

## **Instructions for Department Approvers**

### **29 July 2020**

#### How will I be notified that a form is ready for approval?

When a member of staff within one of the areas for which you are the approver submits the Leavers form online, this will automatically send you an email containing a hyperlink to the HR Portal. By clicking on the hyperlink, you will be taken directly to the form and will be able to review the answers provided.

The HR Portal automatically sends an email reminder to the approver after 72 hours if a form is still awaiting approval.

If you prefer, you can also see all HR Portal tickets awaiting your approval at a glance using the Pending Approvals button at: <https://staff-hub.imperial.ac.uk/support/home>

#### What am I expected to check?

The online form recreates the questions on the current Excel form. Most of the fields are mandatory, so the form cannot be submitted to you unless an answer has been provided to these questions.

The Department Approver is expected to check the information provided, just as you (or a colleague) would now. We anticipate that the annual leave entitlement and ICT account extension questions are most likely to require scrutiny. Guidance at the start of the online form advises that the Leaver should agree their remaining annual leave entitlement with the department before submitting the form.

Guidance on how to calculate the annual leave entitlement is available at: <https://www.imperial.ac.uk/human-resources/leave/annual-leave/calculations/>

As a Department Approver you cannot amend the information provided. You can simply accept or reject the form and add an explanatory note that will be sent back to the 'Requester'.

#### What happens if I reject the form?

Our guidance advises the Leaver to discuss and agree any potentially contentious information before submitting the form. We hope that this will result in very few forms being rejected. However, if you do notice incorrect information you should reject the form and add a note clearly explaining why it has been rejected.

Information in a form cannot be amended once it has been submitted - so when a form is rejected, the HR Portal ticket is closed and the Leaver must submit their request again as a new form. This is a technical constraint which we cannot change.

#### What happens when I approve the form?

As soon as you approve the form it is directed to the appropriate team in the HR Staff Hub. The activity log in the HR Portal will record the date, time and name of approver so that a clear audit trail is available.

Once the HR Staff Hub has processed the form, they will change the ticket status to 'Resolved' and this triggers email notifications to the Payroll and Pensions teams. If you have also approved the Leaver's request to extend their ICT access an email notification will be sent to the ICT Service Desk team. These email notifications contain only the fields required by those teams to complete their subsequent actions.

Resolving the ticket also generates an email to the Leaver's Line Manager to inform them that the request has been processed.

What happens if nobody approves the form?

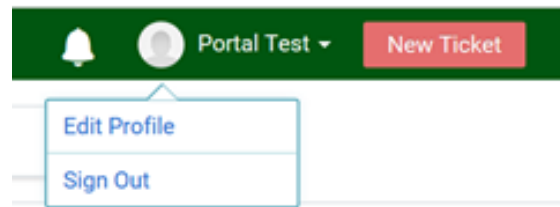
Leavers forms will not be processed until they have been approved by the appropriate Department Approver. The HR Portal automatically sends an email reminder to the approver after 72 hours if a form is still awaiting approval.

How do I delegate the Department Approver role?

The Department Approver role can be delegated to cover periods of absence such as annual leave or illness.

To delegate the approval:

- 1) On the [HR Portal homepage](#) click the arrow by your name and select Edit Profile



- 2) Click on Delegate Approvals



3) Enter the delegate's details and the delegation period, then click Delegate

### Delegate Approvals

Delegate approvals while you are away

**Delegate to \***

Select Delegatee ▼

**Delegate from \***

10-12-2019	10:14am
------------	---------

**Delegate until**

DD-MM-YYYY	HH:MM
------------	-------

**Notes**

#### How do I change the Department Approver?

If you wish to permanently change the Department Approver please contact [HR Strategic Support](#).

#### Other information

There are occasionally situations which fall outside of the standard Leavers scenario such as redundancy (non-fixed term contract), dismissal or death in service. These are not currently covered by the online form and in the short term will continue to be processed 'offline' via consultation with [HR Strategic Support](#) as we develop an appropriate longer-term solution for these cases.