PENINSULA

Your guide to issuing HR Documentation

Contents

Introduction to your HR Documentation

As a Peninsula client, you have access to a suite of HR documents that keep you in line with UK employment law and help you get the best from your staff.

Read on for an overview of your HR Documentation and discover how to issue these documents to your employees.

Why is it important to issue your documents?

Your policies and documentation help you carry out essential HR procedures and manage staff in a fair and consistent way.

They also help you reinforce important rules around conduct and workplace expectations.

With our careful wording, you'll have the flexibility you need to manage your staff when handling disputes, capability issues, and conduct issues.

They can be a good communication tool, as you can signpost staff to your HR documentation to remind them about your workplace rules and procedures.

Your documentation can be useful in promoting the culture of your organisation; this can be achieved through mission statements, branding, the types of policies, perks, and procedures you issue, which can shape your organisation's structure, objectives, targets, and more.

Did you know?

Some HR documents are required by law, like issuing a written Statement of Main Terms of Employment.

This is a legislative requirement under the Employment Rights Act 1996, and failure to issue this can lead to up to 4 weeks compensation at tribunal.

It's important to check your HR documentation before making certain decisions, such as making a pay deduction.

For example, if an employee damaged company property, and you deducted the cost from the employee's pay, it's important to check that there is an agreement in place for this kind of deduction.

In this scenario, you could be at risk of making an unlawful deduction if you did this without already having a specific clause in the employee's contract allowing you to do so.

Where to find your HR Documentation

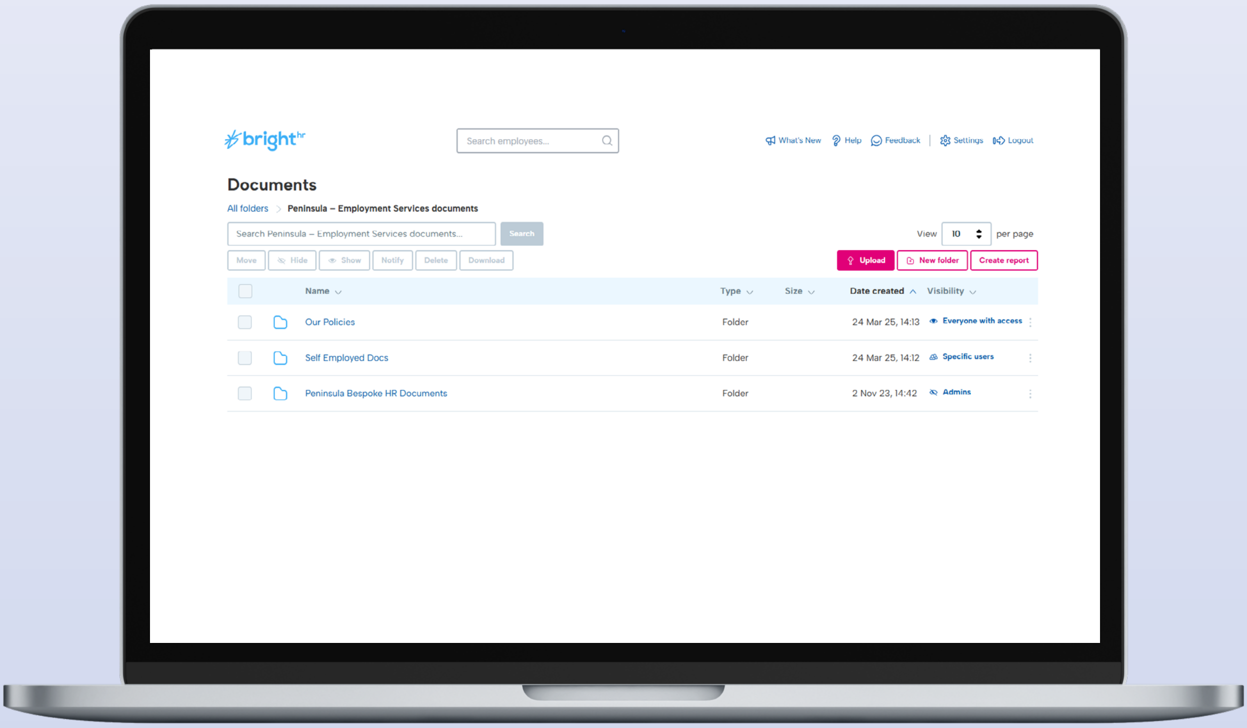
Your up-to-date HR documents will be stored in your BrightHR account.

This is where you can find and download the latest version of your documents:

BrightHR > Documents > Company Folder> Peninsula Bespoke HR Documents > Your bespoke Documents.

[Link directly to company folder.]

[Watch this video to learn more about accessing your documents via BrightHR.]



This folder will always contain your most up-to-date documents.

If we make any amendments to the documents, they will update in this folder with the renewed date.

Only 'Admins' will have permission to access this folder.

If you want to allow managers or any other employee to access this folder, you can amend the permissions for the folder.

[Link directly to permissions]

OR:

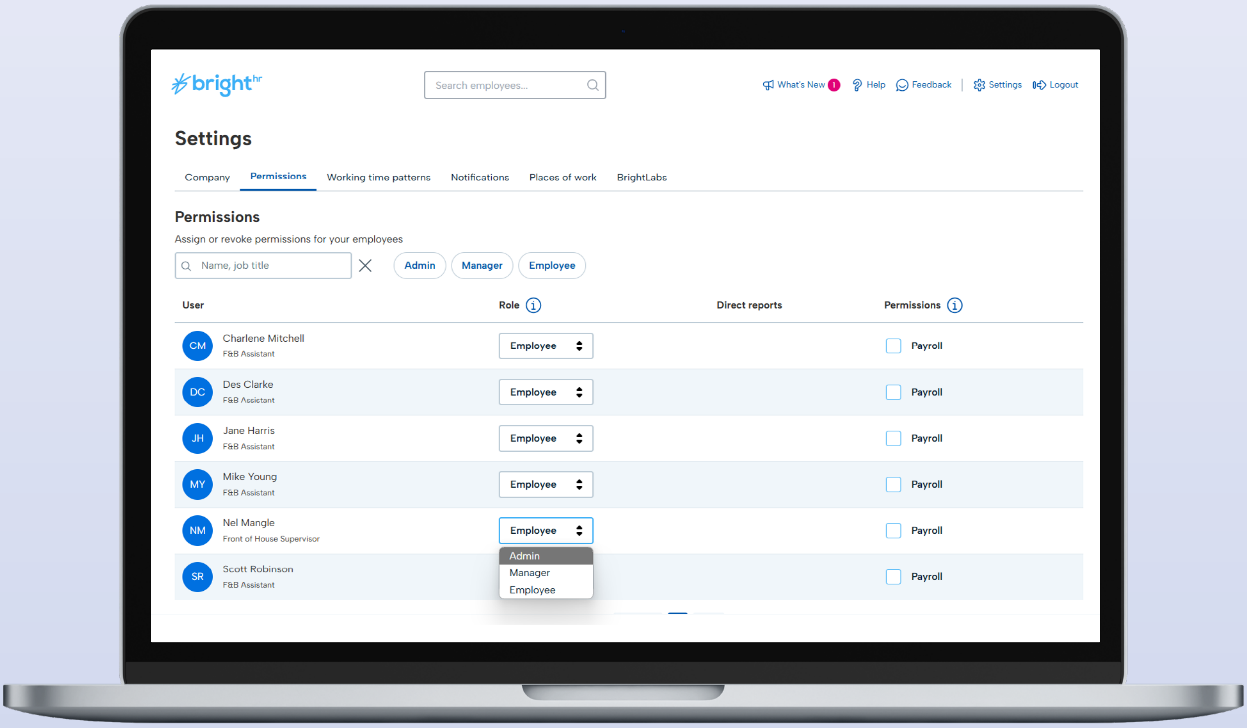
[To learn how to do that, watch this video]

Note: To see the documents the user will need to be an Admin or a Manager, so the permissions will also need to be amended once the user has been added.

Permissions are changed via the Permissions tab in Settings:

Due to the nature of HR documentation, this folder will contain confidential information about employees and their entitlements.

So, make sure you limit access to members of the team who are entitled to see this type of information.



Issuing your HR Documentation to existing employees

There will be times when you need to share HR documents with your staff.

First, you need to make sure you've set up BrightHR and added your employees to the system. When adding an employee, you can set them as either 'regular' or 'variable'.

When your employees are registered its important they familiarise themselves with BrightHR and everything it offers, you can send the below link to employees to get them started.

[Welcome to BrightHR – Employee (UKI)]

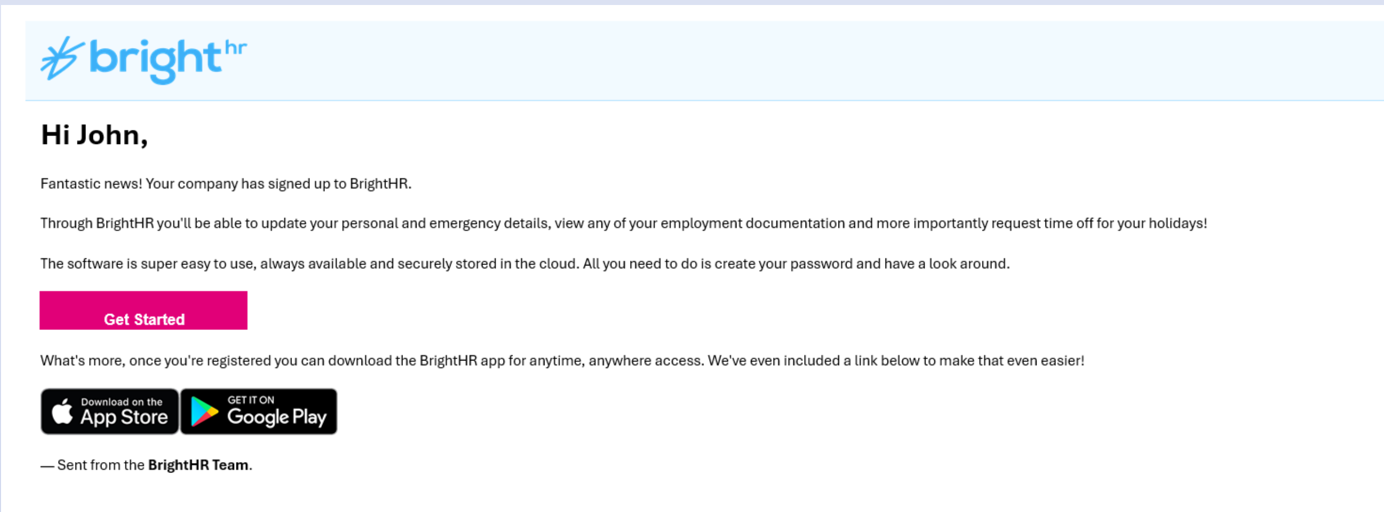
Here's how to add a new employee:

- Add employee
- Add details
- Save and continue
- Add to BrightHR
- Send invite

Now that you've added your employees to the system, they will all have their own profile on your BrightHR account, with employment details and holiday entitlement that's specific to them.

[Watch this video to learn more about setting up your employees on BrightHR.]

Registration e-mail:



brighthr

Hi John,

Fantastic news! Your company has signed up to BrightHR.

Through BrightHR you'll be able to update your personal and emergency details, view any of your employment documentation and more importantly request time off for your holidays!

The software is super easy to use, always available and securely stored in the cloud. All you need to do is create your password and have a look around.

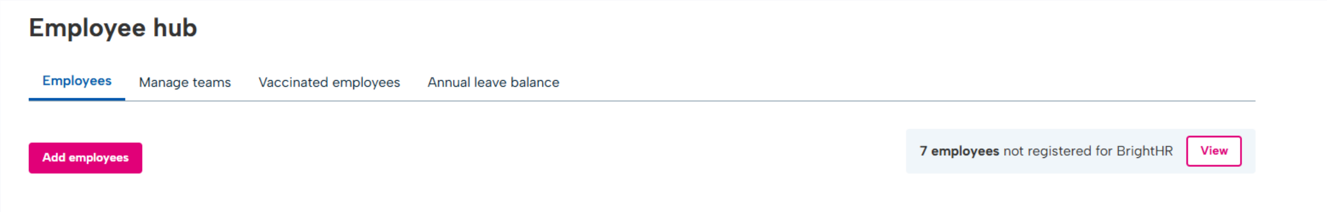
Get Started

What's more, once you're registered you can download the BrightHR app for anytime, anywhere access. We've even included a link below to make that even easier!

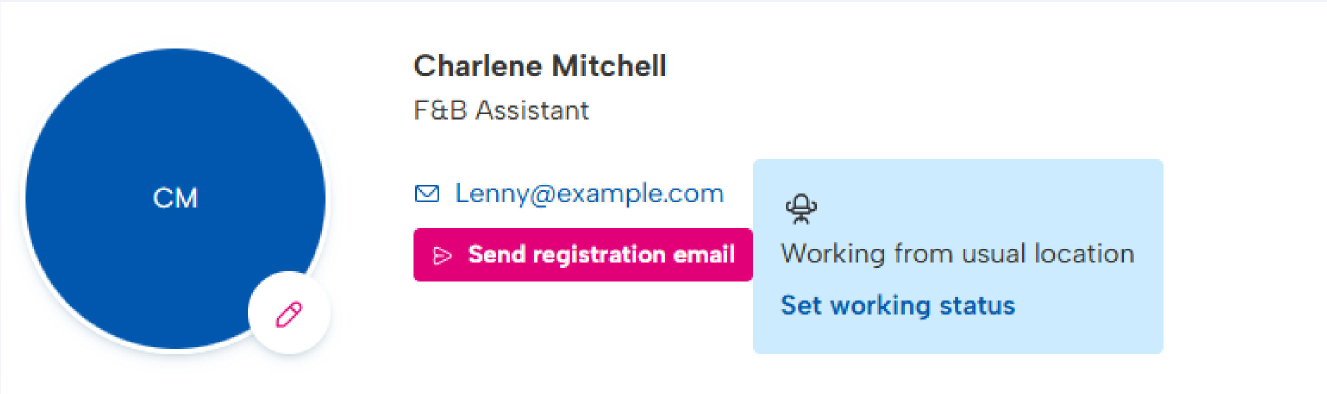
Download on the App Store | GET IT ON Google Play

— Sent from the **BrightHR Team**.

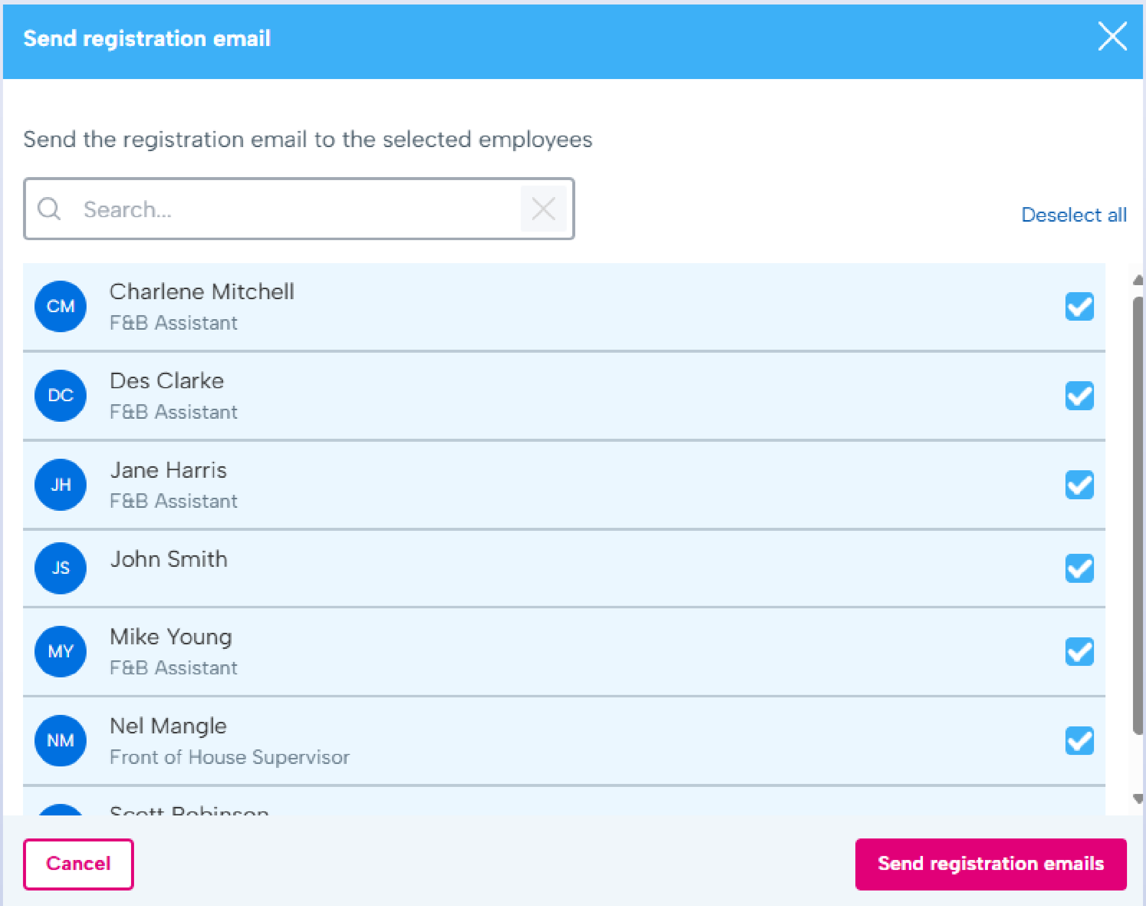
Employee hub:



Employee profile:



List of unregistered users:



When you've set up your employees, it's time to issue your documents...

Note – the user must be registered for them to be eligible to receive the acceptance request.

First, head back to Peninsula Bespoke HR Documents

Then, download the relevant documents that you want to issue to employees, and save these locally to your drive.

If you need to personalise or edit your document, make sure you download it first.

You will need to edit some documents with employee details, for example you would need to update a Statement of Main Terms with these details:

- Employee name and salary details
- The employee's original start date when they first started with you
- The terms and conditions you have agreed for your business will be included in the SMT already - however please ensure they are checked before issued.

Then, save this locally to your computer drive.

Additional documents may include your employee handbook, deductions from pay agreement, restrictive covenant, apprenticeship agreement, 48-hour opt-outs or training agreements.

For more information on which documents need to be issued, head to 'Understanding your HR Documentation'.

When you have finished editing your documents, you can now upload them and send to your employees. Here's how...

- Go to the 'Employee' section
- Select 'View profile' for the employee
- Click on the 'Documents' tab
- Create a new folder detailed 'HR Documentation'
- Click on the three dots and select 'Folder settings'
- Amend the visibility of the folder to allow the employee to view it. You can select the employee in 'specific users'
- Select 'Upload', and browse for the file
- Select the document
- Select employee to gain read receipt from
- Select employee to gain acceptance from
- Tick to send a notification to your employee
- Upload File

This will send the document to your Employee for them to read and accept via BrightHR.

How to upload a document to a specific employee

We would recommend this is completed for each document you issue to your employee, so that there is a separate read and accept receipt feature attached to each document.

We wouldn't recommend to bulk upload the documents with just one read and accept receipt feature, for all.

You will need to complete this for all your employees.

Employee handbook

It's recommended you store a copy of your Employee Handbook in your Company Folder.

This means, if you make any amendment to the company handbook in future, you can re-upload it in this folder and send it to your employees all together.

Here's how to share your employee handbook:

- Go to 'Documents'
- Go to 'Company Documents'
- Select 'New Folder'
- Create Folder – name it 'Employee handbook'
- Select three dots next to visibility
- Select 'folder settings'
- Select everyone with access - this will mean the folder can be seen by everyone in the company, or you can select specific people.
- Click 'Upload'
- Browse for the file
- Select your Employee Handbook
- Select everyone you would like to issue this document
- Select 'Upload file'

This will upload your Employee Handbook to the company folder and make it visible to your employees.

As you have already sent the Employee Handbook in the employee's individual folder, you won't need to send a further read and accept receipt - however, if we make any updates to the handbook in future, then this will be a key time-saving feature for you.

Watch this video for more details:

[How to share documents with your business, set read receipts and acceptance.]

Issuing your HR Documentation – New employees

When a new employee starts, you'll want to share their essential T&Cs, workplace policies, and onboarding information.

First, set up BrightHR and register your new starter. When adding an employee, you can set them as either 'regular' or 'variable'.

Here's how you add a new employee onto BrightHR:

- Add Employee
- Add their details
- Include start date for when the employee is due to start employment with you
- Save and continue
- Add to BrightHR
- Send Invite

[How to get started adding your employees on BrightHR]

You must issue the Statement of Main Terms of Employment on or before the first date of employment, however many employees will want to receive this when accepting the offer.

It's good practice to register your new starter onto BrightHR, and then send the Statement of Main Terms for the employee to read and accept, before their start date.

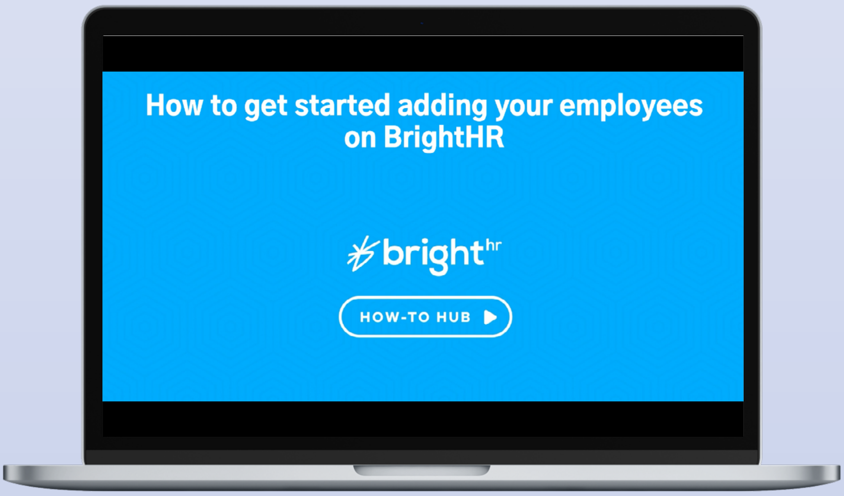
If you do not want to register your employee on BrightHR before they start - you can send the contract of employment via email and attach the signed copy to the employee's file in the document section.

After you've set up your new employee...

Once you've set up your new employee, it's time to issue your remaining documents.

Head back to:
'Peninsula Bespoke HR Documents'

Then, download the relevant documents that you want to issue to your employees.



You will need to edit some documents with employee details - for example, you would need to update a Statement of Main Terms with these details:

- Employee name and salary details
- The employee's original start date when they first started with you
- The terms and conditions you have agreed for your business will be included in the SMT already - however, please ensure they are checked before being issued

Then, save this locally to your computer drive.

You may need to issue other documents, like your employee handbook, deductions from pay agreement, restrictive covenant, apprenticeship agreement, 48-hour opt-outs or training agreements.

For more information on which documents need to be issued, head to 'Understanding your HR Documentation'.

When you've completed your documents, they are now ready to be uploaded and sent to your new starter.

Here's how...

- Go to the Employee section
- Select 'View profile' for the employee
- Click on the 'Documents' tab
- Create a New Folder and name it 'New Starter Documentation'
- Click on the three dots and select 'Folder settings'
- Change the visibility of the folder to allow the employee to view it
- Select Upload, Browse File
- Select the document
- Select employee to gain read receipt from
- Select employee to gain acceptance from
- Tick to send a notification to your employee
- Upload file

This will send the document to your employee to read and accept via BrightHR...

We would recommend you complete this for each document you issue to your new starter, so there is a separate read and accept receipt feature attached to each document.

We wouldn't recommend to bulk upload the documents with just one read and accept receipt feature for all.

Understanding your HR Documentation

Here's a summary of important terms and documents you'll need to know...

Form for Existing Employees

You can find this in your HR Document Library, here:

HR Document Library

This form explains why you are issuing new employment documentation and has a section for your employees to confirm their personal details and emergency contact information. This is key information that you will need when creating your employee profiles.

You should complete the date section at the bottom of this form. This should be the latest date you want the employee to return the form.

Induction checklist

This can be found in your HR Document Library here:

HR Document Library

This form has a section for any new employees to confirm they have read and understood the new Employee Handbook and also ensure they have provided all of the relevant information and have had all relevant procedures explained to them.

Statement of Main Terms of Employment (SMT)

Each employee should have access to a copy of their SMT with all details completed - e.g. job title and salary/wage, either before their start date or on their first day, at the latest.

You can send this via BrightHR with a read and accept receipt feature before their start date. Alternatively, you can allocate time for this on the employee's first day. The employee will then be able to access the documents in the relevant folder in BrightHR.

Employee Handbook

You should give employees access to a copy of the Employee Handbook.

It's best to have a digital version of the Employee Handbook in a central location and ensure all employees know how to access it.

This is so that the employee always has access to the most up-to-date version of the handbook if you make any changes.

With BrightHR, you can upload your Employee Handbook and set read receipts to check who has seen and accepted the document.

Deductions from Pay Agreement

A 'Deductions from Pay Agreement' is a document that summarises all the clauses in the Employee Handbook that references a potential deduction from an employee's pay.

Employees must provide express permission before you make any deductions. You can send this via BrightHR with a read and accept receipt feature. Then, the employee will be able to access the documents in the relevant folder in BrightHR.

Restrictive Covenant (if applicable)

A restrictive covenant is a clause in an employment contract that limits specific activities during or after your employee's employment to you.

Seek advice from Peninsula before implementing any Restrictive Covenant Agreement for the first time and carefully consider whether it's the right option.

If you issue a restrictive covenant at the start of employment, consider your offer of employment and whether you will balance the restriction with an attractive salary and benefits.

However, if you introduce a restrictive covenant to existing employees during their employment, then consider additional benefits such as a pay rise or promotion.

Doing this means that your employee will be more likely to agree to the contract change.

You can send the restrictive covenant via BrightHR with a read and accept receipt feature. Then the employee will then be able to access the documents in the relevant folder in BrightHR.

Watch this short video to explain what you need to know about restrictive covenants.

For general advice on restrictive covenants, contact our Solicitors Team.

48-Hour Opt-Out Agreement (if applicable)

Employees can't legally work for more than 48 hours per week, unless they opt out.

Your employees can voluntarily opt-out of the maximum 48 hour working week provided by the Working Time Regulations.

You can send this via BrightHR with a read and accept receipt feature. The employee will then be able to access the documents in the relevant folder in BrightHR.

Training Agreement (if applicable)

When you invest in an employee's learning and development, you may fund a course, event, or training programme to develop their skills.

You should issue a Training Agreement to employees before the specific training takes place – not as a blanket agreement to cover all training.

In the Training Agreement, you should include details of the actual cost of training, and the start and end date of the training.

The cost included in the Training Agreement should not include the employee's wages for the time spent training.

You can send this via BrightHR with a read and accept receipt feature. The employee will then be able to access the documents in the relevant folder in BrightHR.

Here's a short video which explains everything you need to know about Training Agreements.

For general advice on Training Agreements, contact our Solicitors Team.

Vehicle Rules (if applicable)

If you provide company cars (and the Vehicle Rules are not incorporated into the Employee Handbook), the employee should accept a copy of the Vehicle Rules. You can send this to the employee via BrightHR with a 'read and accept' receipt attached.

Apprenticeship Agreement – (if applicable)

It's important to seek advice from our consultants (0844 892 2772) before you issue the Apprenticeship Agreement to any existing apprentices.

The information you include in the agreement will differ depending on the type of apprenticeship. Here's how:

1. For all Apprenticeship Agreements in Wales; or those in England where a 'framework' is used, because no 'standard' yet exists:

There are certain elements you must include in this type of Apprenticeship Agreement to maintain its legal standing. The presence of these will ensure that it is an Apprenticeship Agreement, and not a contract of apprenticeship.

In addition to the usual information required for a Statement of Main Terms, you must ensure that the following is correctly inserted:

- A statement of the skill / trade / occupation that the individual is receiving training in - e.g. painter and decorator.
- The name of the relevant qualifying apprenticeship framework e.g. Construction Building (England).

You will need to contact the training provider for the details of the apprenticeship framework and make sure you include the correct terms in the contract. Not including these in the Agreement may severely restrict your management options relating to the individual. If you need any assistance when gaining this information, please contact the 24-hour advice service for further assistance.

2. For Apprenticeship Agreements in England where a 'standard' exists:

The required elements for this Agreement differ from the previous type (above). In addition to the usual information required for a Statement of Main Terms, you must include the following:

- The length of the apprenticeship
- The length of the off-the-job training you will provide as part of the apprenticeship. This cannot be less than 20% of their normal working hours.

You should issue each new apprentice two copies of their Apprenticeship Agreement, before their start date or on their first day at the latest, and complete all details e.g. job title, salary/wage, statement of occupation, name of apprenticeship framework.

You can send this via BrightHR with a read and accept receipt feature. The employee will then be able to access the documents in the relevant folder in BrightHR.

Off-the-job training

You must provide off-the-job training for all apprentices, regardless of the type of contract, which must take a minimum of 20% of their normal working hours.

However, you only need to include the length of the off-the-job training in an Apprentice Agreement where a 'standard' exists.

In England, full-time apprentices starting their apprenticeships between 1 August 2022 and 31 July 2024, must spend at least 20% of a 30-hour week in off-the-job training (even where the apprentice works more than 30 hours per week).

This equates to an average of 6 hours off-the-job training per week, over the planned duration of the apprenticeship practical period.

The minimum requirement for a part-time apprentice working less than 30 hours per week, remains unchanged - at 20% of their normal working hours over an extended duration.

Document folders in BrightHR and Document Management

Your Document Library

You will enjoy access to a range of guides and policies to make your life easier when managing your staff and to help you build the business culture you want.

Reducing the time you spend on day-to-day HR is one of our biggest priorities. That's why we offer a range of forms and templates to free you from admin and make it quick and easy to manage your staff.

Head to your HR Document Library by tapping here.

You can access this in the left-hand navigator and select 'Documents'.

Don't forget, you can filter by the jurisdiction you are looking for, and use the search bar to look for any document you want.

If you don't find the document, you're looking for then simply select contact us, fill in the details, and we will be in touch.

Exploring BrightHR:

You'll find the following folders in your BrightHR system:

- Document folder
- Company-wide documents
- My documents
- Admin documents
- Employee documents
- Documents to-do list

Company-wide documents

If you head to your documents on BrightHR, you'll see we've already created some folders for you. One of these is the folder with your company name on it, which is your company-wide folder.

This means that all employees will be able to access documents uploaded in here.

You could use this to store your company handbook, working from home policy and more!

My documents

In your documents you will also see a folder for 'My documents'.

This folder is for any of your own personal documents, only your manager or another admin will see documents uploaded in here.

Admin documents

The next folder you'll see is the 'Admin' folder. This folder is only visible to - yes, you guessed it - admins. You could upload a document template for appraisals or return to work forms, anything that only admins will need to see.

Employee documents

In your documents you'll also have a folder for each team that you've created on BrightHR, if you open up one of these folders you'll then see a folder for each employee that is assigned to that team.

In here is where you can upload any documents specific to an employee, you can upload the employee's contract of employment, latest appraisal or even their latest training certificate.

In an employees document folder, you can also create your own custom sub-folders using the 'New folder' button, to make finding the document you need even easier.

Document to-do list

This handy feature will collate any required actions attached to any documents such as follow up, read receipts etc.

You can even filter down based on the action needed! You'll be managing documents like a pro in no time...

What if I need additional documents or amendments?

If you require any documentation changes, then contact our HR Policy and Documentation Team, who will discuss your requirements and make the necessary amendments to your bespoke documents.

We will update your documents and upload these in your bespoke folder. When the documents are ready, you can download these directly.

To request a change, contact the **HR Documentation Team** on:

- **Phone number:** 0161 836 2773
- **Email address:** HRDocuments@peninsula-uk.com
- Or click here to request an appointment

HR Document Reviews

As a Peninsula client, you are entitled to unlimited HR Documentation Reviews.

HR legislation changes fast – which may leave your policies and documents outdated.

When that happens, we'll get in touch with you directly, to discuss your documentation.

So, make sure you're signed up to our email communications.

Sign up to our communications.

And if you make any changes within your business, you might want to update your documentation as a result.

To do that, request HR documentation here.

We won't make any changes to your HR Documentation without your approval, so it's important you book a HR Documentation Review, and do keep an eye out for our emails.

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