



How to...add a stage to an existing grievance record for an employee

Purpose:

This guide will show you how to add a stage to an existing grievance record for an employee within **People Manager** in Your HR in accordance with the appropriate policy.

The direct line manager of an employee is normally responsible for updating and maintaining an employee's record.

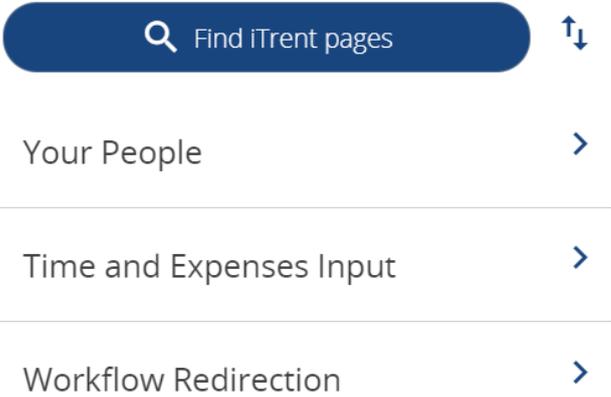
Before creating a grievance record managers should talk to a HR Advisor as there may be particular sensitivities around these types of casework. Contact hradvice@warwickshire.gov.uk or phone 01926 412370.

Logging in to Your HR:

To log into Your HR, please refer to the **How to...Log in to Your HR Guide (ESS 1)**. After login you will be presented with the **People Manager Homepage**

To add a stage to an existing grievance record

- Choose your people from the top right menu



- Your direct reports/staff will then appear in a list on the left hand side panel of the screen. They will be 'shimmering' to alert you to the fact that they are now available to select from.

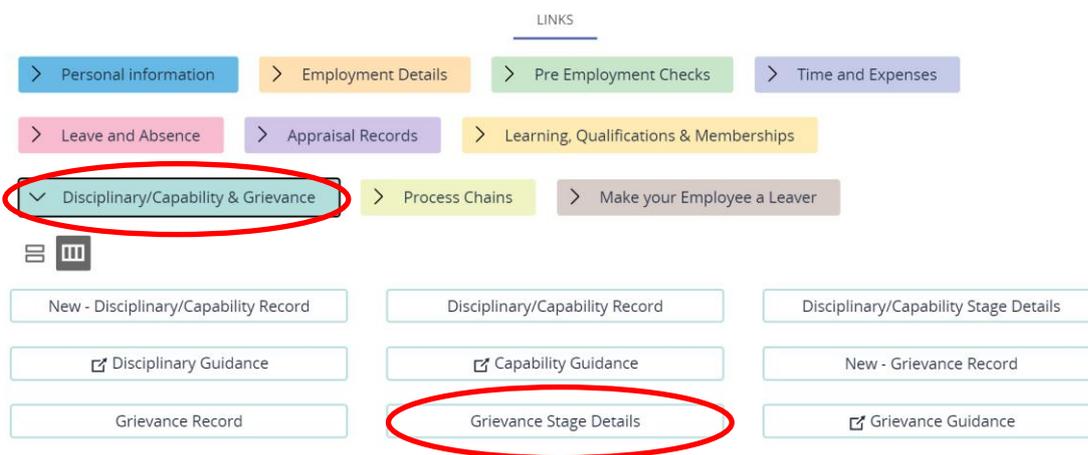


- As you hover over the individual names, you can view some of their main personal details.

- You can also search for a particular employee that is not your direct report, but is in your hierarchy by entering their name into the search box on the **magnifying glass icon**.

- Click the employees details you would like to view.

- Their employee details** screen will now be displayed
- Choose Disciplinary/Capability & Grievance** from **LINKS** and then choose **Grievance Stage Details**



Hint: To view a list of existing disciplinary/capability cases recorded for an employee, you will need to select '**Grievance Record**'

- Once you have selected the employee whose record you need to update, their grievance record below will be listed.

^ Grievance records ⋮

Age Discrimination

- Click into the grievance record that you need to add a stage to.
- **IF** more than one stage has already been entered on the system, you will first have to select the most recent stage to add to before you are able to add a new stage (below)

^ Grievance stage ⋮

Grievance appeal

Hint: Click on this tab  to expand this view to show all grievance stage details in one pane.

- Once you have clicked into a record, the stage that has been entered already will appear, with the options to save, delete or add a new record.
- Select New

Grievance stage details Mr Joe Test

⌵ MENU
 ↻
🖨

Stage *

Lodged * 

Resolved 

Save
Delete
New

- Select the appropriate stage from the drop down box.
- Enter the **lodged** date – you can click on the date picker to select a date.

Grievance stage details New ▼ MENU ↻ 🖨

Stage *

Lodged * 

Resolved

Save

February 2023

Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
5			1	2	3	4	5
6	6	7	8	9	10	11	12
7	13	14	15	16	17	18	19
8	20	21	22	23	24	25	26
9	27	28					

Today is Thu, 23 Feb 2023

- Enter the Resolved date below the lodged date – you can click on the date picker to select a date

Hint: With Grievance records, you can save the record without entering a resolved date. Once the process is complete, you can then go back into the record and enter this date.

- Click **SAVE** at the bottom of the page



- The following will be displayed at the top of the screen once saving is complete.

 Changes have been saved.

- You are then able to see your direct reports again and the new stage will be added to the list.

^ Grievance records

Age Discrimination

^ Grievance stage

Grievance appeal

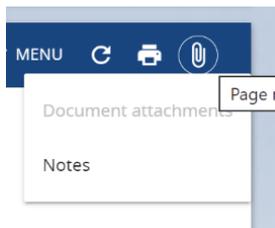
Grievance formal

Grievance informal

Hint: To view a list of existing grievance cases recorded for an employee, you will need to select '**Grievance Record**'

Notes:

Notes can only be entered against the record, not against a stage.



Should you wish to enter any useful, **factual** information as a note to each stage i.e. (Name of Trade Union contact, context of the case etc?) Click on the 'paperclip' icon to enter.

The following screen will appear:

Note details New ↻ 🖨

Notes

Note input date

Valid until 📅

Note creator

Allow public access

Please note that this information will form part of an employee's formal record and can be requested as part of a Subject Access Request.

- Documentation relating to an employee will need to be uploaded onto HR ER. The 'Note Details' is to capture key information that may be relevant to process i.e. Trade Union Representative, Change of meeting details etc....
- Enter the note that you wish to add. There is no need to enter a valid until date.
- The "Note creator" field is automatically completed with your Your HR number.
- Allow public access – if you leave this box ticked the note can be read by anyone with the appropriate access, eg a more senior manager in the hierarchy and HR Advisors.
- Click on save
- The "paperclip" icon is blue to indicate when the notes field contains text.

Stages

There are a number of stages, some of which are only applicable to particular services. Therefore, please ensure you scroll the full list and select the relevant stage in line with your service policy.

Returning to People Manager Homepage.

- If you would like to stay in this employee's record to view other information, click the Menu option at the top of the screen and the short cuts to other pages within the employee's record are shown. Click on any of these to navigate to the page.
- Click the Your HR Logo in the top left hand corner of the screen to return to the home page.

Notifications

- Your employee will not receive any notifications.
- Managers will receive email notification when creating a record only.

Filing documents on the employees HR-ER file.

- Documents relating to this case should be uploaded to the Performance Section of the employee's HR-er file. Use the following naming convention to link all the documents to this single case record - "Grievance" followed by the "Lodged" date you created the record followed by the title of the document. eg (Grievance 02/04/19 Investigation terms of reference).

For further information or support please refer to Your HR on the [Intranet](#) or contact the HR Advisory Service via email: hradvice@warwickshire.gov.uk or phone on 01926 412370

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