Job title*

Reporting position

Reporting unit

PREVIEW TRANSFER

Vacant position search Close

Job title

Org. unit

Position ref. no.

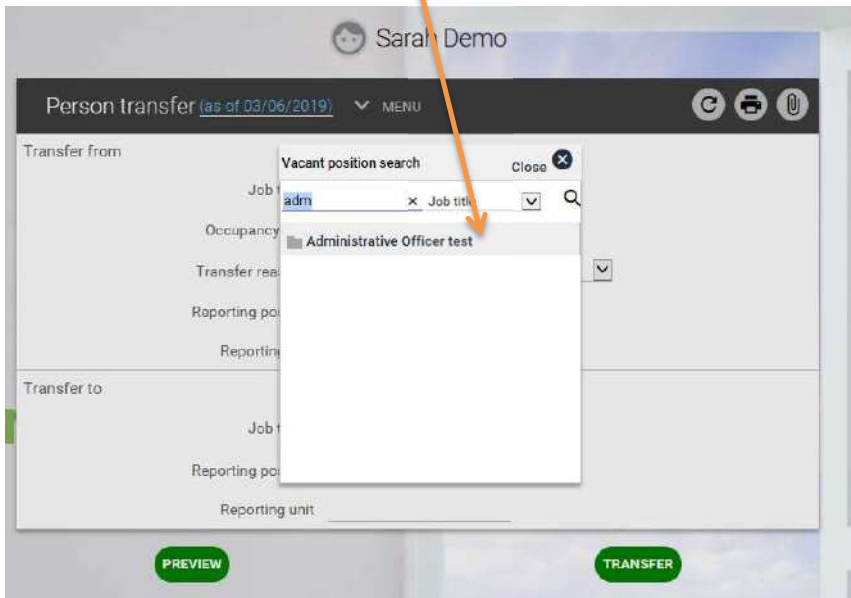
Post

Search for the vacant position by changing your criteria and searching by either:

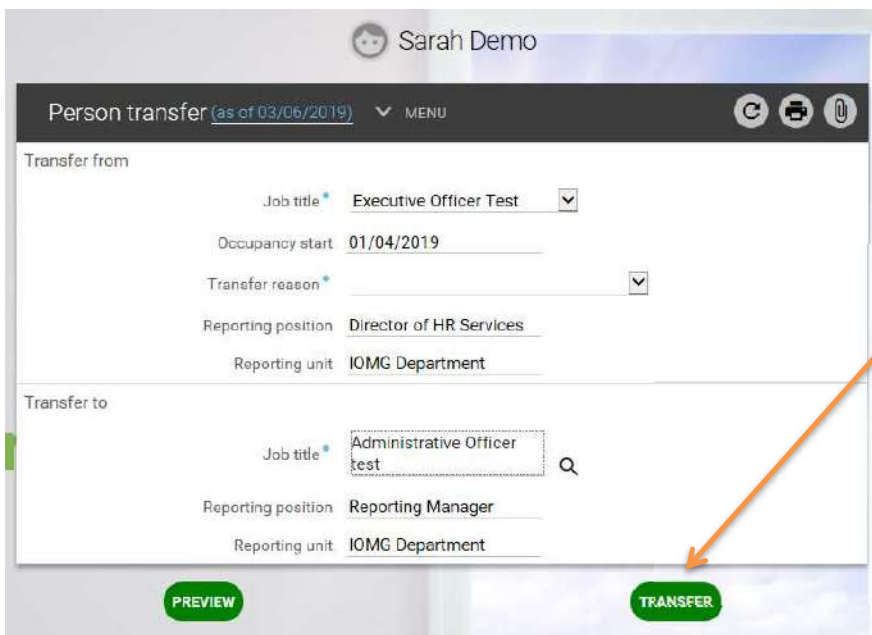
- Job title
- Organisation unit
- Position ref no
- Post

Click on the magnifying glass to search for the position

Click on the vacant position displayed.



The screenshot shows the 'Person transfer' form for user Sarah Demo, dated 03/06/2019. A 'Vacant position search' dropdown is open, showing a search for 'adm' with the result 'Administrative Officer test' selected. The form includes fields for 'Transfer from' (Job title, Occupancy, Transfer reason, Reporting position, Reporting unit) and 'Transfer to' (Job title, Reporting position, Reporting unit). At the bottom are 'PREVIEW' and 'TRANSFER' buttons.



The screenshot shows the 'Person transfer' form with the following populated fields:
Transfer from:
Job title: Executive Officer Test
Occupancy start: 01/04/2019
Transfer reason: [dropdown]
Reporting position: Director of HR Services
Reporting unit: IOMG Department
Transfer to:
Job title: Administrative Officer test
Reporting position: Reporting Manager
Reporting unit: IOMG Department
At the bottom are 'PREVIEW' and 'TRANSFER' buttons.

Click on **Transfer**.

This change of position will be sent as a task to your line manager to authorise.

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Making other employment changes for a team member

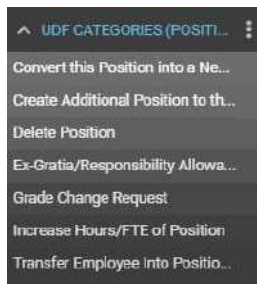
Please use this link if you wish to make any of the below employment or position changes

- Convert this position into a new position
- Create additional position to this post
- Delete position
- Ex-gratia/Responsibility Allowance payment request
- Grade change request
- Increase hours/FTE of position
- Transfer employee into position *To be completed by the receiving manager

To make an employment change, simply click on **Other Employment Change**:

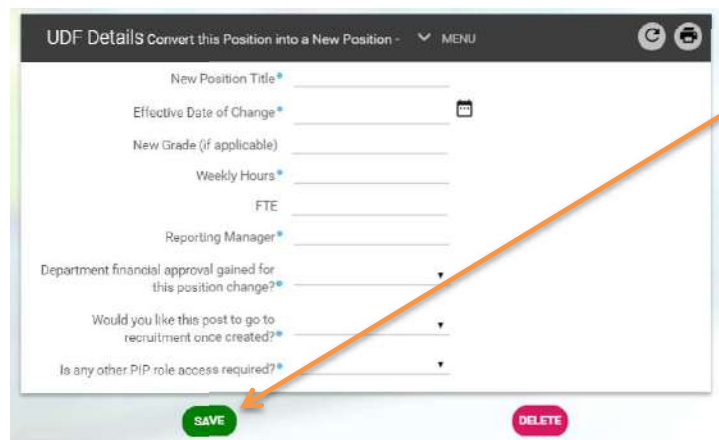


A list of the above employment changes will appear on the left hand side of your screen under the heading **UDF Categories (Position)**



Select the change you wish to action and the form will open on your screen.

Complete the necessary details of the employment change and click **Save**

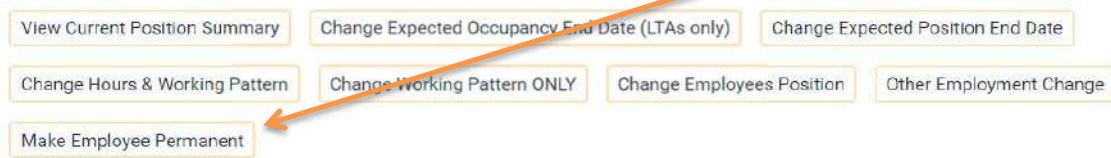


A screenshot of a form titled 'UDF Details Convert this Position into a New Position'. The form contains the following fields: 'New Position Title*', 'Effective Date of Change*', 'New Grade (if applicable)', 'Weekly Hours*', 'FTE', 'Reporting Manager*', 'Department financial approval gained for this position change?*', 'Would you like this post to go to recruitment once created?*', and 'Is any other PiP role access required?*. At the bottom of the form are two buttons: 'SAVE' (green) and 'DELETE' (pink). An orange arrow points from the text 'Complete the necessary details of the employment change and click Save' in the adjacent text box to the 'SAVE' button.

Payroll Deadline Date: With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Make employee permanent

To make an employment permanent click on **Make Employee Permanent**

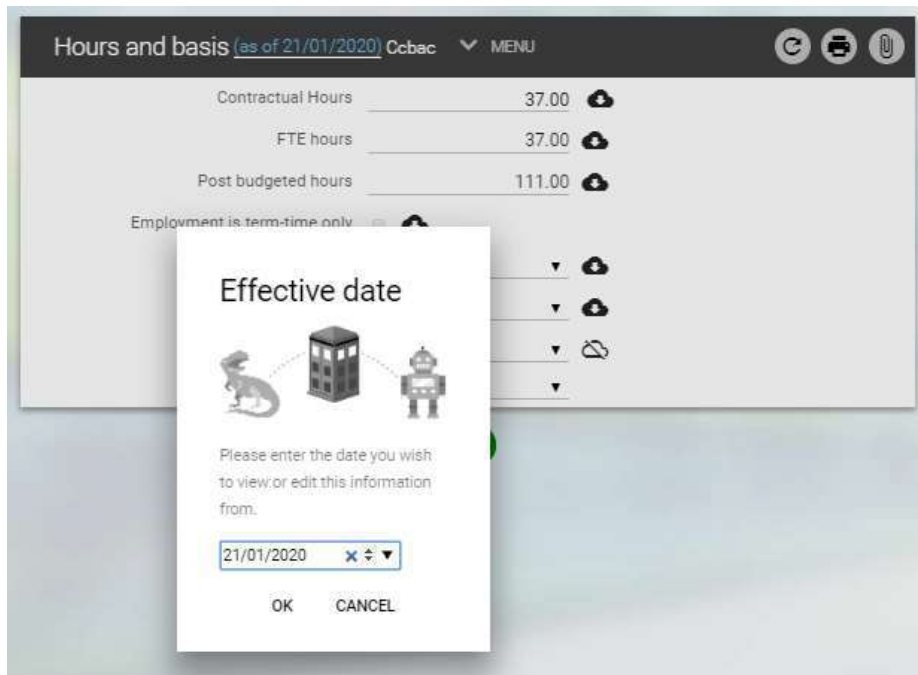


View Current Position Summary Change Expected Occupancy End Date (LTAs only) Change Expected Position End Date

Change Hours & Working Pattern Change Working Pattern ONLY Change Employees Position Other Employment Change

Make Employee Permanent

The following screen will open prompting you to enter an effective date:



Hours and basis (as of 21/01/2020) Ccbac MENU

Contractual Hours 37.00

FTE hours 37.00

Post budgeted hours 111.00

Employment is term-time only

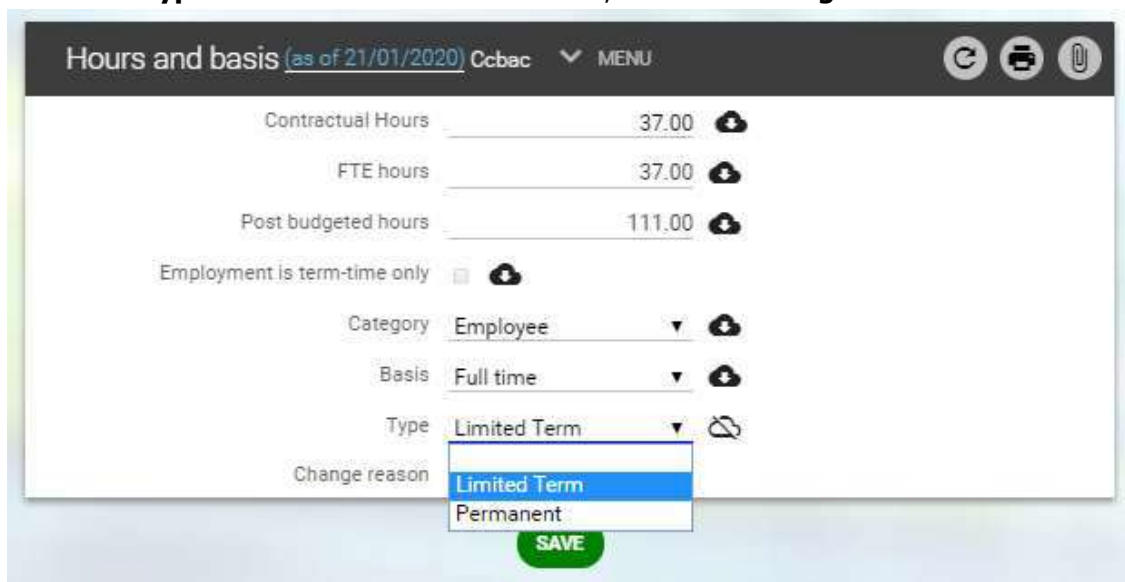
Effective date

Please enter the date you wish to view or edit this information from.

21/01/2020

OK CANCEL

Within the **Type** field amend this to **Permanent**, select the **Change** reason and **Save**.



Hours and basis (as of 21/01/2020) Ccbac MENU

Contractual Hours 37.00

FTE hours 37.00

Post budgeted hours 111.00

Employment is term-time only

Category Employee

Basis Full time

Type Limited Term

Change reason Limited Term Permanent

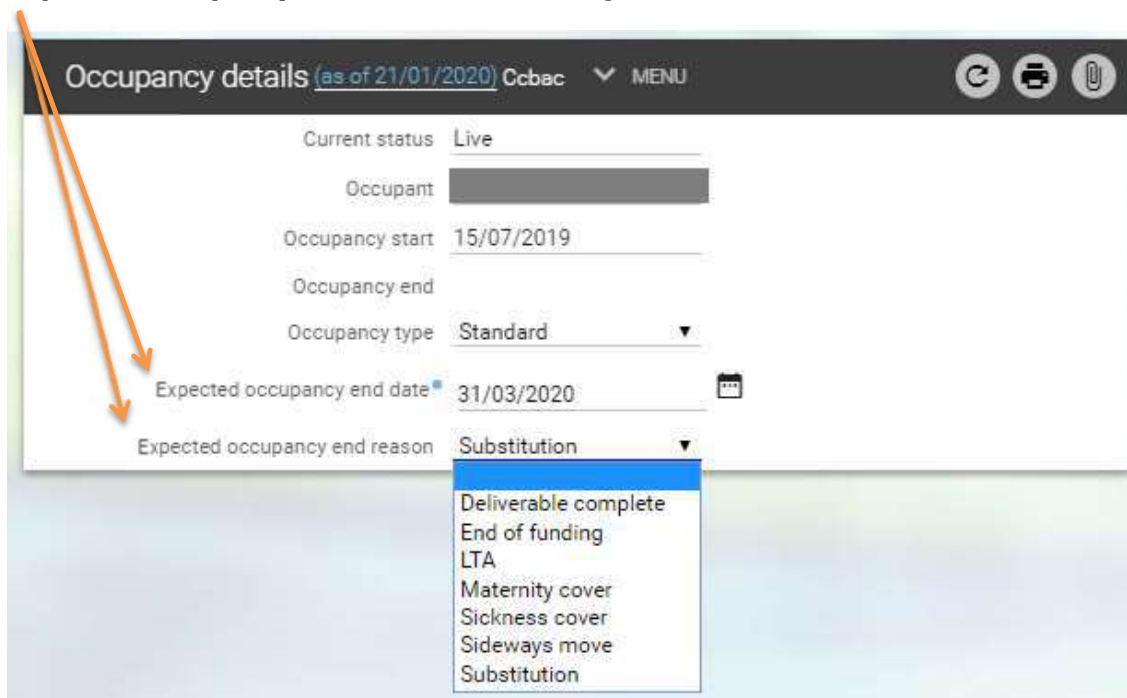
SAVE

If your team member has an expected occupancy end date you will need to remove this.

To do this, return to your **Employment Information** menu and select the **Change Expected Occupancy End Date (LTAs only)** link.



Enter the effective date and within the **Occupancy Details** screen delete the date in the **Expected Occupancy end date** field and change the reason to be blank and click **Save**.

A screenshot of the 'Occupancy details' screen. The header shows 'Occupancy details (as of 21/01/2020) Ccbac' and a 'MENU' button. The form fields include: 'Current status' (Live), 'Occupant' (redacted), 'Occupancy start' (15/07/2019), 'Occupancy end' (empty), 'Occupancy type' (Standard), 'Expected occupancy end date' (31/03/2020), and 'Expected occupancy end reason' (Substitution). Two orange arrows point from the text above to the 'Expected occupancy end date' and 'Expected occupancy end reason' fields. The 'Expected occupancy end reason' dropdown menu is open, showing options: 'Substitution', 'Deliverable complete', 'End of funding LTA', 'Maternity cover', 'Sickness cover', 'Sideways move', and 'Substitution'.

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Schools - TLR's & Change of FTE

Submitting a TLR

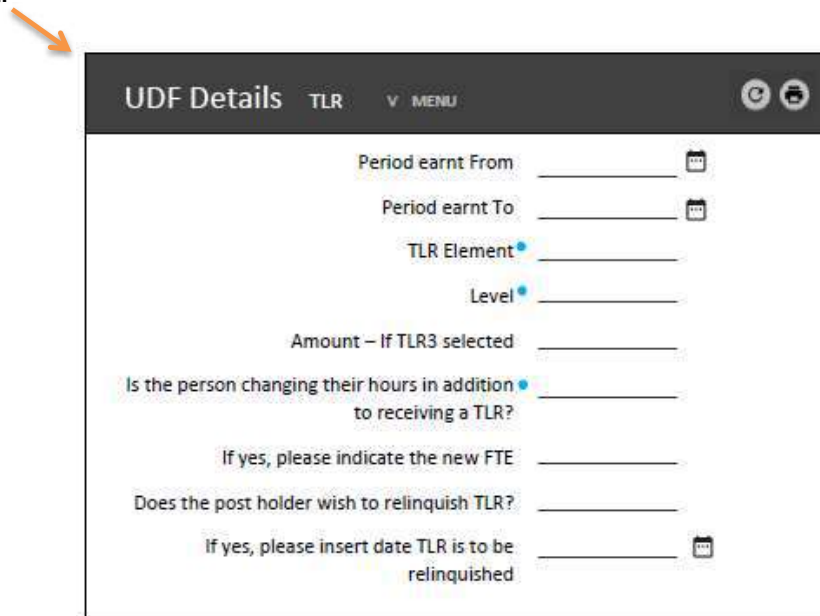
To submit a TLR for one of your team just click on **Other Employment Change**



View Current Position Summary Change Expected Occupancy End Date (LTAs only) Change Expected Position End Date
Change Hours & Working Pattern Change Working Pattern ONLY Change Employees Position **Other Employment Change**
Make Employee Permanent

Select your team members' position you wish to record a TLR against. A list of UDF categories (employment changes forms) will appear on the left hand side of your screen.

Click on TLR form and complete the fields and drop down options in relation to the TLR payment.



UDF Details TLR V MENU

Period earned From _____

Period earned To _____

TLR Element _____

Level _____

Amount – If TLR3 selected _____

Is the person changing their hours in addition to receiving a TLR? _____

If yes, please indicate the new FTE _____

Does the post holder wish to relinquish TLR? _____

If yes, please insert date TLR is to be relinquished _____

Click Save.



The request will be sent to the PiP Changes Team to review and process the change. The TLR request will be sent to the PiP Changes Team who will review and process the TLR and issue confirmation of the TLR payment to the team member. The Head Teacher will receive confirmation of the TLR.

If the TLR results in a change of hours, OHR will process the change and confirm the change in hours.

Payroll Deadline Date: With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Relinquishing a TLR

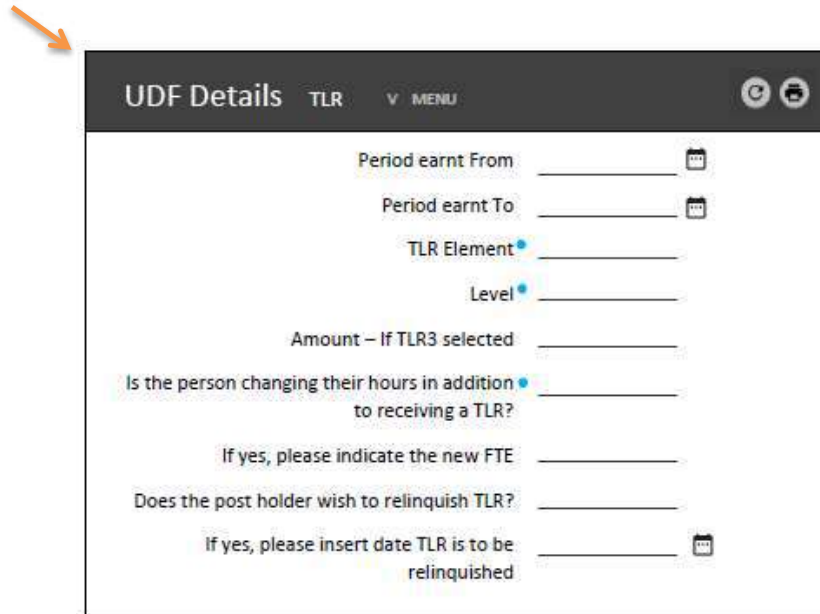
To relinquish a TLR for one of your team just click on **Other Employment Change**



View Current Position Summary Change Expected Occupancy End Date (LTAs only) Change Expected Position End Date
 Change Hours & Working Pattern Change Working Pattern ONLY Change Employees Position **Other Employment Change**
 Make Employee Permanent

Select your team members' position you wish to relinquish a TLR against. A list of UDF categories (employment changes forms) will appear on the left hand side of your screen.

Click on TLR form and complete the fields and drop down options in relation to the TLR to be relinquished.



UDF Details TLR V MENU

Period earnt From _____

Period earnt To _____

TLR Element • _____

Level • _____

Amount – If TLR3 selected _____

Is the person changing their hours in addition to receiving a TLR? • _____

If yes, please indicate the new FTE _____

Does the post holder wish to relinquish TLR? _____

If yes, please insert date TLR is to be relinquished _____

Click Save.



The request will be sent to the PiP Changes Team who will review and process the change. OHR will issue confirmation to the Team Member, copying the Head Teacher into the correspondence.

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Change of FTE

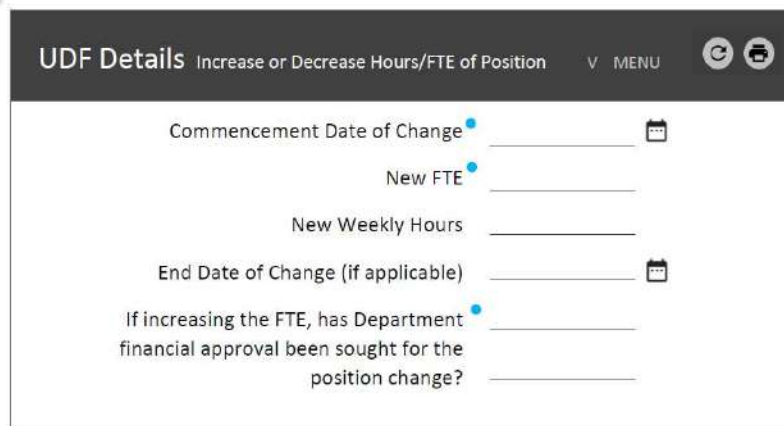
To change the FTE for one of your team just click on **Other Employment Change**






View Current Position Summary Change Expected Occupancy End Date (LTAs only) Change Expected Position End Date
Change Hours & Working Pattern Change Working Pattern ONLY Change Employees Position **Other Employment Change**
Make Employee Permanent

Select your team members' position you wish to change their FTE. A list of UDF categories (employment changes forms) will appear on the left hand side of your screen.

Click on the form titled "**Increase or decrease Hours/FTE of position**" and complete the fields providing information on the change of hours.




UDF Details Increase or Decrease Hours/FTE of Position V MENU  

Commencement Date of Change  _____

New FTE _____

New Weekly Hours _____

End Date of Change (if applicable)  _____

If increasing the FTE, has Department financial approval been sought for the position change? _____

Click Save.



The request will be sent to the PiP Changes Team to review and process the change.

If the request is to increase the FTE of the position, please send a copy of the financial approval to the PiP Changes Team (pipchanges@gov.im) to support the request.

Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **14th of the month** so any employment changes to be paid in that month must be **approved in PiP** by the 14th or they will not be paid until the following month.

Holidays

In this section you can view the following information:

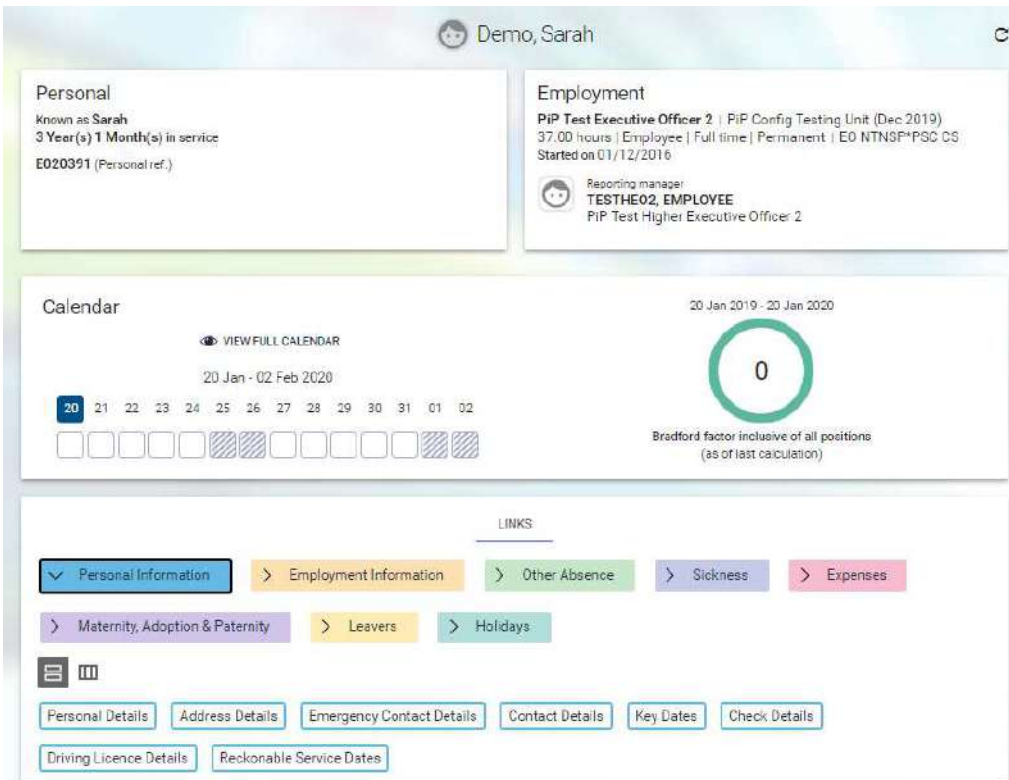
- Holiday entitlement – this includes bank holiday entitlement as well as annual leave
- Details of any requested/booked holidays

As a Line Manager you can also do the following:

- Manually adjust the holiday entitlement – for TOIL/accrued days etc. (if staff are entitled to them as part of their terms and conditions of employment).
- Record when staff who are entitled to public holidays off as part of their T's & C's have worked a bank holiday and are entitled to that day back as part of their entitlement.

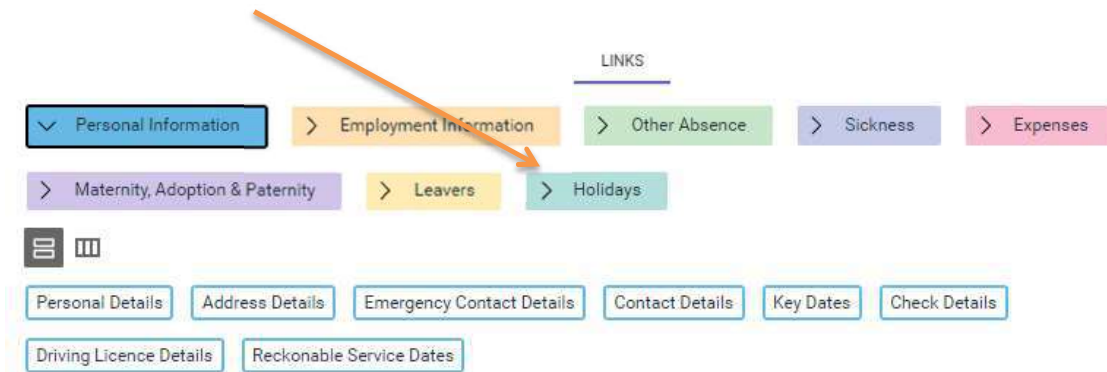
To view the holiday details of one of your team first click on **My Staff** and then click on that team member's name.

Your screen will now look like this:



The screenshot shows a user interface for a staff member named Sarah. The top header displays the user's name and a search icon. Below this, there are two main sections: 'Personal' and 'Employment'. The 'Personal' section shows 'Known as Sarah', '3 Year(s) 1 Month(s) in service', and 'E020391 (Personal ref.)'. The 'Employment' section shows 'PiP Test Executive Officer 2 | PiP Config Testing Unit (Dec 2019)', '37.00 hours | Employee | Full time | Permanent | E0 NTNSP*PSC 05', 'Started on 01/12/2016', and 'Reporting manager: TESTHE02, EMPLOYEE | PiP Test Higher Executive Officer 2'. Below these sections is a 'Calendar' view for the period '20 Jan - 02 Feb 2020'. The calendar shows a grid of days with some days shaded in grey. To the right of the calendar is a circular gauge showing '0' and the text 'Bradford factor inclusive of all positions (as of last calculation)'. At the bottom, there is a 'LINKS' section with buttons for 'Personal Information', 'Employment Information', 'Other Absence', 'Sickness', 'Expenses', 'Maternity, Adoption & Paternity', 'Leavers', and 'Holidays'. Below the links are several buttons for 'Personal Details', 'Address Details', 'Emergency Contact Details', 'Contact Details', 'Key Dates', 'Check Details', 'Driving Licence Details', and 'Reckonable Service Dates'.

To select the **Annual leave** section, simply click on the **Holidays** button:

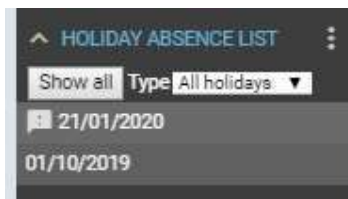


Your menu will now look like this:



To view the holidays of your selected team member, simply click on Holiday details

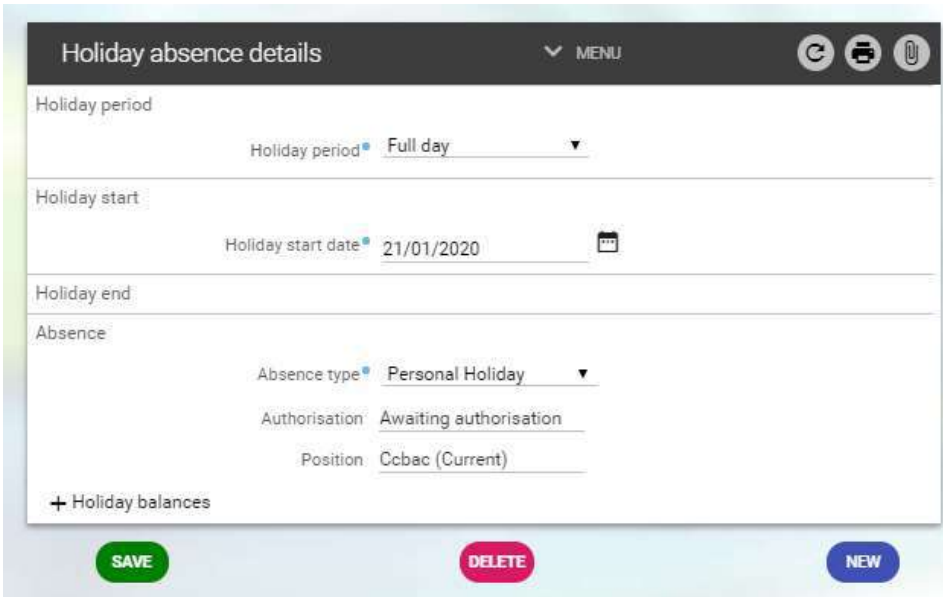
If your team member has already requested/taken more than one holiday a list of absences will appear on the left hand side of your screen.



Note: an ! to the left of the absence means the request is waiting for approval.

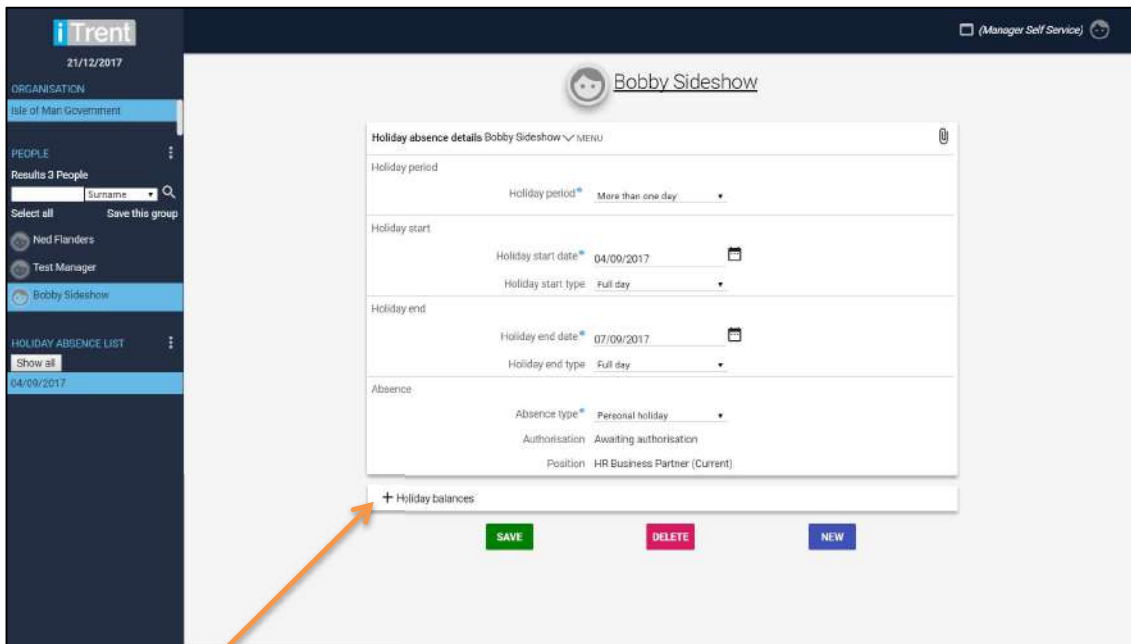
Click on the holiday request you want to view from the list.

Your screen will now look like this:



Viewing the balance of holiday entitlement for a team member

From the **Holidays Details** screen you can also check how many hours a team member has remaining of their holiday entitlement:



Click on **Holiday balances**:

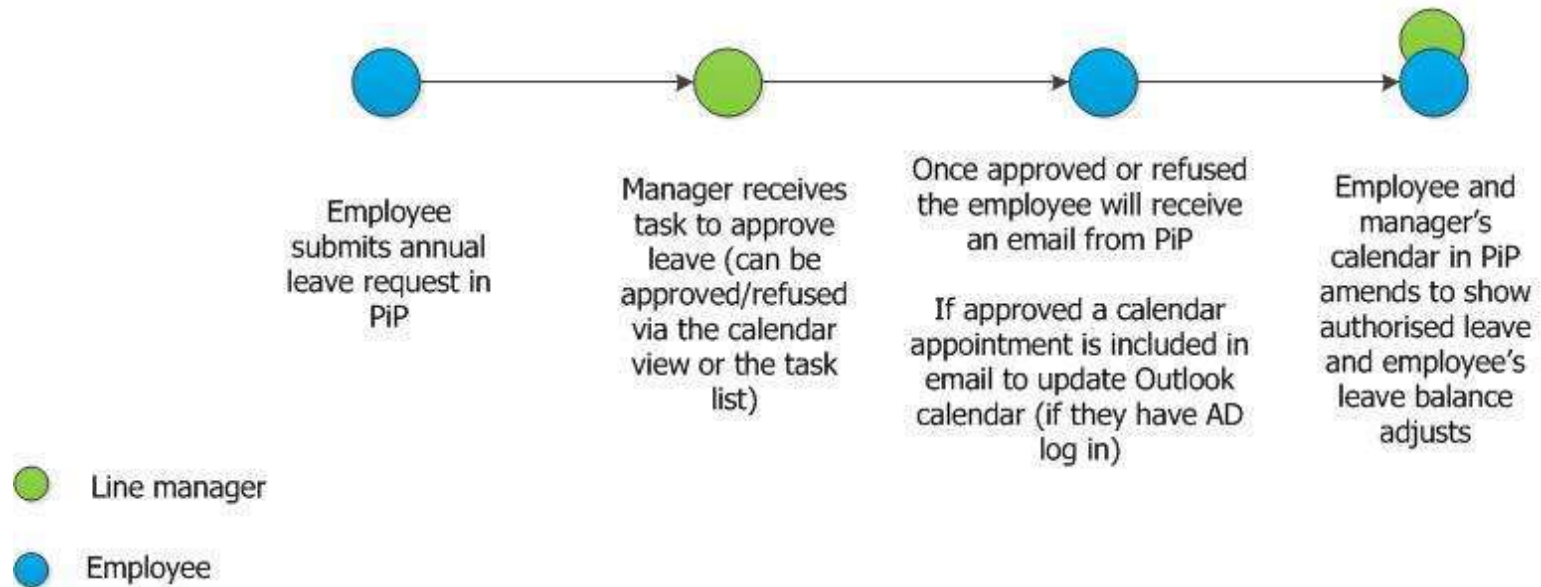
You will now see the holiday balances at the bottom of the screen:

— Holiday balances				
HR Business Partner - PSC CS Annual Leave Bands C - F				
Holiday period	Entitlement	Taken	Scheduled	Balance
01/08/2017 - 31/03/2018 (Part)	143.5 H	60 H	7.5 H	76 H
01/04/2018 - 31/03/2019	229.5 H	0 H	67.5 H	162 H

In the above example the team member has 76 hours remaining for leave year 2017/2018 and has 162 hours remaining for the leave year 2018/2019.

Annual leave request process map

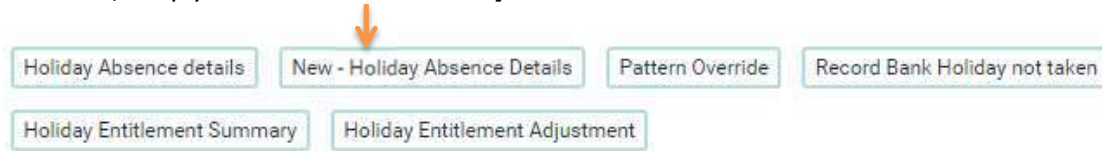
Annual Leave request process in PiP



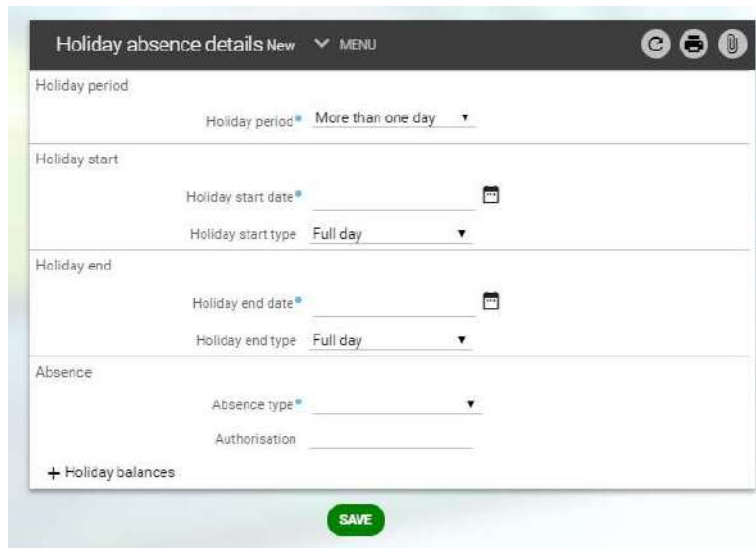
Booking annual leave on behalf of one your team

It is recommended that team members book their own annual leave using PiP For Me (Employee Self Service). However, there may be occasions where you need to book it on their behalf e.g. they call in as absent from work for childcare reasons.

To do this, simply click on **New - Holiday Absence Details**:



Your screen will now look like this:

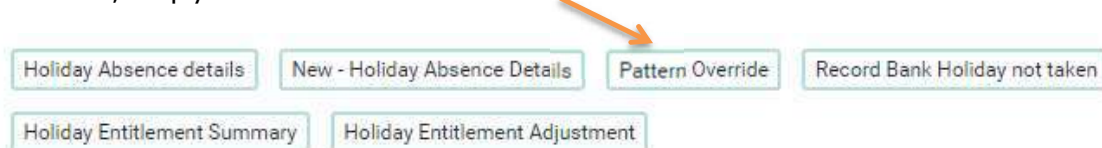


Enter the details of the holiday and click **save**. This holiday will automatically be approved.

Overriding a member of your teams holiday pattern

If an employee does not have a standard working pattern and their working days constantly change, you will need to enter a pattern override against their absence (holiday, sickness and other absence).

To do this, simply click on **Pattern Override**



From the left hand side of your screen choose which holiday you wish to change the pattern for.

Your screen will now look like this:

Within the Pattern override screen select the day in the pattern you wish to change.

For this example I have changed Friday to be 0 hours. Click Validate to calculate the hours.

Click **Save**

Note: If you are overriding the working pattern for an open absence, please enter '7' into the 'Number of days in this pattern' field.

Pattern override Pattern Override 21/01/2020 - 24/01/2020 MENU

Pattern information

Position

Pattern type

From date

To date

Number of days in this pattern

Pattern date details

	Tue	Wed	Thu	Fri	Total
Week 1	07:24	07:24	07:24	07:24	29:36

VALIDATE SAVE

Pattern information

Position

Pattern type

From date

To date

Number of days in this pattern

Pattern date details

	Tue	Wed	Thu	Fri	Total
Week 1	07:24	07:24	07:24	00:00	22:12

VALIDATE SAVE

Viewing the holiday entitlement of a team member

When calculating leave entitlements, PiP takes into account several things:

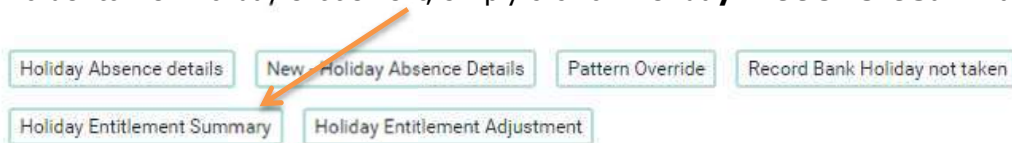
- Organisation start date
- Continuous service date
- Annual leave credit date
- Terms and conditions
- Contracted hours
- Working pattern
- Weeks worked in the leave year (for those that start or end their position part way through the leave year)
- Carried forward leave amounts

PiP will automatically pro-rate all leave entitlements based on the above criteria and so will:

- Award additional leave dates as appropriate
- Calculate and apply carried forward amounts starting with any carried forward amounts from leave year 2020/2021 (carried forward amounts from the leave year 2019/2020 will have to be adjusted manually owing to the leave feature being used for the first time)

*N.B.: Please note that the PSC Privilege Day sits outside of leave entitlement as a non-working day. Also, PiP **does not** automatically add an annual leave day for long service. As an employee can choose to either receive pay or an additional annual leave day, if they choose to take an additional leave day this will need to be added as a manual adjustment by the manager. To do this, follow the instructions on page 67.

In order to view holiday entitlement, simply click on **Holiday Entitlement Summary**:



Your screen will now look like this example:

This example is an individual on PSC Civil Service terms and conditions who has 21 days annual leave plus an additional 12 days carried forward for the 2020/2021 annual leave year.

Note: to convert your team members holiday entitlement into days simply divide the hours figure by their standard working day e.g. 7.4.

T&C's Annual leave/TOIL

Ignore this pro rata figure

Leave carried forward

Holiday entitlement summary ▾ MENU

Employment details

Position: PIP Administrative Officer ▾

Period details

Holiday period dates: 01/04/2020 - 31/03/2021 ▾

Length of service at relevant date: 2 year(s) 0 month(s) 0 day(s)

Scheme name: PSC NTNSP CS Annual Leave ▾

Membership dates: 01/04/2018 -

Entitlement for period: 244.3 hours (155.4 hours Pro Rata) 88.8 brought forward)

Entitlement example:
This figure is your team members annual leave entitlement which includes:

- Annual leave entitlement e.g. 21 days (155.4 hours)
- Any annual leave carried forward to this leave year e.g. 12 days (88.8 hours)

= 244.3 hours (33 days in total)
If they work part time or started part way through the year, this balance will reflect the pro-rated entitlement

From	To	Duration	Remaining entitlement
03/06/2020	03/06/2020	7.4	236.9
07/07/2020	09/07/2020	22.2	214.7
13/10/2020	13/10/2020	7.4	207.3

Taken or scheduled holidays

Duration: Number of hours deducted from balance as per team members working pattern

Remaining holiday entitlement = 28 days (207.3 hours)

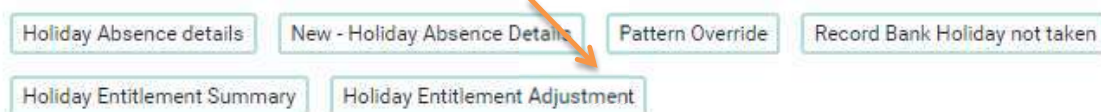
This is the balance your team member will see in **PiP For Me**

If you would like to see a breakdown of the holiday entitlement summary screen for your team member's terms and conditions, please see our 'Your team members holiday balance explained' guides here: <https://hr.gov.im/pip/pip-training/pip-for-my-team/quick-user-guides/annual-leave-toil-and-special-leave/>

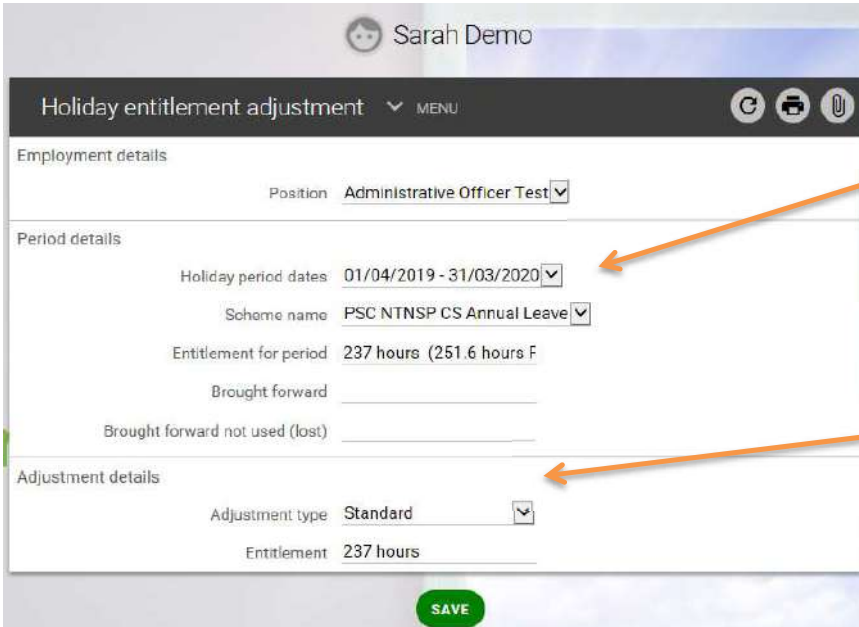
Adjusting the holiday entitlement for one of your team members

You have access to adjust your team member's holiday entitlement and TOIL balance in PiP. For example if a person reaches 10 years' service and they decide to claim an additional days' annual leave, you can credit their holiday balance.

To do this, simply click on **Holiday Adjustment**:



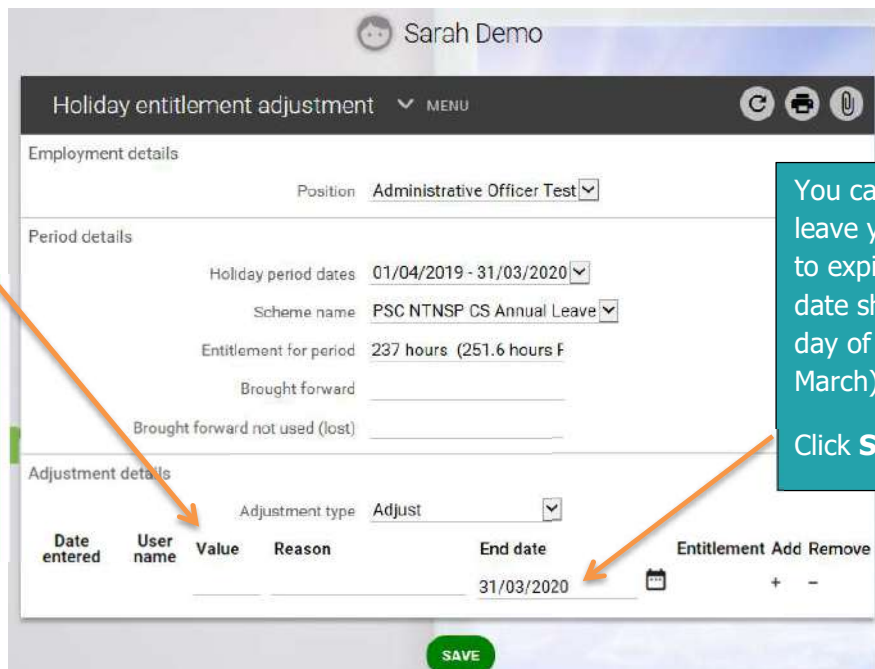
Your screen will now look like this:



Click on the **Scheme name** drop down to select whether you want to adjust the holiday or TOIL balance.

You will also need to change the adjustment type. Click on the **Adjustment type** drop down and select **Adjust**.

Your screen will update to show display adjustment details:



Enter the number of hours you wish to adjust the persons balance by.

Note: if you include a '-' in front of the value, the number of hours will be **deducted** from the balance. e.g. **-7.4**

You can determine which leave year the entitlement is to expire. Please note this date should also be the last day of the leave year (31 March)

Click **Save**

Making a holiday adjustment process map

Holiday Adjustment process in PiP



Other Absence (Special Leave)

Entering a special leave absence for one of your team members

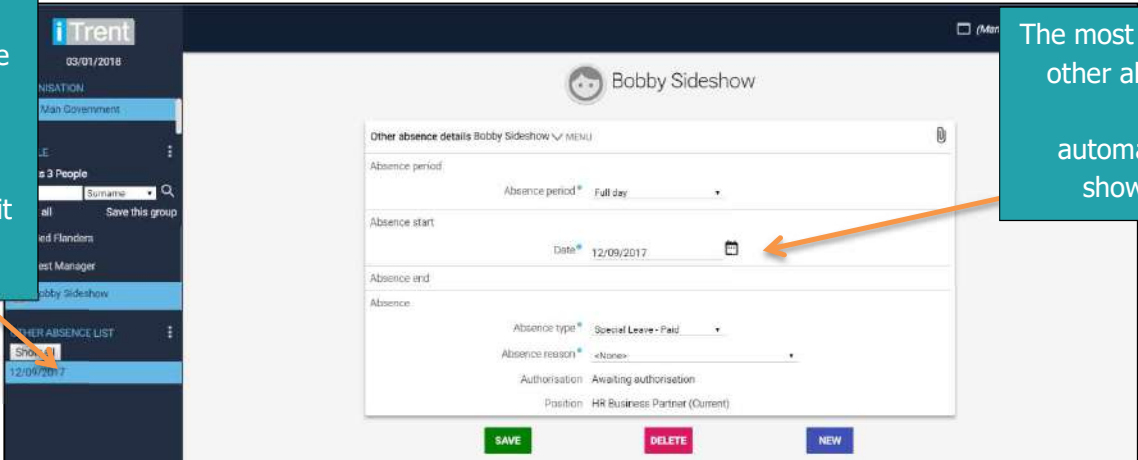
To do this, simply click on **Other Absence Details**:



Your screen will now look like this:

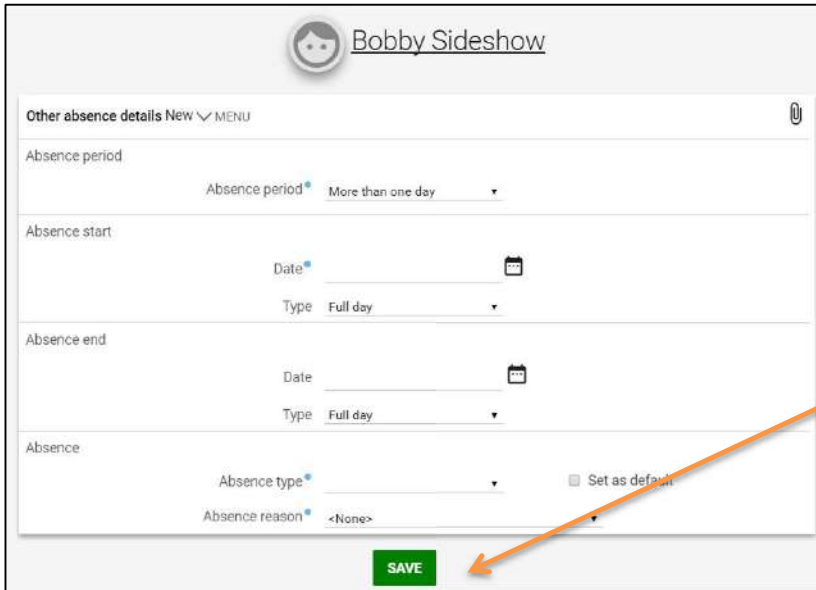
To create a new **other absence** click on **New**.

Any other absences will be listed here, if there are any. To view one simply click on it from the list.



The most recent other absence will automatically show here:

Your screen will now look like this:

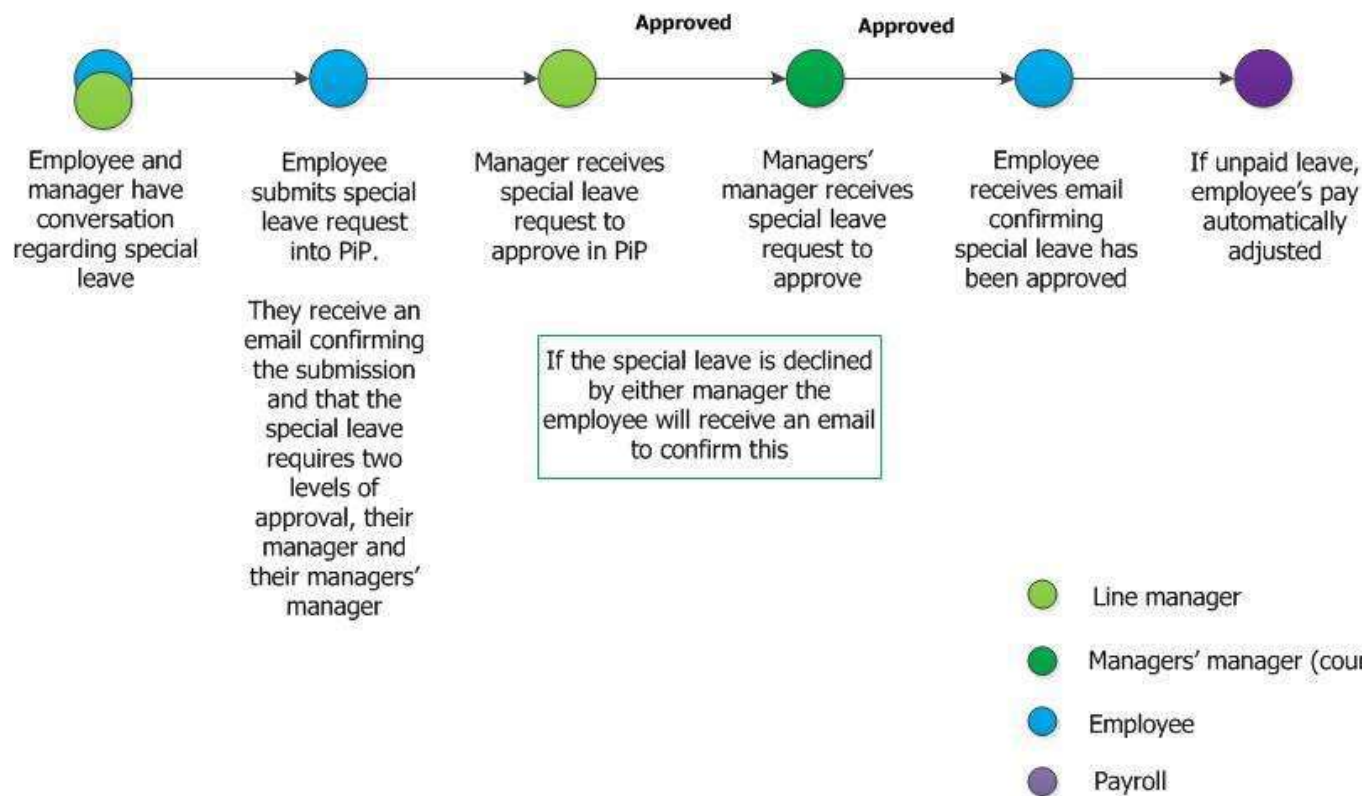


If your team member has not had any previous other absences the screen above will be the screen you see when you first click on **Other Absence Details**.

***N.B.:** Please note that in some areas of Government, you will be required to obtain additional approval for Special Leave from your Director/Finance Officer/Accounting Officer etc. This will need to be done outside of PiP **before** you enter the details into PiP on behalf of your team member. If you are unsure of the requirement in your area you will need to check with your manager.

Also if your team member has other positions within Government that you do not line manage, you may still receive workflow emails and/or authorisation tasks for Special Leave. Please see the [note](#) in To Do list section of this guide regarding this.

Special leave request process in PiP



Sickness

In this section you can view the following information:

- Details of any sickness absence
- Details of sickness absence stages e.g. reduction to half pay depending on individual terms and conditions of employment
- Any Doctors Certificates that may have been recorded

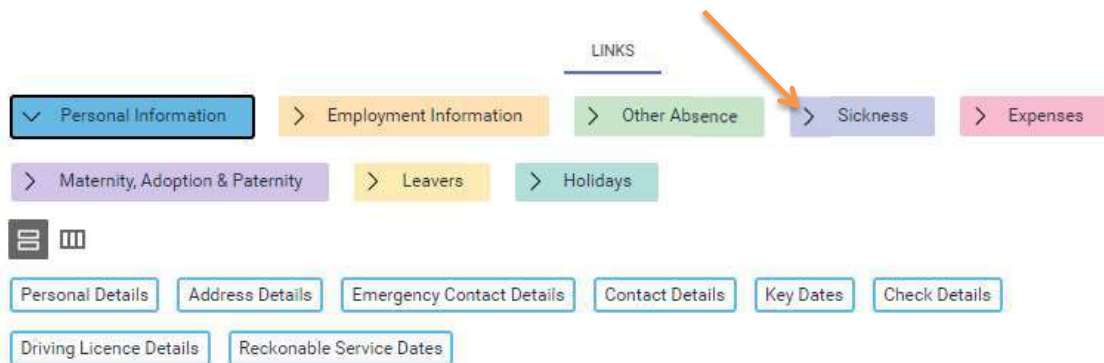
As a Line Manager you can also do the following:

- Create a new sickness absence
- Edited an existing sickness absence
- Override a sickness pattern
- Record any relevant documents e.g. Doctors certificates, recording the details against the relevant sickness absence
- Record absence stages

Viewing sickness absences for one of your team members

To view the sickness absences of one of your team first click on **My Staff** and then click on that team member's name.

To open the **Sickness** section, simply click on the **Sickness** button:



Your screen will now look like this:



Click on **View Sickness Absence** and a list of absences will appear on the left hand side of your screen. Select the absence you wish to view and the full details will open. If there is only one absence in the list the absence details will open automatically.

TESTA02, EMPLOYEE

Sickness absence details TESTA02, EMPLOYEE

Sickness period

Sickness period

Absence start

Absence start date

Absence end

Expected end date

Absence

Absence type

Absence reason

Exclude from Bradford Factor calculation ☐

Position

SAVE **DELETE** **NEW**

Creating a sickness absence for one of your team members

To do this, simply click on **Create New Sickness Absence**:

Create New Sickness Absence **View Sickness Absence** **Sickness Pattern Override** **View Absence Stages** **Run Sickness Letter Merge**

View Doctors Certificate

Your screen will now look like this:

Bobby Sideshow

Sickness absence details New

Sickness period

Sickness period

Absence start

Absence start date

Absence start type

Absence end

Absence end date

Absence end type

Expected end date

Absence

Absence type

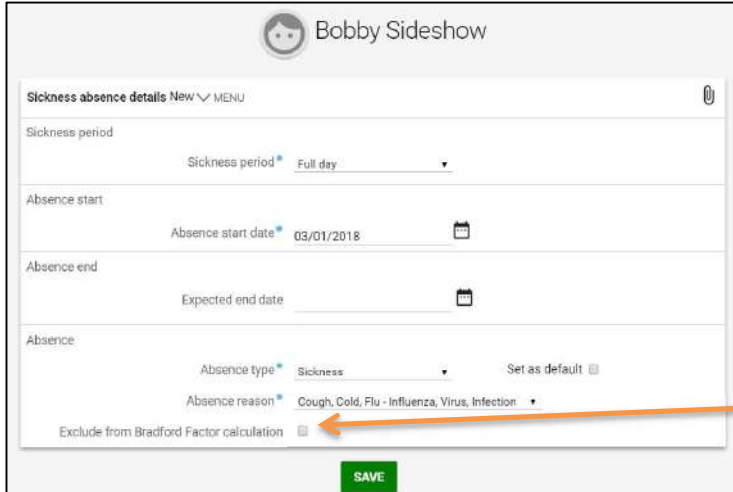
Absence reason

Exclude from Bradford Factor calculation ☐

SAVE

Complete each section in the screen above – all the sections with the blue dots are mandatory fields and click **Save**.

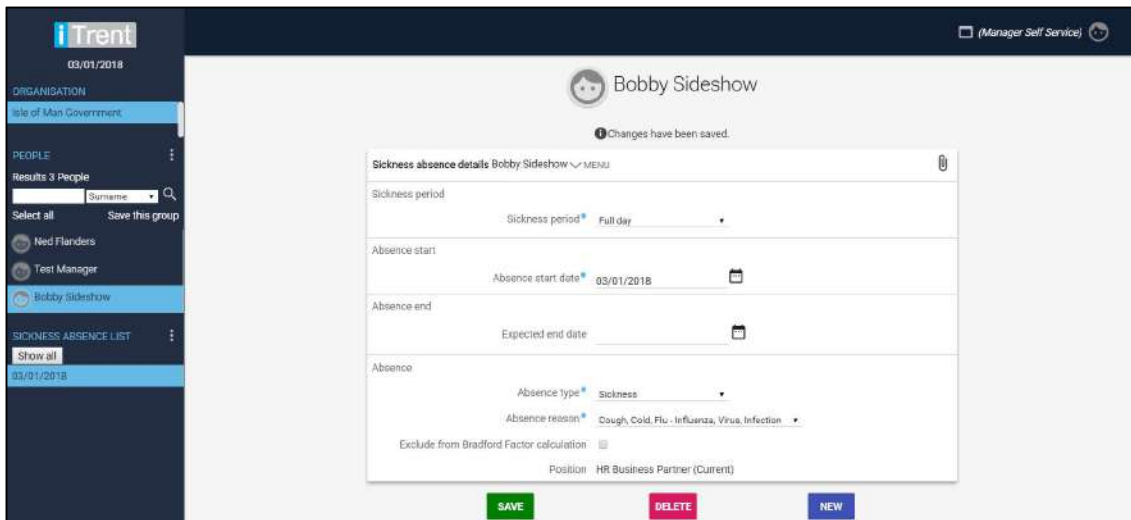
For example, to record a day of sickness on the 3rd January 2018 for a cold your screen would look like this:



You don't have to complete the **Expected end date** unless you know what this is likely to be.

You can also exclude this period of absence from the Bradford Factor calculation – you should always check this before ticking this box. Under normal circumstances all sickness absences should be counted as part of the Bradford Factor.

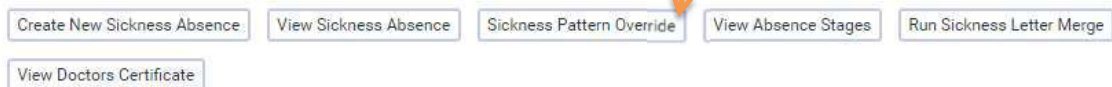
Your screen would now look like this:



Overriding your team members sickness pattern

If an employee does not have a standard working pattern and their working days constantly change, you will need to enter a pattern override against their absence (holiday, sickness and other absence).

To do this, simply click on **Sickness Pattern Override**



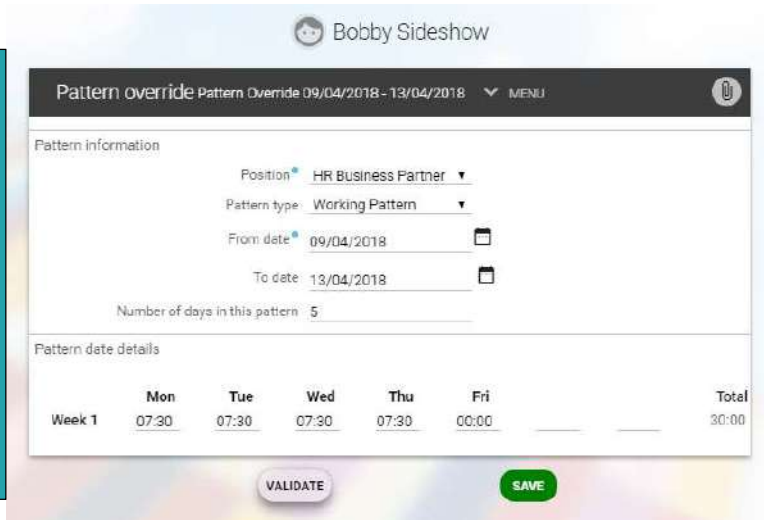
From the left hand side of your screen choose which sickness you wish to change the pattern for.

Your screen will now look like this:

Within the Pattern override screen select the day in the pattern you wish to change.

For this example I have changed Friday to be 0 hours. Click Validate to calculate the hours.

Click Save



Note: If you are overriding the working pattern for an open absence, please enter '7' into the 'Number of days in this pattern' field.

Adding details of Doctors' certificates

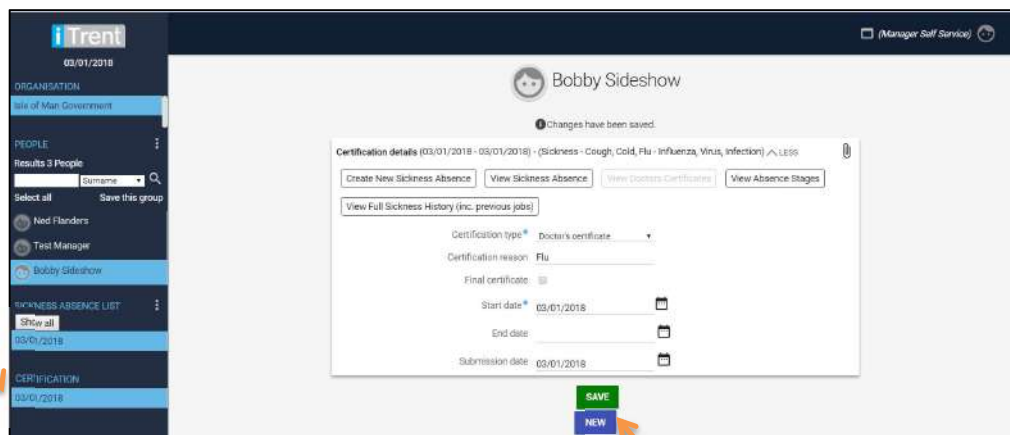
You can add the details of any doctor's certificates to the sickness record of one of your team members.

To do this, simply click on **View Doctors Certificates**:



Your screen will now look like this:

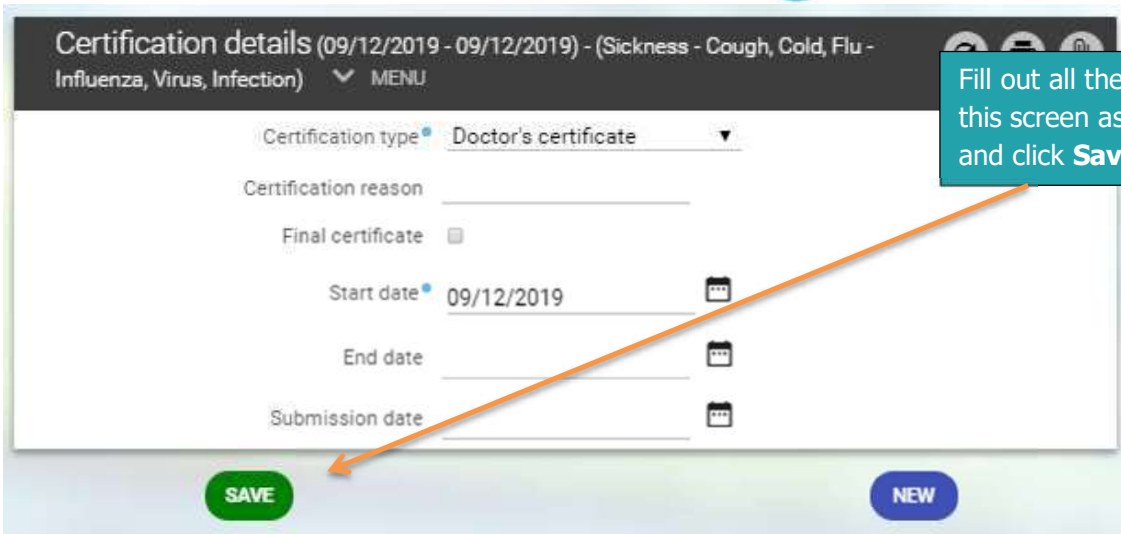
Any previous certificates you have added against absences will be listed here, if there are any. To view one simply click on it from the list.



You can add details of another certificate here by clicking on **New**.

You will be prompted to select a sickness absence from the left hand side of your screen.

Your screen will now look like this:





Certification details (09/12/2019 - 09/12/2019) - (Sickness - Cough, Cold, Flu - Influenza, Virus, Infection) ▼ MENU


Certification type • Doctor's certificate ▼

Certification reason _____

Final certificate ☐

Start date • 09/12/2019 

End date _____ 

Submission date _____ 

SAVE **NEW**

Fill out all the fields on this screen as necessary and click **Save**.

Recording absence stages and contact during sickness for one of your team members

As a line manager you have a duty of care for the individuals who report directly to you and this includes having regular contact with them when they are off work through ill health.

On PiP For My Team you can record any telephone conversations you have with your team when they are off work sick, including when they first advise you of their absence. You can also record any home visits you or another manager may make as part of keeping in touch.

There are also various stages of sickness absence for anyone who has been signed off by their Doctor to enable that person to get back to work quicker.

The stages that you must record are:

- Occupational Health Referral – if a referral is made
- Phased Return to Work (Paid)
- Phased Return to Work (using Holiday)
- Phased Return to Work (using Sick Pay)

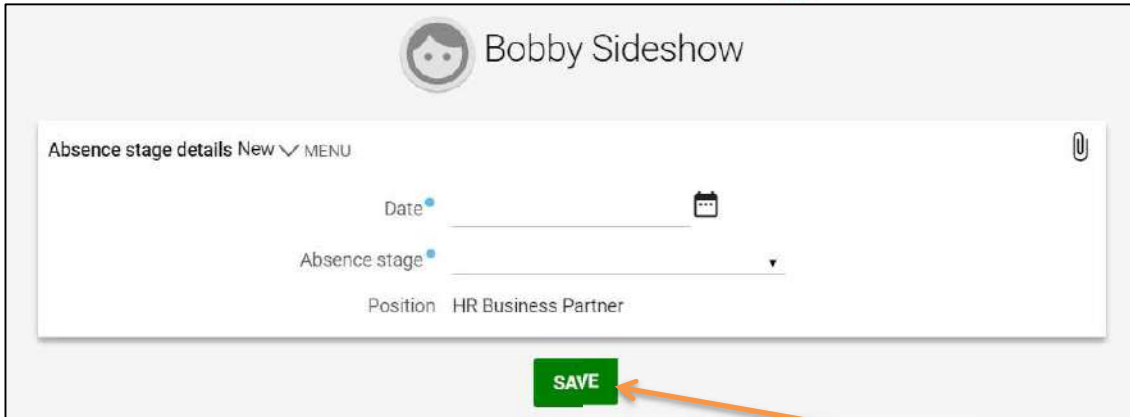
To do this, simply click on **View Absence Stages**:



Create New Sickness Absence View Sickness Absence Sickness Pattern Override

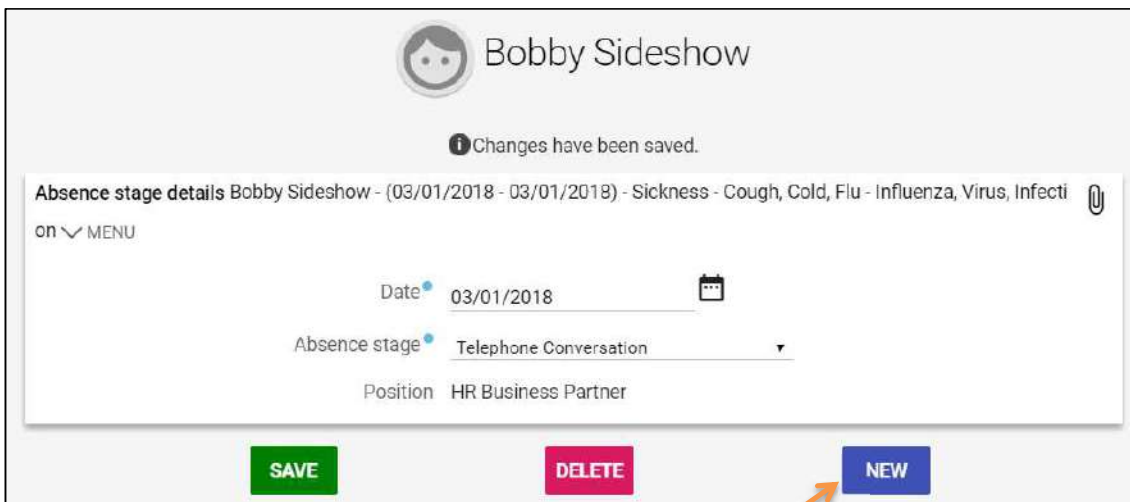
View Absence Stages Run Sickness Letter Merge View Doctors Certificate

Your screen will now look like this:



Complete the sections on this screen with the relevant information and click **Save**.

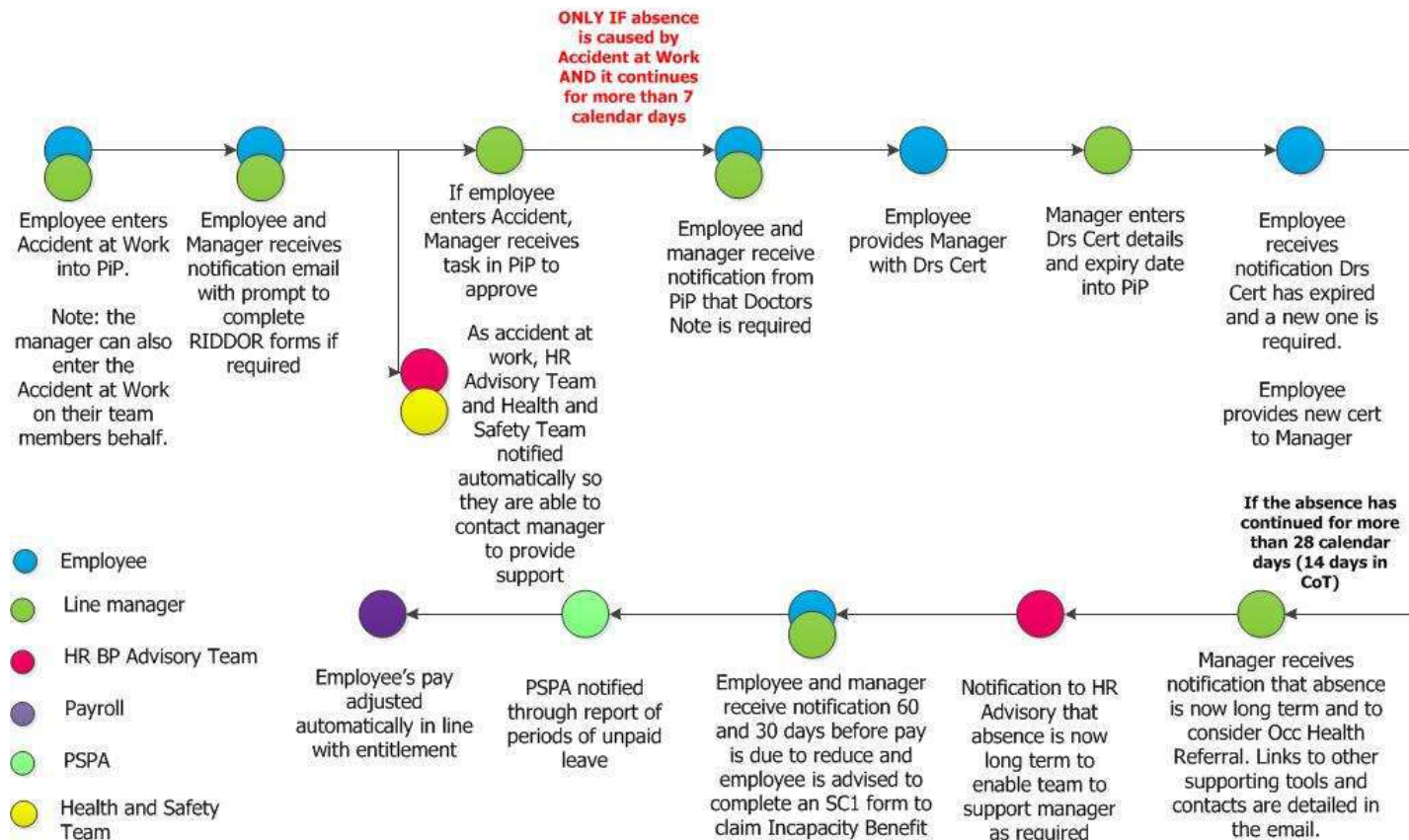
For example, to record a telephone conversation on the 3rd January 2018 your screen would now look like this:



To create a new contact or absence stage, simply click on **New**.

Accident at work process map

Accident at Work process in PiP



Time, Mileage & Expenses

As a line manager you are responsible* for checking and signing off any time, mileage or expenses claims that any of your team members submit on PiP For Me (Employee Self Service).

*(this may vary depending on your area of Government, check with your area whether you are responsible or whether these claims should be redirected to a Finance Manager/Accounting Officer/Central Admin etc.).

Mileage & Expenses claims

Once you have authorised a claim it is submitted electronically to Payroll to be included in the next pay run. Payroll will not process paper claims once PiP is live.

In order to receive payment for any claims the Reporting Manager must either:

Authorise the claim from their To Do list

or,

Re-direct the claim to another appropriate person to authorise (see note above)

If a member of your team submits a claim that is in relation to work sanctioned or requested by another manager you can redirect that specific claim to the relevant manager for them to authorise it on their own To Do list.

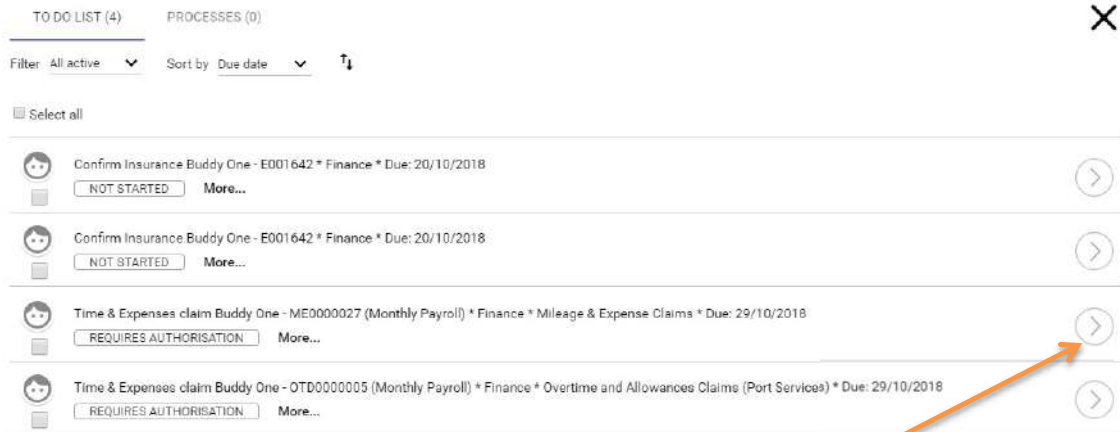
Payroll Deadline Date

With the introduction of PiP the deadline date for payroll is now the **7th of the month** so any claims to be paid in that month **must be approved** in PiP by the 7th or they will not be paid until the following month.

WARNING! There may be local deadline dates in place in your area to give line managers time to authorise claims. Please check with your manager if you are unsure of your local deadline date.

Authorising Claims

When one of your team submits a claim on Employee Self Service a task will be added to your To Do list.



TO DO LIST (4) PROCESSES (0) X

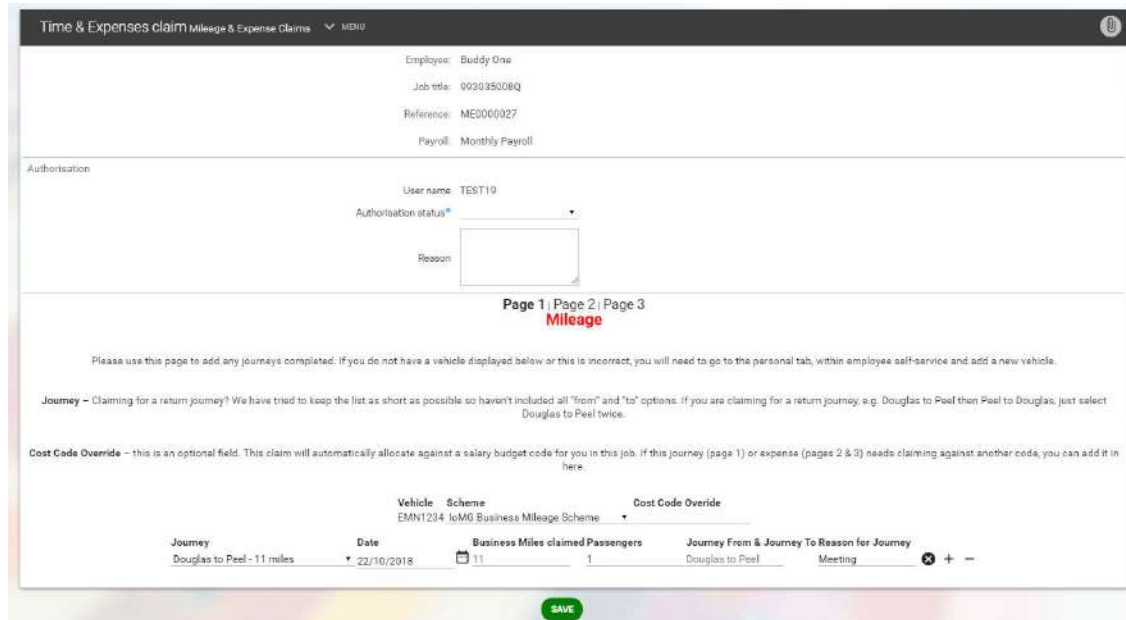
Filter: All active Sort by: Due date

Select all

	Confirm Insurance Buddy One - E001642 * Finance * Due: 20/10/2018	NOT STARTED More...	
	Confirm Insurance Buddy One - E001642 * Finance * Due: 20/10/2018	NOT STARTED More...	
	Time & Expenses claim Buddy One - ME0000027 (Monthly Payroll) * Finance * Mileage & Expense Claims * Due: 29/10/2018	REQUIRES AUTHORISATION More...	(highlighted with orange arrow)
	Time & Expenses claim Buddy One - OTD0000005 (Monthly Payroll) * Finance * Overtime and Allowances Claims (Port Services) * Due: 29/10/2018	REQUIRES AUTHORISATION More...	

To view the details of a claim and to authorise it click on the arrow.

Your screen will now look like this:



Time & Expenses claim Mileage & Expense Claims

Employee: Buddy One
Job title: 002035008Q
Reference: ME0000027
Payroll: Monthly Payroll

Authorisation

User name: TEST10
Authorisation status*
Reason

Page 1 | Page 2 | Page 3
Mileage

Please use this page to add any journeys completed. If you do not have a vehicle displayed below or this is incorrect, you will need to go to the personal tab, within employee self-service and add a new vehicle.

Journey - Claiming for a return journey? We have tried to keep the list as short as possible so haven't included all "from" and "to" options. If you are claiming for a return journey, e.g. Douglas to Peel then Peel to Douglas, just select Douglas to Peel twice.

Cost Code Override - this is an optional field. This claim will automatically allocate against a salary budget code for you in this job. If this journey (page 1) or expense (pages 2 & 3) needs claiming against another code, you can add it in here.

Vehicle Scheme Cost Code Override
EMN1234 IoMG Business Mileage Scheme

Journey	Date	Business Miles claimed	Passengers	Journey From & Journey To	Reason for Journey
Douglas to Peel - 11 miles	22/10/2018	11	1	Douglas to Peel	Meeting

SAVE

Click on the arrow for the **Authorisation status** and choose the status from the following options:

- Authorised
- Not authorised
- On hold

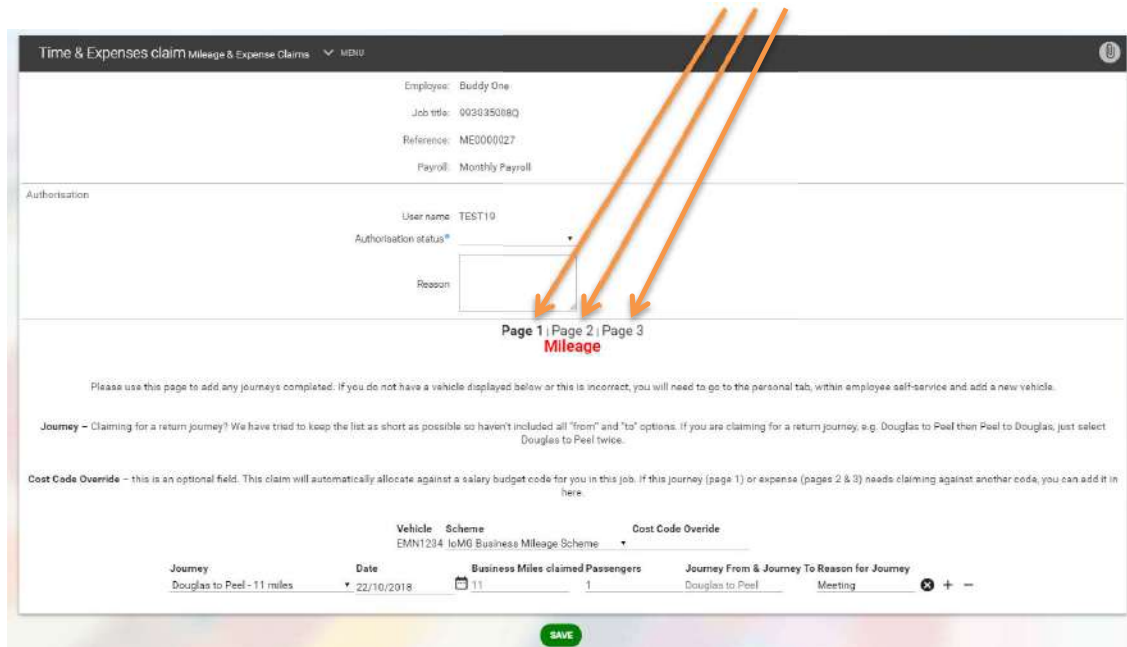
It is best practice for you to speak to your team member first before you choose either **Not authorised** or **On hold** so that they are aware of what you have decided and why you

have made that decision. Selecting an option and saving it on PiP For My Team (Manager Self Service) will cause an automated e-mail to be sent out to that team member advising them of your action. If you aren't authorising a claim you must also add a reason by typing into the **Reason** free-text box:



The screenshot shows a form with a label 'Reason' next to a large, empty text input box. Above the input box is a dropdown menu labeled 'Authorisation status' with a blue dot and a downward arrow.

To view all the pages of a claim you can click on the page number:



The screenshot shows the 'Time & Expenses claim Mileage & Expense Claims' page. At the top, there's a header with 'Time & Expenses claim Mileage & Expense Claims' and a 'MENU' button. Below the header, there's a section for 'Employee: Buddy One', 'Job title: 003035088Q', 'Reference: ME000027', and 'Payroll: Monthly Payroll'. The 'Authorisation' section shows 'User name: TEST10' and 'Authorisation status: *'. Below this is a 'Reason' text box. At the bottom of the 'Reason' section, there are links for 'Page 1 | Page 2 | Page 3' and 'Mileage'. Three orange arrows point to these links. Below the links, there's a 'Please use this page to add any journeys completed. If you do not have a vehicle displayed below or this is incorrect, you will need to go to the personal tab, within employee self-service and add a new vehicle.' section. The 'Journey' section shows 'Douglas to Peel - 11 miles' and 'Date: 22/10/2018'. The 'Business Miles claimed' section shows '11' and '1'. The 'Journey From & Journey To Reason for Journey' section shows 'Douglas to Peel' and 'Meeting'. At the bottom, there's a 'SAVE' button.

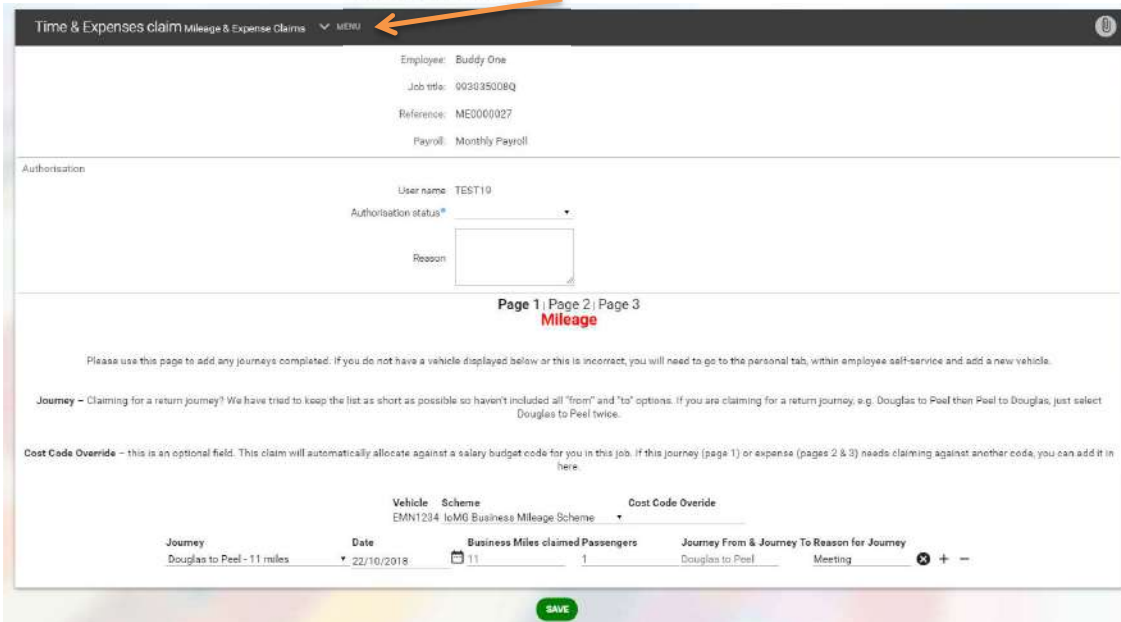
Page 1 is displayed automatically when you open a claim. You need to click on **Page 2** or **Page 3** to see the other pages of the claim.

Click **Save**.

Viewing attachments submitted with claims

When a claim is made for any expenses, any relevant receipts should also be uploaded so that you can review those receipts to check they match the amount being claimed for.

At the top of the actual claim click on the **MENU** down arrow:



Time & Expenses claim Mileage & Expense Claims **MENU**

Employee: Buddy One
Job title: 993035008Q
Reference: ME0000027
Payroll: Monthly Payroll

Authorisation
User name: TEST10
Authorisation status*
Reason

Page 1 | Page 2 | Page 3
Mileage

Please use this page to add any journeys completed. If you do not have a vehicle displayed below or this is incorrect, you will need to go to the personal tab, within employee self-service and add a new vehicle.

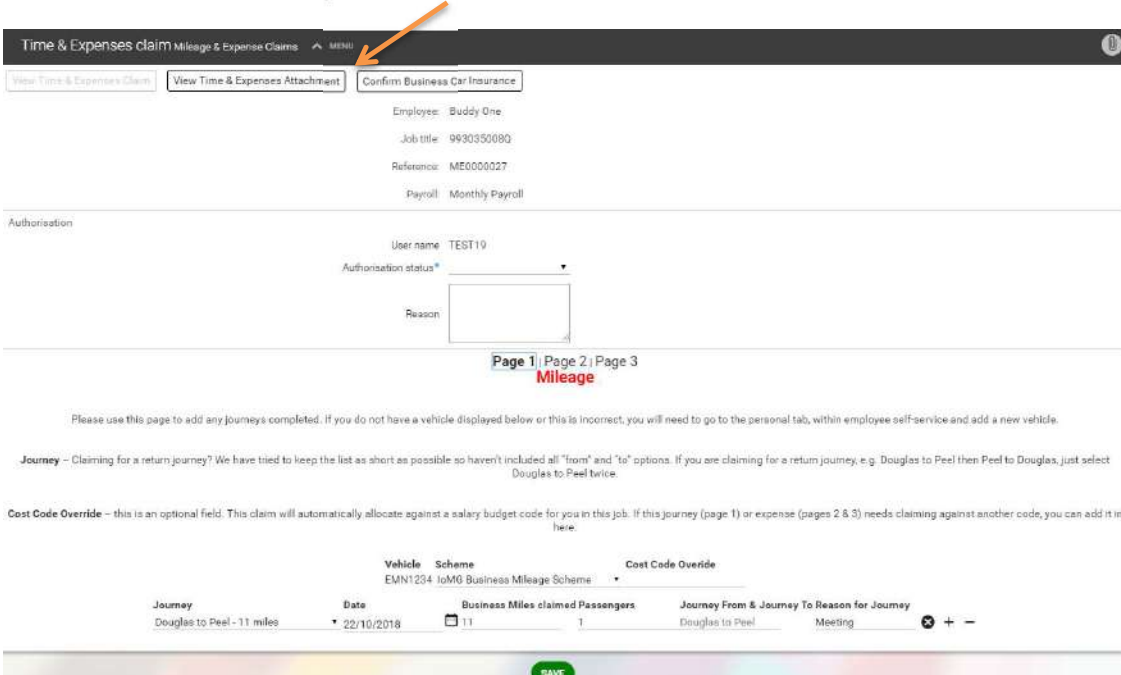
Journey – Claiming for a return journey? We have tried to keep the list as short as possible so haven't included all "from" and "to" options. If you are claiming for a return journey, e.g. Douglas to Peel then Peel to Douglas, just select Douglas to Peel twice.

Cost Code Override – this is an optional field. This claim will automatically allocate against a salary budget code for you in this job. If this journey (page 1) or expense (pages 2 & 3) needs claiming against another code, you can add it in here.

Journey	Date	Vehicle	Scheme	Business Miles claimed	Passengers	Journey From & Journey To Reason for Journey
Douglas to Peel - 11 miles	22/10/2018	EMN1234	IoMG Business Mileage Scheme	11	1	Douglas to Peel Meeting

SAVE

Click on **View Time & Expenses Attachment**:



Time & Expenses claim Mileage & Expense Claims **MENU**

View Time & Expenses Claim **View Time & Expenses Attachment** Confirm Business Car Insurance

Employee: Buddy One
Job title: 993035008Q
Reference: ME0000027
Payroll: Monthly Payroll

Authorisation
User name: TEST10
Authorisation status*
Reason

Page 1 | Page 2 | Page 3
Mileage

Please use this page to add any journeys completed. If you do not have a vehicle displayed below or this is incorrect, you will need to go to the personal tab, within employee self-service and add a new vehicle.

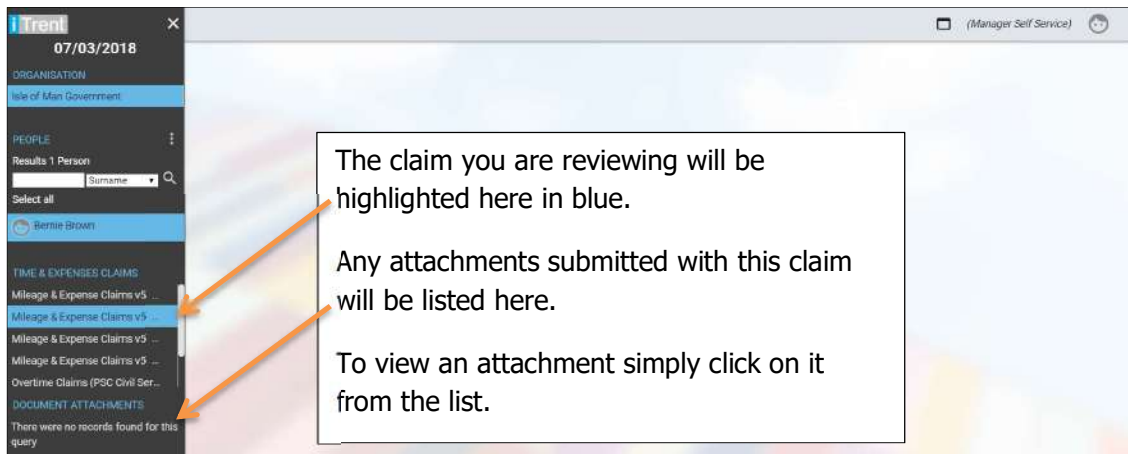
Journey – Claiming for a return journey? We have tried to keep the list as short as possible so haven't included all "from" and "to" options. If you are claiming for a return journey, e.g. Douglas to Peel then Peel to Douglas, just select Douglas to Peel twice.

Cost Code Override – this is an optional field. This claim will automatically allocate against a salary budget code for you in this job. If this journey (page 1) or expense (pages 2 & 3) needs claiming against another code, you can add it in here.

Journey	Date	Vehicle	Scheme	Business Miles claimed	Passengers	Journey From & Journey To Reason for Journey
Douglas to Peel - 11 miles	22/10/2018	EMN1234	IoMG Business Mileage Scheme	11	1	Douglas to Peel Meeting

SAVE

Your screen will now look like this:



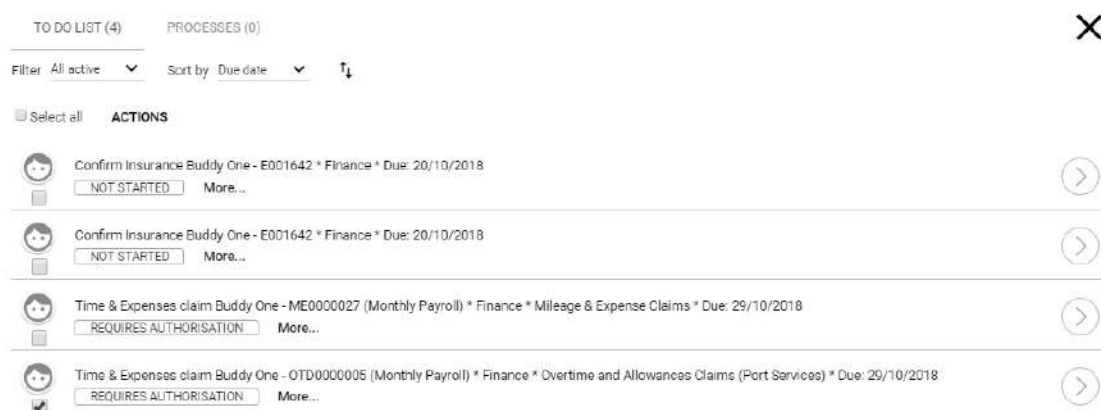
Re-directing a claim to another Reporting Manager

Note: Redirections should only be used for redirecting a Mileage or Expense claim to another manager. Other team tasks which contain personal information for example sickness absence or special leave requests should be managed by the line managers and the manager's manager.

To re-direct a claim click on the box below the face icon for that specific claim:



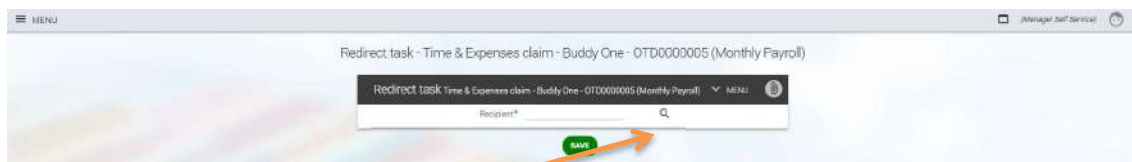
Your screen will now look like this:



Click on **REDIRECT** at the top your To Do list:

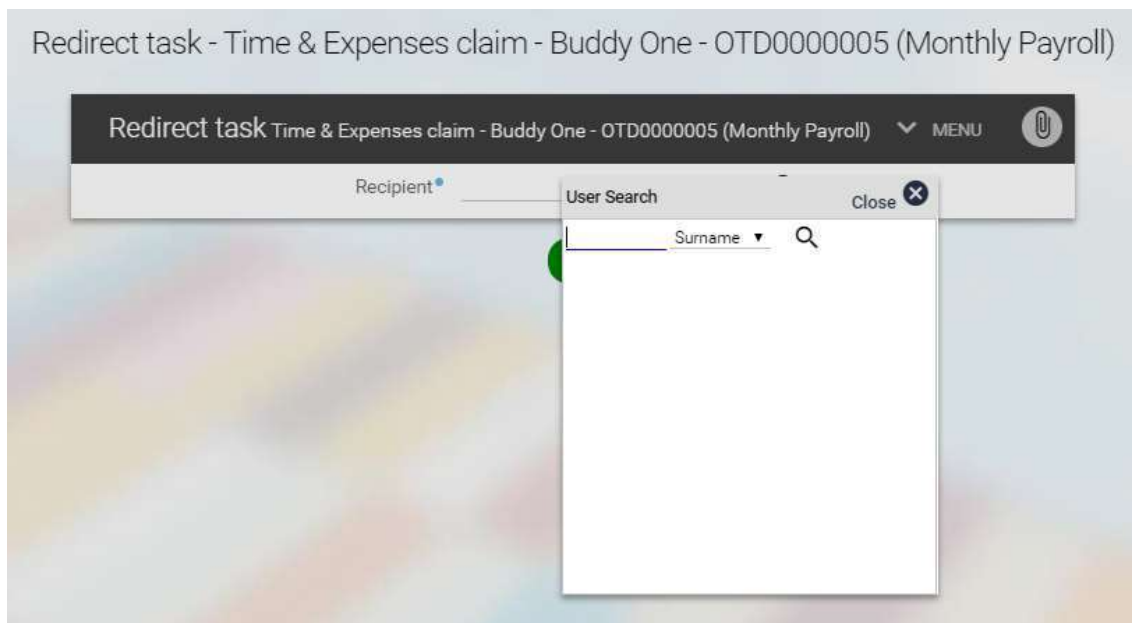


Your screen will now look like this:



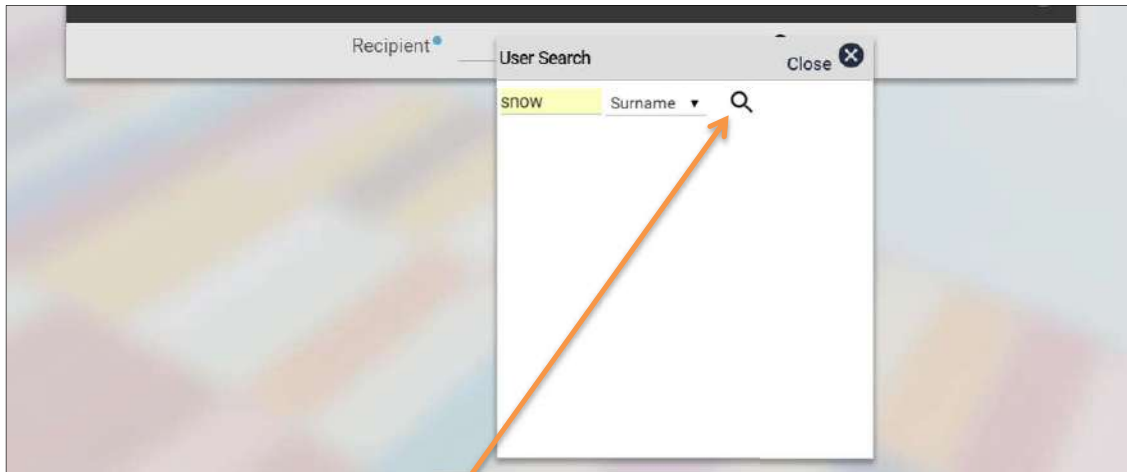
Click on the magnifying glass.

Your screen will now look like this:



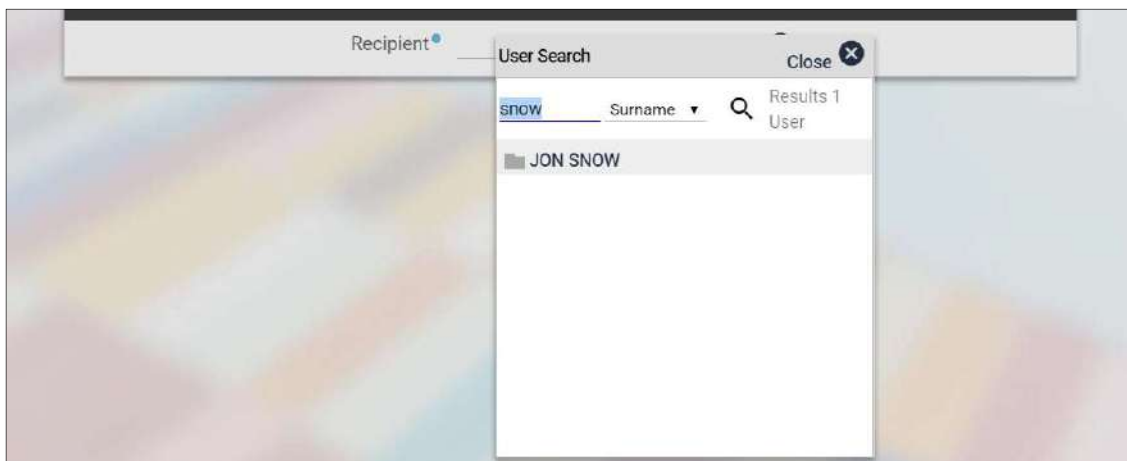
The search functions defaults to surname, but for GDPR reasons it is best practice to search by username by clicking on the arrow beside surname and selecting username. People can share names but our usernames are unique, so searching by username helps to mitigate any risk of the expense claim being redirected to the wrong person.

Once you have chosen your search criteria you will then need to enter the surname or username in the search field:



Then click on the magnifying glass.

Your screen will now look like this:



Select the correct manager from the search results by clicking on their name in the list. If you have searched using the username there should only be one result.

Your screen will now look like this:

Redirect task - Time & Expenses claim - Buddy One - OTD0000005 (Monthly Payroll)

Redirect task Time & Expenses claim - Buddy One - OTD0000005 (Monthly Payroll)

Recipient **JON SNOW**

SAVE

Click **Save**.

The Expenses link

When you select the Expenses link from the screen below you will get three options:

- View Expenses Claim
- View Time & Expenses Attachment
- Confirm Business Car Insurance

View Expenses Claim

Confirm Business Car Insurance

View Expenses Claim

This option allows you to view all the mileage and expenses claims that your team member has submitted, including claims still to be authorised.

SEARCH FIND ITRENT PAGES

Andrews, Adam

Callow, Catherine

Evans, Ellen

Ford, Fiona

Gordon, Georgia

Horn, Harriett

TIME & EXPENSES CLAIMS

Mileage & Expense Claims v2

Mileage & Expense Claims v2

Mileage & Expense Claims v2

Mileage & Expense Claims v2

Mileage & Expense Claims v2

Mileage & Expense Claims v2

Mileage & Expense Claims v2

Calendar

VIEW FULL CALENDAR

23 Jun - 06 Jul 2020

23 24 25 26 27 28 29 30 01 02 03 04 05 06

8

Bradford factor inclusive of all positions (as of last calculation)

LINKS

Personal Information

Employment Information

Other Absence

Sickness

Expenses

Maternity, Adoption & Paternity

Leavers

Holidays

View Expenses Claim

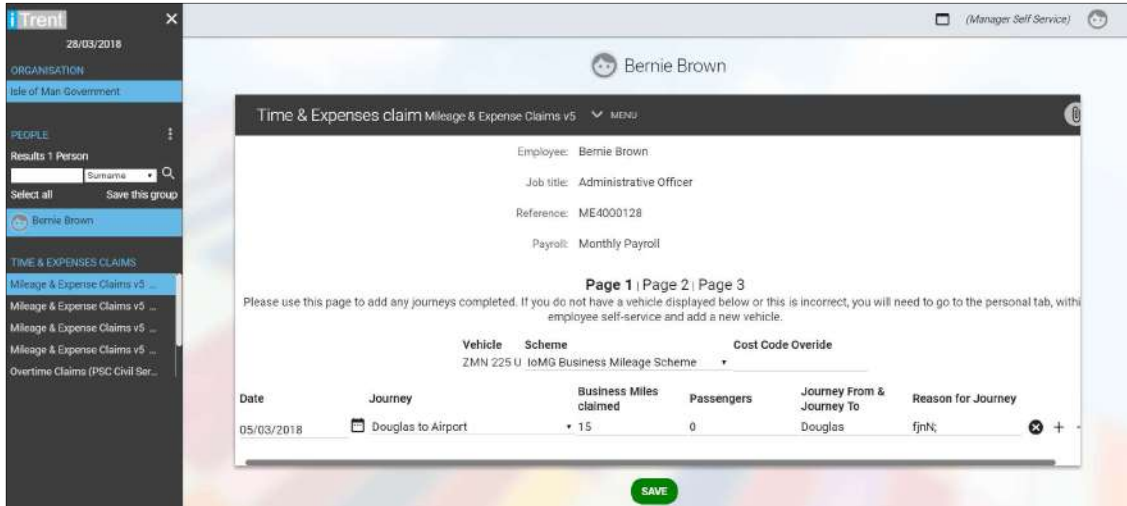
Confirm Business Car Insurance

The claims will be listed in date order with the latest claim at the top of the list.

To view the details of a claim without viewing the claim itself i.e. date submitted and authorisation status, hover your cursor of the claim in the list.

To view a particular claim, simply click on it from the list.

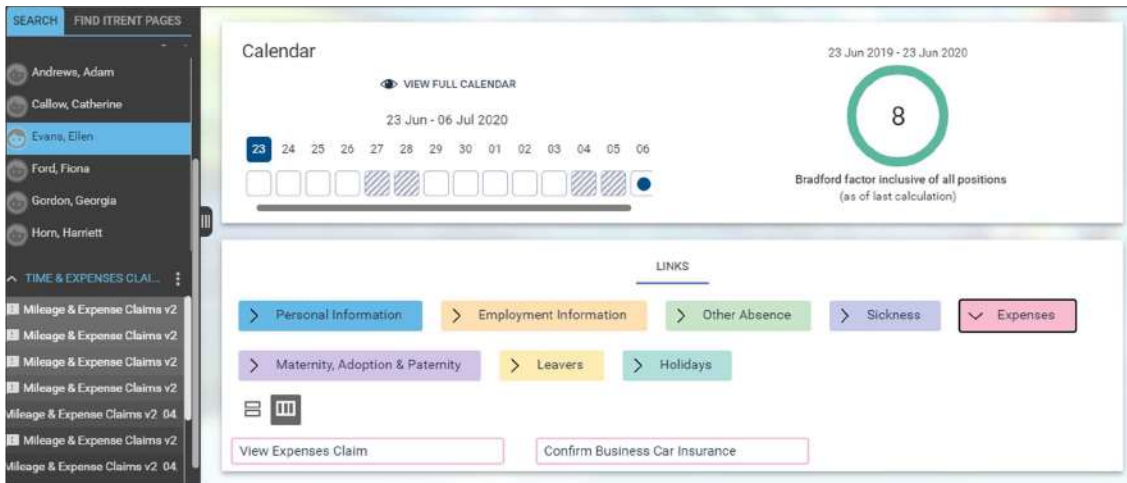
Your screen will now look like this:



The screenshot shows the 'Time & Expenses claim Mileage & Expense Claims v5' form for Bernie Brown. The form includes fields for Employee (Bernie Brown), Job title (Administrative Officer), Reference (ME4000128), and Payroll (Monthly Payroll). It also shows a table for journeys with columns for Date, Journey, Business Miles claimed, Passengers, Journey From & Journey To, and Reason for Journey. A 'SAVE' button is visible at the bottom.

View Time & Expenses Attachment

This option allows you to view any attachments uploaded with a specific claim, including claims still awaiting authorisation.



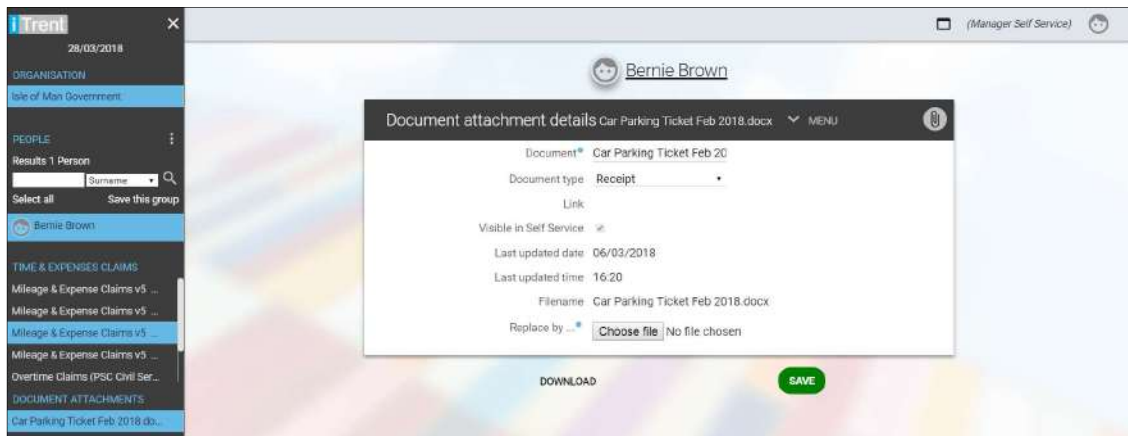
The screenshot shows the 'Time & Expenses Attachment' view. It includes a 'Calendar' section with a date range of 23 Jun 2019 - 23 Jun 2020 and a 'Bradford factor inclusive of all positions (as of last calculation)' of 8. Below the calendar is a 'LINKS' section with buttons for Personal Information, Employment Information, Other Absence, Sickiness, Expenses, Maternity, Adoption & Paternity, Leavers, and Holidays. At the bottom, there are buttons for 'View Expenses Claim' and 'Confirm Business Car Insurance'.

The claims will be listed in date order with the latest claim at the top of the list.

To view the details of a claim without viewing the claim itself i.e. date submitted and authorisation status, hover your cursor of the claim in the list.

To view any attachments for a particular claim, simply click on the claim from the list.

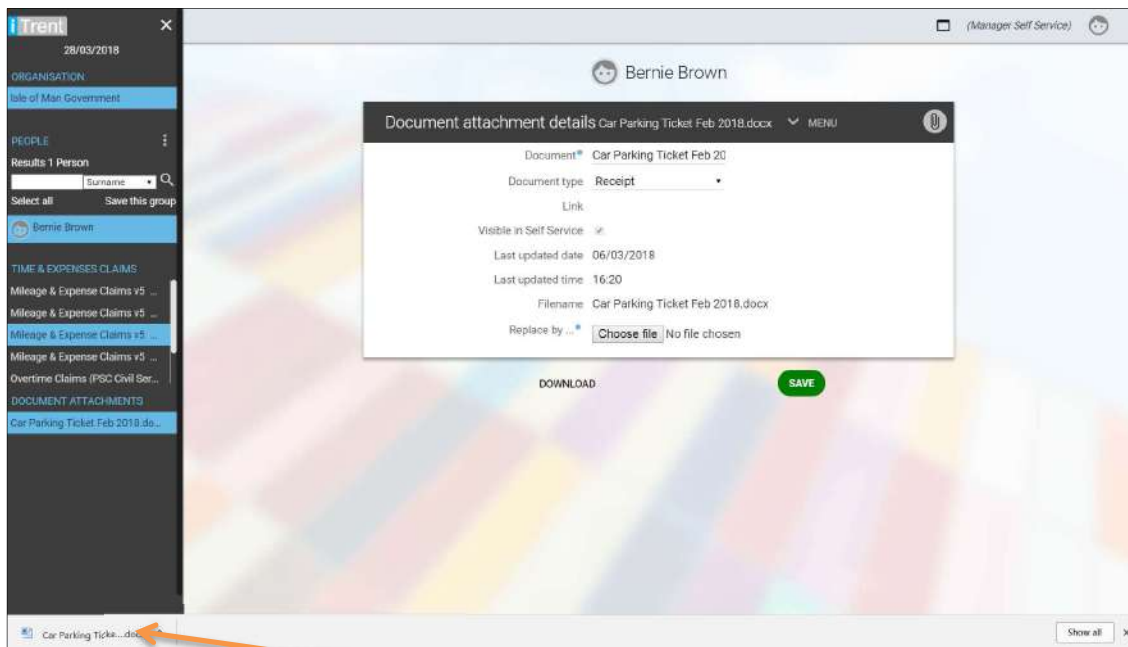
Your screen will now look like this:



If there is more than one attachment they will be listed under Document Attachments. To view a particular attachment simply click on it from the list.

To view the actual receipt etc. click on **DOWNLOAD**.

Your screen will now look like this:



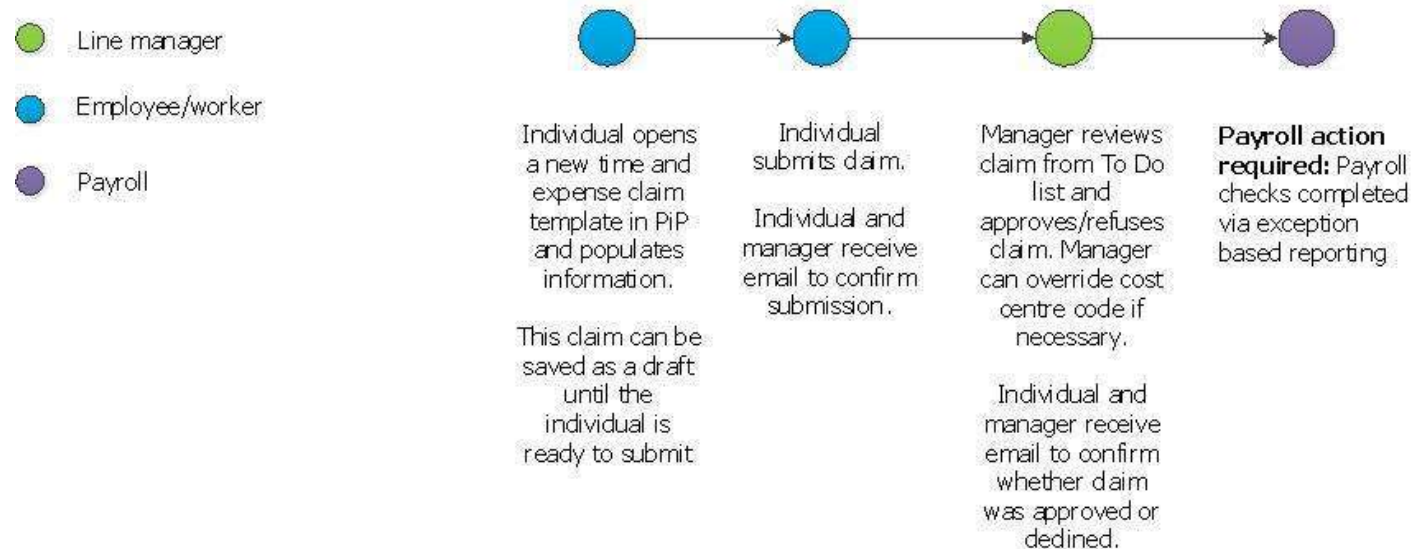
Click on the downloaded attachment here.

Time and expense claim process map

Note: Mileage and Expense claims will be introduced first. Time and allowance claims will be introduced at a later stage.

Submitting a time and expense claim in PiP

Time, overtime, additional hours, mileage claim,
expenses etc



Confirm Business Car Insurance

If a member of your team uses their own vehicle for work journeys other than to and from work at the start or end of the day or their shift, they must be covered in their own car insurance to use their car for business or work-related purposes.

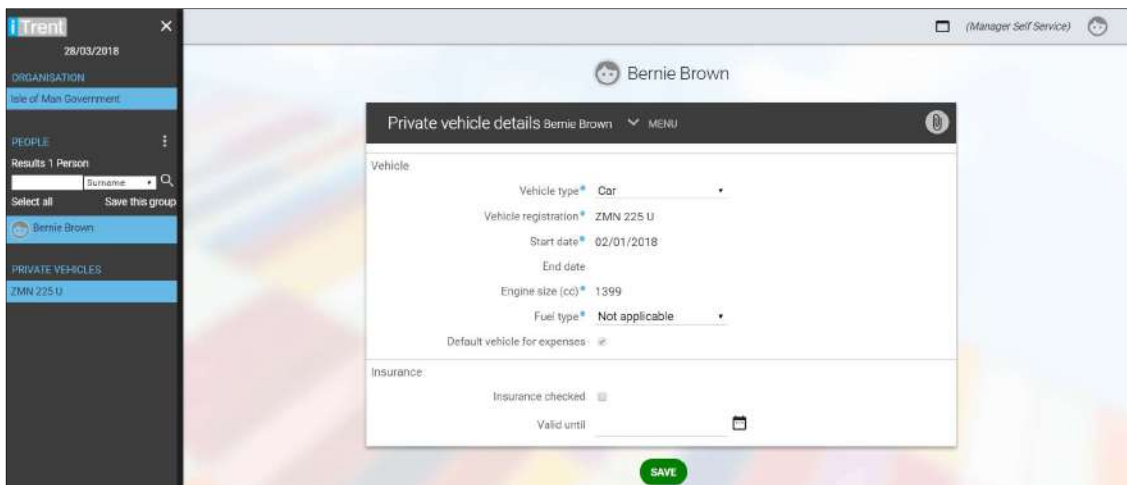
As a manager you should check that the insurance cover of your team members is correct by asking them to provide you with hardcopy of their policy.

You can then acknowledge this on PiP For My Team.

Click on **Confirm Business Car Insurance**:



Your screen will now look this:



Click the **Insurance checked** box and type in expiry date of the policy into the **Valid until** date field and click **Save**.

Please note that if add a valid until date, PiP will notify you and your team member via email when this policy is due to expire.

If you have previously received a task in your To Do list to check the business insurance you will need to return to your To Do list on your homepage and approve the business insurance task.

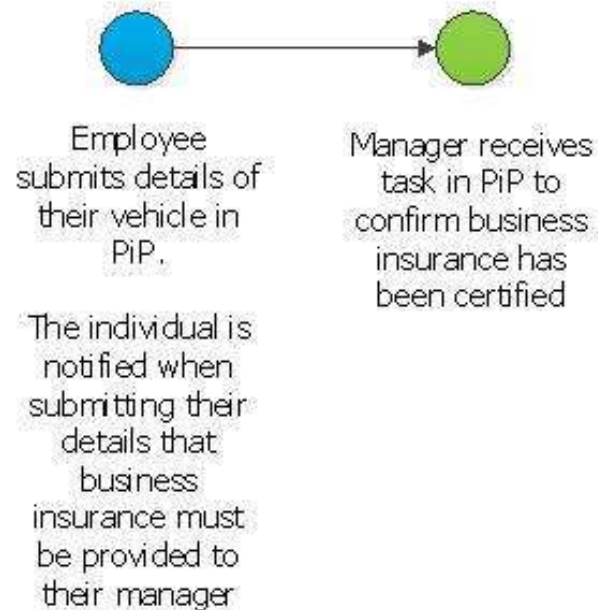
For guidance on approving tasks, please click [here](#):

Adding a private vehicle for mileage claims and verifying insurance process map

Adding a private vehicle and certifying business insurance in PiP

● Line manager

● Employee



Maternity, Paternity & Adoption

In this section you can view the following information:

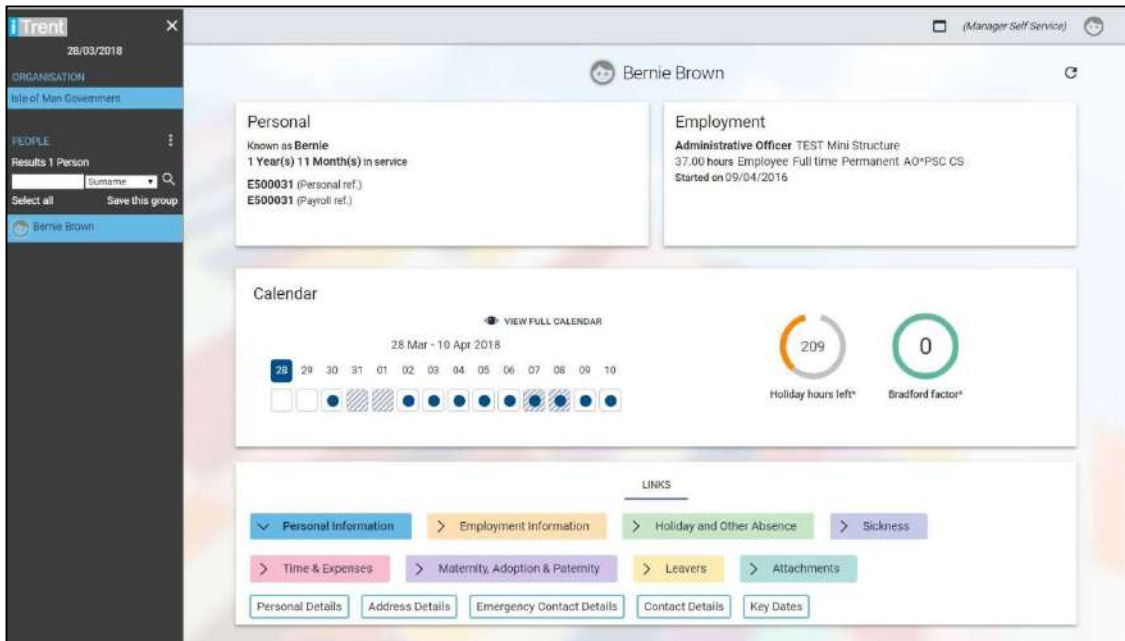
- Details of any maternity, paternity or adoption periods
- Details of any maternity or adoption Keeping In Touch (KIT) days

As a Line Manager you can also do the following:

- Create a new maternity, paternity or adoption period
- Edit the details of a maternity, paternity or adoption period
- Create a new maternity or adoption KIT day
- Create a maternity, adoption or paternity letter

To view the maternity, paternity or adoption details of one of your team first click on **My Staff** and then click on that team member's name.

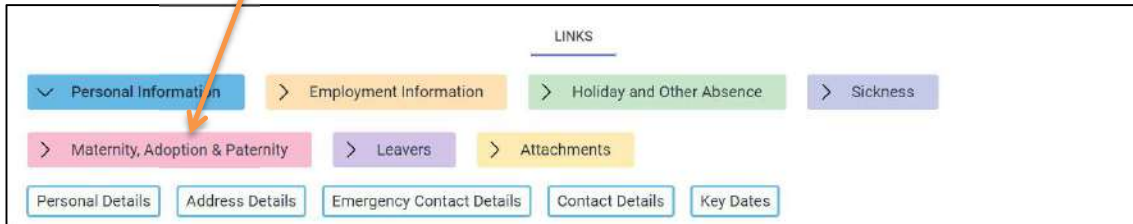
Your will screen will now look like this:



The screenshot shows the iTrent Manager Self Service interface for a user named Bernie Brown. The interface is divided into several sections:

- Left Sidebar:** Contains navigation links for 'iTrent', '28/03/2018', 'ORGANISATION' (Isle of Man Government), 'PEOPLE' (Results 1 Person), and a search bar for 'Bernie Brown'.
- Personal Information:** Displays 'Known as Bernie', '1 Year(s) 11 Month(s) in service', and employee references 'E500031 (Personal ref.)' and 'E500031 (Payroll ref.)'.
- Employment Information:** Displays 'Administrative Officer TEST Mini Structure', '37.00 hours Employee: Full time Permanent AO*PSC CS', and 'Started on 09/04/2016'.
- Calendar:** Shows a calendar view for '28 Mar - 10 Apr 2018' with a 'VIEW FULL CALENDAR' link. It includes a 'Holiday hours left*' gauge showing 209 and a 'Bradford factor*' gauge showing 0.
- LINKS:** A section with various links for further information, including 'Personal Information', 'Employment Information', 'Holiday and Other Absence', 'Sickness', 'Time & Expenses', 'Maternity, Adoption & Paternity', 'Leavers', 'Attachments', 'Personal Details', 'Address Details', 'Emergency Contact Details', 'Contact Details', and 'Key Dates'.

To select the **Maternity, Paternity & Adoption** section, simply click on the **Maternity, Paternity & Adoption** button:



Your screen will now look like this:



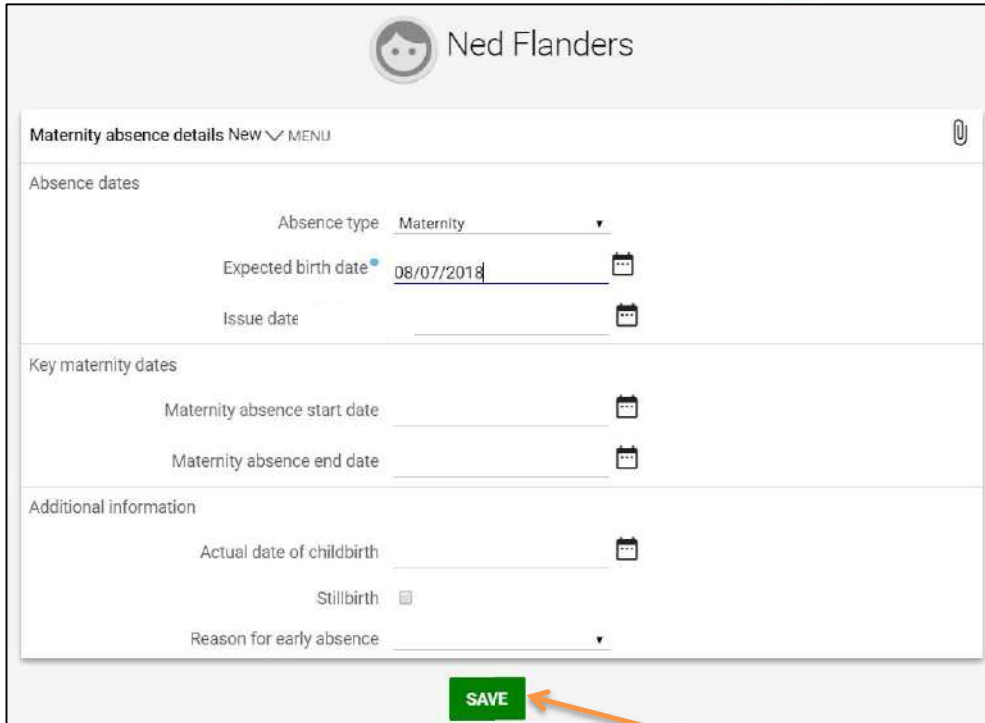
Adding a new maternity, paternity or adoption period

You can create a new record as soon as a member of your team advises you that they are pregnant, going to adopt or they are going to be a father. You can then amend this record once they finish work to go on leave and also when they return to work on completion of their leave. For example:

To do this, simply click on **New Maternity Details**:



Your screen will now look like this:



Ned Flanders

Maternity absence details New ▾ MENU

Absence dates

Absence type Maternity ▾

Expected birth date 08/07/2018

Issue date

Key maternity dates

Maternity absence start date

Maternity absence end date

Additional information

Actual date of childbirth

Stillbirth ☐

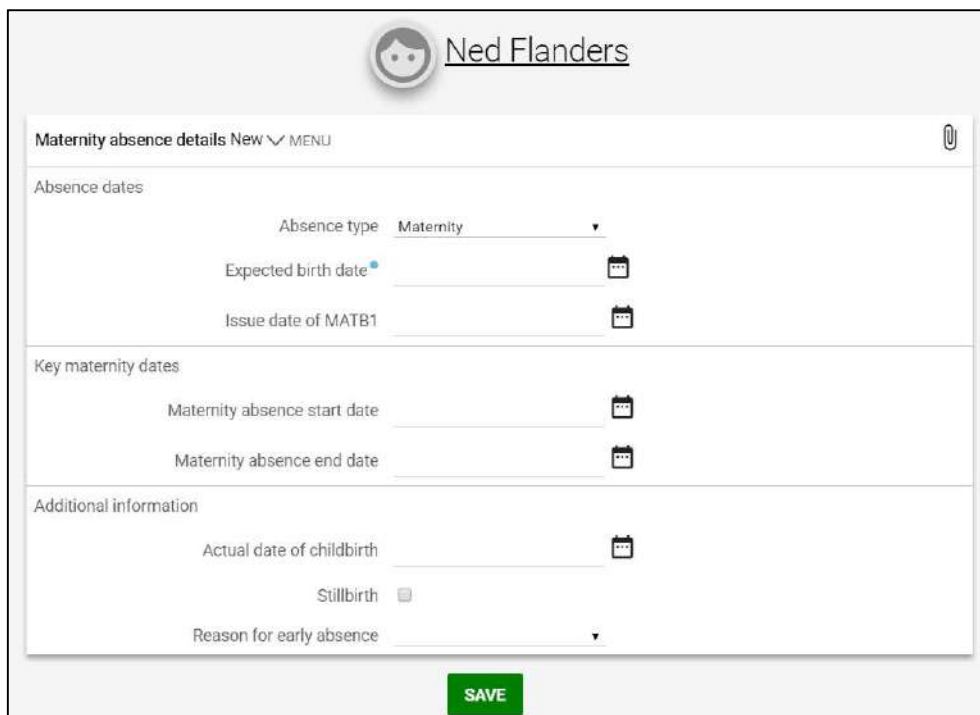
Reason for early absence ▾

SAVE

Complete the **Expected birth date** and then click **Save**.

For example, if a member of your team advises you that their baby is due on the 8th July 2018 your screen would look like this:

Your screen will now look like this:



Ned Flanders

Maternity absence details New ▾ MENU

Absence dates

Absence type Maternity ▾

Expected birth date

Issue date of MATB1

Key maternity dates

Maternity absence start date

Maternity absence end date

Additional information

Actual date of childbirth

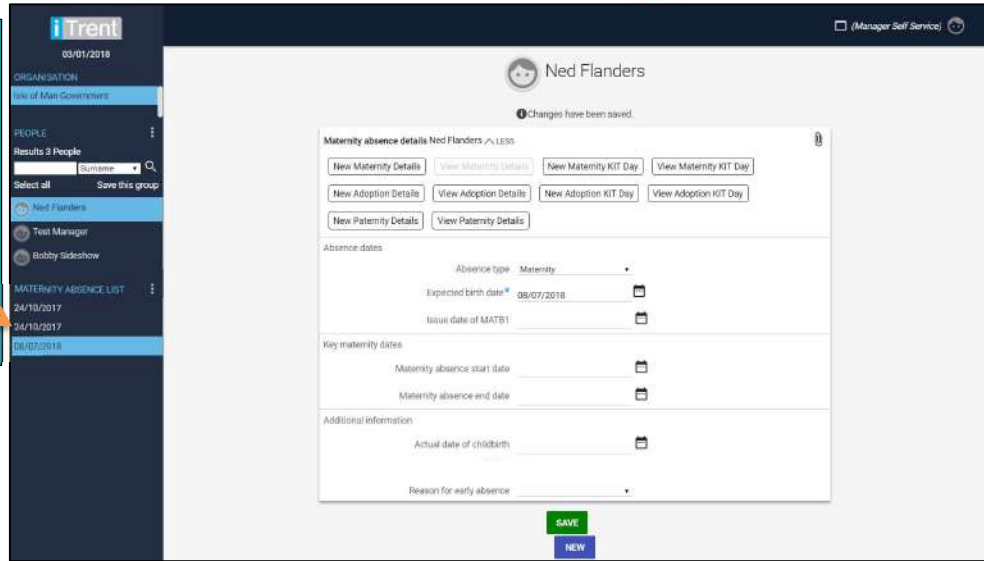
Stillbirth ☐

Reason for early absence ▾

SAVE

Any previous or current maternity periods will be listed here, if there are any.

To view simply click on the one you want from the list.



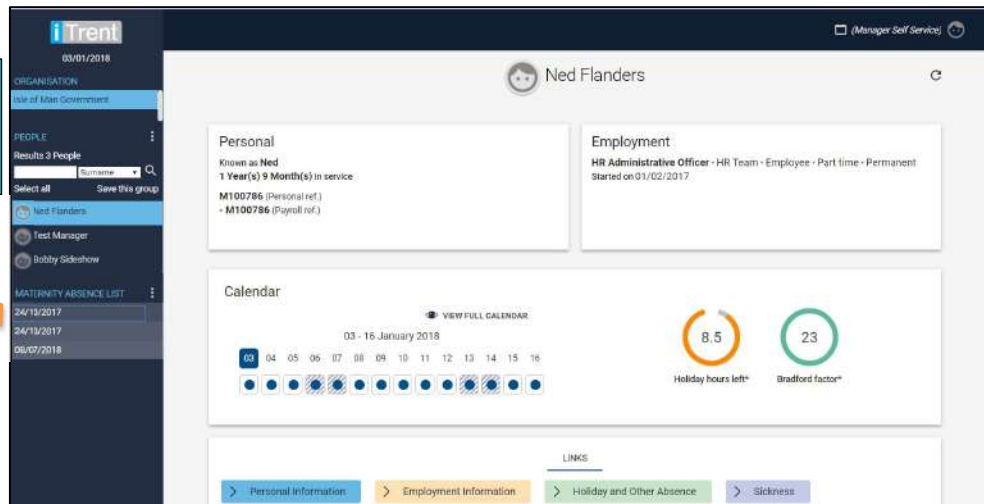
Adding details of a MATB1

To do this, simply click on **View Maternity Details**:

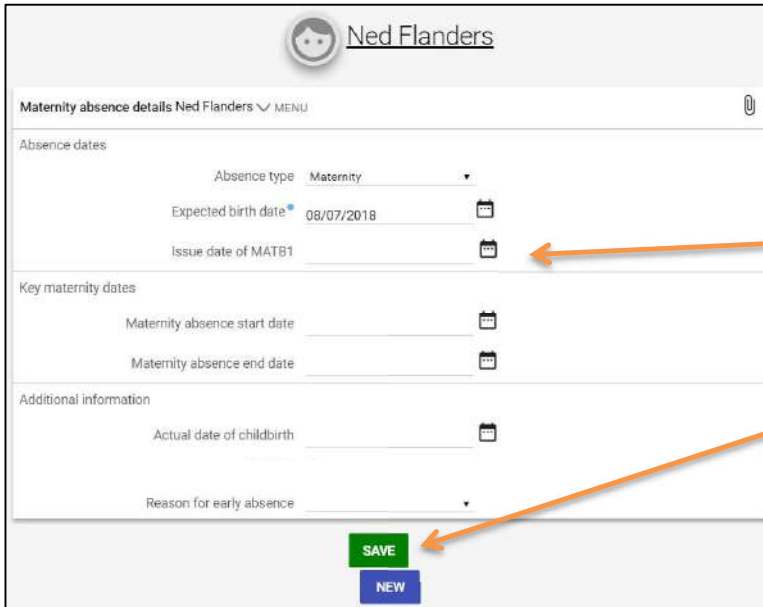


Your screen will now look like this:

Click on the correct maternity period from the list here:



Your screen will now look like this:



Add the date of the
MATB1 form here and
then click **Save**.

Adding a start and end date

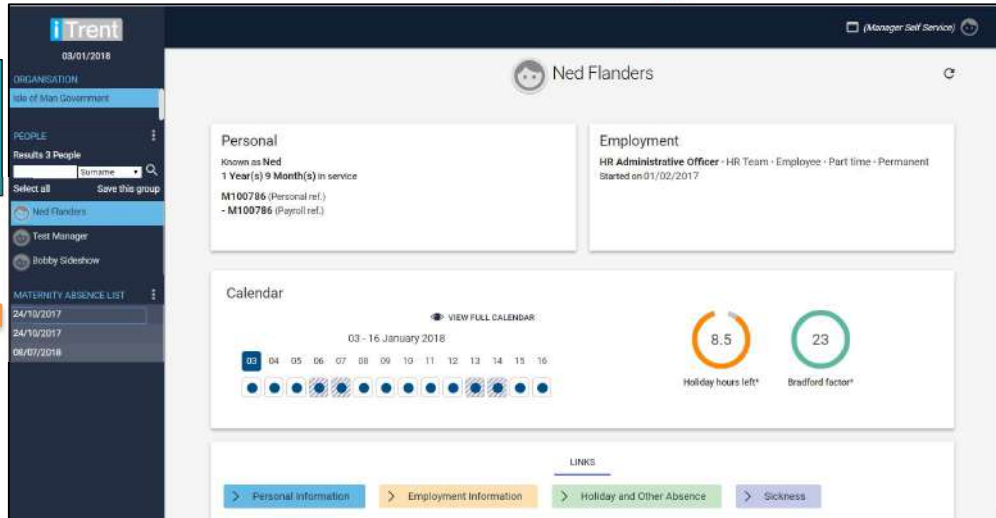
To add a start and end date to an employee's leave, click the view details tiles. For example:

To do this, simply click on **View Maternity Details**:



Your screen will now look like this:

Click on the correct maternity period from the list here:



Maternity Absence List

- 24/10/2017
- 24/10/2017
- 08/07/2018

Personal
Known as Ned
1 Year(s) 9 Month(s) in service
M100786 (Personal ref.)
- M100786 (Payroll ref.)

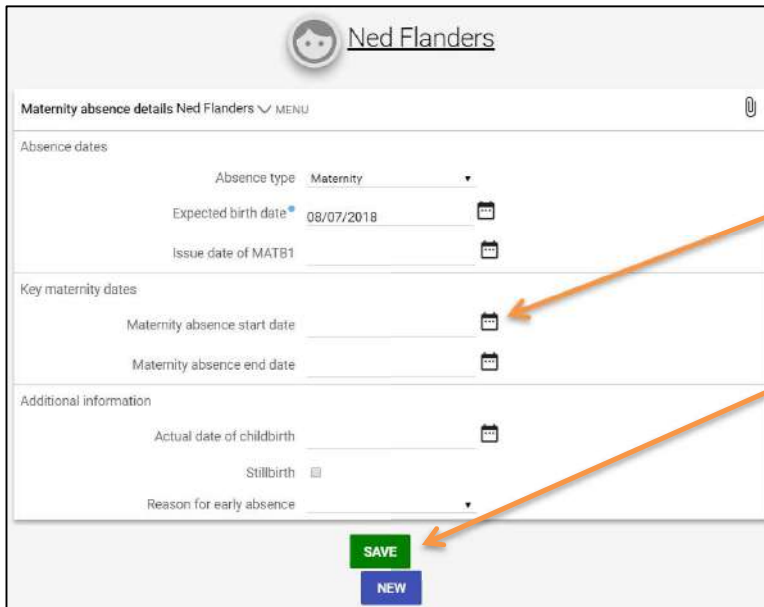
Employment
HR Administrative Officer - HR Team - Employee - Part time - Permanent
Started on 01/02/2017

Calendar
VIEW FULL CALENDAR
03 - 16 January 2018
03 04 05 06 07 08 09 10 11 12 13 14 15 16

Summary:
8.5 Holiday hours left*
23 Bradford factor*

LINKS
[Personal Information](#)
[Employment Information](#)
[Holiday and Other Absence](#)
[Sickness](#)

Your screen will now look like this:



Maternity absence details Ned Flanders MENU

Absence dates

Absence type: Maternity

Expected birth date: 08/07/2018

Issue date of MATB1

Key maternity dates

Maternity absence start date

Maternity absence end date

Additional information

Actual date of childbirth

Stillbirth

Reason for early absence

SAVE
NEW

Add the start and end date of their maternity absence here and then click **Save**.

If your member of your team has had to start their maternity leave earlier than 11 weeks before their due date, usually on medical grounds, you need to give a reason for their early absence by selecting a reason from the drop down field on the above screen.

You can choose either:

- Premature birth or,
- Pregnancy-related illness

You can also add in the date of the birth of their child/children if necessary, but this isn't a mandatory field.

Adding a keeping in touch (KIT) day

Team members, currently on leave, are entitled to up to 10 keeping in touch (KIT) days whilst they are on leave. These days aren't mandatory and mustn't be taken earlier than two weeks following the birth of their baby, but they are a useful way for a new parent to ease their return to work to re-familiarise themselves with the workplace and to try out childcare options and arrangements.

The entitlement to Maternity or Adoption Allowance is not altered or stopped when they come in for a KIT day and they may receive an additional day's pay for every KIT day they do if they submit the relevant claim form. They may also be offered time off in lieu of payment for doing a KIT day.

KIT days are arranged as an agreed day between yourself and your team member. A member of staff cannot demand a KIT day and equally you cannot demand your member of staff completes a KIT day.

Employees are required to let Social Security, General Benefits know when they have worked a KIT day. If someone works over the allowed 10 days, whether they are part-time or full-time, they will lose a day's maternity or adoption allowance for each day over that they work.

Please note that the team member and manager will need to submit an overtime claim form to OHR Payroll to claim payment for the number of hours they came into work for each of their KIT day.

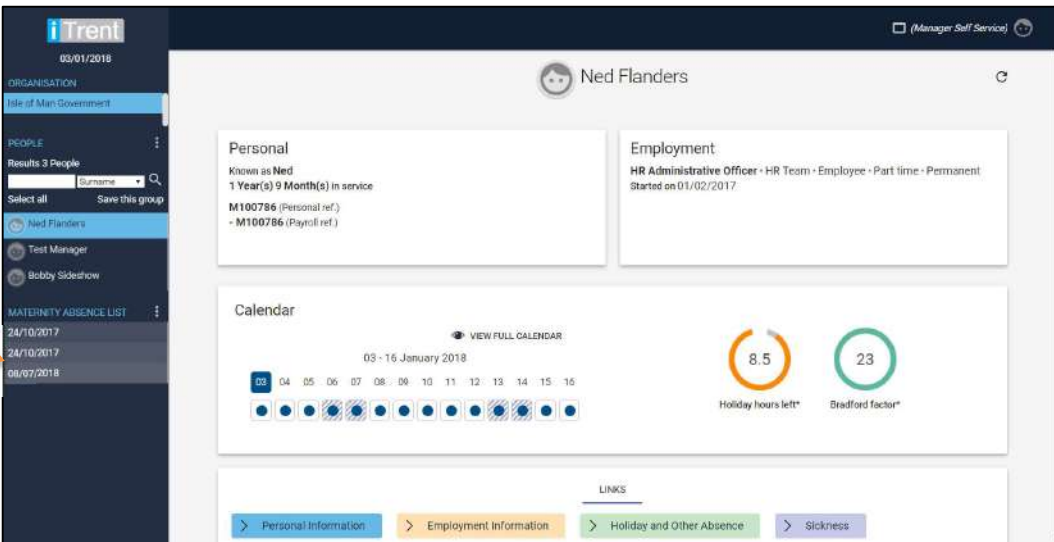
To record a KIT day, simply click on **New Maternity KIT Day**:



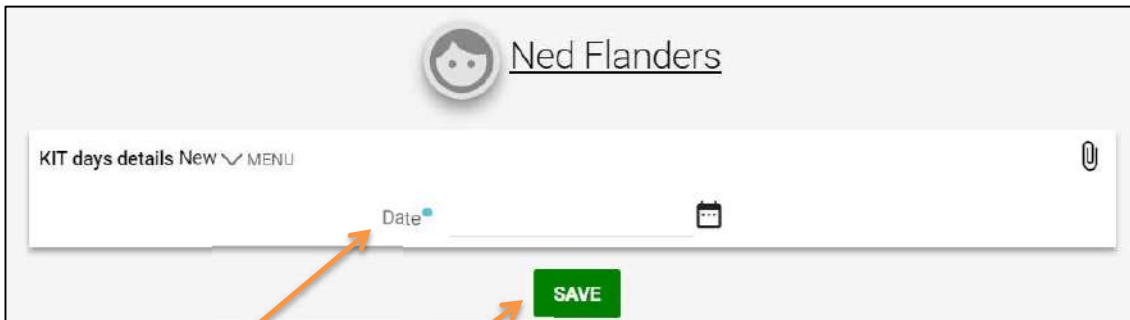
New Maternity Details	View Maternity Details	New Maternity KIT Day	View Maternity KIT Day	Run Maternity Letter Merge
New Adoption Details	View Adoption Details	New Adoption KIT Day	View Adoption KIT Day	Run Adoption Letter Merge
New Paternity Details	View Paternity Details	Run Paternity Letter Merge		

Your screen will now look like this:

Click on the maternity period you want to add the KIT day from the list here:



Your screen will now look like this:

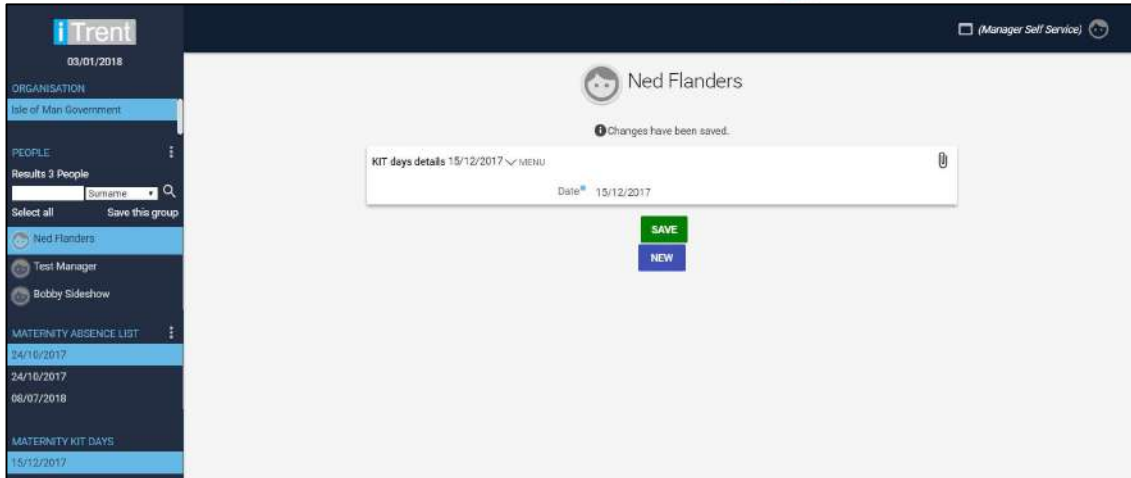


Complete the **Date** and click on **Save**.

For example, if your team member worked a KIT day on the 15th December 2017 your screen would now look like this:



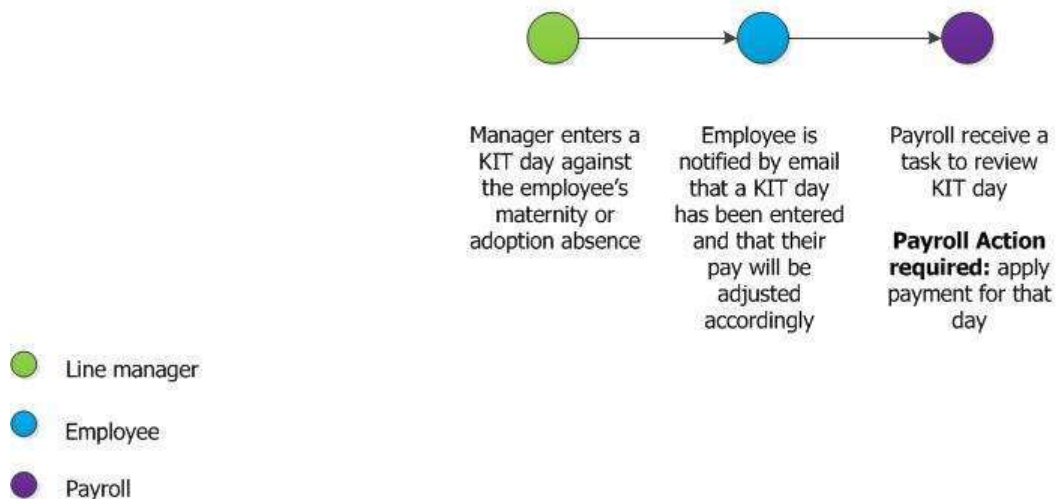
Your screen will now look like this:



These KIT days can be viewed via the “view KIT day” tiles, from there you can select the maternity or adoption period needing to be accessed.

Maternity and Adoption KIT day process

Maternity and Adoption Keeping in Touch (KIT) Day process in PiP



Creating letters

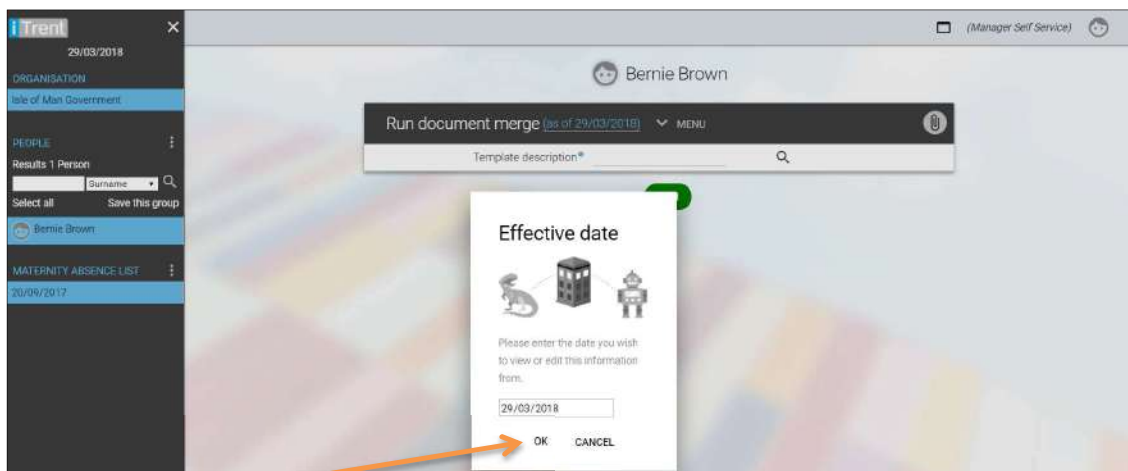
If you require support in producing a maternity/ adoption/ paternity letter for your team member please contact the OHR PiP Helpdesk who will take you through this process step by step. When recording maternity/ adoption/ paternity absences on PiP For My Team you are required to create and print letters confirming dates for your team member.

To create a letter for your team member follow the example below:



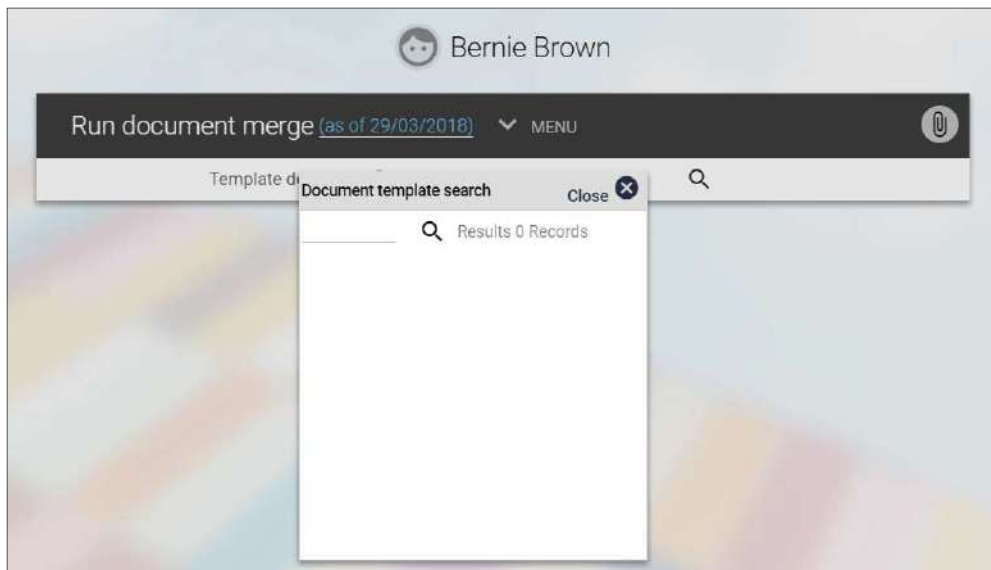
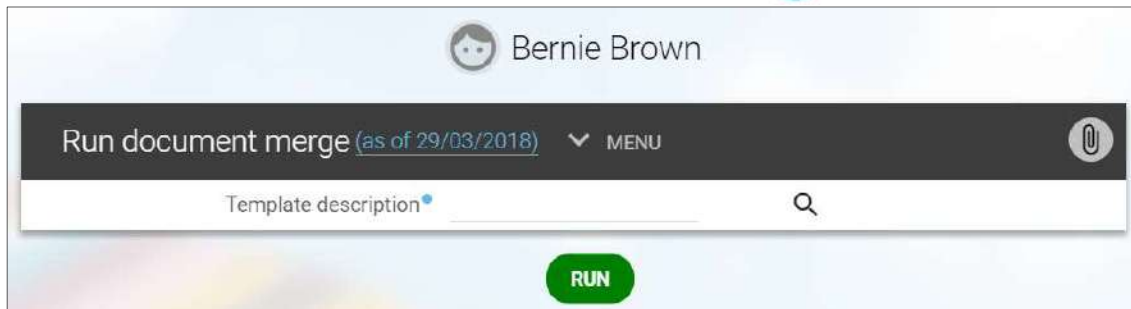
From the Links simply click on **Run Maternity Letter Merge**.

Your screen will now look like this:



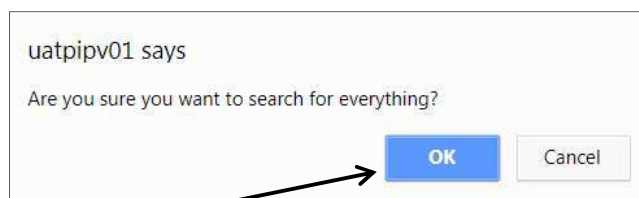
Click **Ok**.

Choose the letter template you need to use by clicking on the magnifying glass:



If you are unsure of the template you required simply click on the magnifying glass to search for all the relevant maternity letter templates.

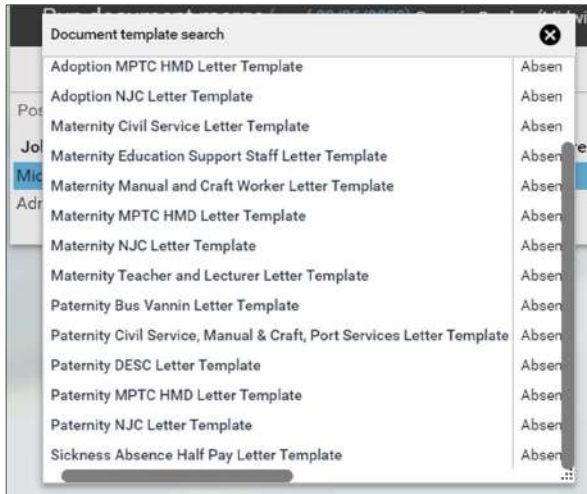
You will then see the following message on your screen:



Click **Ok**.

You will then see a list of the available templates.

For example,

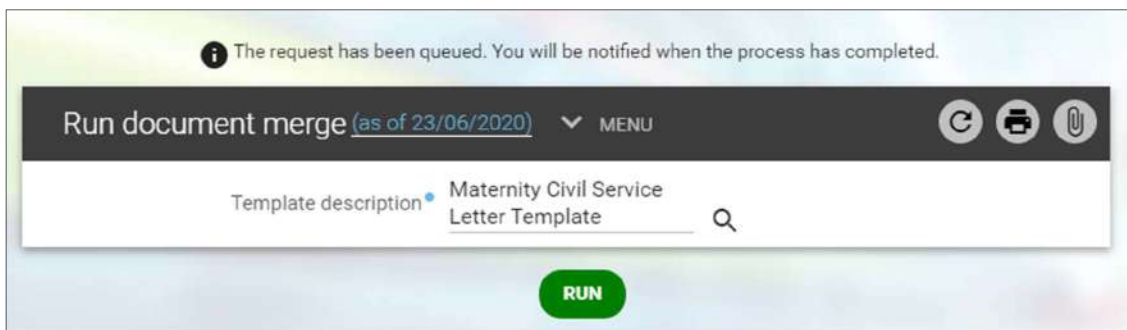


Click on the template you want to use.



Click **Run**.

Your screen will now look like this and will include a message at the top stating your letter merge is being processed:



Once the process is complete you can review the letter and print it from your **To Do List**.

Click on **PROCESSES**:



TO DO LIST (4) **PROCESSES (1)** X

Filter: All active Sort by: Due date ↑↓

☐ Select all

	Confirm Insurance Buddy One - E001642 * Finance * Due: 20/10/2018	NOT STARTED More...	>
	Confirm Insurance Buddy One - E001642 * Finance * Due: 20/10/2018	NOT STARTED More...	>
	Time & Expenses claim Buddy One - MED000027 (Monthly Payroll) * Finance * Mileage & Expense Claims * Due: 29/10/2018	REQUIRES AUTHORISATION More...	>
	Time & Expenses claim Buddy One - OTD000005 (Monthly Payroll) * Finance * Overtime and Allowances Claims (Port Services) * Due: 29/10/2018	REQUIRES AUTHORISATION More...	>

The letter you requested will then be listed as a **Document merge** on your Processes list:

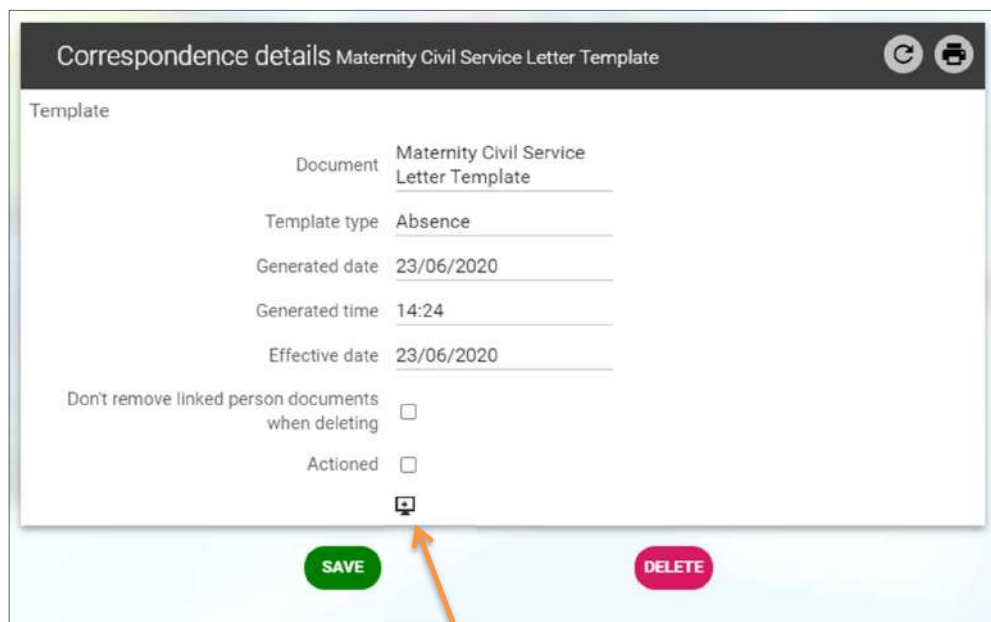


TO DO LIST (12) **PROCESSES (0)** X

Document merge, Isle of Man Government	COMPLETE 29/03/2018 10:19	>
Report - Employee Contact Details, Isle of Man Government	COMPLETE 28/03/2018 15:50	>
Report - Employee Information Check, Isle of Man Government	COMPLETE 29/03/2018 15:32	>

Click on the arrow on the correct process.

Your screen will now look like this:



Correspondence details Maternity Civil Service Letter Template

Template

Document: Maternity Civil Service Letter Template

Template type: Absence

Generated date: 23/06/2020

Generated time: 14:24

Effective date: 23/06/2020

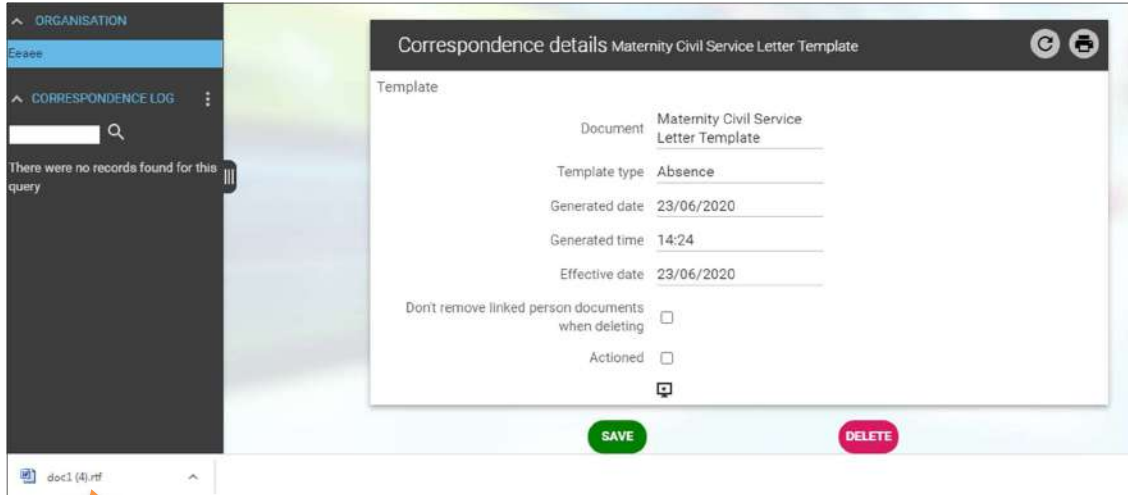
Don't remove linked person documents when deleting: ☐

Actioned: ☐

SAVE **DELETE**

To review, edit, save or print a copy of the letter click on the download icon.

Your screen will now look like this:



Click **here** to open the letter.

Here's a sample letter:

Mrs <<forename_1_initial>> <<forename_2_initial>> Brown
<<house_name>>
<<numberstreet>>
<<local_area>>
<<posttown>>
IM2 1JU
<<country>>

29 March 2018

Dear Mrs Brown

Congratulations and thank you for telling me about your pregnancy and the date that your baby is due. I am writing to you about your maternity leave and pay.

As we have discussed, you are eligible for 26 weeks' ordinary maternity leave.

Given your chosen start date of 15 September 2017, your maternity leave will end on 14 June 2018.

If you want to change the date your leave starts you must, if at all possible, tell me at least 28 days before your proposed new start date or 28 days before 15 September 2017 (your original start date), whichever is sooner.

If you decide to return to work before 14 June 2018, you must give me at least 28 days' notice.

As we discussed, you are eligible for 26 weeks' Statutory Maternity Pay. This will be payable as follows;

<u>Entitlement period</u>	<u>Rate (£)</u>
6 weeks	100
	50

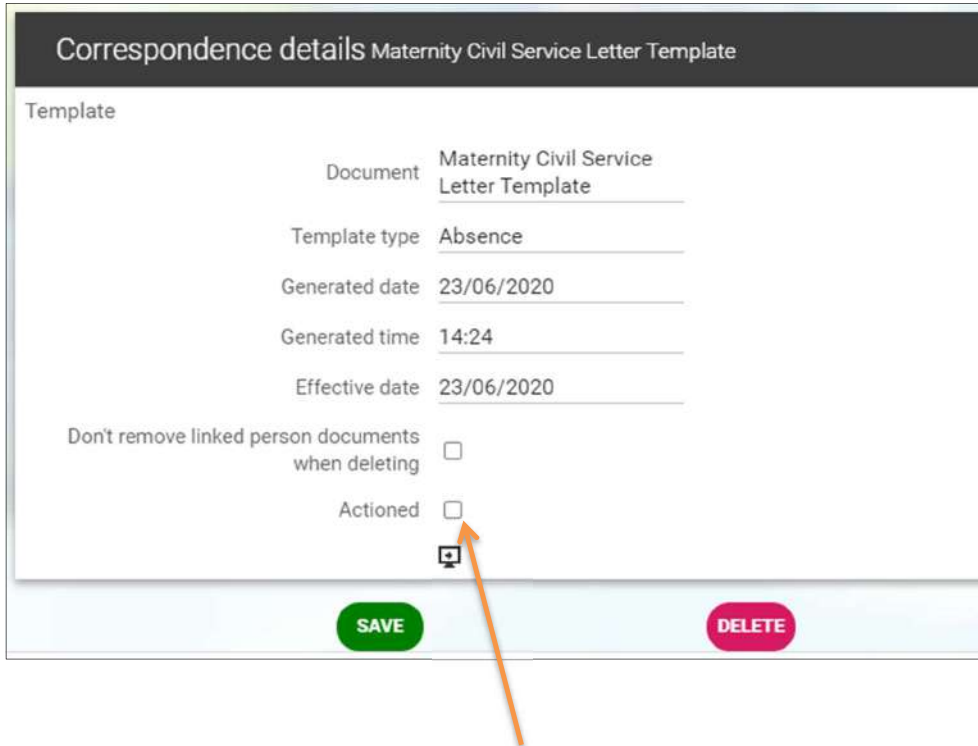
As your employer I want to make sure that your health and safety as a pregnant mother are protected while you are working, and that you are not exposed to risk. I have already carried out an assessment to identify hazards in our workplace that could be a risk to any new, expectant, or breastfeeding mothers. Now you have told me you are pregnant I will arrange for a specific risk assessment of your job and we will discuss what actions to take if any problems are identified. If you have any further concerns, following this assessment and specifically in relation to your pregnancy, please let me know immediately.

If you decide not to return to work you must still give me proper notice. Your decision will not affect your entitlement to SMP.

If you have any questions about any aspect of your maternity entitlement please do not hesitate to get in touch with me. I wish you well.

Yours sincerely,

c.c. Bob Bell



Correspondence details Maternity Civil Service Letter Template

Template

Document Maternity Civil Service Letter Template

Template type Absence

Generated date 23/06/2020

Generated time 14:24

Effective date 23/06/2020

Don't remove linked person documents when deleting ☐

Actioned ☐

☐

SAVE **DELETE**

To complete this task tick the **Actioned box** and click **Save**.

Interim process for documents produced in PiP

Please note that no contractual update or absence documents can be loaded into PiP at this time. Document management for these documents will be introduced at a later stage.

Process for managers:

Should you be producing a sickness, maternity, paternity or adoption letter in PiP, please ensure **the document is saved in a secure location with appropriate access within your own Departments area**. We strongly recommend that you password protect the document (Word or PDF) if emailing the document to your team member. You can find guidance on password protecting documents below. Please refer to your Departments Records Management and Document Retention Policy which will confirm how long you should keep the document for.

How to password protect a document:

Excel

File > Protect workbook > Encrypt with password > Type password > retype password

PDF (You must have Adobe Pro for this)

Open the PDF and choose Tools > Protect > Encrypt > Encrypt with Password.

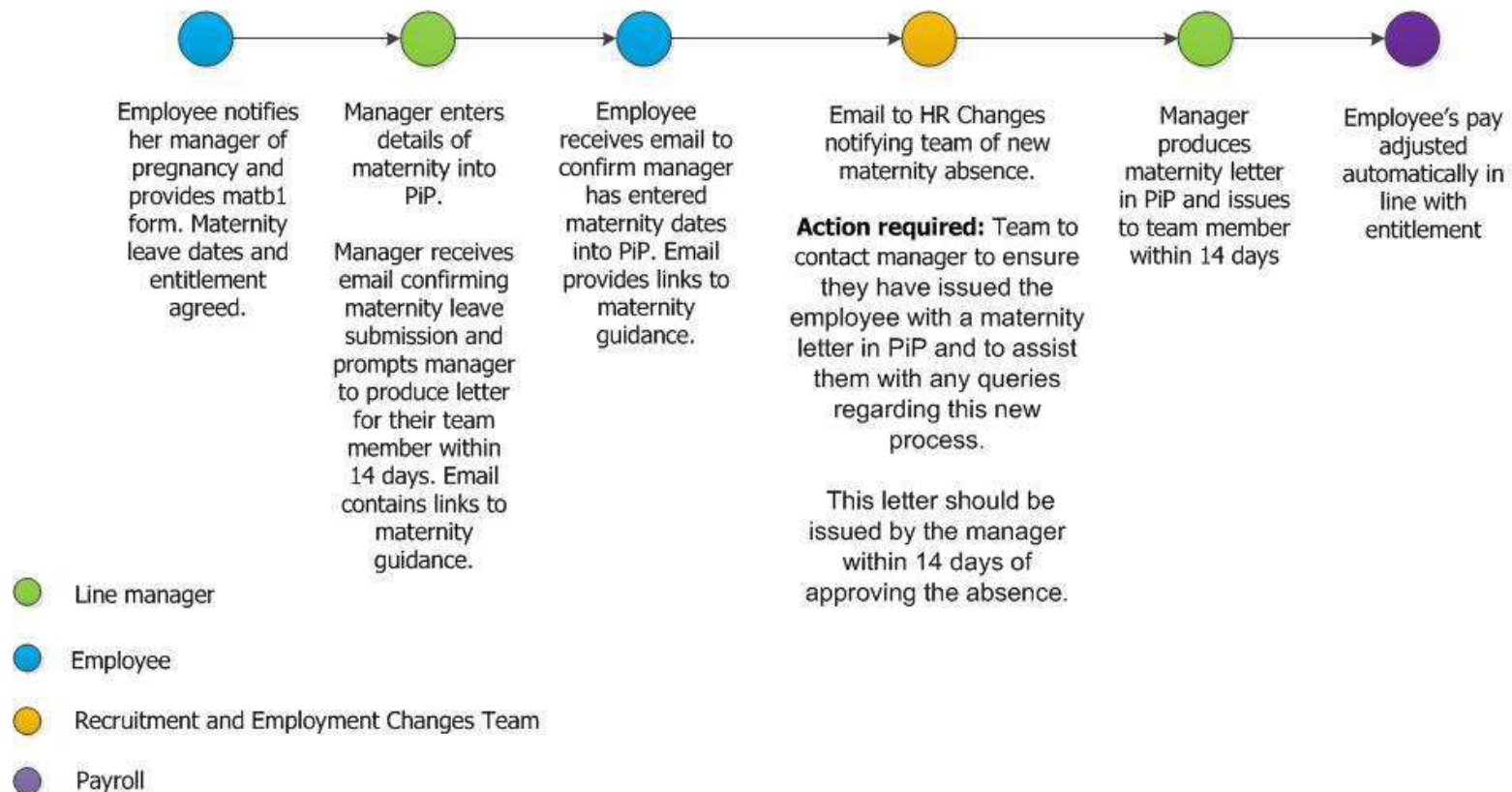
If you receive a prompt, click Yes to change the security. Select Require A Password To Open The Document, then type the password in the corresponding field.

Word

File > Info > Protect Document > Encrypt with Password > Type password > retype password > save

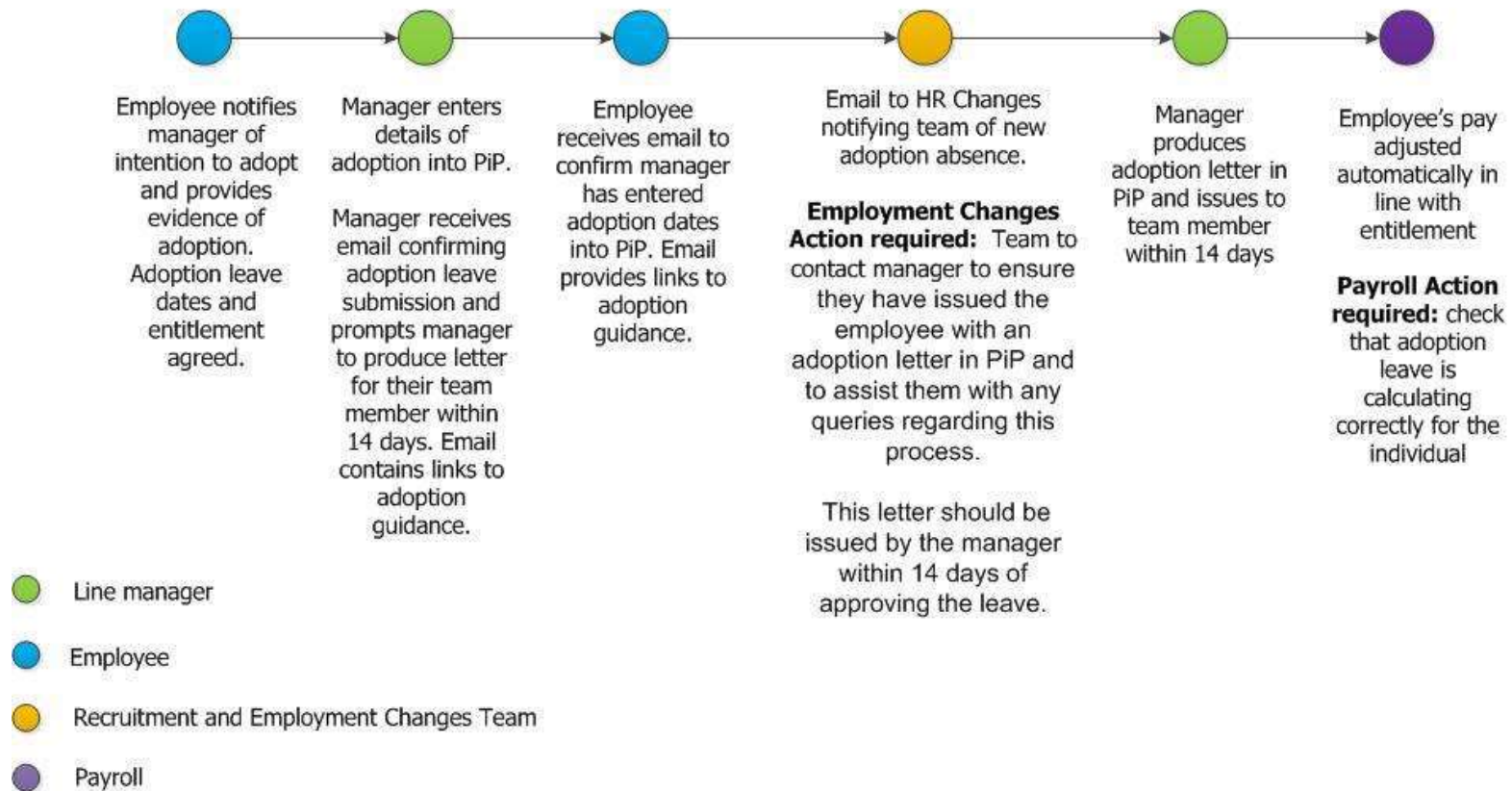
Maternity absence process map

Maternity leave process in PiP



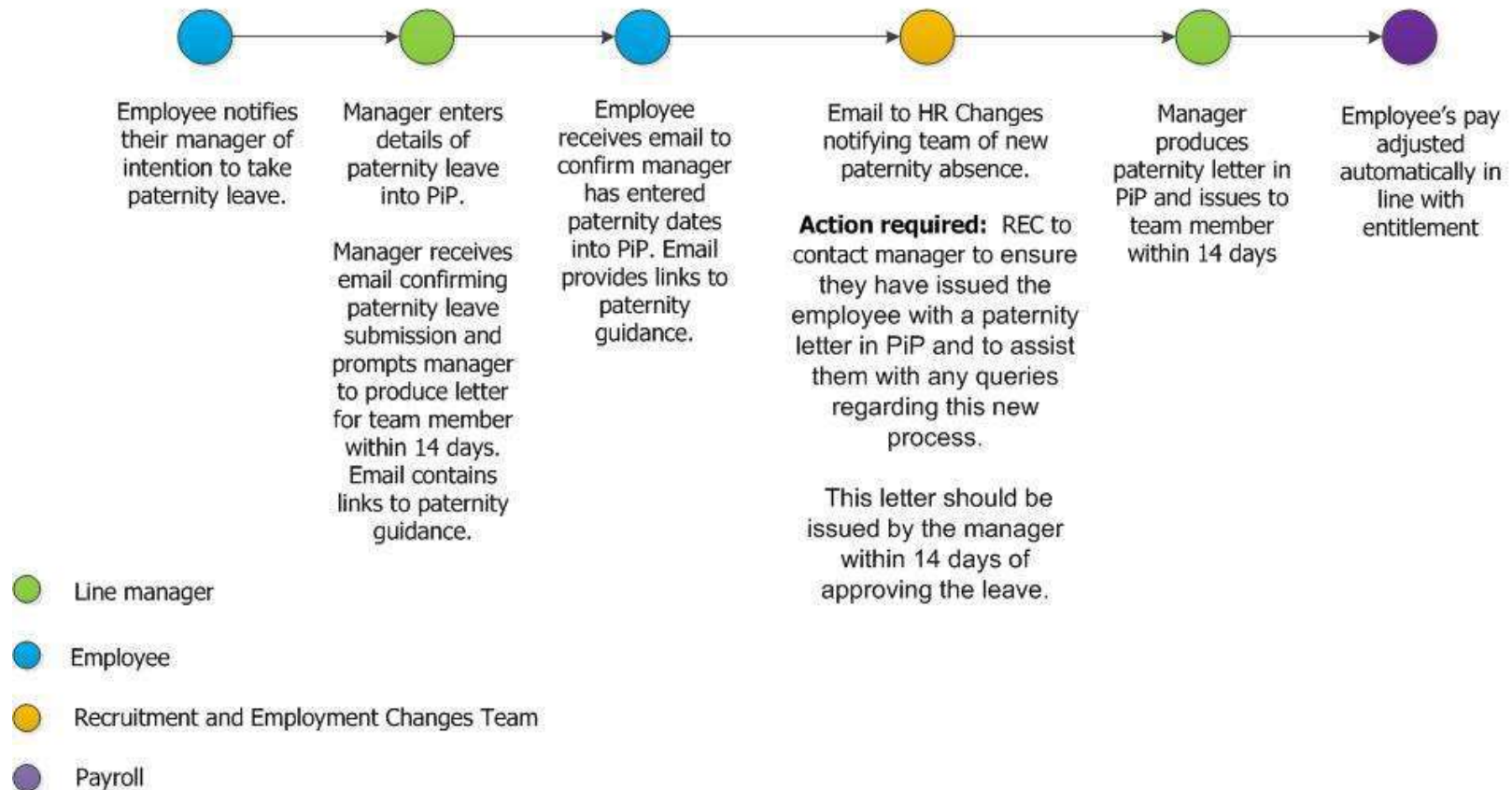
Adoption absence process map

Adoption leave process in PiP



Paternity leave process map

Paternity leave process in PiP



Leavers

In this section you can view the following information:

- Resignation details for your team member if they have entered this via PiP For Me (Employee Self Service)
- Holiday entitlement for your team member who is leaving

As a Line Manager you can also do the following:

- Make one of your team a leaver
- Add an end date to a position for one of your team members

To view the leaver details menu for one of your team first click on **My Staff** and then click on that team member's name.

Select the **Leavers** section, simply click on the **Leavers** button:

Your screen will now look like this:



Resignation details

Within PiP For Me (Employee Self Service) individuals have the ability to submit their resignation details.

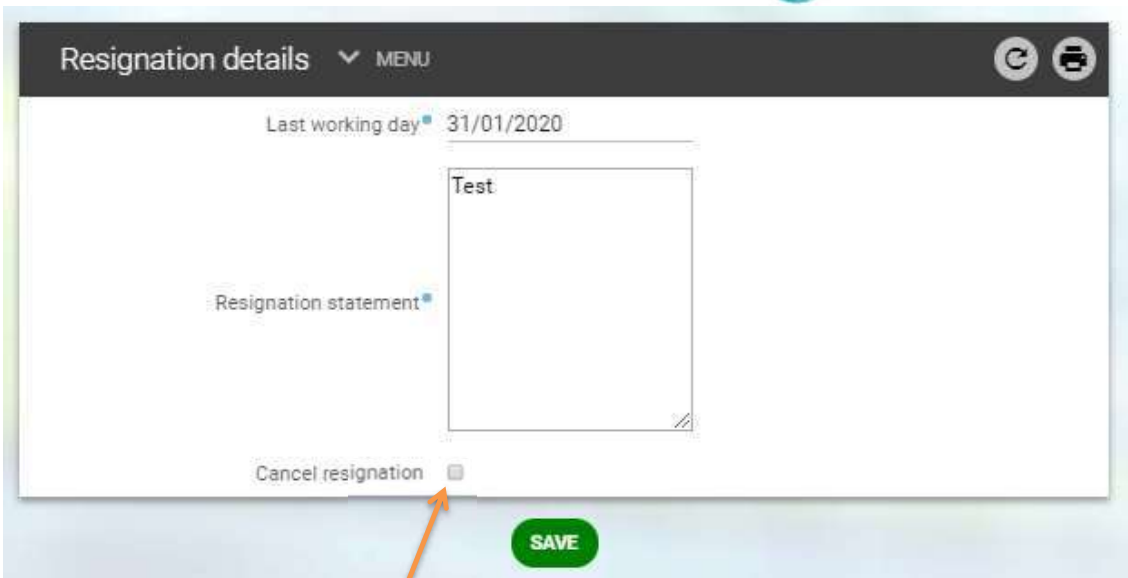
If a member of your team submits their resignation details you will receive a notification email asking you to log into PiP to view the full details.

Note: Your team member will have been notified by PiP that the last working day which they have entered will not be confirmed until they have met with you and mutually agreed their last day of employment.

To view the resignation details click on **Resignation Details** from the **Leavers** menu:



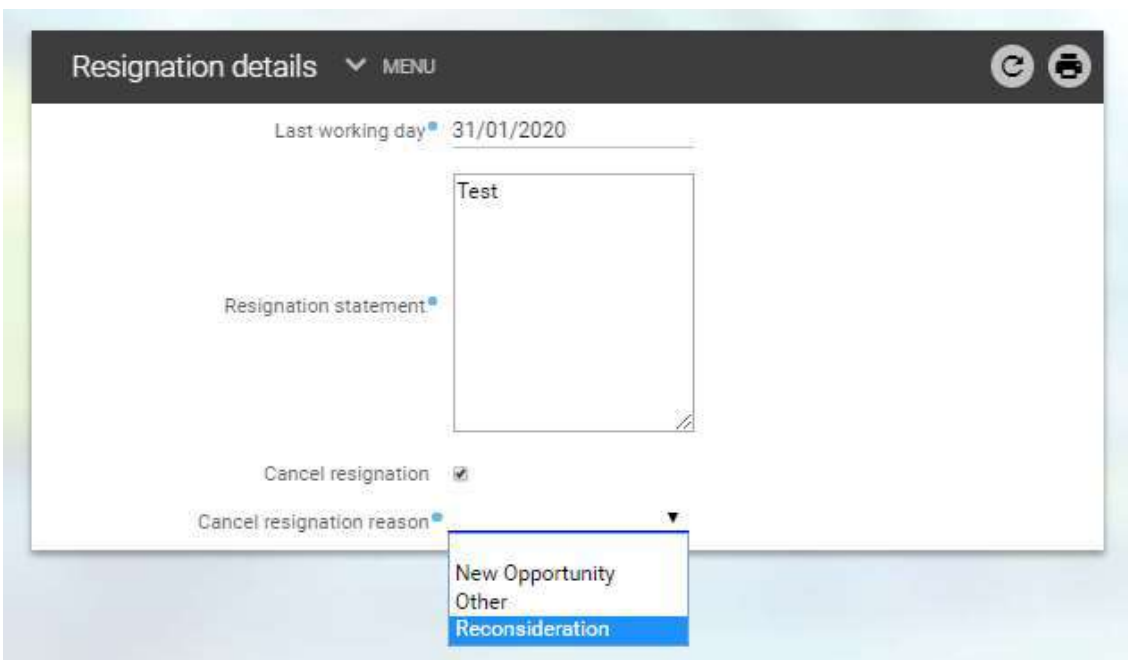
Your screen will now look like this:



If your team member wishes to retract their resignation then you can cancel this within the **Resignation details** screen.

To do this tick the **Cancel resignation** check box, enter the reason and save changes.

Your screen will now look like this:



Making an employee a leaver

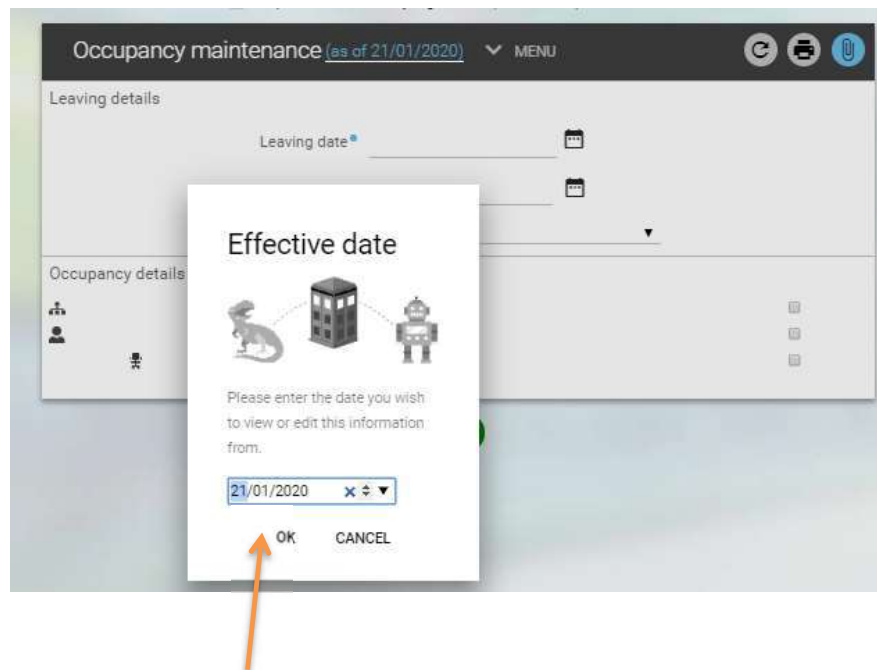
If a member of your team only has one position in IOMG which reports to you or they have multiple positions with different managers but they are leaving the position which reports to you, then you can make them a leaver in this screen.

Note: If your team member has multiple positions with different line managers and they are leaving all positions it isn't possible for you to make them an organisation leaver. Each manager will need to process them as a leaver for the positions which report to them.

To do make them a leaver, simply click on **Make an Employee a Leaver**:

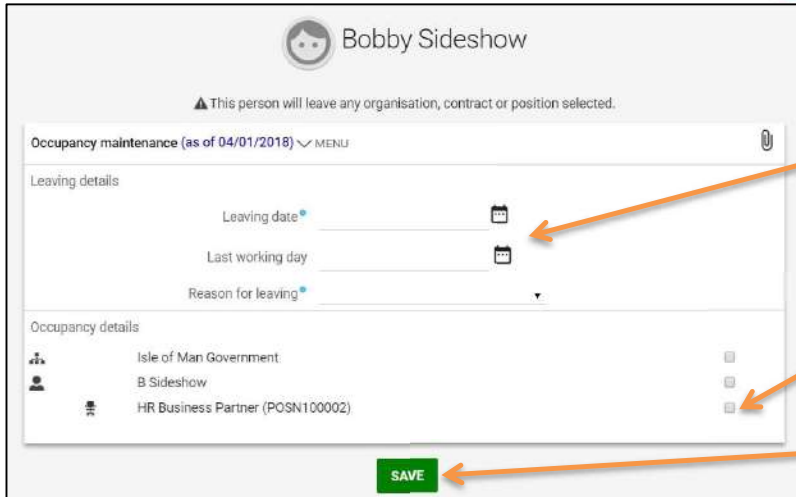


Your screen will now look like this:



Enter the **Effective date** on the message below in order to proceed:

Your screen will now look like this:



Enter the **Leaving date**, the **Last working day** (if this is different from the leaving date, and the **Reason for leaving**.

If they have more than one current role tick the box next to the role they are leaving.

Click **Save**.

Your team member will receive an email to confirm their leaving details and you will also receive an email confirming the leaver information details have been entered. Within the email contains a checklist of things you need to do before your team members last day, e.g. contact GTS to close down network account, security card to be returned etc.

To view the Managers Guide to Leavers, which contains everything you need to ensure your leaver's exit goes as smoothly as possible, click [here](#).

Checking the remaining holiday entitlement when one of your team members leave

As well as checking the balance of someone's holiday entitlement from the Holiday and Other Absence section you can also check it in the Leavers section.

***N.B.:** Please note that the holiday entitlement will not pro-rate to reflect the person's leaving date until you have saved their leaving date. If you save the date first, then click on the holiday entitlement link, their holidays will then be pro-rated.

To do this, simply click on **View Holiday Entitlement:**



Your screen will now look like this:

 Bobby Sideshow

 Holiday entitlement summary ▾ MENU

 Employment details

 Position: HR Business Partner ▾

 Period details

 Holiday period dates: 01/08/2017 - 31/03/2018 (Part) ▾

 Length of service at relevant date: Not started

 Scheme name: PSC CS Annual Leave Bands C - F ▾

 Membership dates: 01/08/2017 -

 Entitlement for period: 143.5 hours (251.6 hours Pro Rata)

From	To	Duration	Remaining entitlement
28/08/2017	28/08/2017	7.5	136
04/09/2017	07/09/2017	30	106
25/12/2017	25/12/2017	7.5	98.5
26/12/2017	26/12/2017	7.5	91
01/01/2018	01/01/2018	7.5	83.5
30/03/2018	30/03/2018	7.5	76

Team members completing LTAs or moving to a new role within IoM Government

Not all staff who leave are leaving the government altogether. It may be that they are moving to a new position in a different area or are completing an acting-up role or LTA with you and are moving back to their substantive role.

If your team member is moving to a different area of the organisation, this transfer will be processed via the OHR Recruitment and PiP Changes Team.


If the team members LTA is coming to an end, simply click on **End Date Position**:

Make an Employee a Leaver

View Holiday Entitlement

End Date Position


Your screen will now look like this:

 Bobby Sideshow

 Position details (as of 04/01/2018) HR Business Partner ▾ MENU

 Job title: HR Business Partner

Effective date



Please enter the date you wish to view or edit this information from.

04/01/2018 x ▾

OK CANCEL

Expected position end reason: Deliverable complete ▾

Expected position end date: 31/12/2017

Structure group 1 ▾

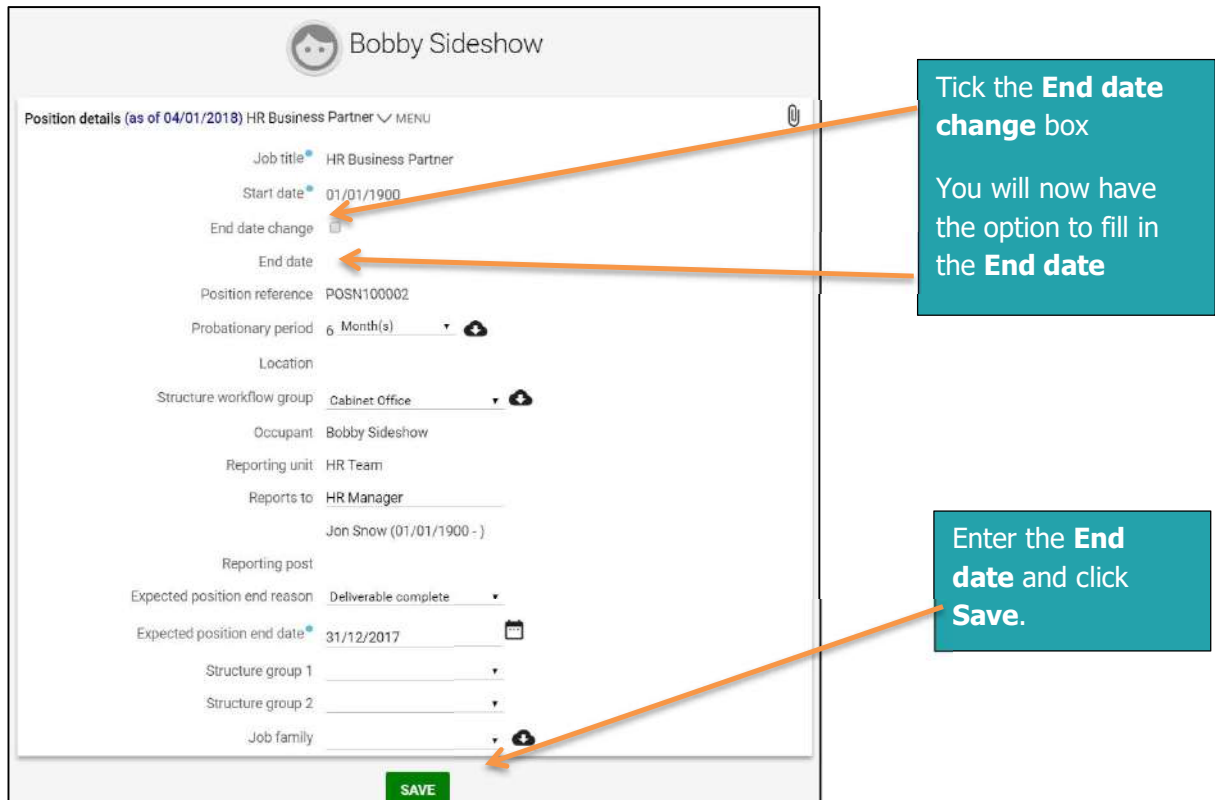
Structure group 2 ▾

Job family ▾

SAVE

Enter the **Effective date** on the message below in order to proceed:

Your screen will now look like this:



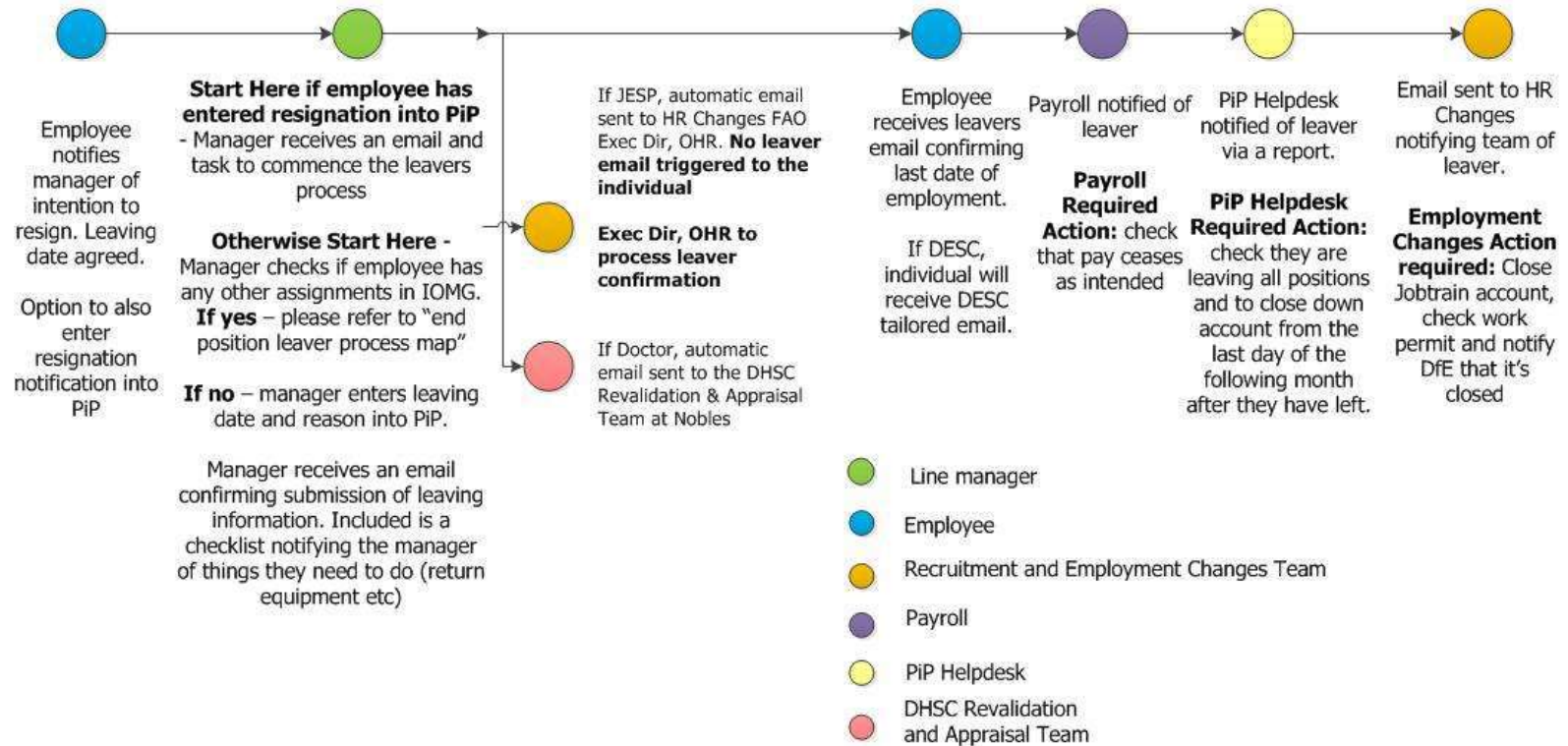
The screenshot shows the 'Bobby Sideshow' HR system interface. The main form is titled 'Position details (as of 04/01/2018) HR Business Partner' and includes a 'MENU' button. The form contains the following fields and values:

- Job title: HR Business Partner
- Start date: 01/01/1900
- End date change: ☐ (An orange arrow points to this checkbox with the instruction: 'Tick the **End date change** box')
- End date: (An orange arrow points to this field with the instruction: 'You will now have the option to fill in the **End date**')
- Position reference: POSN100002
- Probationary period: 6 Month(s)
- Location: (empty)
- Structure workflow group: Cabinet Office
- Occupant: Bobby Sideshow
- Reporting unit: HR Team
- Reports to: HR Manager
- Reporting post: Jon Snow (01/01/1900 -)
- Expected position end reason: Deliverable complete
- Expected position end date: 31/12/2017
- Structure group 1: (empty)
- Structure group 2: (empty)
- Job family: (empty)

At the bottom of the form is a green 'SAVE' button. An orange arrow points to this button with the instruction: 'Enter the **End date** and click **Save**.'

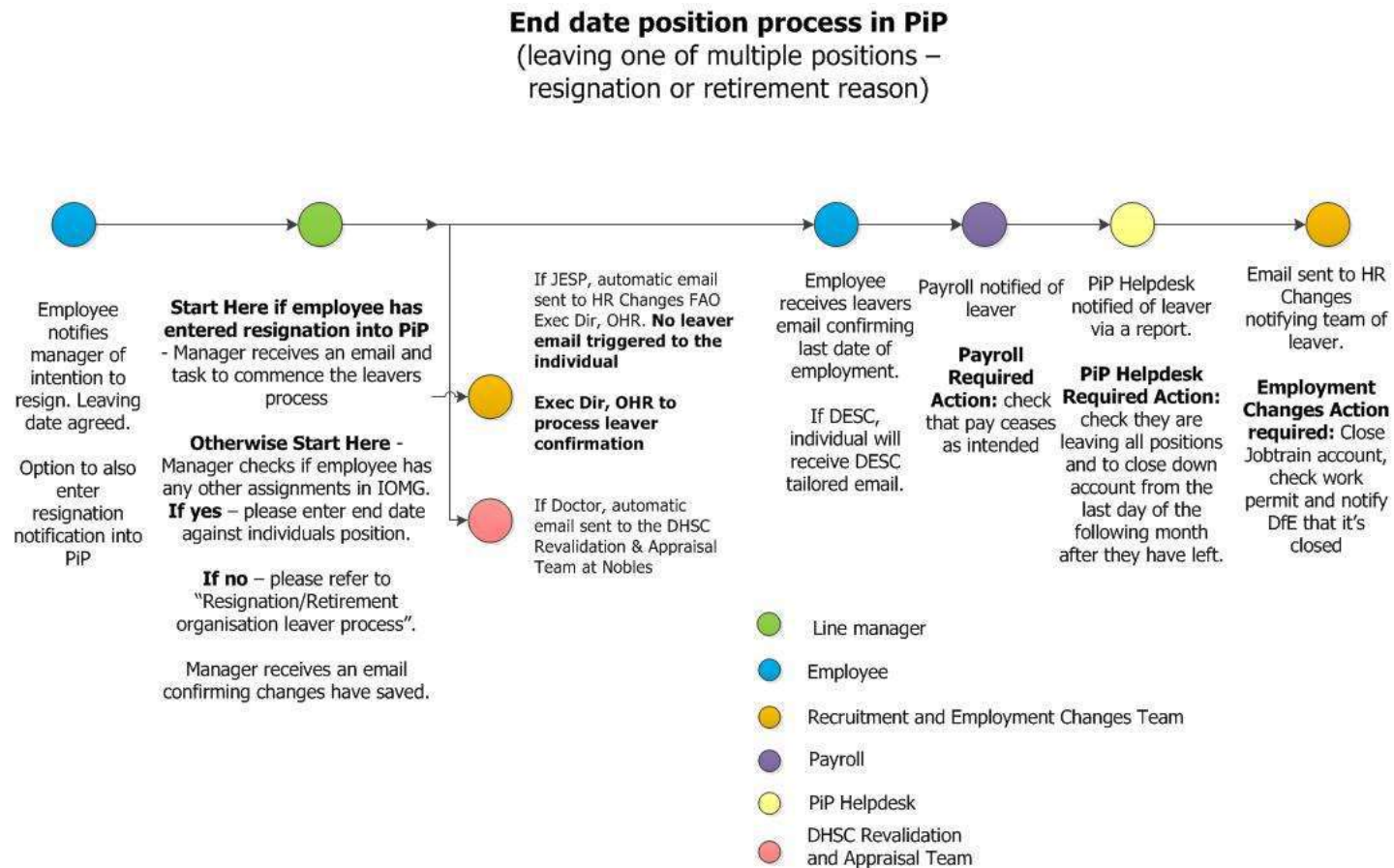
Manager led leaver process map

Resignation/Retirement organisation leaver process in PiP




End date position process map

End date position process in PiP (leaving one of multiple positions – resignation or retirement reason)



Attachments

Interim process for documents produced in PiP

Please note that documents cannot be uploaded or viewed in PiP at this time, however the paperclip icon  will still appear. Document management for these documents will be introduced at a later stage.

Process for managers:

Should you be producing a sickness, maternity, paternity or adoption letter in PiP, please ensure the document is saved in a secure location with appropriate access within your own Departments area. We strongly recommend that you password protect the document (Word or PDF) if emailing the document to your team member. You can find guidance on password protecting documents below. Please refer to your Departments Records Management and Document Retention Policy which will confirm how long you should keep the document for.

How to password protect a document:

Excel

File > Protect workbook > Encrypt with password > Type password > retype password

PDF (You must have Adobe Pro for this)

Open the PDF and choose Tools > Protect > Encrypt > Encrypt with Password.

If you receive a prompt, click Yes to change the security. Select Require A Password To Open The Document, then type the password in the corresponding field.

Word

File > Info > Protect Document > Encrypt with Password > Type password > retype password > save

Creation of brand new position

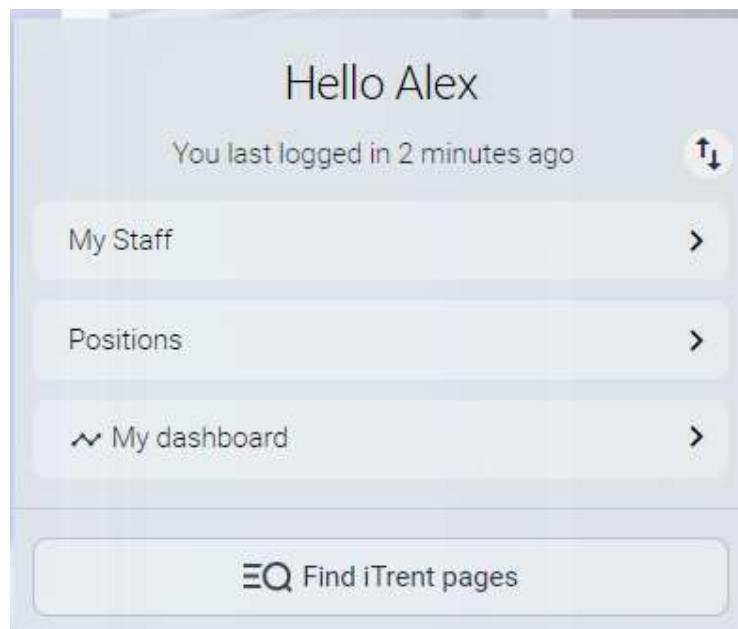
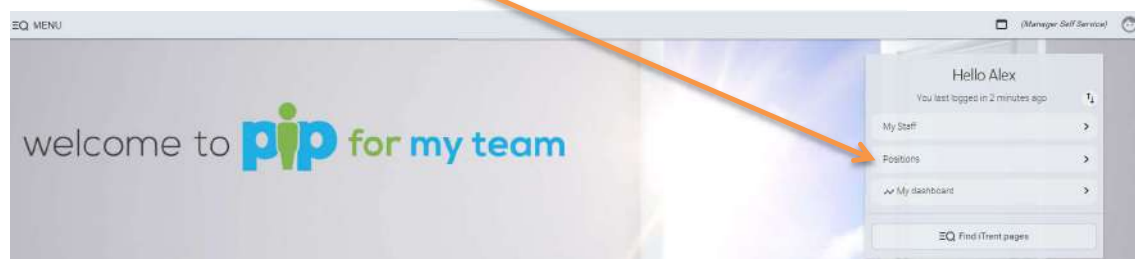
Positions changes (creating additional positions, amending details and deleting positions)

In this section of PiP For My Team you can action the following position changes:

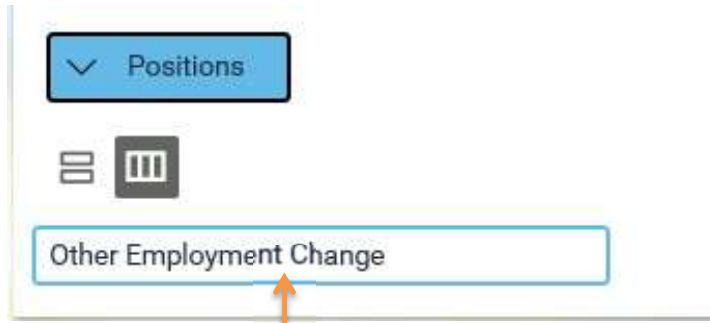
- Convert existing position into a new position
- Create additional position to this post ('I want another one of these')
- Delete position
- Ex-gratia/Responsibility allowance payment request
- Grade change request
- Increase or decrease hours/FTE of position
- Transfer employee into position *to be completed by receiving manager

Before you submit a change request for any of the above we would recommend that you request a position/structure report from the OHR PiP Helpdesk (askpip@gov.im) to obtain a list of the positions and position reference numbers in your area.

To action any of the above, click on **Positions** from your PiP For My Team home screen.



Your screen will now look like this

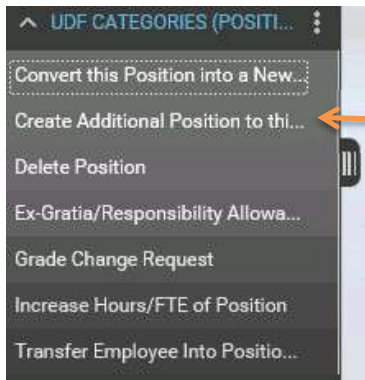


Click on **Other Employment Change**.

Using the search bar on the left hand side of your screen, search for the position you wish to make a change to. You can search via different categories, including job title, position reference number, post, person's surname who is occupying that position etc. Click on the magnifying glass to start your search.

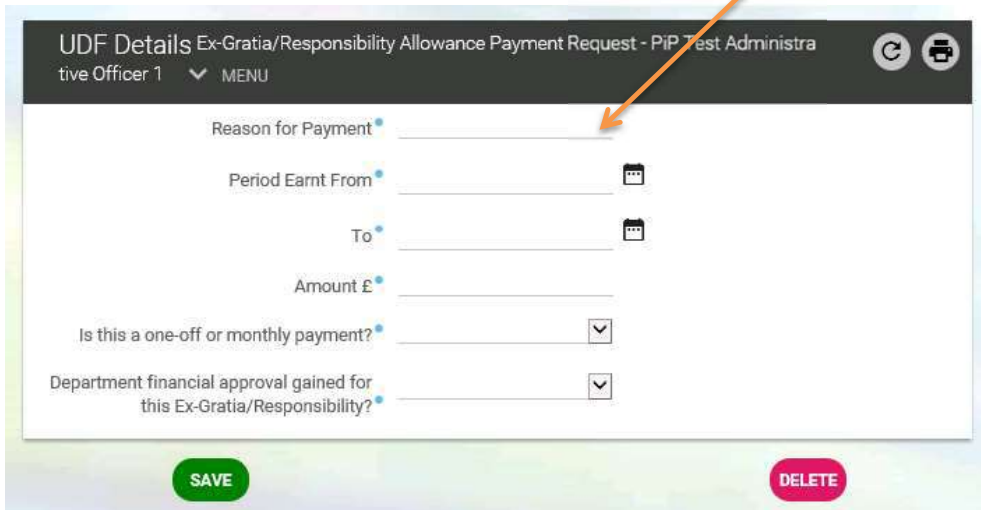


Once your position has been found, click on **Other Employment Change** again and a list of the position changes will appear on the left hand side of your screen under the heading **UDF Categories (Position)**




Select the change you wish to action and the form will open on your screen.


Complete the necessary details of the employment change and click **Save**



UDF Details Ex-Gratia/Responsibility Allowance Payment Request - PiP Test Administrative Officer 1 ▼ MENU

Reason for Payment

Period Earned From 

To 

Amount £

Is this a one-off or monthly payment? ▼

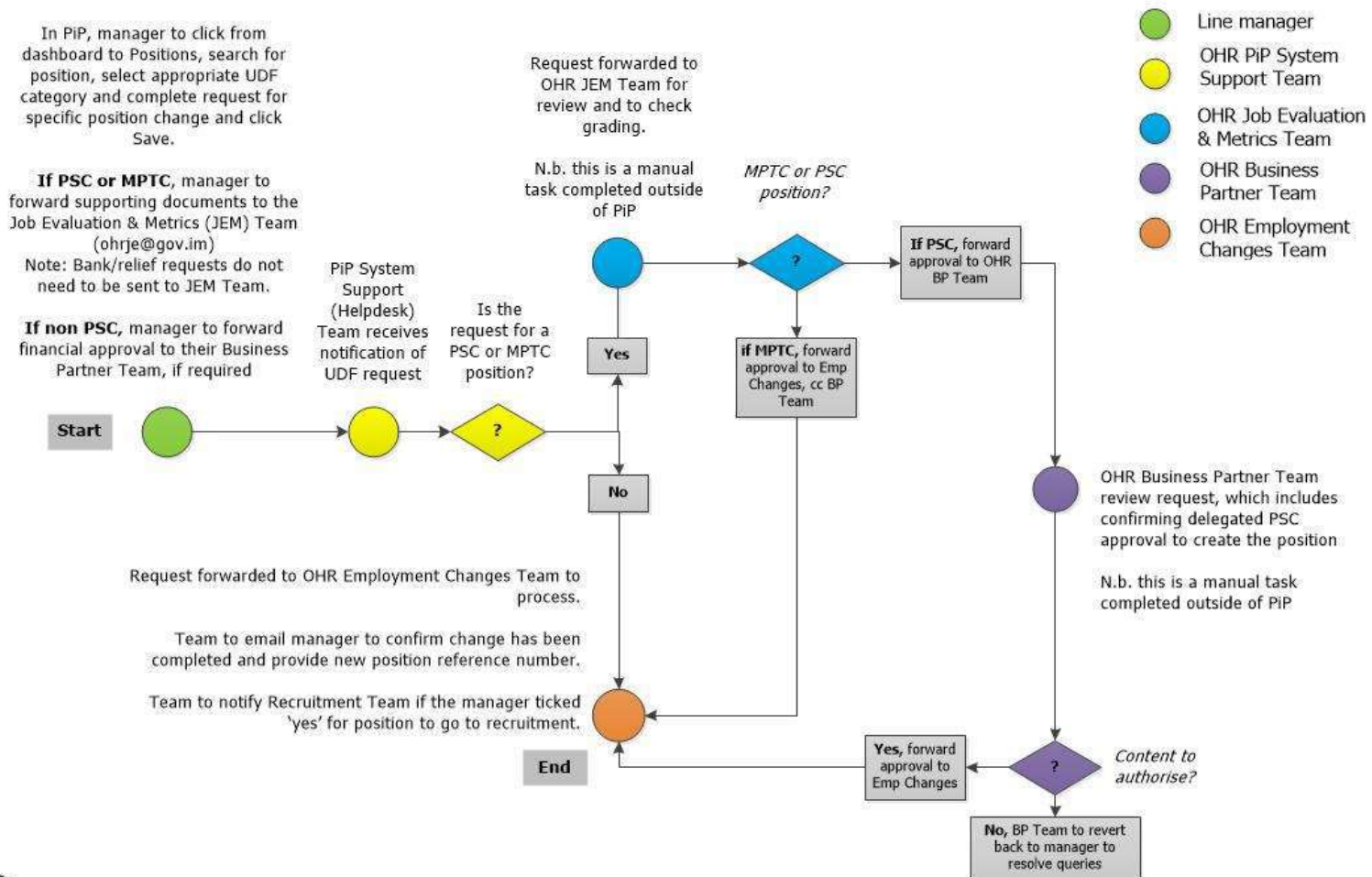
Department financial approval gained for this Ex-Gratia/Responsibility? ▼

SAVE **DELETE**

Your request will be sent to the OHR PiP Helpdesk Team for review and if specific approval is required e.g. Business Partner Approval, the Helpdesk Team will forward the request on to the relevant team, before the request is processed.

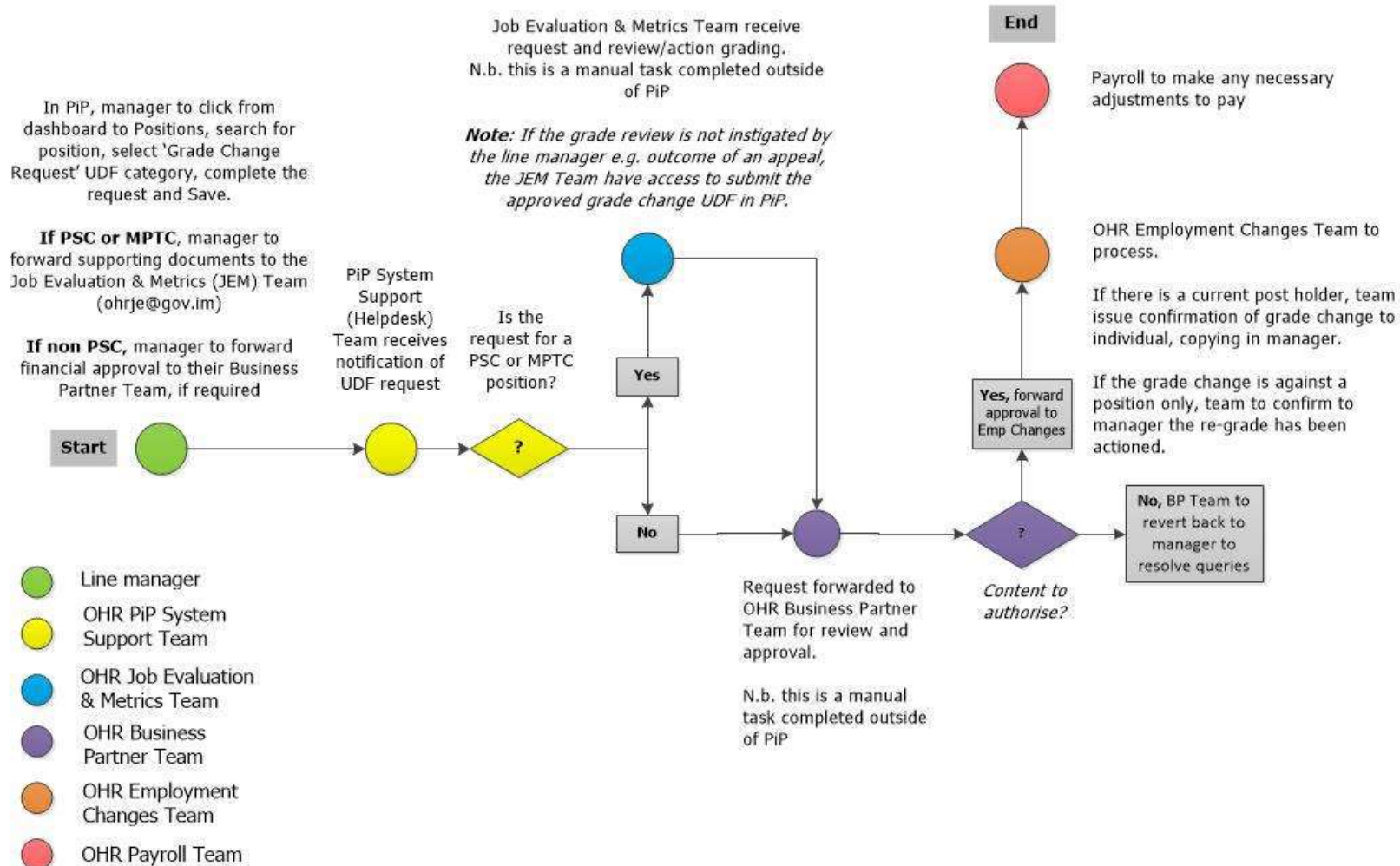
Converting an existing position into a new position or Create an additional existing position process

"Converting an Existing Position into a New Position" or "Creating Another Existing Position" Process

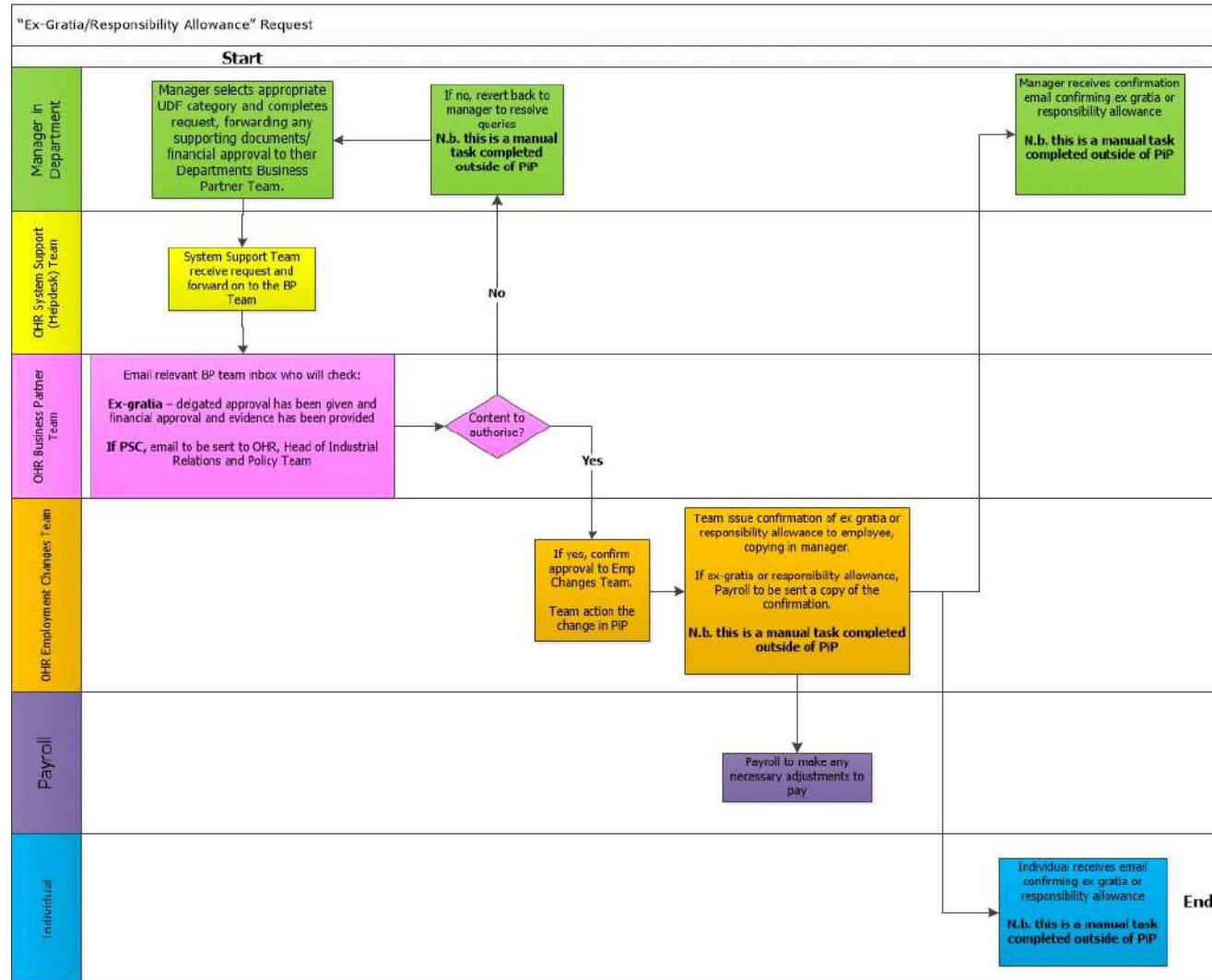


Change of grade process

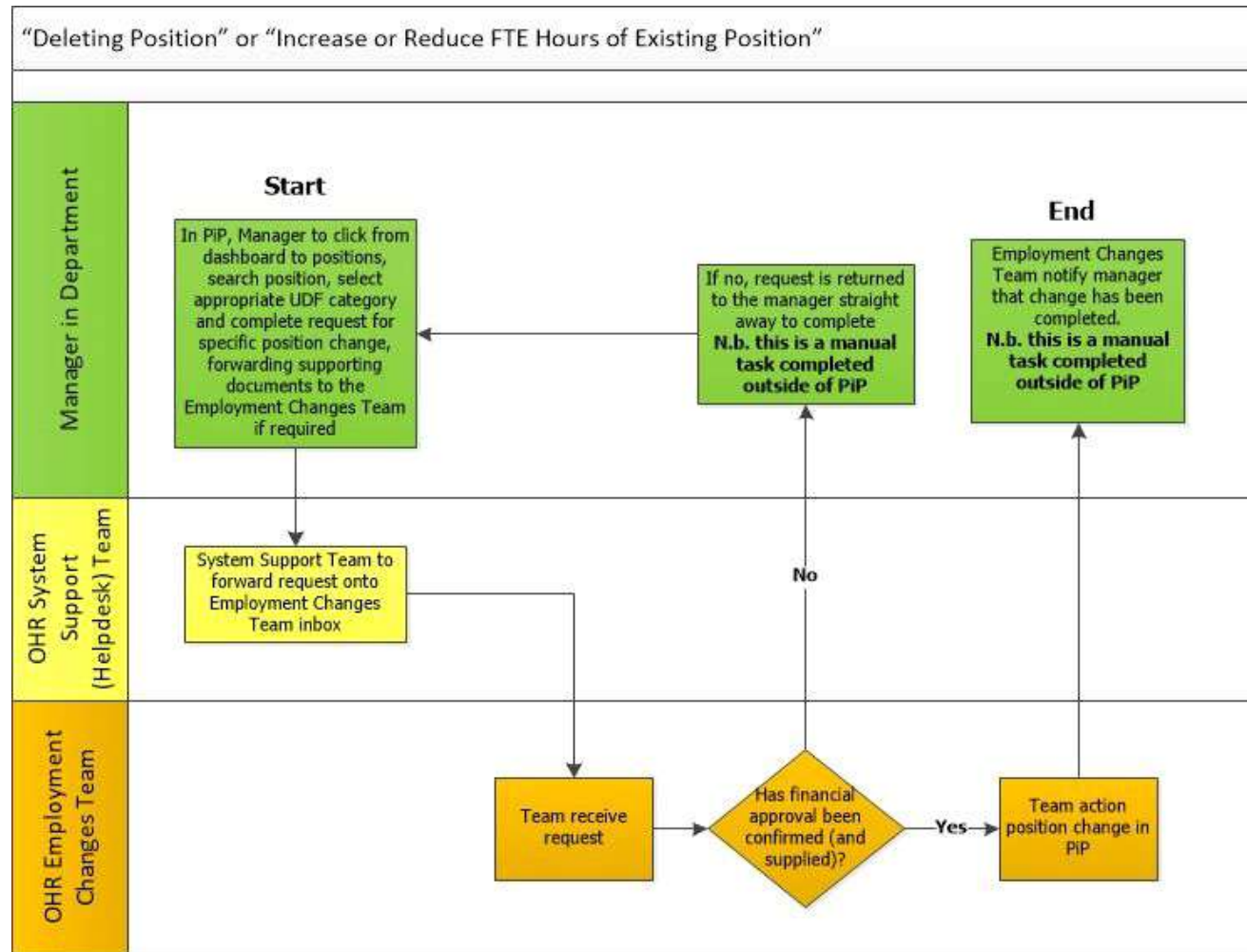
Grade Change Request Process



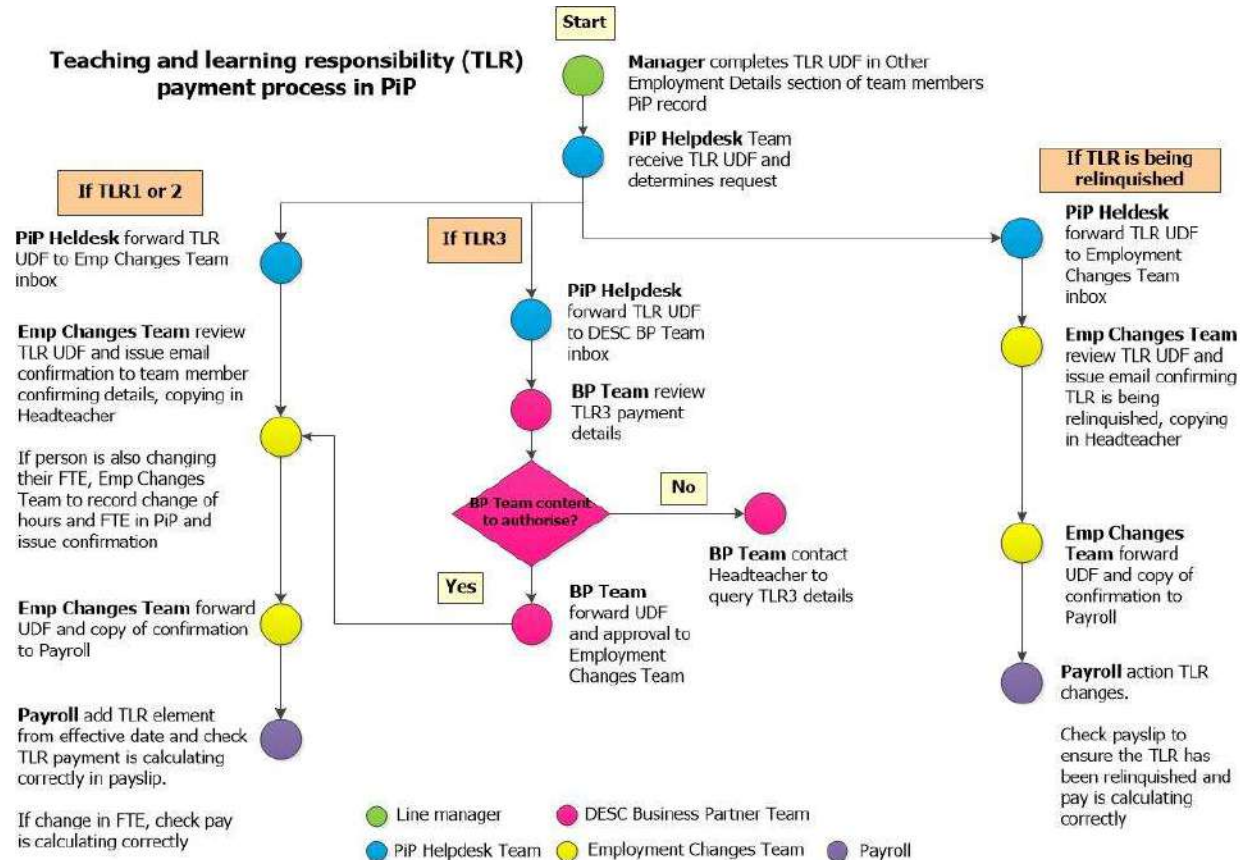
Ex-gratia and responsibility allowance process



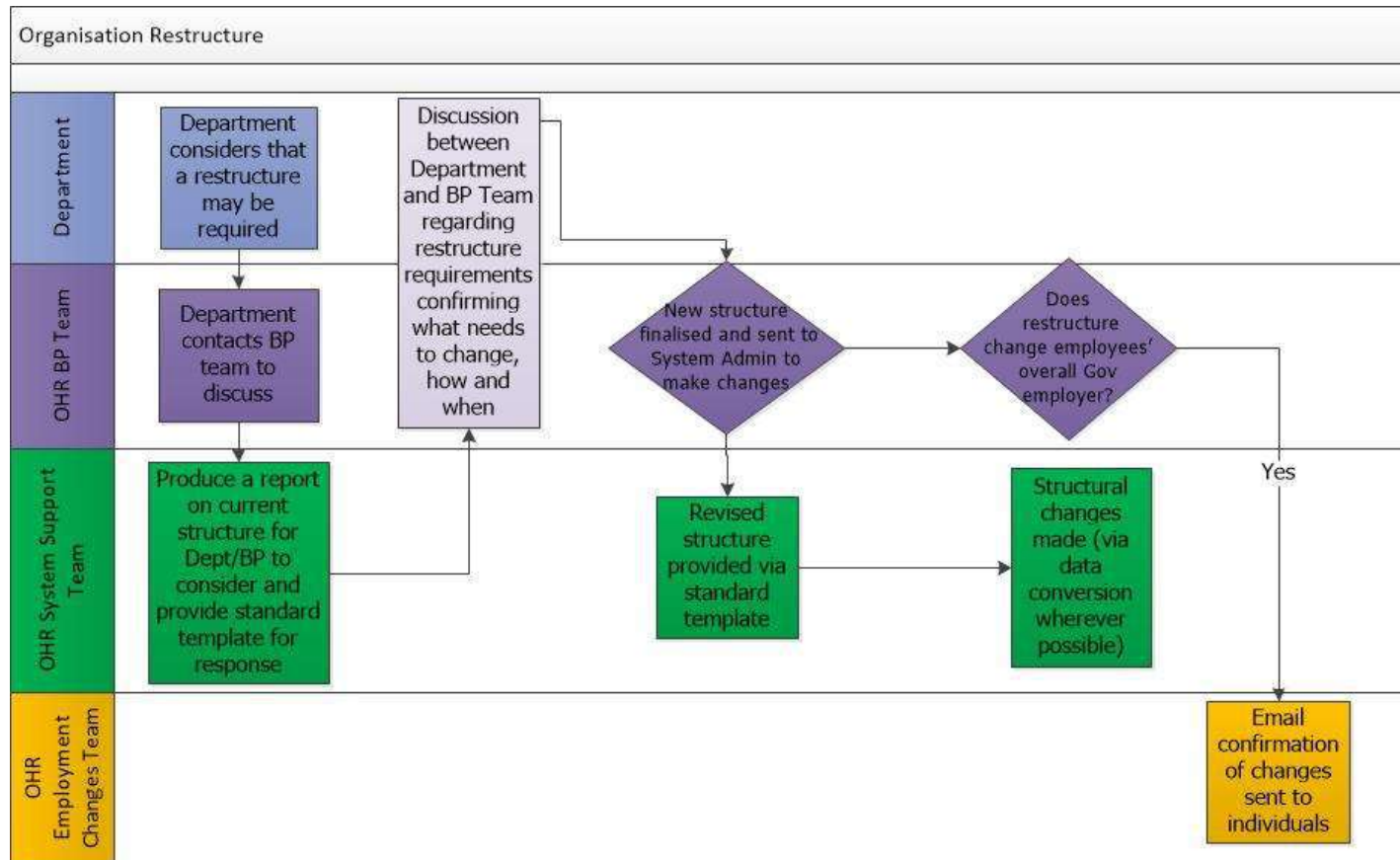
Deleting a position or increasing or reducing the FTE hours of an existing position



Department of Education, Sport and Culture TLR process



Organisation restructure process



Help & Support

OHR support

Should you need support with any of the new processes please contact the following OHR teams who will be happy to talk through the process with you:

Absence processes: PiP Changes Team, Tel: 694303, email: pipchanges@gov.im

Employment Changes processes: PiP Changes Team, Tel: 694303, email: pipchanges@gov.im

Time and Expenses: Payroll Team, Tel: 685595 email: payroll@gov.im

Login or technical support: PiP Helpdesk Tel: 685999 Email: pipsupport@gov.im

Manager – Frequently Asked Questions

What is the new functionality going live now?

PiP For Me includes:

- Annual leave
- Requesting flexi leave
- TOIL
- Sickness absence
- Special leave requests
- Mileage and expenses
- Workflow emails



PiP For My Team (MSS)

- My Staff – full access
- Absence (sickness, annual leave, special leave, maternity, paternity and adoption)
- Employment changes
- Dashboard absence analytics
- Workflow and key task reminders (absence reminders, LTA end dates approaching, etc)

What do I need to do when I first log on after the new functionality is live?

Log in to PiP for my team as normal and just click on the “Getting Started” tab at the bottom of the dashboard and it will take you, step by step, through what checks you need to do to ensure that your record is up to date and correct.

What if I can’t find an appropriate working pattern for my team member in PiP?

If you can’t find the working pattern you need, just contact the PiP Changes Team pipchanges@gov.im who will then build it for you.

How will I know what requests my team have made?

Your dashboard in Manager Self Service (PiP for My Team) will show you all the requests your team have made that require action from you.

You will also receive an email notification from the system for anything that requires your attention.

What do I do if I do not have sufficient Financial Delegations as a manager to authorise a task?

Please take the opportunity to remind yourself of the financial delegations and limits in place in your Department and what you can/can’t authorise, e.g. mileage/expenses claims. If you do not have delegated authority to authorise a claim you can re-direct the request from your team member to the appropriate person with authority.

Call the PiP team on 685999 and they will talk you through this process.

What happens to my tasks when I am on leave?

If you do not process tasks within 7 days they will automatically escalate to your manager to approve in your absence.

I've received an email and/or a task in my To Do list for my team member, but it's not for the job that I manage, what should I do?

If your team member also holds other positions within Government, you may receive workflow emails and possibly authorisation tasks for their other positions.

If you receive a workflow email for their other position which you do not manage, please check your 'To Do' list to see if you have also received an authorisation task.

If you have only received a workflow email and **have not** received an authorisation task, please disregard the email.

If you **have** received an authorisation task, please do not click on the task and simply **contact the PiP Helpdesk on 685999 or pipsupport@gov.im**. The PiP team will then check that the proper authorisations are actioned.

There will be a system update from the suppliers of PiP in the near future which will fix this issue, we appreciate your patience and cooperation until the update is made.

Do I have to manually work out annual leave carry overs?

As all the leave band and carry over rules are in the system, and no leave has been booked during 19/20 the system will assume that your team members will receive their maximum carry over. You will need to make a holiday entitlement adjustment to correct this. The step by step guidance to do this is here: <https://hr.gov.im/media/1795/how-do-i-adjust-toil-or-annual-leave-entitlement.pdf>

For 2020/21 and going forward, any annual leave outstanding at the end of the leave year will be automatically calculated and rolled into the next year, in accordance with the relevant carry over rules in your terms and conditions.

I have a team member who has opted for an additional day's leave for their long service award. What do I need to do in PiP?

Follow the same guidance as above and put "long service" into the reason field.

$$\Delta t = \frac{-b \pm \sqrt{b^2 - 4ac}}{2a}$$

$$\Delta t = \frac{-6.4 \pm \sqrt{(6.4)^2 - 4(-4.9)(1.2)}}{2(-4.9)}$$

$$\Delta t = \frac{-6.4 \pm \sqrt{64.5}}{-9.8}$$

$$\Delta t = \frac{-6.4 \pm 8.0}{-9.8} = -0.16 \text{ s or } 1.5 \text{ s}$$

I have team members who are part time, do I have to manually work out their entitlement?

No, PiP will pro rata their annual leave entitlement if they are part time or started part way through the year.

PiP will also work out when a team member reaches an anniversary date that would adjust their leave entitlement. The system will also pro-rate this accordingly, if necessary.

Can I view other teams' calendars to determine what cover is needed in our area?

No, this can't currently be viewed in PiP owing to the sensitive absence information included, so please continue to have conversations with your colleagues about this, as you do now.

Can I see Bradford Factors?

Yes, you can see the Bradford Factor within each of your team member's records. These will be accurate, real time scores, provided the absence has been entered in to PiP, and they will be recalculated on a daily basis.

What does the tick box for 'Exclude from Bradford Factor' within the sickness absence details screen do?

This is only used for Accident at Work. It will mean that the absence isn't included in Bradford Factor calculation on that team member's employee record.

What about OHR forms?

The OHR forms as you currently know them (OHR1, 3, 5 etc.) and all existing sickness forms, paper and online, will no longer be used when PiP goes live. You will be able to request and action changes in PiP and you will be able to track progress of any workflows/authorisations. The system will also send automatic confirmation e-mails to team members for certain actions, for example completing their leaver information.

How do request for a brand new position to be created as I don't see the form in PiP?

There is a new simplified online form accessible via the intranet to replace the OHR1.

What data has been migrated into PiP from Oracle?

No employment history is being migrated however everyone's organisation start date will be migrated accurately. We have also migrated six years of absence history in order for entitlement calculations to work effectively. It will also mean that the absence reports will be up to date and accurate when PiP goes live.

Can I keep updates in PiP regarding a sickness absence?

Yes, within PiP you have a section called Absence Stages where you can record the dates of any telephone calls, return to work conversations, Occupational Health referrals etc.

How do we record the SC1 form in PiP?

As of 1 April 2018 the claim for Incapacity Benefit (SC1 forms) will only need to be completed when an employee moves to half or nil pay. It is the individual's responsibility to complete the SC1 form and forward it on to Social Security at the time when their pay reduces, so this doesn't need to be recorded in PiP.



Will PiP calculate sick pay?

Yes, PiP will send out an e-mail to both the team member and line manager at around 60 and 30 days prior to an individual reaching half or nil pay. It will still be the responsibility of the line manager to ensure the team member has received their notification and is aware of any impact on their pay.

The line manager can also create a mail merge letter from PiP to send out to the team member.

What do I need to do in PiP if my team member is absent long term?

If your team member is absent long term, if appropriate you should make sure they have changed their email in Employee Self Service to one they use at home so they can still receive their email notifications from PiP while they are not in work.

You should also remind them to log into Employee Self Service at least once a month to ensure their password remains active. If you they have any problems logging in while on long term absence, please ask them to contact the PiP Helpdesk pipsupport@gov.im.

If another manager is covering your team member's role long term, you will need to contact the PiP Helpdesk to obtain the appropriate access for the covering manager – either through requesting a structure amendment so the team report to the covering manager, or by creating an additional PiP position.

You can also record Absence Stages in PiP for your team member.

What period of time do the Dashboard Analytics cover?

They cover the last 12 months of absence records.

I have multiple teams reporting to me, can I see all their information in the Dashboard Analytics?

Yes, all those who ultimately report to you up to three tiers down will be included.

What training will be available for managers?

In addition to offering training to all line managers and Buddies during the "go live" period, the PiP team are creating a wide range of guidance documents, how to leaflets and e-learning videos to help you learn how to use PiP. We will also be holding a number of Manager Self Service briefing sessions prior to go live.



If you require any assistance after go live, you will be able to ask one of the PiP Buddies in your Department for support or you can contact the OHR PiP Helpdesk.

I can only see my direct reports in Manager Self Service, how can I view all my reports?

Click into the blank field above the list of names of your direct reports and then click on the magnifying glass. This will bring up all other reports in your teams, up to three levels down.

Where can I add a GL code and cost centre into a Mileage and Expense Claim?

Yes, it's important to ensure that the right code and cost centre is added to a claim for it to be costed appropriately against your budgets. When you receive a task to authorise a mileage/expense claim, click on the more arrow to review the claim. If the employee has not yet done so, you can add the code into the "Cost Code Override" field.

You will need to enter the 19 digit code. The first 10 digits should be the cost centre, then a space, then the 8 digit GL code

How will excessive Special Leave Paid be prevented?

There is a two-step authorisation process for special leave (paid and unpaid). So a manager will authorise it and then their manager will receive a task to authorise it. The second stage of authorisation is specifically intended to ensure consistency in approach and ensure that special paid leave is not granted excessively.

The Office of Human Resources will also be reporting on special leave that has been granted to support Departments in monitoring claims and authorisations.

How can I get a report I need from PiP?

If you or someone in your are has Admin Role access then they will have reporting capacity, otherwise you can request the information you need either from the PiP Team or your HR Advisory team.

When I look at a team member's record it says they are on probation but they're not – how can I get this corrected?

You don't need to take any action. This issue is in the process of being corrected by the PiP team and should be resolved within the next few weeks.

**Have we answered all your questions? We hope so but if not,
please contact the PiP Team pipsupport@gov.im or speak to
your Department Representative**