HUMAN RESOURCES ADMINISTRATION GUIDE

AUTOMATED WORKFLOW & MANAGER SELF SERVICE

This Guide provides information to those responsible for the administration & management of staff, including, People Managers, Administrative Assistants and FAII's. Information contained in the guide provides direction for processing HR employee and position related transactions from both a system and process perspective.

Human Resources
City of Hamilton
08/29/2022

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QUICK REFERENCE GUIDES

KEY TERMS:

“Initiator”

The individual who initiates a transaction, which can be either the Manager or their delegated support staff (i.e. Administrative Assistant or FA staff)

“Manager”

Any individual who has responsibility for direct reports (and indirect reports if applicable) and who is responsible for the administration of those reports. This includes, Supervisors, Managers, Directors, General Managers, and the City Manager

“Proxy”

(delegate): The person who accepts the delegated authority and acts on another’s behalf to initiate or approve transactions.

“Delegate”

(proxy): The person who accepts the delegated authority and acts on another’s behalf to initiate or approve transactions.

“Delegator”

Person who assigns authority to another user to initiate or approve transactions

“MyHRInfo@hamilton.ca”

Emails generated as a result of workflow transactions will always be from this email address

STANDARD AUTHORIZATION LEVELS:

The below table details the minimum required authorizations in order for Human Resources (HR) to process a transaction from the Automated Workflow & Manager Self Service (MSS) system

Transaction Type	Required Approval Levels
Create Job Opening	2 levels of approval, but at least a Director
Pay Rate Changes	2 levels of approval but at least a Manager
Job Transfers/ Employee Movement (not posted)	1 level of approval but at least a Manager
Voluntary Terminations	1 level of approval but at least a Manager
Training Requests	1 level of approval

What if my General Manager wants a higher level of Approval?

In the case where the department standard requires more approvers than the Human Resources standard above, the Automated Workflow system allows those initiating and approving transactions to **insert up to 2 additional approvers.**

Departmental standards are not monitored by Human Resources, and any transaction received by HR satisfying the minimum criteria will be processed.

TRANSACTION TYPE REFERENCE GUIDE:

Purpose

The chart below provides a list of HR transactions/ processes that are related to employee movements. The charts indicate:

- Who initiates a given transaction
- Whether the transaction is executed utilizing the Manager Self-Service system or via email/correspondence with Human Resources

Transactions Executed ONLINE Via Manager Self Service		
Transaction Type	**Description**	**Initiated By**
Create Job Opening	Use the Create Job Opening transaction to initiate the job posting process for replacement of staff or filling a new position, or to initiate on behalf of a Manager who has delegated this responsibility to you.	Manager or Delegate
Pay Rate Change	Use the Request Pay Rate Change transaction to initiate a pay rate change for an employee, or to initiate on behalf of a Manager who has delegated this responsibility to you. Including merit awards, step progressions, and change in qualifications impacting pay.	Manager or Delegate
Transfer – NOT Posted (variety of Reason codes below)	Use the Transfer Employee transaction to initiate a transfer for an employee to different position # due to employee movement that is **<u>not handled through the posting process</u>**, or to initiate on behalf of a Manager who has delegated this responsibility to you.	Manager or Delegate
Transactions Executed ONLINE Via Manager Self Service Cont'd		

Transaction Type	Description	Initiated By
Transfer Reason – Employer Initiated/Employee Request	This transaction and reason is used for people movements to new locations/shift/position numbers, while maintaining the same classification/job code	Manager or Delegate
Transfer Reason – Return to Previous Position	This transaction and reason is used for employee's moving back to their home position, usually due to the end of a temporary assignment.	Manager or Delegate
Transfer Reason – Seasonal	This transaction and reason is used for the transfer of seasonal staff in permanent dual classifications (i.e. Recreation in Winter and Parks in Summer)	Manager or Delegate
Transfer Reason – Short Term Coverage	This transaction and reason is used for the transfer of staff for a maximum of 4 weeks due to vacation coverage (union), sick coverage, or union business coverage.	Manager or Delegate
Transfer Reason – Internal Posting Process (Fire Local 288, OPSEU, and ONA ONLY)	This transaction and reason is to be used when the department internally posts a role in one of the stated unions (as a result of CBA language or practice which provides opportunity to union members in advance of a formal city-wide internal posting).	Manager or Delegate
Transfer Reason – Probation Complete-ATU	This transaction and reason is to be used for the assignment of Bus Operators to their home position upon completion of their training.	Manager or Delegate

Transactions Executed ONLINE Via Manager Self Service Cont'd		
Transaction Type	**Description**	**Initiated By**
Transfer Reason – Training Complete (Fire Only)	This transaction and reason is to be used for the assignment of Firefighters to their stations upon completion of their training.	Manager or Delegate
New Hire – NOT Posted	This transaction and reason is to be used for hiring a paid New Hire/Rehire where there was no posting process involving HR staff. This may include, Coop Students, School Crossing Guards, Temp/Contract Hires, & part-time Library Staff Mass hires are handled separately via a spreadsheet.	Manager OR FAII
Termination – Voluntary	This transaction and reason is to be used for processing Voluntary Terminations/ Resignations such as Resignations, Retirements, Death, End of Temporary Assignments.	Manager or Delegate
Position Data Change (PDC)	Use this transaction to create new positions, inactivate positions and process changes to position attributes such as, Dept ID, location, hours, FTE, budget status, Reg/Temp status, full time/part time status.	FAII

The below Chart summarizes transactions handled **<u>outside</u>** of the Manager Self Service System, typically dealt with via **<u>email or verbal correspondence with Human Resources</u>**. No online entry from the department is required for the below:

Transactions Executed OUTSIDE of Manager Self Service		
Transaction Type	**Description**	**Contact**
New Hire OR Transfer <u>Posted</u>	When hiring or transferring an employee as a result of the posting process, including the processing of internal transfers resulting from a posting, Human Resources will facilitate process.	HR Employment Services
Extension to Temporary Contracts	For extensions to temporary contracts, Human Resources will facilitate system and employee notifications.	HR Employment Services
Additional Duty Pay	For Non-Union employees who are temporarily handling additional work in their current role. A business case is required to be submitted to HR Compensation by the department explaining why the employee should be eligible for additional duty pay.	HR Compensation

Unpaid Leave of Absence (> 30 days)	For an Unpaid Leave or Return from leave of Absence greater than 30 days, including, personal unpaid leaves, professional development leaves, or legislated job protected leaves (i.e. Maternity, Compassionate Care, Military, Organ Donor etc), employees will notify their Manager via a paper Request For Unpaid Leave of absence form, to be forwarded to Human Resources upon Manager approval.	Employee initiated via Unpaid Leave of Absence form
Transactions Executed OUTSIDE of Manager Self Service Cont'd		
Transaction Type	**Description**	**Contact**
Transfer Reason – Confirm to Permanent	For the confirmation of a temporary employee as permanent in their position. An employee can only be confirmed in a position if a competition has already occurred for the original temporary role. Human Resources will facilitate system and employee notifications.	HR Employment Services
Transfer Reason – Temporary Internal Secondment/Minor Reorg	When transferring an employee as a result of an **internal secondment** to another City of Hamilton position usually as a result of project work or for people movements to new positions due to **a minor reorganizations**, which repurposes the incumbents' existing position, Human Resources will facilitate	HR Employment Services

	system and employee notifications. A “Minor Reorganization” would be one that is contained within a division and is within the approved budget	
Transfer Reason – Acting Assignment	In order to process a Transfer due to an Acting assignment (non-union) or Temporary Deployment (union) of greater than 1 month (due to sick coverage or filling a position while it is being posted), Human Resources will facilitate system and employee notifications.	HR Employment Services
Termination – Involuntary	For terminations considered to be involuntary typically as a result of discipline, frustration of contract, salary continuance, AWOL, working notice, layoff.	HR Labour Relations

MANAGER STATUS CHANGE GUIDE:

Purpose:
Use this reference guide to understand how transactions and delegations are impacted due to a Manager's status change or transfer to another role in the organization – and to understand what action may be required to ensure transactions continue to flow through the system.

Important:

"WFA" – Abbreviation for the Human Resources Workflow Administrator, who may need to be contacted to assist in the management of status changes and pending transactions.

GUIDELINES		
Status	**Definition**	**Impact:**
Manager Terminates or on Leave of Absence	Manager is terminated or on a Leave of absence for greater than 1 (not active on Job Data)	- When possible Manager should complete pending transactions prior to status change or they will be "stuck" & require WFA to adjust - All pre-existing delegations/ proxies will disappear when the status change occurs - & they will no longer have access/receive transactions - Responsibility to Initiate & Approve will jump to the next level in the chain to be processed until the position is filled - **<u>Contact the WFA</u>** to release "Stuck" transactions

Status	Definition	Impact:
Transfers	Movement to another position in the organization with new directs reports, or no direct reports	- Manager should approve or deny pending transactions prior to transfer. Manager will still have access to pending transactions from former position following transfer. - Pre-existing delegations continue to exist: Manager should **revoke** them because the proxies in the former dept will be able to continue to initiate and approve transactions for Manager's new direct reports - Responsibility to Initiate & Approve will jump to the next level in the chain to be processed until the position is filled - If Manager moves to a new role with **NO direct reports, the Manager tab will disappear** in PeopleSoft and any pending transaction will be stuck. **Call WFA to release.**
Manager is off "Sick" or "WSIB", "Sudden Absence"	Position remains "filled" in PeopleSoft Position Management and incumbent remains active in Job Data	- When possible, Manager should complete pending transactions prior to status change - Manager should **assign their approval and initiation authority to a delegate/proxy** where one does not exist - In the absence of a delegated initiator, responsibility will go to the next level Manager - In the absence of a delegated approver, transactions will continue to flow to the absent Manager and get stuck - All pre-existing delegations/ proxies will remain, allowing continued ability to initiate and approve transactions on the absent Manager's behalf - **Contact the WFA** to create delegations & release pending transactions for absent Manager if required

Status	Definition	Impact/Action:
A Manager Position becomes "Over-Allocated"	A single position exists with 2 active Manager Level incumbents	- Responsibility to initiate rests with all active incumbents - Approvals will route to the Active Manager incumbent with the lowest emplid in PeopleSoft. If this is not acceptable, **contact the WFA** to create delegations to the Manager with the higher emplid. - **NOTE** – for situations of greater than 1 month, it is recommended to create a new temporary position for the 2nd Manager (instead of over-allocating)

SELF SERVICE VIEW PAGES

MANAGER VIEW EMPLOYEE INFORMATION:

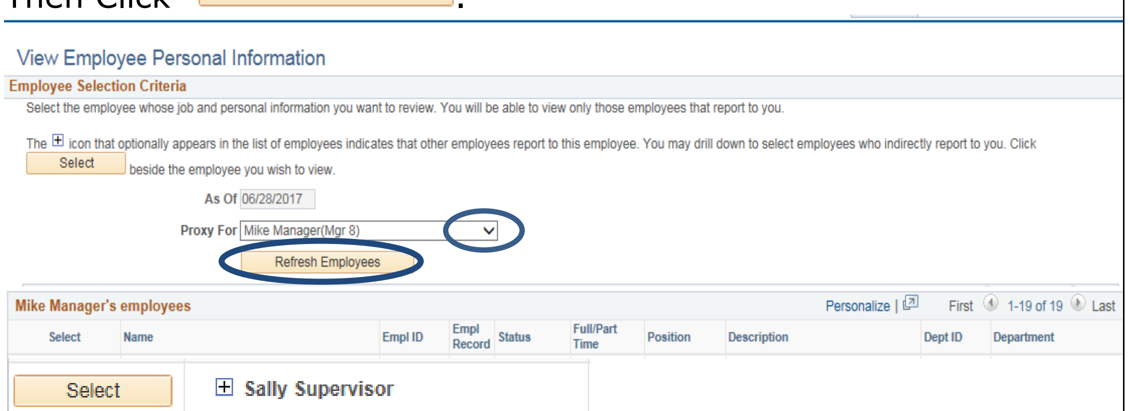
Purpose
Use the View Employee Personal Info transaction to view your employees' current contact information and job data, or to view information on behalf of a Manager who has delegated this responsibility to you.

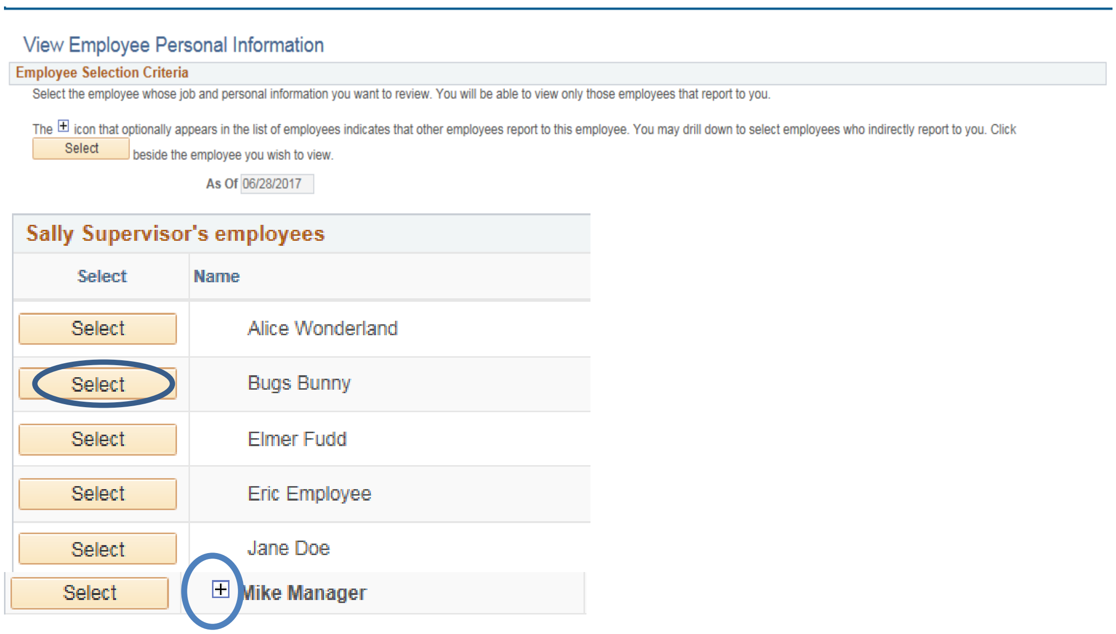
Important
You can view information for your direct reports, as well as drill down the organization through your indirect reports to view their information.

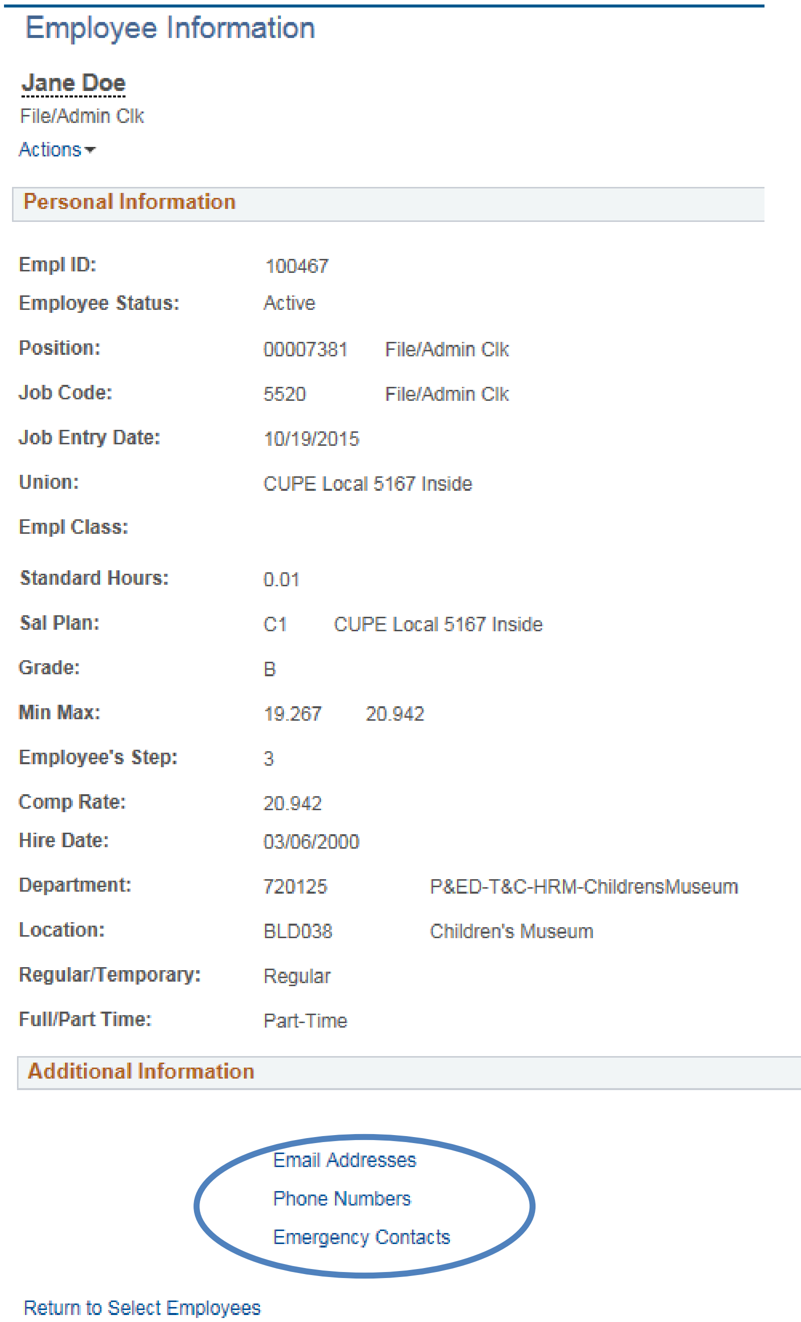
Procedure
Follow the steps below to view employee contact and job data.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation:
Manager tab>View Employee Personal Info</td></tr>
<tr><td>2</td><td>If you are a Manager wishing to view information for your employees, proceed to step 3.

If you are a proxy wishing to view information on behalf of a Manager who delegated to you, follow the instructions below:

Select the Manager for whom you would like to process transactions by clicking in the drop down "Proxy For" box.
Then Click Refresh Employees.

</td></tr>
</table>

	 *Note: Although you will see an option to* Process my own Employees*, if you are not a Manager and you select this and click Refresh Employees, you will receive a message that there are no direct reports since you have no employees reporting to you.*
3	If you see a  that optionally appears in the list of employees this indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. To select an employee click the **Select** button beside the employee's name. 

<table>
<tr>
<td>4</td>
<td>You are presented with the employee’s current job data:


To select another employee to view their current job data, click Return to Select Employees.

To view the employee’s current contact information, click the appropriate links in the Additional Information section.</td>
</tr>
</table>

5

To view the employee’s current phone numbers, click Phone Numbers .

Employee Information

Phone Numbers

Eric Employee

Phone Numbers				
Phone Type	*Telephone	Extension	Preferred	Delete
Business	905/123-4567		☐	
Home	905/222-1111		☑	

Return to Employee Information
Return to Select Employees

To view additional contact information for this same employee (email, emergency contacts), click Return to Employee Information and select the appropriate link.

To select another employee and view their information, click Return to Select Employees and follow the onscreen instructions.

6

To view the employee’s current email addresses, click Email Addresses .

Employee Information

Email Addresses

Eric Employee

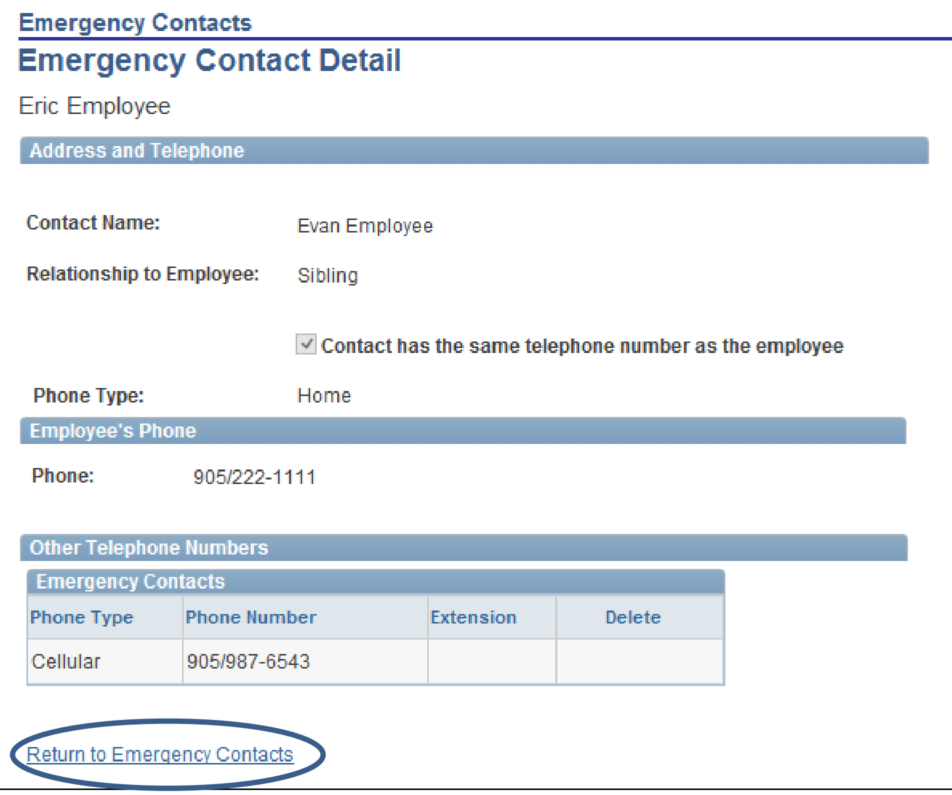
Email Addresses		
Email Type	Email Address	Preferred
Business	eric.employee@hamilton.ca	☑
Home	eric@hotmail.ca	☐

Return to Employee Information
Return to Select Employees

To view additional contact information for this same employee (phone numbers, emergency contacts), click Return to Employee Information and select the appropriate link.

<table>
<tr><td></td><td>To select another employee and view their information, click Return to Select Employees and follow the onscreen instructions.</td></tr>
<tr><td>7</td><td>To view the employee’s current emergency contacts, click Emergency Contacts . You will be presented with a list of emergency contacts provided by the employee.

Click the Contact Name to view the emergency contact detail.


</td></tr>
</table>

	Click Return to Emergency Contacts to return to the list of contacts provided by the employee. To view additional contact information for this same employee (phone numbers, email addresses), click Return to Employee Information and select the appropriate link. To select another employee and view their information, click Return to Select Employees and follow the onscreen instructions.
	End of Procedure

MANAGER VIEW STATUS PAGES:

Purpose

Use the View Status Pages to view the status of all transactions that you initiated or approved at any time. The page captures the completed form with comments and time stamps of approvals/denials from everyone in the workflow chain.

Note: If you delegated approval authority to a proxy, transactions approved by them on your behalf will appear on both your status page and your proxy's status page.

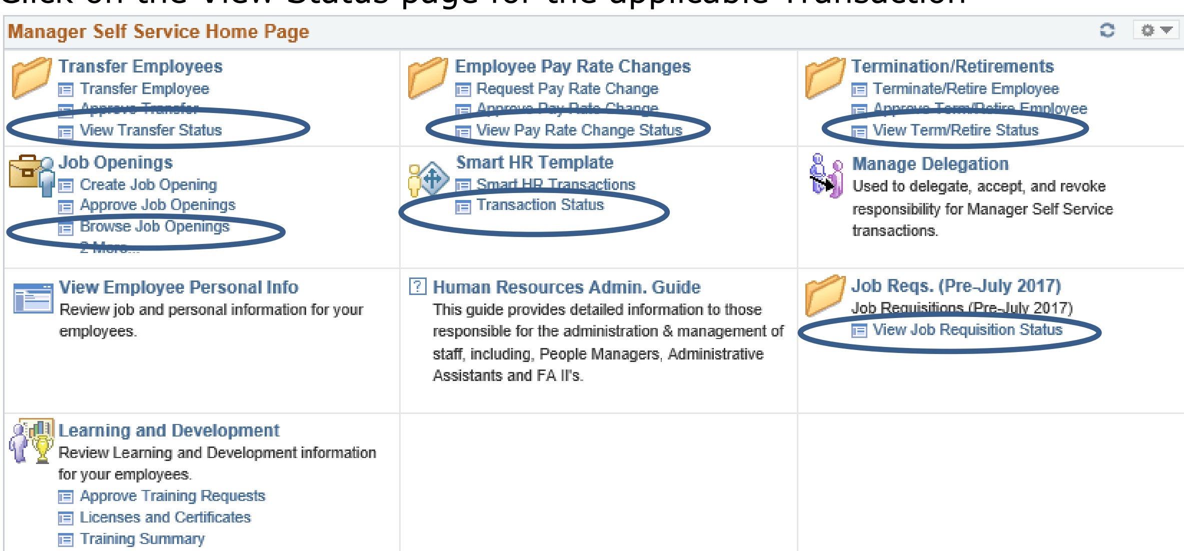
Important

View Status Pages are available for each of the workflow transactions: Termination/Retirements, Employee Pay Rate Changes, Transfer Employees, and Job Openings (Browse Job Openings).

Note: The Smart HR Template Status Page differs from those above and is only available to the user who initiates the Template Hire/Rehire.
To view the status of a Job Opening, select Browse Job Openings. The Job Reqs (Pre-July 2017) are to view Historical Job Requisition pre-upgrade.

Procedure

Follow the steps below to access a View Status page on the **Manager Tab**:

Step	Action
1	Navigation: Manager tab>*Transaction Name*>View Transfer Status
2	Click on the View Status page for the applicable Transaction 

3

For Transfer, Employee Pay Rate Change, Termination/Retirements, select the transaction you wish to view by clicking on the employee name.

Show Transactions: let default remain as "Linked to me".
Filter by status: default is Show all. Change status as needed. (see definitions below)

Select a Transaction

The list below contains transfer requests. Select an employee to view details.

Linked to me: displays all transactions where you were involved in the Manager Self Service transaction. This could be as an initiator, an approver, or a delegate.

I have access to: should be used only by core users. this will display all transactions tied to DeptIDs that you have access to.

Show transactions: Linked to me　　Filter by status: --- Show all ---

--- Show all ---
Awaiting HR Processing
Cancelled by HR
Denied
Error. Contact Administrator.
In Approval Process
Processed by HR

Employee Transfer Requests　　Find | First 1-5

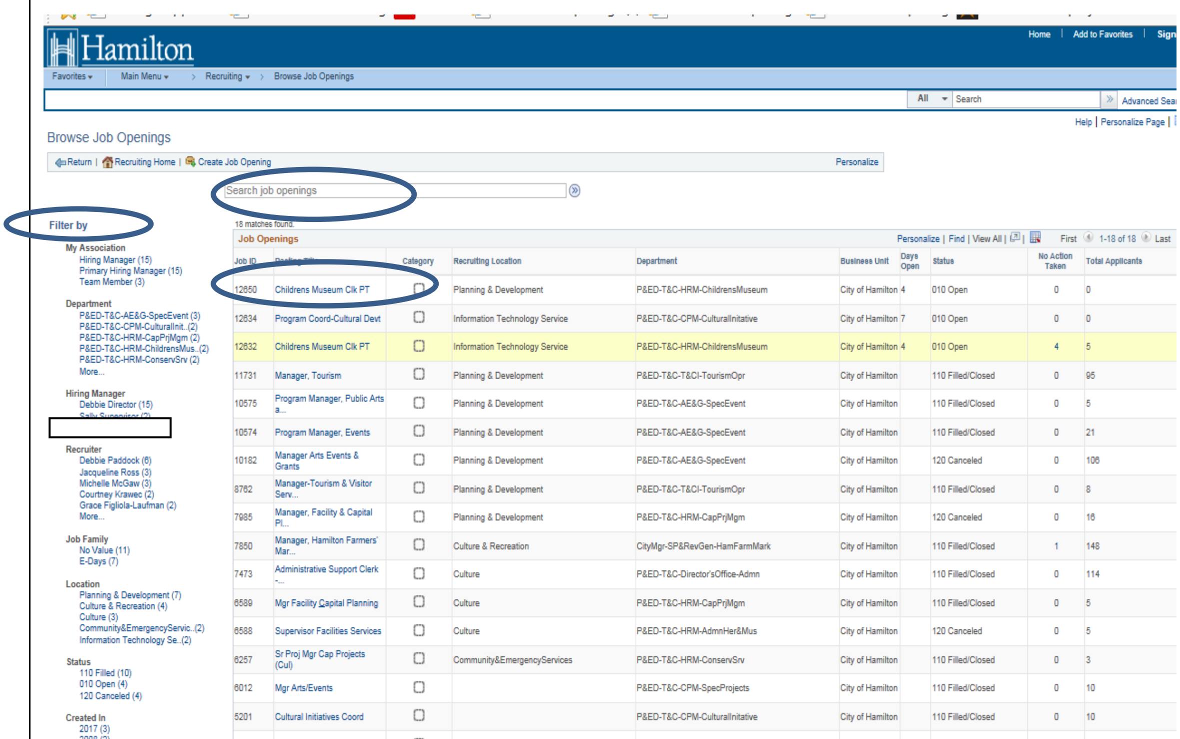
Name	Empl ID	Transfer Date	Effective Sequence	Workflow Status
Donald Duck	052750	06/01/2015	1	Awaiting HR Processing
Donald Duck	052750	06/01/2015	2	Awaiting HR Processing
Elmer Fudd	117227	05/25/2015	1	Processed by HR
Eric Employee	118575	06/30/2015	1	Cancelled by HR
Eric Employee	118575	09/01/2015	1	Processed by HR

Note: transactions "Linked to Me" will only appear on your status page once you have approved the transactions.

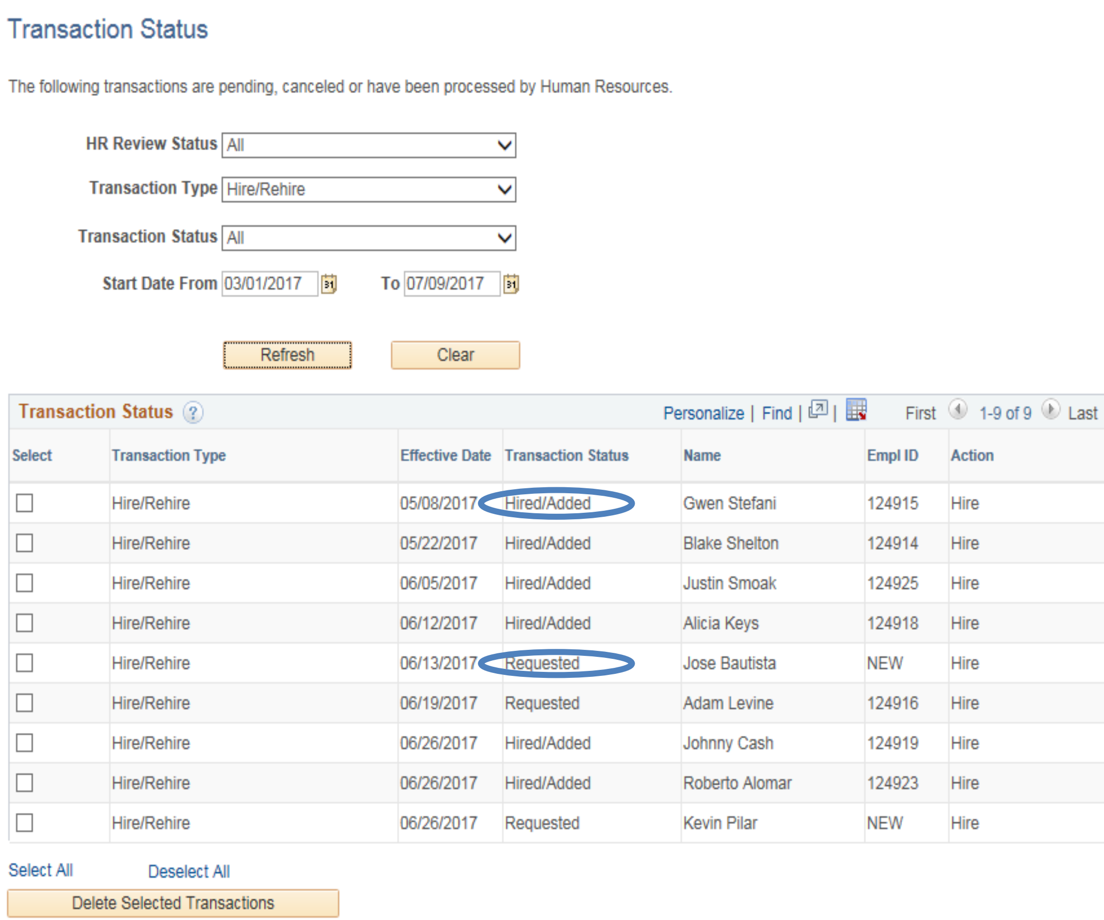
Filter by Status definitions:
Awaiting HR Processing – Transaction has been routed to HR and waiting to be processed.
Cancelled by HR – Transaction has been routed to HR and HR has cancelled it.
Denied – Transaction was not routed to HR as an approver in the department chain has denied it which terminates the remainder of the approval chain.
Errors Encountered – System generated.
In Approval Process – Transaction is pending in the department approval process and will be routed to HR once all approvals are complete.
Processed by HR – Transaction has been processed by HR.

4 For Browse Job Opening, select the Job Opening you wish to view by either:

- clicking on the **Posting Title Name** under Job Openings
- Use **Search Job Openings** field to perform keyword search
- Use **Filter by** and click on any of the links under each of the Areas.



Note: you will only see Job Openings for which you are the hiring Manager and Approvers in workflow approval chain

<table>
<tr><td>5</td><td>For Smart HR Transaction Status, the page differs and is only available to the Initiator. All transactions appear on one page. You can change the start date range as needed and click Refresh.

</td></tr>
<tr><td>6</td><td>Accessing View Status Page via Emails:

Workflow will generate an email to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; the email will contain a link to the status page for that particular transaction.</td></tr>
<tr><td></td><td>End of procedure.</td></tr>
</table>

FAII VIEW STATUS PAGES:

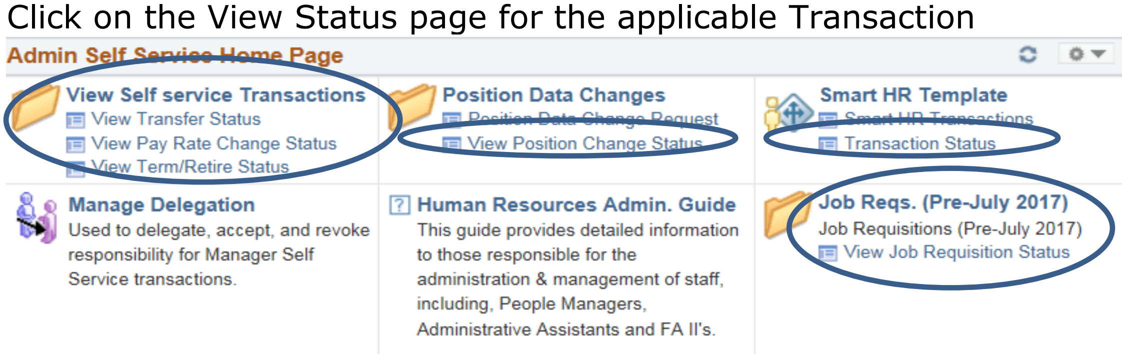
Purpose:
Use the View Status Pages to view the status of all transactions at any time. The page captures the completed form with comments and time stamps of approvals/denials from everyone in the workflow chain.

Important:
View Status Pages are available for each of the workflow transactions: Termination/Retirements, Employee Pay Rate Changes, Transfer Employees, and Position Data Changes.

Note: The Smart HR Template Status Page differs from those above and is only available to the user who initiates the Template Hire/Rehire.

Note: Status pages for Job Openings are only available to Managers under Browse Job Openings. Delegates who can initiate a Job Opening will receive an email to advise that the Job Opening was successfully submitted. The Job Reqs (Pre-July 2017) are to view Historical Job Requisition pre-upgrade.

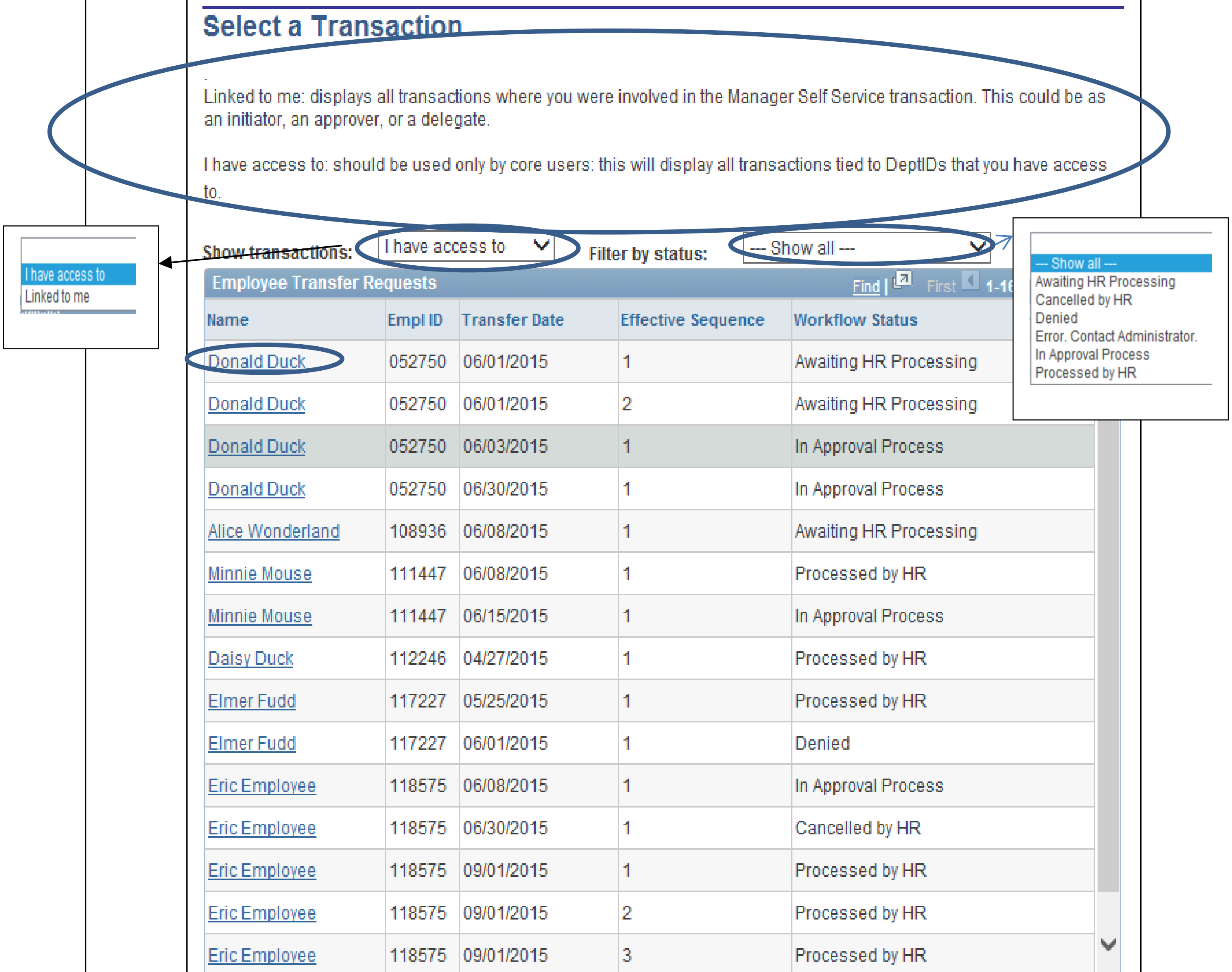
Procedure:
Follow the steps below to access a View Status page on the **Admin Tab**:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation: Admin tab>View Self Service Transactions>View Status page
OR
Admin tab>Position Data Changes>View Position Data Change Status
OR
Admin tab>Smart HR Template>Transaction Status</td></tr>
<tr><td>2</td><td>Click on the View Status page for the applicable Transaction

</td></tr>
</table>

3 For Transfer, Employee Pay Rate Change, Termination/Retirements, select the transaction you wish to view by clicking on the employee name.

Show Transactions: default is "Linked to me". Change to "I have access to" if you wish to view all transactions within your DeptID access. (see definitions on screen shot below).

Filter by status: default is Show all. Change status as needed. (see definitions below).



Select a Transaction

Linked to me: displays all transactions where you were involved in the Manager Self Service transaction. This could be as an initiator, an approver, or a delegate.

I have access to: should be used only by core users: this will display all transactions tied to DeptIDs that you have access to.

Show transactions: I have access to — Filter by status: --- Show all ---

I have access to
Linked to me

--- Show all ---
Awaiting HR Processing
Cancelled by HR
Denied
Error. Contact Administrator.
In Approval Process
Processed by HR

Employee Transfer Requests — Find | First 1-16

Name	Empl ID	Transfer Date	Effective Sequence	Workflow Status
Donald Duck	052750	06/01/2015	1	Awaiting HR Processing
Donald Duck	052750	06/01/2015	2	Awaiting HR Processing
Donald Duck	052750	06/03/2015	1	In Approval Process
Donald Duck	052750	06/30/2015	1	In Approval Process
Alice Wonderland	108936	06/08/2015	1	Awaiting HR Processing
Minnie Mouse	111447	06/08/2015	1	Processed by HR
Minnie Mouse	111447	06/15/2015	1	In Approval Process
Daisy Duck	112246	04/27/2015	1	Processed by HR
Elmer Fudd	117227	05/25/2015	1	Processed by HR
Elmer Fudd	117227	06/01/2015	1	Denied
Eric Employee	118575	06/08/2015	1	In Approval Process
Eric Employee	118575	06/30/2015	1	Cancelled by HR
Eric Employee	118575	09/01/2015	1	Processed by HR
Eric Employee	118575	09/01/2015	2	Processed by HR
Eric Employee	118575	09/01/2015	3	Processed by HR

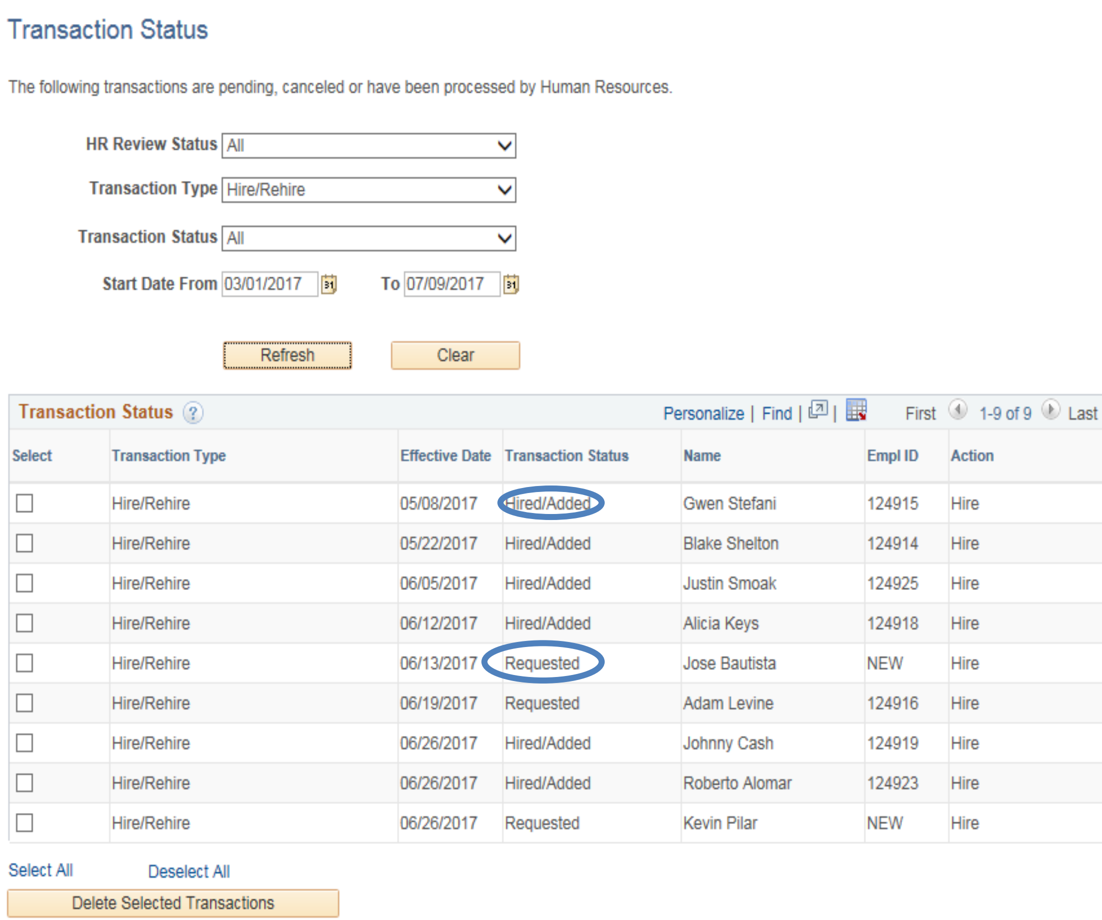
Filter by Status definitions:

Awaiting HR Processing – Transaction has been routed to HR and waiting to be processed.

Cancelled by HR – Transaction has been routed to HR and HR has

cancelled it.
Denied – Transaction was not routed to HR as an approver in the department chain has denied it which terminates the remainder of the approval chain.
Errors Encountered – System generated.
In Approval Process – Transaction is pending in the department approval process and will be routed to HR once all approvals are complete.
Processed by HR – Transaction has been processed by HR.

4 For Smart HR Transaction Status, the page differs and is only available to the Initiator. All transactions appear on one page. You can change the start date range as needed and click Refresh.



Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status: All
Transaction Type: Hire/Rehire
Transaction Status: All
Start Date From: 03/01/2017 To: 07/09/2017

Refresh | Clear

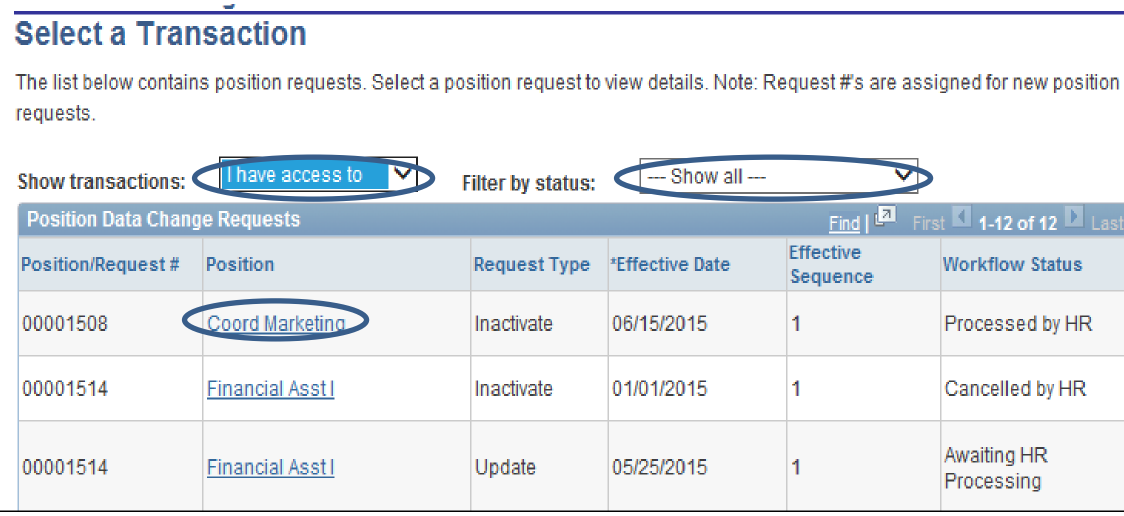
Transaction Status | Personalize | Find | First 1-9 of 9 Last

Select	Transaction Type	Effective Date	Transaction Status	Name	Empl ID	Action
☐	Hire/Rehire	05/08/2017	Hired/Added	Gwen Stefani	124915	Hire
☐	Hire/Rehire	05/22/2017	Hired/Added	Blake Shelton	124914	Hire
☐	Hire/Rehire	06/05/2017	Hired/Added	Justin Smoak	124925	Hire
☐	Hire/Rehire	06/12/2017	Hired/Added	Alicia Keys	124918	Hire
☐	Hire/Rehire	06/13/2017	Requested	Jose Bautista	NEW	Hire
☐	Hire/Rehire	06/19/2017	Requested	Adam Levine	124916	Hire
☐	Hire/Rehire	06/26/2017	Hired/Added	Johnny Cash	124919	Hire
☐	Hire/Rehire	06/26/2017	Hired/Added	Roberto Alomar	124923	Hire
☐	Hire/Rehire	06/26/2017	Requested	Kevin Pilar	NEW	Hire

Select All | Deselect All

Delete Selected Transactions

5 For Position Data Changes, select the transaction you wish to view by clicking on the Position name.
Show Transactions: default is Linked to me. Change to “I have access to” if you wish to view all transactions within your DeptID access. (see definitions on screen shot below).

<table>
<tr><td></td><td>Filter by status: default is Show all. Change status as needed.

</td></tr>
<tr><td>6</td><td>Accessing View Status Page via Emails:

Workflow will generate an email to all FAII with DeptID access to the position once HR Records has processed the transaction; the email will contain a link to the status page for that particular transaction. If HR Records cancels the transaction, no email is generated to FAII’s.</td></tr>
<tr><td></td><td>End of procedure.</td></tr>
</table>

ALERTS & NOTIFICATIONS

EMAIL NOTIFICATION GUIDE:

Purpose
The table below provides a description of when emails will be generated and to whom as a result of Manager Self Service workflow. Use the Ref # to view corresponding Email Samples.

Important
Emails generated as a result of workflow will always be from **MyHRInfo@hamilton.ca**

Action	Email to	Email Description	Ref #
Submitted Job Opening	**Initiator or Hiring Manager** (Job Opening) of the Transaction	Notification that their transaction has been successfully submitted for required approval(s)	1
Approve Pay Rate Change, Termination, Transfer, Job Opening & Training Requests	Each **approver** in the Chain as the transaction is routed to them	Notification that their approval is required	2
Deny Pay Rate Change, Termination, Transfer, Job Opening & Training Requests	**Initiator or Hiring Manager** (Job Opening) of the Transaction or **Employee** (Training Requests)	Notification that their transaction has been denied and by whom.	3
Pay Rate Change, Termination, Transfer, Position Data Change, and Smart HR Templates that have been **Processed** by HR	**Initiator** of the Transaction; and **FAII** with access to the employee or position	Notification that their transaction has been processed by HR	4
Pay Rate Change, Termination, Transfer, Job Opening, Position Data Change and Smart HR Templates that have been **Cancelled** by HR	**Initiator** of the Transaction	Notification that their transaction has been cancelled by HR	5

Action	Email to	Email Description	Ref #
Hires, Rehires & Transfers handled through the Posting Process and have been **Processed** by HR	**Hiring Manager; and FAII** with DeptID access to the employee	Notification that their transaction has been processed by HR	6
Hires, Rehires & Transfers handled through the Posting Process and have been **Cancelled** by HR	**Hiring Manager**	Notification that their transaction has been Cancelled by HR	7
Manager **Initiates Delegation**	**Proxy**	Notification requesting their acceptance	8
Proxy **Accepts Delegation**	**Manager**	Notification advising that the proxy has accepted their request	9
Proxy **Rejects Delegation**	**Manager**	Notification advising that the proxy has rejected their request	10
Manager **Revokes Delegation**	**Proxy**	Notification advising that their delegation is being revoked	11
Proxy Becomes **Inactive**	**Manager**	Notification that action is required as your delegate is inactive	12
Job Opening has been **Approved**	**Recruiter (Primary)**	Notification that a Job Opening has been approved. Note the Job Opening status has changed from pending to open.	13
ALERT - No Show, Incomplete or Late Cancellation Training Notification	**Manager**	Notification that an employee that reports to and is enrolled in a course and has had their status change to: No Show, Incomplete or Late Cancellation. And charges may be incurred	14

Each Transaction type has its own email; this table provides a sample email for a transaction:	
Ref #	**Email**
1	Subject: Submitted - Job Opening - 12657 - Your request was submitted for approval Your request was successfully submitted. This request requires approval(s) before it will be saved to the database. Transaction Name: Job Opening Request ID: 12657 HRMS Analyst This is an automated message. Please do not respond to this email.
2	Subject: Approval Required Pay Rate Change - Eric Employee A request is awaiting your approval. Transaction Name: Pay Rate Change Employee Name: Eric Employee Employee Id: 118575 Originator Name: Daffy Duck To approve or deny this request, go to: http://hathoruat.hamilton.ca:7001/psp/hr9cprd/EMPLOYEE/HRMS/c/N_WF_MSS.N_HR_RATE_APPR.GBL?Page=N_HR_RATE_EE&Action=U&EMPLID=118575&EMPL_RCD=0&ACTION_DT_SS=2015-06-17&EFFSEQ=1 This is an automated message. Please do not respond to this email.

3	Subject: Denied - Pay Rate Change - Eric Employee Your request was denied. Transaction Name: Pay Rate Change Employee Name: Eric Employee Employee Id: 118575 Denied By: Mike Manager To view the transaction and any comments, go to: http://hathoruat.hamilton.ca:7001/psp/hr9cprd/EMPLOYEE/HRMS/c/N_WF_MSS.N_HR_RATE_VW.GBL?Page=N_HR_RATE_EE&Action=U&EMPLID=118575&EMPL_RCD=0&ACTION_DT_SS=2015-06-10&EFFSEQ=1 This is an automated message. Please do not respond to this email.
4	ubject: Informational - Pay Rate Change Transaction for Eric Employee has been processed by HR A request was processed by HR. If retroactive adjustments are required they will be processed by Finance Payroll within one pay period following the rate adjustment. Originator Name: Sally Supervisor Processed by: Tracey Jaremey Transaction Name: Pay Rate Change Employee Name: Eric Employee Employee Id: 118575 To view the status of this request, go to: http://hathoruat.hamilton.ca:7001/psp/hr9cprd/EMPLOYEE/HRMS/c/N_WF_MSS.N_HR_RATE_VW.GBL?Action=U&ACTION_DT_SS=2015-09-01&EFFSEQ=3&EMPLID=118575&EMPL_RCD=0 This is an automated message. Please do not respond to this email.

5	Subject: Cancelled by HR Pay Rate Change - Eric Employee Your request was cancelled. Transaction Name: Pay Rate Change Employee Name: Eric Employee Employee Id: 118575 Cancelled By: Tracey Jaremey To view the transaction and any comments, go to: http://hathoruat.hamilton.ca:7001/psp/hr9cprd/EMPLOYEE/HRMS/c/N_WF_MSS.N_HR_RATE_VW.GBL?Action=U&ACTION_DT_SS=2015-09-01&EFFSEQ=2&EMPLID=118575&EMPL_RCD=0 This is an automated message. Please do not respond to this email.
6	Subject: Processed by HR Manage Hire Request - test Mctester Your request was processed by HR. If retroactive adjustments are required they will be processed by Finance Payroll within one pay period following the rate adjustment. Processed By: Tracey Jaremey Manage Hire Request: 900000051 Transaction Name: Manage Hire Request Position #: 00008946 Title: Page Library Employee or Applicant Name: test Mctester This is an automated message. Please do not respond to this email.

7	Subject: Cancelled by HR Manage Hire Request - Eric Employee Your request was cancelled. Transaction Name: Manage Hire Request Manage Hire Request ID: 8819 Job Code: 6769 Position Title: Financial Assistant Employee/Applicant Name: Eric Employee Cancelled By: Tracey Jaremey This is an automated message. Please do not respond to this email.
8	Subject: Delegation Request from Sally Supervisor has been submitted for your review and acceptance Sally Supervisor (or an administrator on their behalf) has submitted a delegation request to you. Here are the details: Transaction(s): Job Opening-Initiator#1, Pay Rate Change-Initiator#1, Terminate/Retire-Initiator#1 From: 2017-06-26 To: You can review the request, then accept or reject the request, using the link below. http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=JobOpening&TRANS_ALLOWED=I&FROM_DATE=2017-06-26 This is an automated message. Please do not respond to this email.

9	Subject: Delegation accepted by Donald Duck Donald Duck has accepted a delegation request that you (or an administrator on your behalf) submitted. Here are the details: Transaction: Job Opening-Initiator#1, Pay Rate Change-Initiator#1, Terminate/Retire-Initiator#1 From: 2017-06-26 To: You can review the status of the request using the link below. http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=JobOpening&TRANS_ALLOWED=I&FROM_DATE=2017-06-26 This is an automated message. Please do not respond to this email.
10	Subject: Delegation Rejected by Daffy Duck Daffy Duck has rejected a delegation request that you submitted (or an administrator submitted on your behalf). Here are the details: Transaction: Transfer Employee-Initiator#2 From: 2017-06-26 To: You can review the status of the request using the link below. http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_NOTIFY.HCDL_MGR_DLG_HOME.GBL?Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=N_HR_TRANSFER&TRANS_ALLOWED=J&FROM_DAE=2017-06-26 This is an automated message. Please do not respond to this email.

11	Subject: Delegation Revoked by Sally Supervisor Sally Supervisor (or an administrator submitted on their behalf) has revoked a delegation request that was assigned to you. Here are the details: Transaction: View Employee Info-Initiator#1 From: 2017-06-26 To: You can review revoked requests using the link below. http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=HR_EE_INF_MGR&TRANS_ALLOWED=I&FROM_DATE=2017-06-26 This is an automated message. Please do not respond to this email.
12	Subject: Action Required your delegate Sally Supervisor is inactive The system has identified that Sally Supervisor is an inactive employee for a delegation request that has been accepted. Here are the details: Delegation Status: A Transaction: Initiate Rate Increase #1 From: 2015-04-21 To: Please review the status of the delegation request and revoke the request using the link below. You can enter a new request for another proxy if you wish. http://hathordev.hamilton.ca:7001/psp/hr9dmo/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_ADMIN_DLG.GBL?Page=HCDL_ADMIN_DLG&Action=U&DELEGATOR_ID=075180&DELEGATOR_RCD=0&TRANSACTION_NAME=N_HR_RATE&TRANS_ALLOWED=I&FROM_DATE=2015-04-21 This is an automated message. Please do not respond to this email.

13	Subject: Job Opening ID (12664) Pest Control Preparation Crew has been Approved The following Job Opening has been "Approved". Job Opening ID: 12664 Posting Title: Pest Control Preparation Crew To view this Job Opening, visit: http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HRS_HRPM.HRS_JOB_OPENING.GBL?Action=U&HRS_JOB_OPENING_ID=12664
14	Subject: ALERT – No Show, Incomplete or Late Cancellation Training Notification **ALERT – No Show, Incomplete or Late Cancellation Training Notification** **Message 1:** Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) **Explanation:** **Transaction Name:** Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request **Employee Name :** Smith,Robert **Employee ID:** 012345 **Attendance status :** Incomplete **Cost of Course :** 0.00 **Course :** CE0005 **Course Title** :NewEmployeeOrientation-CE **Message 2:** Employee 'Enrolled' Attendance Status change to : No Show (26003,62) **Explanation:** **Transaction Name:** Enrolled Attendance Status Change to "No Show" for an Approved Learning and Development Request **Employee Name :** Pitt,Brad **Employee ID:** 012346 **Attendance status :** No Show **Cost of Course :** 0.00 **Course :** HS0009 **Course Title** :Public Health Fundamentals-HS **Message 3:** Employee 'Enrolled' Attendance Status change to : Late Notice Cancellation (26003,62) **Explanation:** **Transaction Name:** Enrolled Attendance Status Change to "Late Notice Cancellation" for an Approved Learning and Develop **Employee Name :** Doe,John **Employee ID:** 012347 **Attendance status :** Late Notice Cancellation **Cost of Course :** 50 **Course :** CE0090

MERIT ALERTS/NOTIFICATIONS:

Purpose

To generate email notifications to Managers identifying employees that are approaching or have reached the threshold defined for a merit increase. The email notifications will go out every other Thursday listing **Salary** employee(s) eligible within the next two weeks and **Wage** employee(s) in the last pay period.

Important

The notification process uses PeopleSoft Position Hierarchy to determine where the alert should go. If the Manager is not active in PeopleSoft (off Job due to Leave etc), the email notification will be sent to the active backfill; if the Manager is off sick (still active on Job), notification will still go to their email Inbox because PeopleSoft considers them to still be active. If the Manager Position is vacant, the email will advance to the next position in the hierarchy. If that position is vacant, the email will be sent to an "undeliverable email account".

FA staff can run the following query (N_HR_MERIT_ALERT_NOTIFICATION) to monitor notifications that were generated. When running query you will be prompted for a Run Date (Note: Run Date prompt is always the day before the wage pay i.e. Wage pay of 04/28/2017 – enter 04/27/2017 as your run date)

Merit Alert Procedure

Step	Action
1	Every other Thursday, if applicable, the Manager will receive the following email notification with the Subject Line: **Employees Eligible for Merit Increase.** *Note: The email contains a hyperlink that will take you to Request Pay Rate Change. You must sign in to MyHR Info to initiate the Pay Rate Change.*

Subject: Employees Eligible for Merit Increase

Listed below are the employees eligible for a merit increase. Click Request Employee Increase to initiate merit increase for each employee.

Emplid	Rcd	Dept ID	Employee Name	Sal Admin Plan	Grade	New Step	New Hourly Rate	Pct.Increase	Merit Increase Dt
119237	0	632020	Pitt,Brad	C1	F	3	$26.548	4.17	2015-06-08 *
120508	0	632020	Joley,Angela	C5	I	2	$29.033	4.54	2015-06-08 *
121669	0	632020	Employee,Eric	CA	7	0	$50.855	3.20	2015-07-14

Disclaimer
(*)Part time employee's merit increase shall become effective based on the hours worked in the position as per the applicable Collective Agreement/Non Union Policy, therefore the Merit Increase Date is subject to change.

This is an automated message. Please do not respond to this email.

2	If the Manager determines the employee is eligible for the merit increase, initiate the Request Pay Rate Change transaction in Manager Self Service. *Note: In the case of non-union, a completed Performance Review is required.*
	End of Procedure.

FAII MONITOR MERIT QUERY*:*

Purpose:
To monitor email notifications that have been generated to Managers identifying employee(s) that are approaching or have reached the threshold defined for a merit increase.

Important:
The notification process uses PeopleSoft Position Hierarchy to determine where the alert should go. If the Manager is not active in PeopleSoft (off Job due to Leave etc), the email notification will be sent to the active backfill; if the Manager is off sick (still active on Job), notification will still go to their email Inbox because PeopleSoft considers them to still be active. If the Manager Position is vacant, the email will advance to the next position in the hierarchy. If that position is vacant, the email will be sent to an "undeliverable email account". **FA staff can run the following query N_HR_MERIT_ALERT_NOTIFICATION)** to monitor notifications that were generated. When running query you will be prompted for a Run Date

Procedure:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Every other Thursday (on the wage pay), if applicable, the Manager will receive the following email notification with the Subject Line: Employees Eligible for Merit Increase. Note: The email contains a hyperlink that will take you to Request Pay Rate Change. You must sign in to MyHR Info to initiate the Pay Rate Change.

Subject: Employees Eligible for Merit Increase

Listed below are the employees eligible for a merit increase. Click Request Employee Increase to initiate merit increase for each employee.

<table>
<tr><th>Emplid</th><th>Rcd</th><th>Dept ID</th><th>Employee Name</th><th>Sal Admin Plan</th><th>Grade</th><th>New Step</th><th>New Hourly Rate</th><th>Pct.Increase</th><th>Merit Increase Dt</th></tr>
<tr><td>119237</td><td>0</td><td>632020</td><td>Pitt,Brad</td><td>C1</td><td>F</td><td>3</td><td>$26.548</td><td>4.17</td><td>2015-06-08 *</td></tr>
<tr><td>120508</td><td>0</td><td>632020</td><td>Joley,Angela</td><td>C5</td><td>I</td><td>2</td><td>$29.033</td><td>4.54</td><td>2015-06-08 *</td></tr>
<tr><td>121669</td><td>0</td><td>632020</td><td>Employee,Eric</td><td>CA</td><td>7</td><td>0</td><td>$50.855</td><td>3.20</td><td>2015-07-14</td></tr>
</table>

Disclaimer
(*)Part time employee's merit increase shall become effective based on the hours worked in the position as per the applicable Collective Agreement/Non Union Policy, therefore the Merit Increase Date is subject to change.

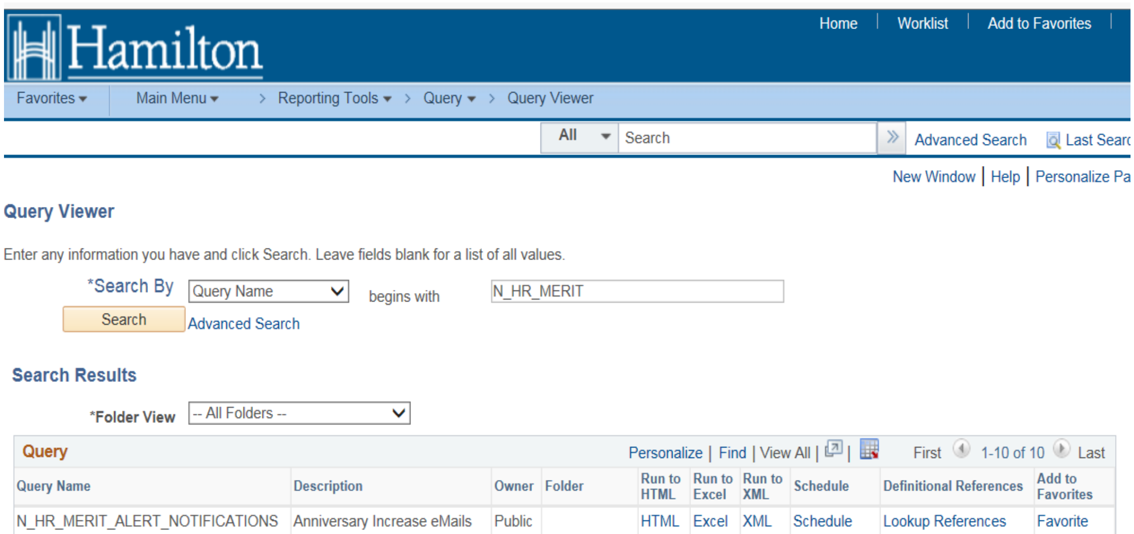
This is an automated message. Please do not respond to this email.
</td></tr>
</table>

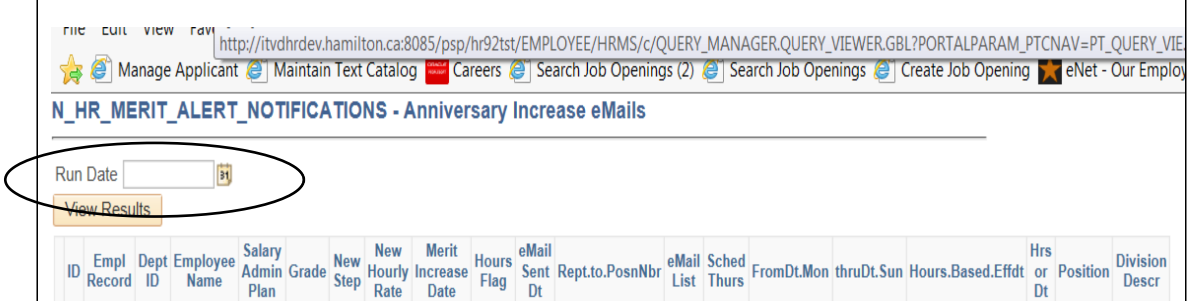
<table>
<tr><td>2</td><td>If the Manager determines the employee is eligible for the merit increase, initiate the Request Pay Rate Change transaction in Manager Self Service.

Note: In the case of non-union, a completed Performance Review is required.</td></tr>
<tr><td>3</td><td>FAII run query

Navigation: Main Menu>Reporting Tools>Query>Query Viewer

Enter beings with: N_HR_MERIT_ALERT_NOTIFICATION
And click Search .


</td></tr>
<tr><td>4</td><td>You will be prompted to enter a Run Date (Note: Run Date prompt is always the day before the wage pay (i.e. for Wage pay of 04/28/2017 – enter 04/27/2017 as your run date)


</td></tr>
</table>

5

The Spreadsheet will provide the following fields:
-Division
-Employee ID & Rcd Number
-Department ID
-Employee Name
-Employee’s Position Number
-Current Salary Admin Plan
-Current Grade
-New Step
-New Hourly Rate
-Merit Increase Date
-Hours Flag – this flags ‘*” Part time employees that have a merit increase based hours worked in the position as per the applicable Collective Agreement/Non Union Policy, therefore the Merit Increase Date provided on this query is subject to change
-Date Email was sent
-Reports To Position Number
-Email recepient
-Date Email Notification was sent

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
FAll to monitoi	10.00													
Division Descr	ID	Empl Record	Dept ID	Employee Name	Position	Salary Admin Plan	Grade	New Step	New Hourly Rate	Merit Increase Date	Hours Flag	eMail Sent Dt	Rept.to. PosnNbr	eMail List
EconomicDevelc	119459	0	362241	Donald Duc	00008448	CA	6	0	48.353	6/22/15	*	7/10/15	00001745	pshrtest@hamilton.ca
Parking&BylawS	103400	0	462005	Elymer Fud	00009310	CA	5	0	44.726	7/21/15		7/10/15	00001874	pshrtest@hamilton.ca
EnvironmentalSe	120530	0	445026	Bugs Bunny	00002173	C5	H	3	32.286	7/23/15		7/10/15	00002104	pshrtest@hamilton.ca
EnvironmentalSe	121705	0	445026	Mr McGoo	00002169	C5	H	2	30.995	7/28/15		7/10/15	00002104	pshrtest@hamilton.ca
Transportation	110633	0	530150	Kanya West	00003649	CA	7	0	52.841	7/29/15		7/10/15	00004316	pshrtest@hamilton.ca
Transportation	121684	0	530150	West North	00003649	CA	2	0	31.314	8/02/15		7/10/15	00004570	pshrtest@hamilton.ca
Transportation	121685	0	530150	Kim Kardasl	00003649	RE	D	2	22.809	6/22/15	*	7/10/15	00004720	pshrtest@hamilton.ca
Transportation	121686	0	530150	Angela Jolie	00003649	CA	4	0	38.307	6/22/15	*	7/10/15	00004720	pshrtest@hamilton.ca
Transportation	121687	0	530150	Brad Pitt	00003649	RE	F	3	26.548	6/22/15	*	7/10/15	00004720	pshrtest@hamilton.ca

End of procedure

DELEGATIONS

MANAGE DELEGATIONS OVERVIEW:

Purpose

If you are a Manager, you can choose to delegate responsibility for your self-service transactions so that others can act on your behalf to initiate and/or approve transactions for your employees.

In addition, any employee may become a proxy (delegate) when a Manager delegates responsibility to them.

Important

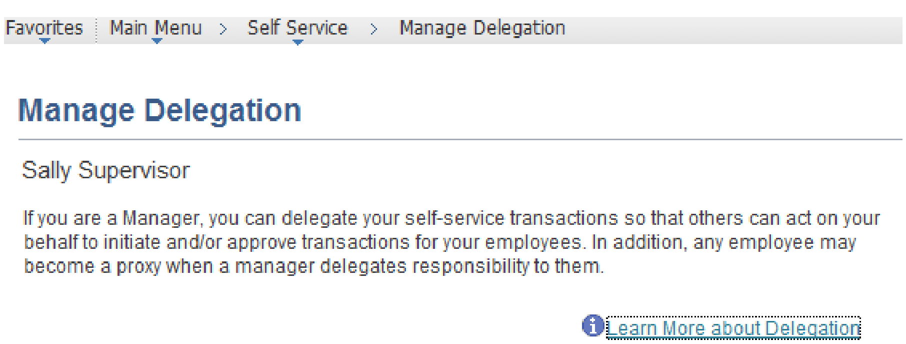
Delegator: Person who assigns authority to another user to initiate or approve transactions.

Proxy (delegate): The person who accepts the delegated authority and acts on another's behalf to initiate or approve transactions.

Procedure:

Follow the steps below for an overview of Manage Delegation links:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Learn More About Delegation: this link is used to review more important details about delegation functionality:

Navigation:
Manager tab>Manage Delegation>Learn More about Delegation


Note: This link is available to all employees.</td></tr>
</table>

<table>
<tr>
<td></td>
<td>
<u>FAQ</u>
Why would I want to delegate my responsibilities?
You may prefer to have administrative support staff process all transactions on your behalf for an indefinite period and then have them routed to you for approval.
You may prefer to delegate your approval rights for a specific period of time if you will be away from the office for an extended period and transactions cannot wait for your return. In these cases, it is important that you also specify an end date in your delegation request so that your delegation is automatically revoked upon your return.

Who can I delegate as my proxy to initiate transactions?
You can select anyone who is an active employee for the City. They do not have to report to you so you can delegate responsibility to initiate transactions to up to 3 employees who provide administrative support to you.

What happens when I delegate approval authority to someone?
When you delegate approval authority to a proxy, this person will act on your behalf to approve transactions as you. They will be notified of pending transactions to approve. If the transaction requires additional approval levels in the hierarchy beyond you, the approval chain will be determined based on your position hierarchy, not your proxy's.

How do I specify a timeframe for delegating transactions?
When you create a delegation request, you will need to specify a From Date and then have the option to enter a To Date. If the To Date is left blank, the delegation will remain active indefinitely until you choose to revoke it.

Why is a transaction not listed for me to delegate to someone else?
This is likely because you have already accepted the responsibility to approve or initiate that transaction on behalf of someone else. If you accept authority to initiate or approve transactions on behalf of someone else, the transaction then drops off your list of available transactions and you cannot then delegate it to others. This is called cascading delegation and is not allowed. Review the “My Delegated Authorities” page and contact the person who delegated to you so they can revoke your authority. Once revoked, you can then delegate that item.

If I am a proxy for approval for someone else, can I then ask someone else to be a proxy for me?
No, if you accept authority to approve transactions on behalf of another manager, you cannot delegate approval authority to anyone else...a proxy cannot have a proxy.

Can I remove myself as a proxy to someone else?
No. When you receive a delegation request, you may reject it. However, once you have accepted it, you cannot reject it. You will need to contact the person who delegated to you and ask them to revoke it.

What happens to my delegations when I transfer to a new position?
Delegations are attached to a userid, not a position. Therefore, if you transfer to a new position, delegations will follow you. If you are a Manager and you transfer positions, you may need to revoke your delegations and create new ones for the new staff that you now work for and with. Similarly, if your proxy transfers positions, you may need to revoke those delegations.
</td>
</tr>
<tr>
<td>2</td>
<td>
Create Delegation Request:
Choose transactions to delegate and proxies to act on your behalf. You may delegate all transactions except Smart HR Template.

Navigation:
Manager tab>Manage Delegation>Create Delegation Request

Select Create Delegation Request to choose transactions to delegate and proxies to act on your behalf.

<u>Create Delegation Request</u>

Note: This link is only available to Managers who are active employees on the City payroll. If a Manager goes on a leave of absence, they lose the ability to create delegations while on inactive status. All pre-existing delegations also cease.
</td>
</tr>
</table>

3	Review My Proxies: Review the list of transactions that you have delegated and revoke your delegated authority: Navigation: Manager tab>Manage Delegation>Review My Proxies Select *Review My Proxies* to review the list of transactions that you have delegated and to revoke delegated authority. Review My Proxies *Note: This link becomes available to a Manager once they have created a delegation request.*
4	Review My Delegated Authorities: Review the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests: Navigation: Manager tab>Manage Delegation>Review My Delegated Authorities Select *Review My Delegated Authorities* to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests. Review My Delegated Authorities *Note: This link becomes available to any employee when someone initiates a delegation request to them.*
	End of Procedure

CREATE A DELEGATION REQUEST:

Purpose

Use Create Delegation Request to delegate responsibility for your self-service transactions so that others can act on your behalf to initiate and/or approve transactions for your employees. This can be for a defined period or indefinitely.

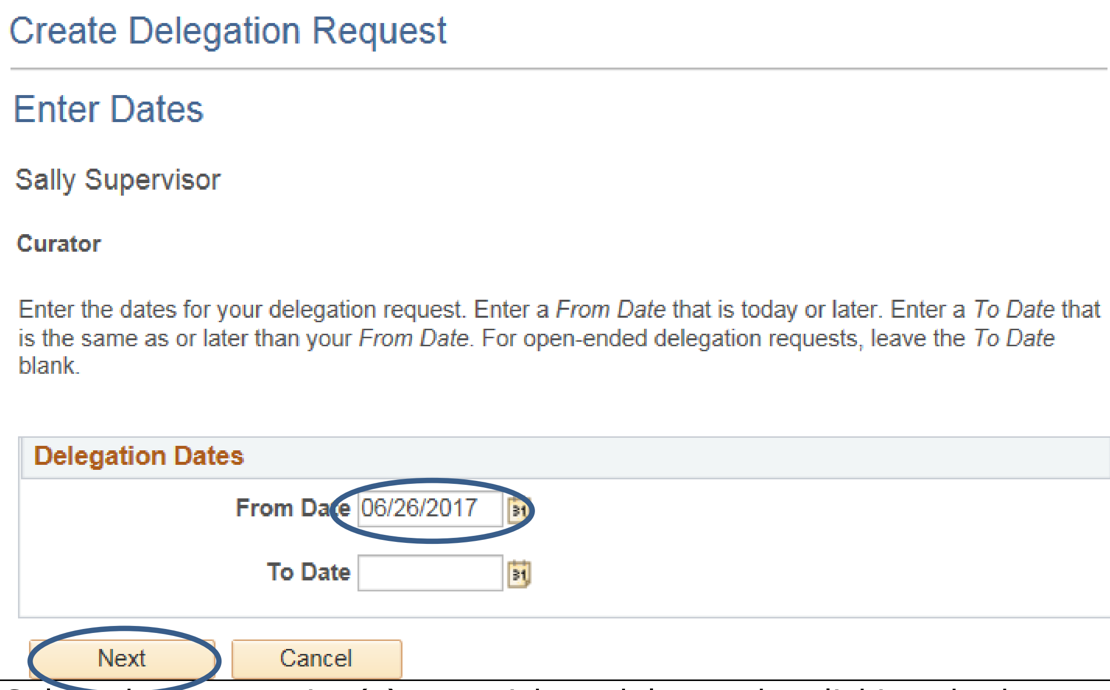
Important

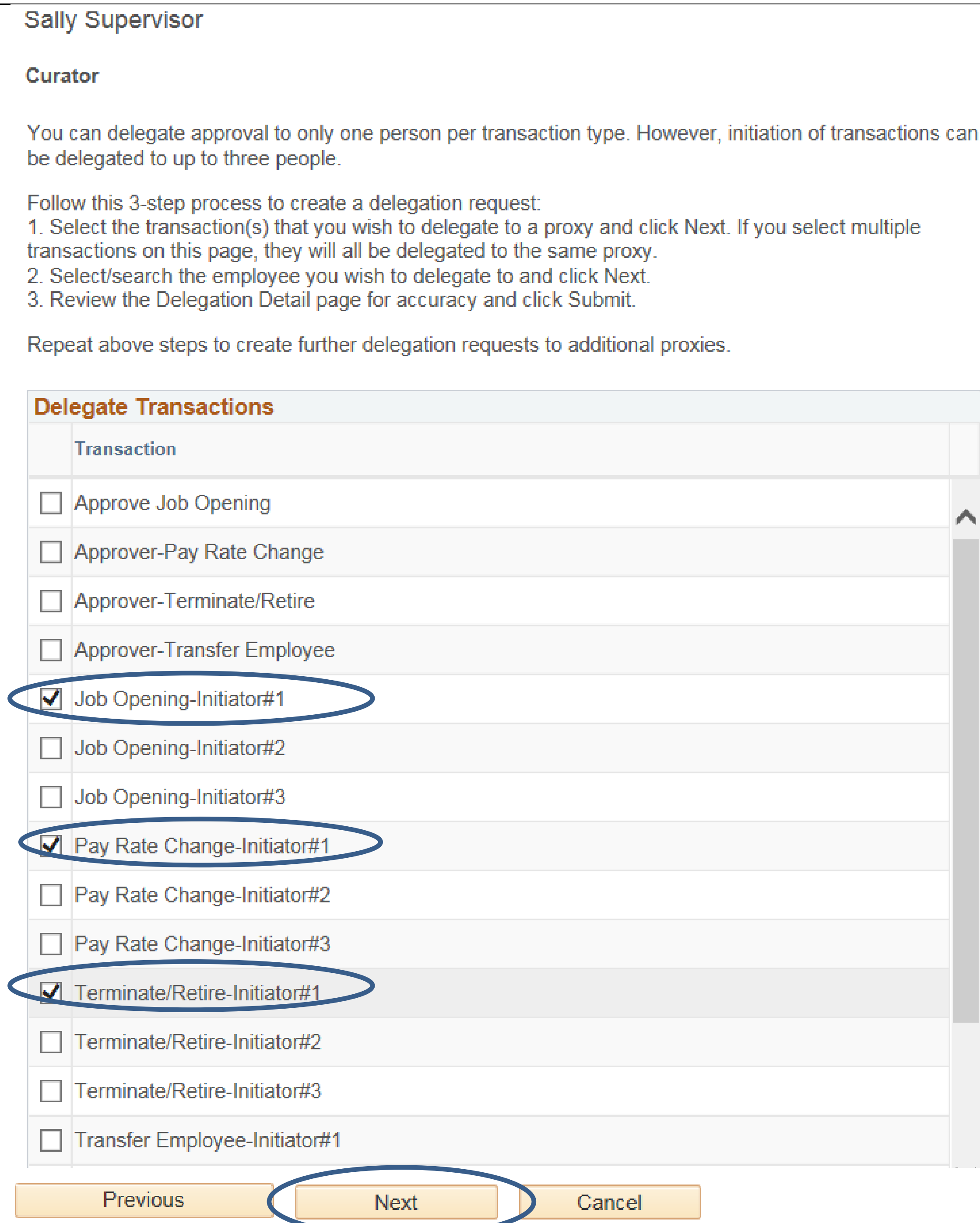
You can delegate responsibility to initiate transactions to up to 3 employees (per transaction type) who provide administrative support to you. However, you can delegate authority to approve transactions to only 1 person per transaction. Your proxy must accept the delegations in order to be able to perform tasks on your behalf. Proxies can only be active employees. If you accept authority to initiate or approve transactions on behalf of someone else, you cannot then delegate that transaction to others.

Procedure:

Follow the steps in the table on the following page to create a delegation request:

Step	Action
1	Navigation: Manager tab>Manage Delegation>Create Delegation Request

<table>
<tr><td>2</td><td>Enter the dates for your delegation request and click Next.
The From Date is mandatory and must be current date or future. The To Date is optional. If you want the delegation request to be active for an extended period, leave it blank. Open-ended delegation requests with no To Date date will continue indefinitely until you revoke them. Delegation requests with a To Date will automatically expire on the day following the To Date.

</td></tr>
<tr><td>3</td><td>Select the transaction(s) you wish to delegate by clicking the box beside the transaction name and click Next.</td></tr>
</table>

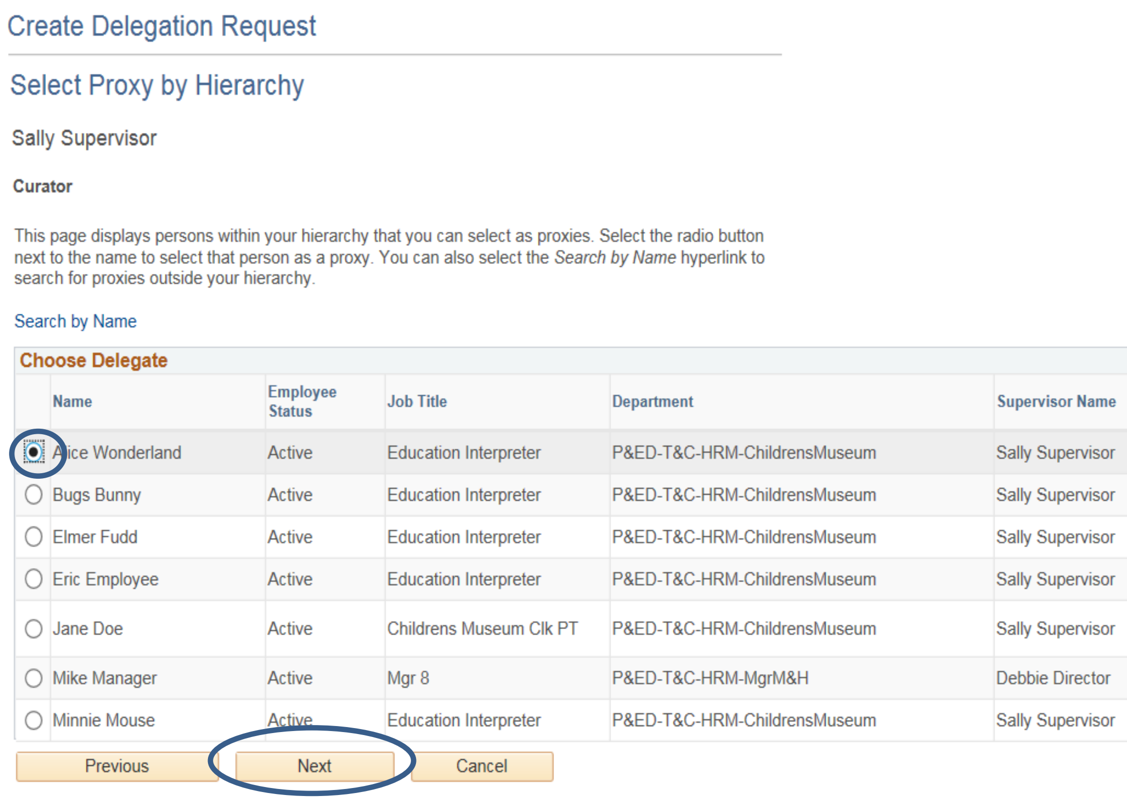


If you select multiple transactions, they will all be delegated to the same proxy.

To delegate each transaction to three different people, you must create a new delegation request for each additional proxy by selecting transaction #1, #2, #3 for each proxy.

Step	Instructions
4	Select the employee who you want to act as your proxy for the transaction(s) you selected on the preceding page.

a) You can delegate to an active employee within your direct reports hierarchy by clicking the radio button beside the employee's name and click Next . Proceed to step 5.



Create Delegation Request

Select Proxy by Hierarchy

Sally Supervisor

Curator

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the *Search by Name* hyperlink to search for proxies outside your hierarchy.

Search by Name

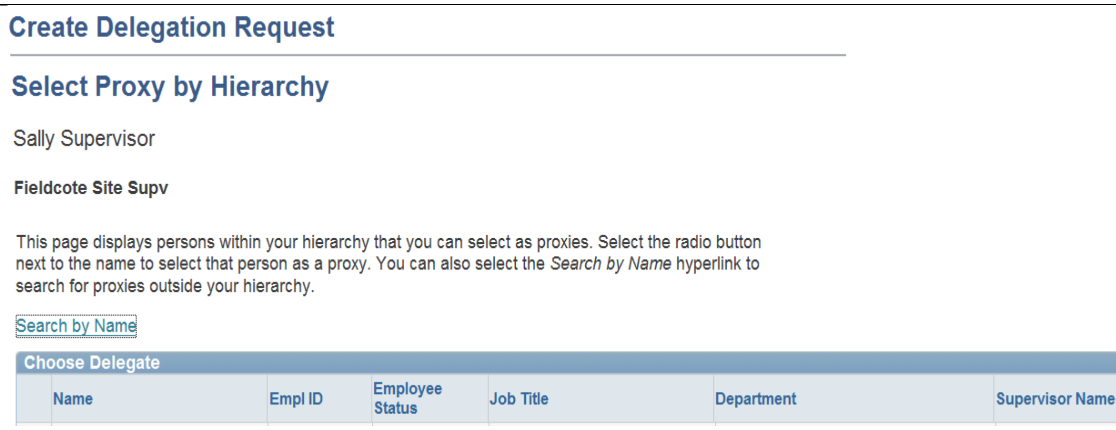
Choose Delegate

	Name	Employee Status	Job Title	Department	Supervisor Name
◉	Alice Wonderland	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sally Supervisor
○	Bugs Bunny	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sally Supervisor
○	Elmer Fudd	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sally Supervisor
○	Eric Employee	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sally Supervisor
○	Jane Doe	Active	Childrens Museum Clk PT	P&ED-T&C-HRM-ChildrensMuseum	Sally Supervisor
○	Mike Manager	Active	Mgr 8	P&ED-T&C-HRM-MgrM&H	Debbie Director
○	Minnie Mouse	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sally Supervisor

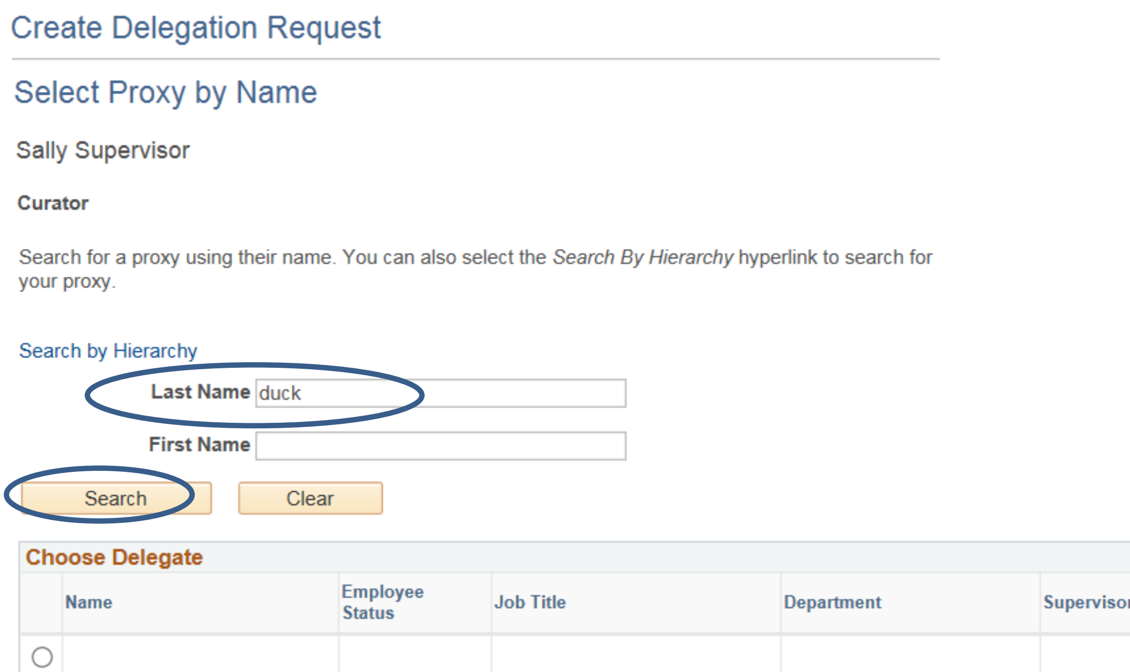
Previous Next Cancel

OR

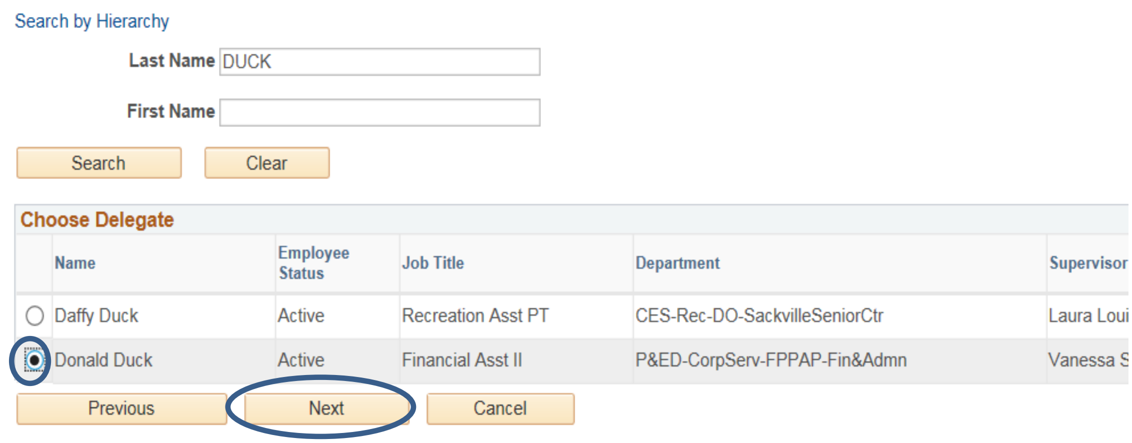
b) You can delegate to any active employee not within your hierarchy by clicking Search by Name .



Then enter the **Last Name** (or partial), and optionally enter the **First Name** (or partial), and click Search.

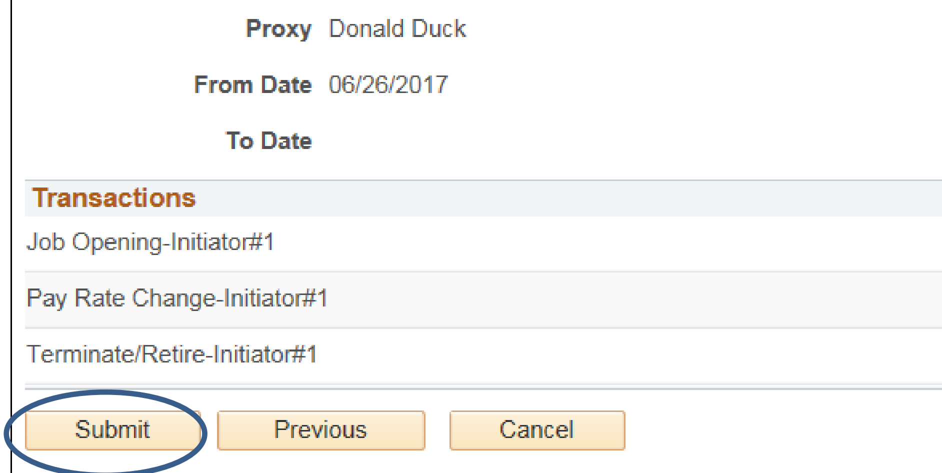


You will be presented with a list of employee names that meet your search criteria, along with job/department details to help you select the correct employee. Click the radio button beside the appropriate name, then click Next.



Note: a delegate who reports to you cannot initiate transactions for themselves. You (or another delegate) will need to initiate those transactions.

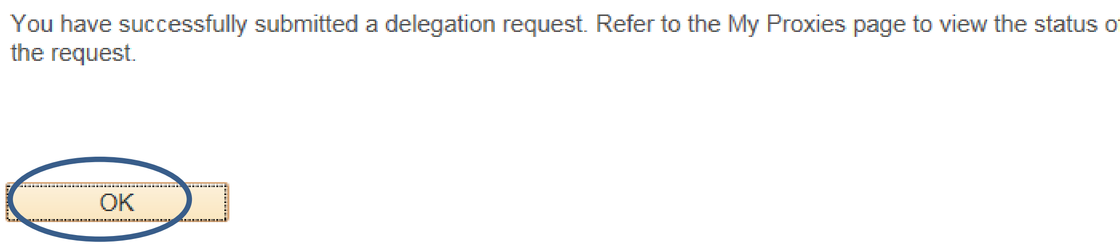
5 Review the Delegation Detail for accuracy. Then click Submit .



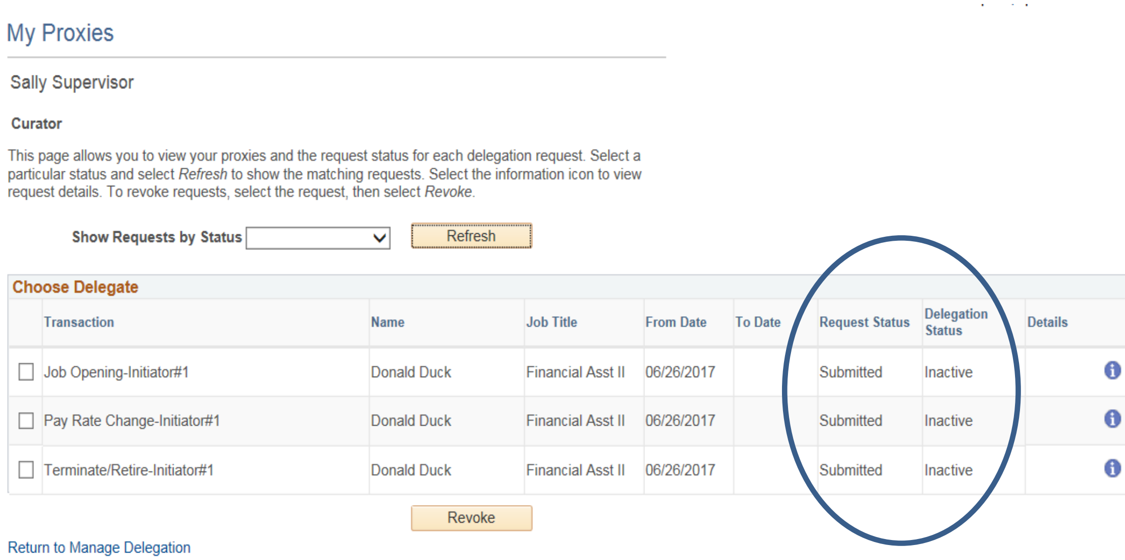
Note: If the Delegation Detail displayed on your screen is not correct, click Previous *to return to prior screens to make adjustments, or* Cancel *to abandon the request.*

6 You will be presented with a message that the delegation request has been successfully submitted.

<table>
<tr><td></td><td>Click OK to go to the Review My Proxies screen where you can review your proxies and delegation status for this request, as well as the history of all delegations that you have submitted.



</td></tr>
<tr><td>7</td><td>You will see that the Request Status is Submitted and the Delegation Status is Inactive. Your proxy must accept your delegation request before they can act on your behalf.



</td></tr>
<tr><td>8</td><td>An email notification is automatically sent by the system to your proxy to alert them of your request and asking them to accept or reject your delegation.</td></tr>
</table>

Subject: Delegation Request from Sally Supervisor has been submitted for your review and acceptance

Sally Supervisor (or an administrator on their behalf) has submitted a delegation request to you. Here are the details:

Transaction(s): Job Opening-Initiator#1, Pay Rate Change-Initiator#1, Terminate/Retire-Initiator#1

From: 2017-06-26

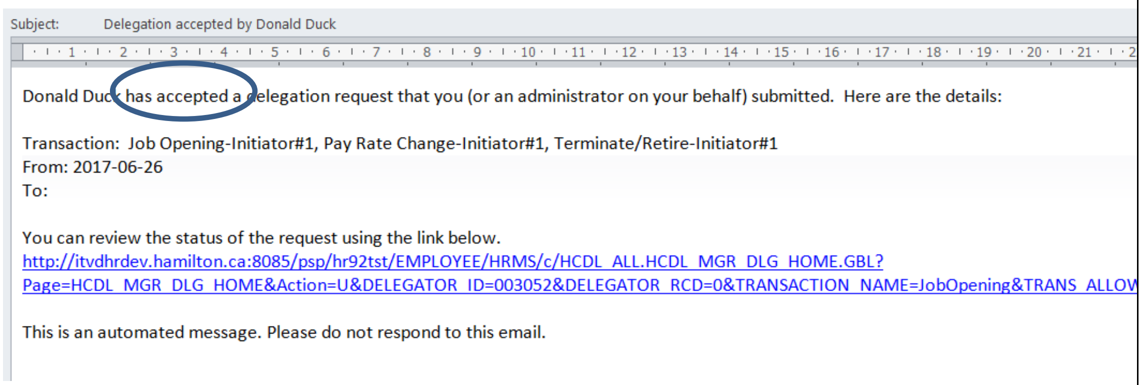
To:

You can review the request, then accept or reject the request, using the link below.

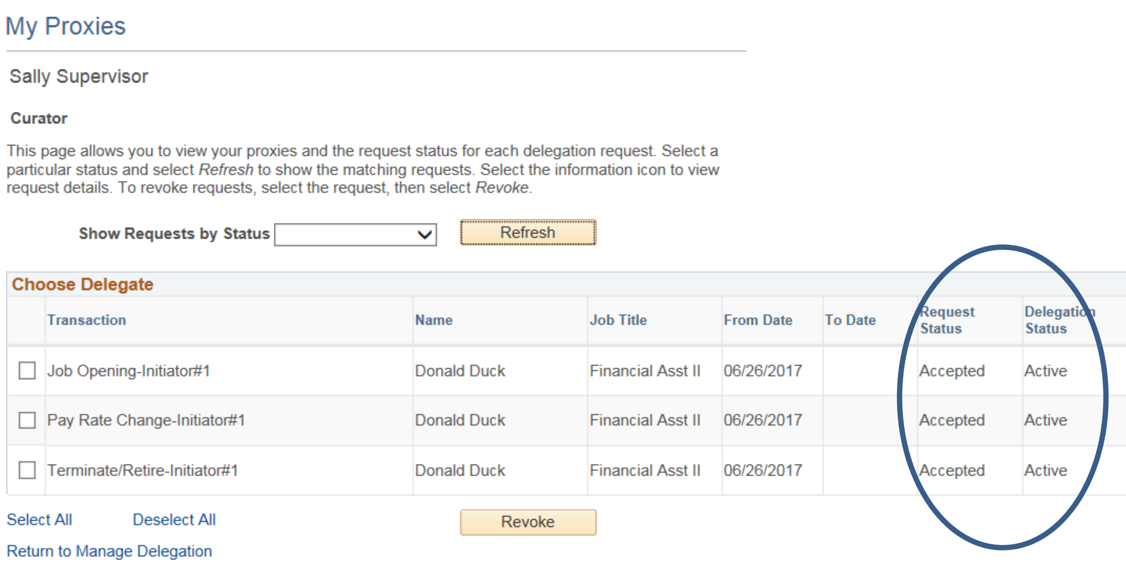
http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?
Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=JobOpening&TRANS_ALLOWED

This is an automated message. Please do not respond to this email.

<table>
<tr><td>9</td><td>Once your proxy either accepts or rejects your delegation, you will receive an email notification advising of their decision.



</td></tr>
<tr><td>10</td><td>Click the link in the email and go to Review My Proxies to review your proxies and delegation status. You will see that Request Status has changed to Accepted and the Delegation Status has changed to Active.



Note: If you have delegated Approval authority, any transactions still pending your approval will be moved to your proxy for their approval on the day that the Delegation Status becomes Active.</td></tr>
<tr><td></td><td>End of procedure.</td></tr>
</table>

REVOKE A DELEGATION:

Purpose

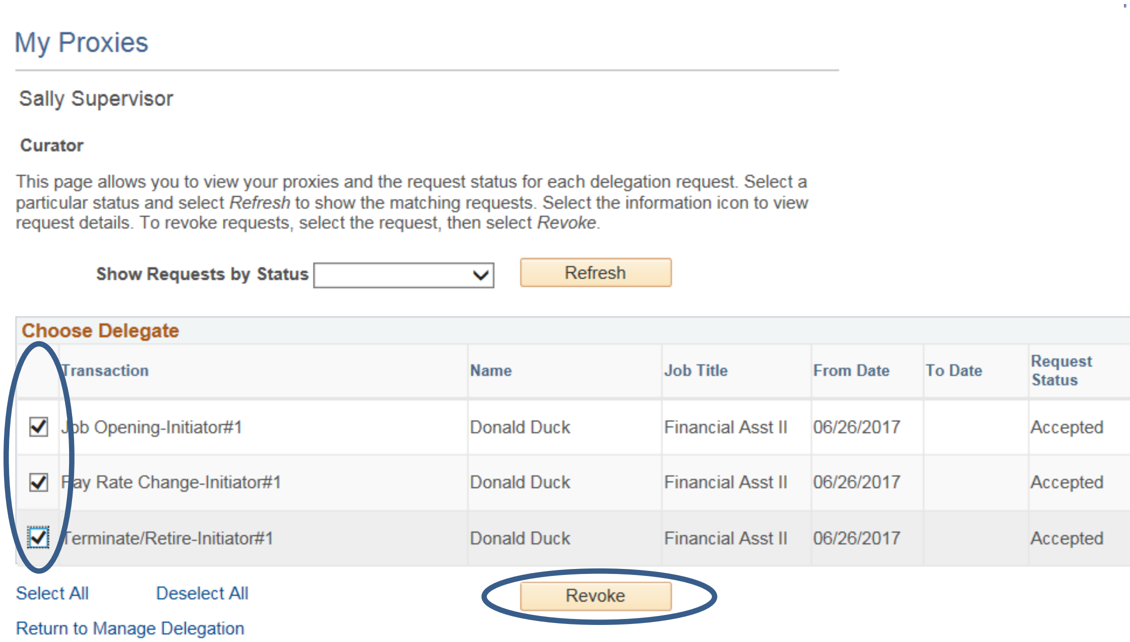
As a Manager, if you have delegated responsibility to initiate or approve your self-service transactions for an indefinite period of time, you can revoke those delegations at any time. Delegation requests with a "To Date" require no action on your part; they will automatically expire on the day following the "To Date".

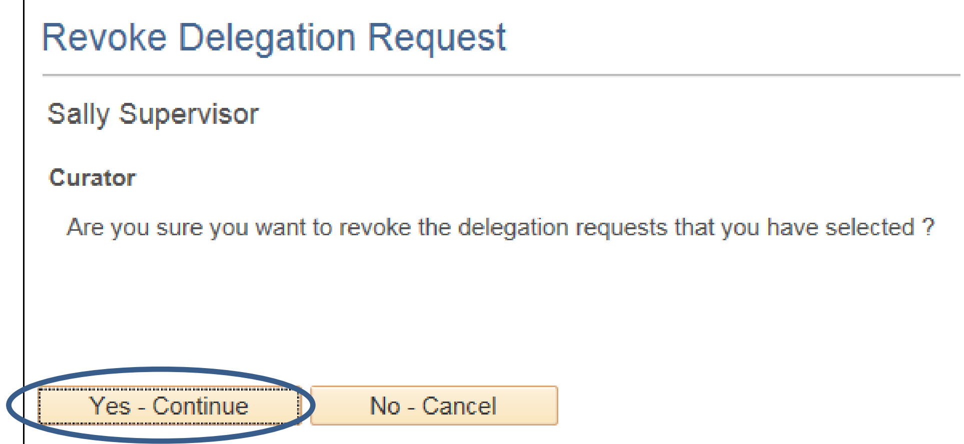
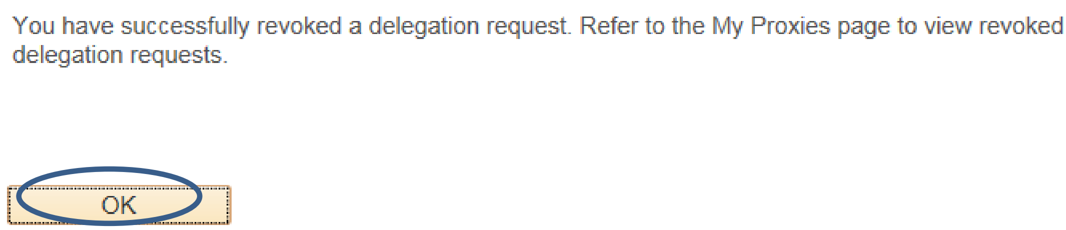
Important

Delegations are attached to your user ID, not your position; therefore, if you transfer to a new position, your delegations will follow you. If your delegate transfers, your delegations will also follow with them. Therefore, as a Manager, you may need to revoke your delegations and create new ones for the staff that you currently work for and with as staff movements occur.

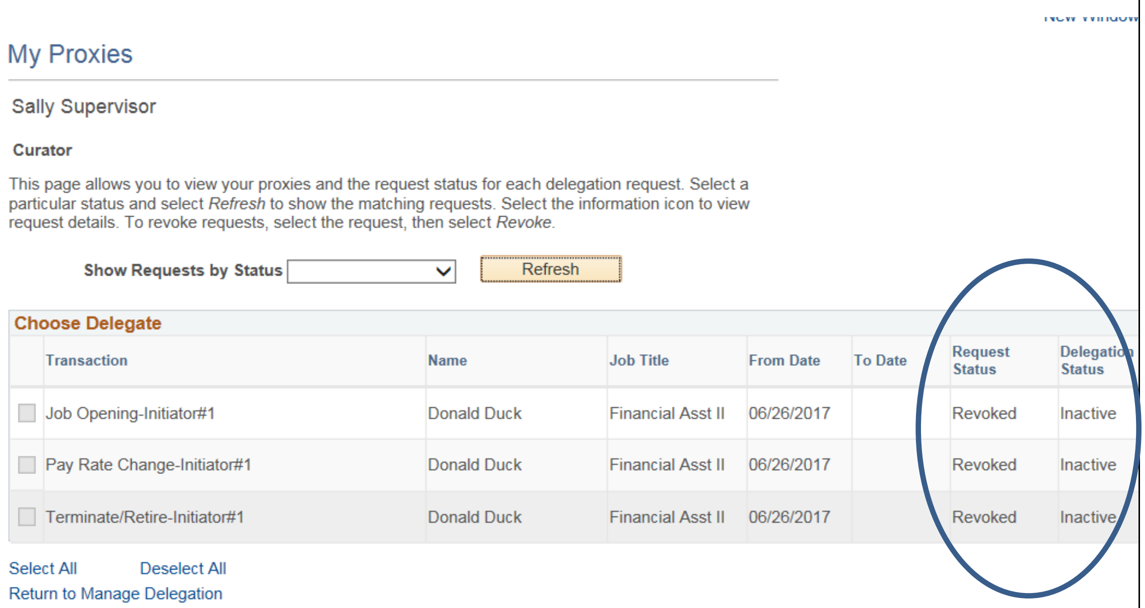
Procedure:

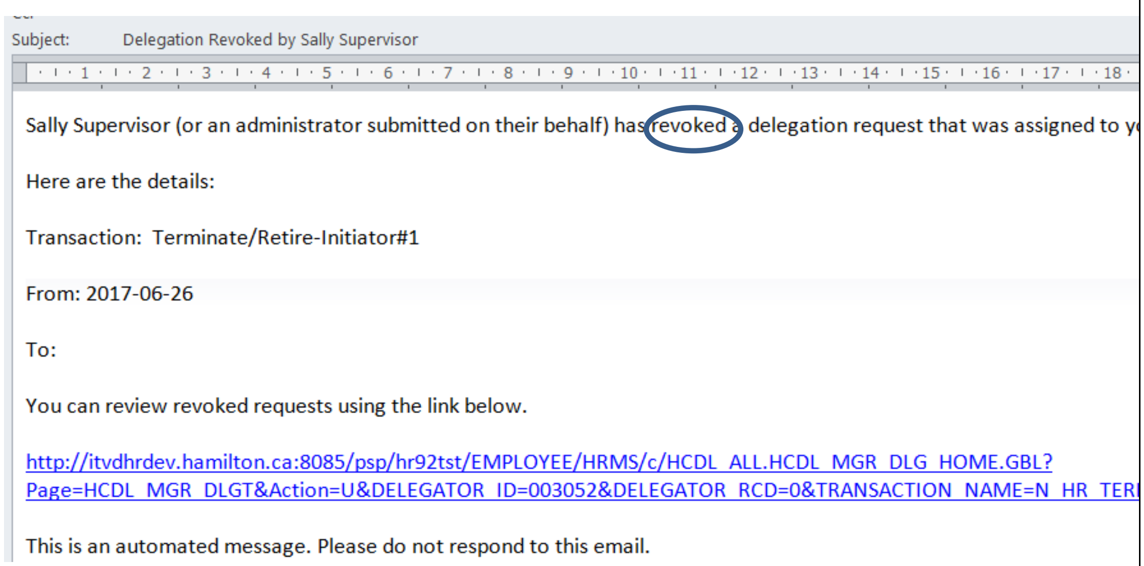
Follow the steps below to revoke a delegation request.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation:
Manager tab>Manage Delegation>Review My Proxies</td></tr>
<tr><td>2</td><td>Select the transaction(s) you wish to revoke by clicking the box beside the transaction name and click Revoke.

</td></tr>
</table>

	If you'd like to revoke all delegations at once, click Select All followed by Revoke.
3	You will be presented with a message asking you to confirm your intention to revoke your delegation(s). Click Yes - Continue. 
4	You will then be presented with a message that the delegation request has been successfully revoked.  Click OK to go to the **Review My Proxies** screen where you can review your proxies and delegation status.

<table>
<tr><td>5</td><td>You will see that The Request Status has changed to Revoked and the Delegation Status has changed to Inactive.


</td></tr>
<tr><td>6</td><td>An email notification is automatically sent by the system to your proxy advising that you have revoked your delegation from them.


</td></tr>
<tr><td></td><td>End of procedure.</td></tr>
</table>

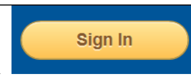
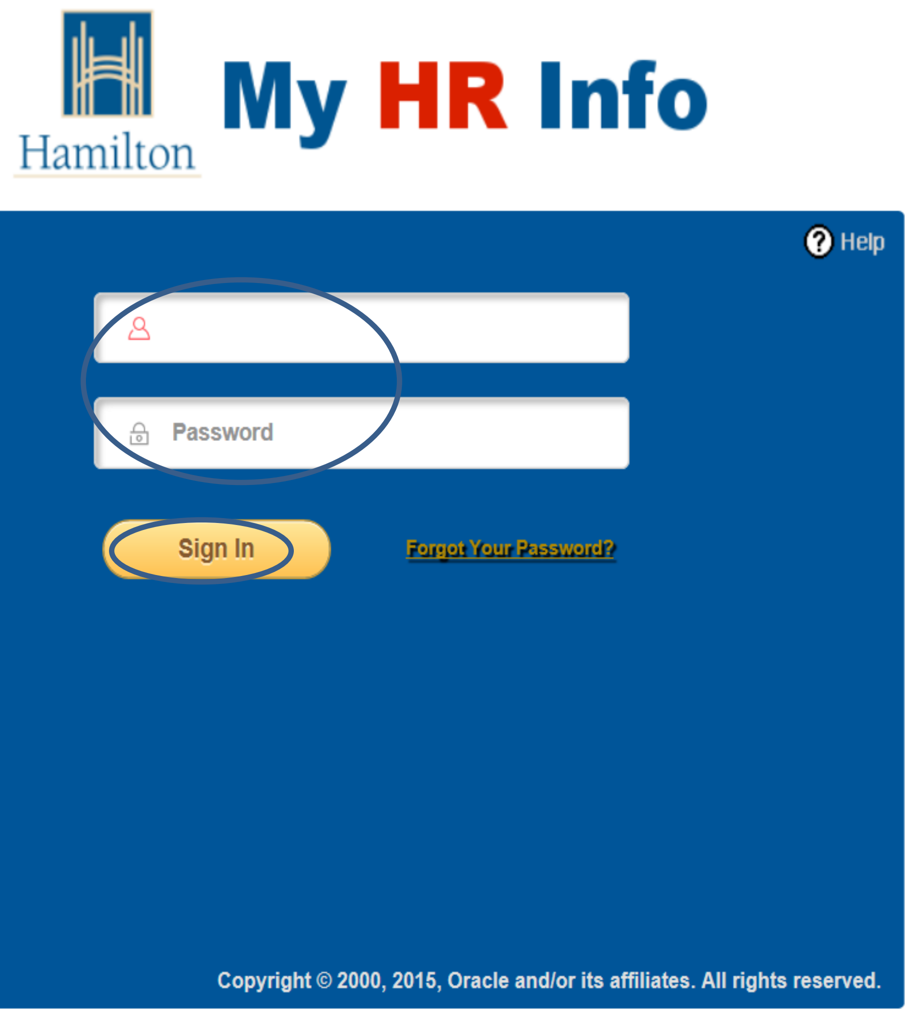
ACCEPT OR REJECT A DELEGATION REQUEST:

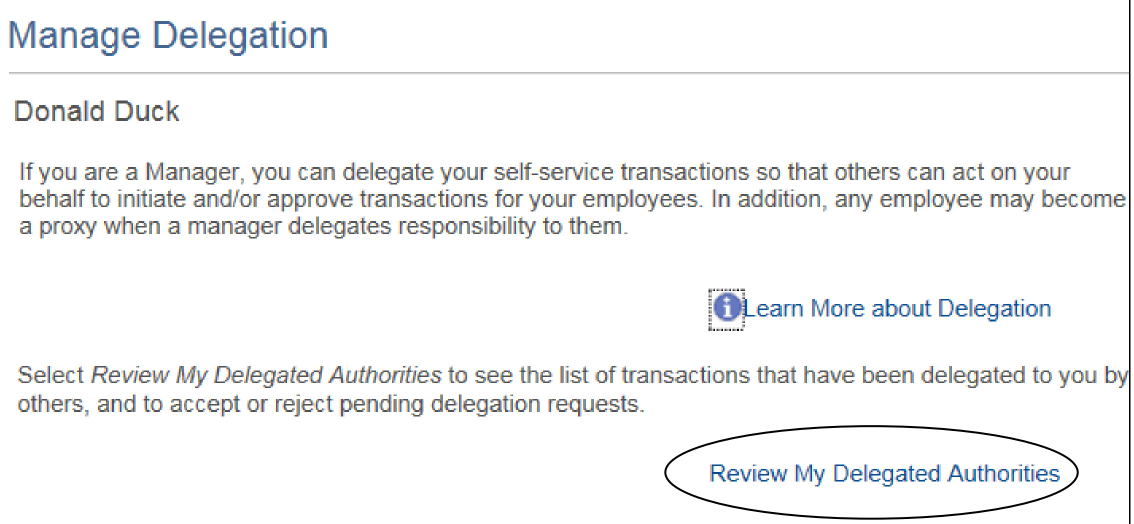
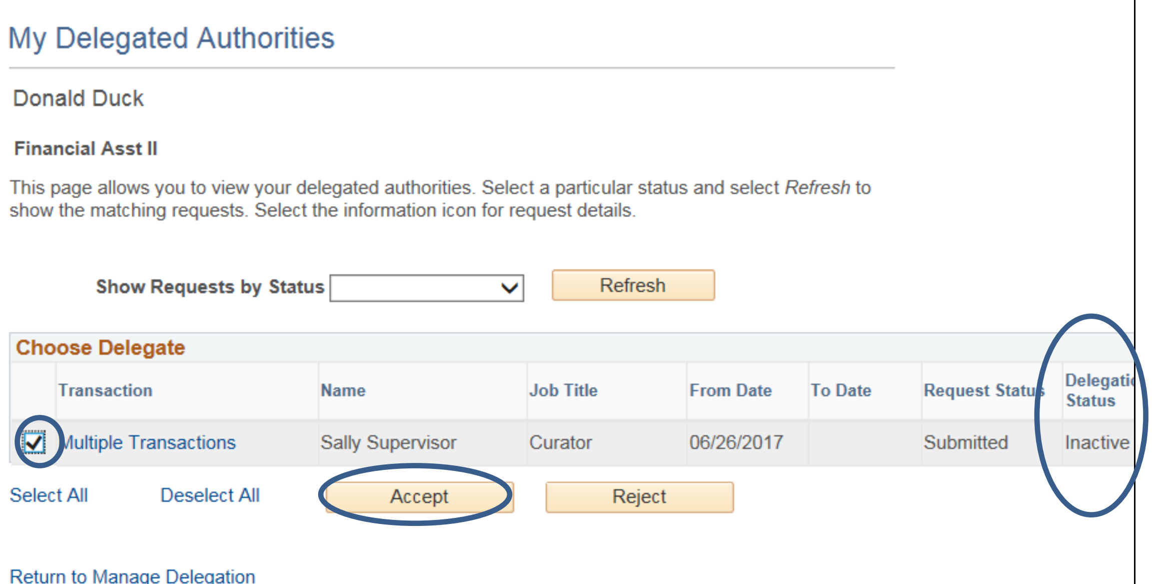
Purpose
A Manager may delegate responsibility to initiate and/or approve self-service transaction on their behalf. These delegations will typically be given to administrative support staff or other Managers; however, any employee may become a proxy when a Manager delegates authority to them. Delegations must then be accepted by the proxies before they can act on the Manager's behalf.

Important
If you are not already a Manager: when you accept a delegation request you must log out and log back into My HR Info (PeopleSoft) again in order for the system to refresh and initialize your new authority; otherwise you will get a "not authorized" error message if you try to initiate a transaction on behalf of that Manager.
If you are a Manager: when you accept a delegation to approve transactions on behalf of another Manager, you cannot delegate your approval rights for that transaction during that same timeframe.

Procedure
Follow the steps below to accept or reject delegations.

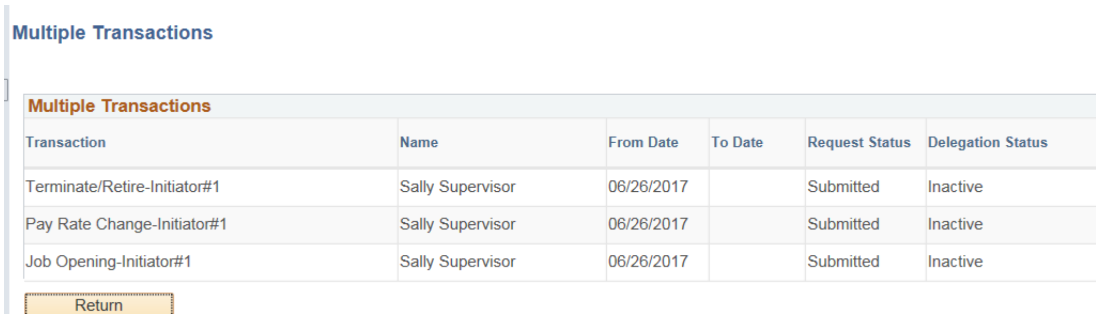
Step	Action
1	When a Manager appoints you as his/her proxy, an email notification is automatically sent by the system to you (the proxy) to alert you that a delegation request is awaiting your review and asking that you accept or reject the delegation. Click on the hyperlink in the email and you will be taken directly to the My HR Info Sign in page. (If you are already logged in, you will be taken directly to the Manage Delegations page).

	Subject: Delegation Request from Sally Supervisor has been submitted for your review and acceptance Sally Supervisor (or an administrator on their behalf) has submitted a delegation request to you. Here are the details Transaction(s): Job Opening-Initiator#1, Pay Rate Change-Initiator#1, Terminate/Retire-Initiator#1 From: 2017-06-26 To: You can review the request, then accept or reject the request, using the link below. http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=J This is an automated message. Please do not respond to this email.
2	Enter your userid and password and click  . 

<table>
<tr><td>3</td><td>You will be taken to the Manage Delegations page. Click Review My Delegated Authorities .

</td></tr>
<tr><td>4</td><td>Review the Inactive transactions that have been delegated to you and decide if you agree to accept, or reject, these responsibilities. Select the transaction(s) and click the appropriate button that corresponds with your decision Accept Reject .


Note: If a Manager delegates more than one transaction to you, you will see them bundled and listed as Multiple Transactions;</td></tr>
</table>

otherwise, you will see the name of the single transaction. You can click the Multiple Transactions *hyperlink to review the transactions before accepting the delegation (or review the details in your email).*

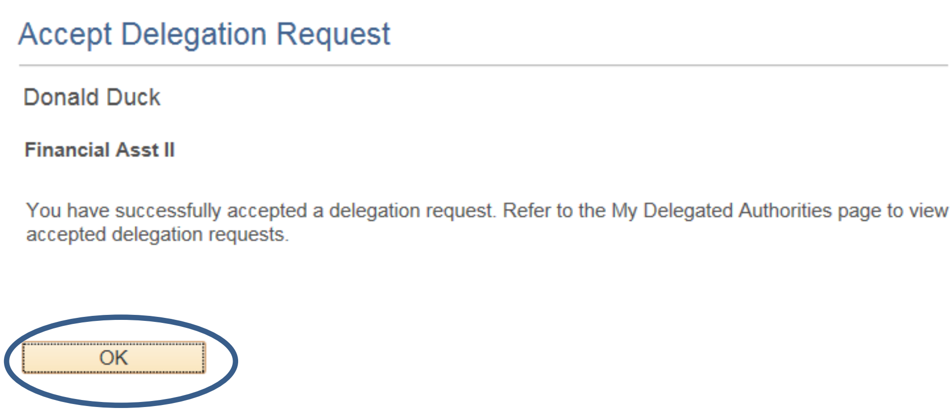


Multiple Transactions

Transaction	Name	From Date	To Date	Request Status	Delegation Status
Terminate/Retire-Initiator#1	Sally Supervisor	06/26/2017		Submitted	Inactive
Pay Rate Change-Initiator#1	Sally Supervisor	06/26/2017		Submitted	Inactive
Job Opening-Initiator#1	Sally Supervisor	06/26/2017		Submitted	Inactive

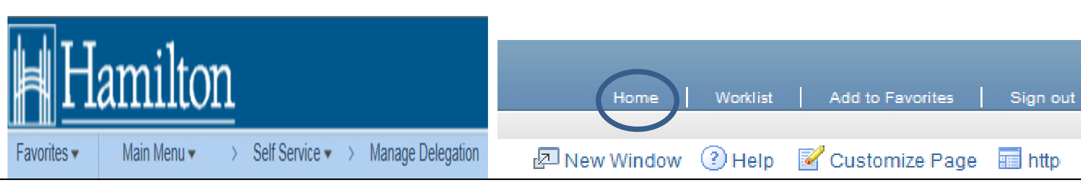
Return

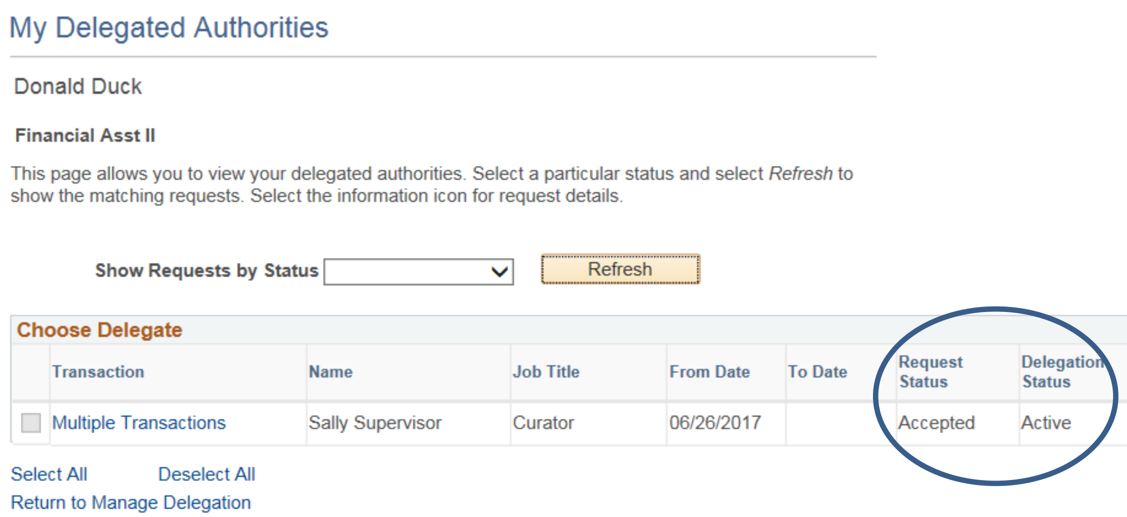
5 *You will be presented with a message that you have successfully accepted (or rejected) the delegation request.*



Click OK to go the **Review My Delegated Authorities** page where you can review the status of this delegation, and a history of all other delegations that you received.

6 You will see that the decision you made in response to the delegation request is reflected here: the **Request Status** is *Accepted (or Rejected)* and the **Delegation Status** is *Active (or Inactive).*

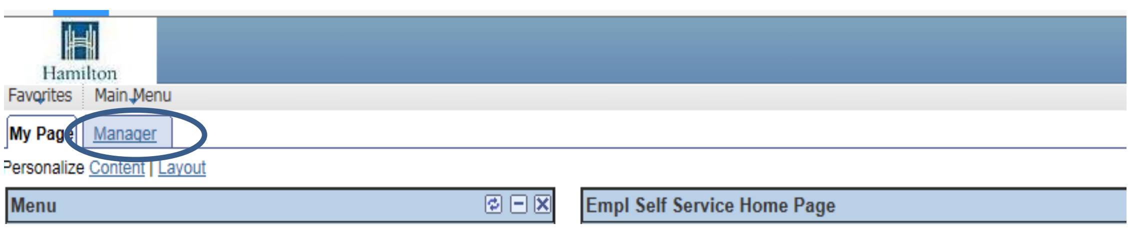




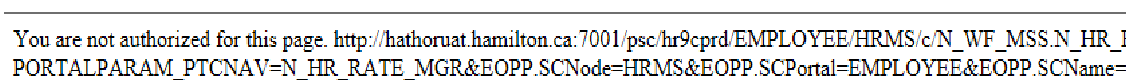
Click 

to return to your Home page.

7 If you are not already a Manager, you will notice that a new tab appears called "Manager" after you have accepted a delegation request.



Note: You must log out and log back into My HR Info in order for the system to refresh and initialize your new authority; *otherwise you will receive a "not authorized" error message if you try to initiate a transaction on behalf of that Manager without first logging out.*



Note: If you are accepting a delegation request to approve transactions on behalf of a Manager, all pending transactions will be reassigned to you for review. Refer to the Approving or Denying Transactions User Guide.

8 An email notification is automatically sent by the system to your delegate advising of your decision to their delegation request.

	Subject: Delegation accepted by Donald Duck Donald Duck has accepted a delegation request that you (or an administrator on your behalf) submitted. Here are the details: Transaction: Job Opening-Initiator#1, Pay Rate Change-Initiator#1, Terminate/Retire-Initiator#1 From: 2017-06-26 To: You can review the status of the request using the link below. http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL? Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=JobOpening&TRAN This is an automated message. Please do not respond to this email.
	End of procedure.

SELF SERVICE TRANSACTIONS

APPROVE OR DENY A PAY RATE, TRANSFER, TERMINATION OR TRAINING REQUESTS:

Purpose

Use the various Approve transaction pages to approve (or deny) a transaction that has been routed to you. This applies to approving Employee Pay Rate Changes, Transfer Employees, and Termination/Retirements. The Template Hires & Position Data Change transactions do not have an approval process: transactions are submitted directly to HR Records for processing from the Initiator.

HR Mandatory Approval Levels are coded to ensure a minimum level of approvals is adhered to. See page 5 for details.

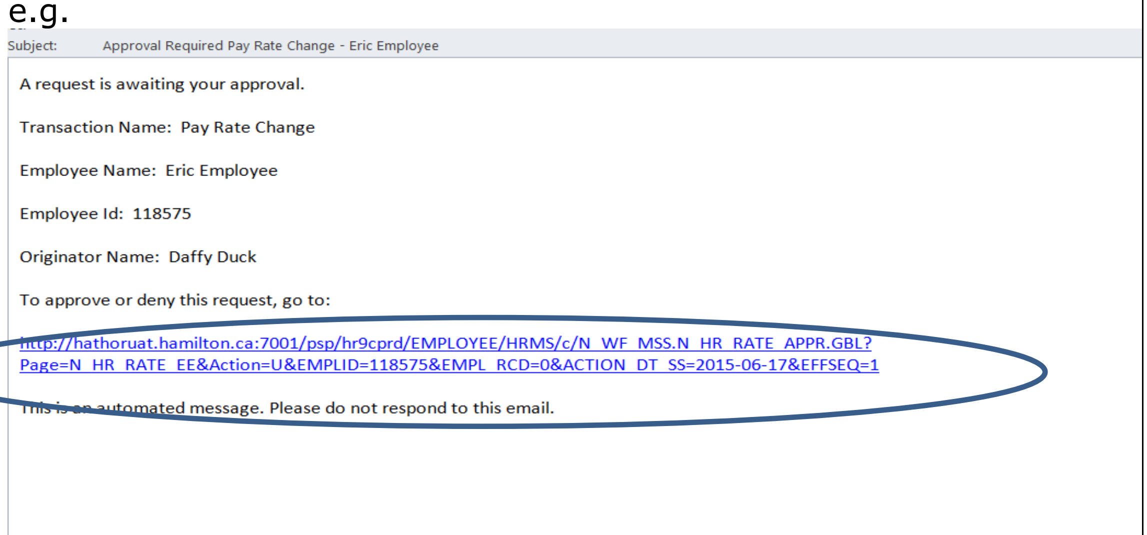
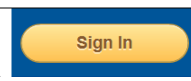
Important

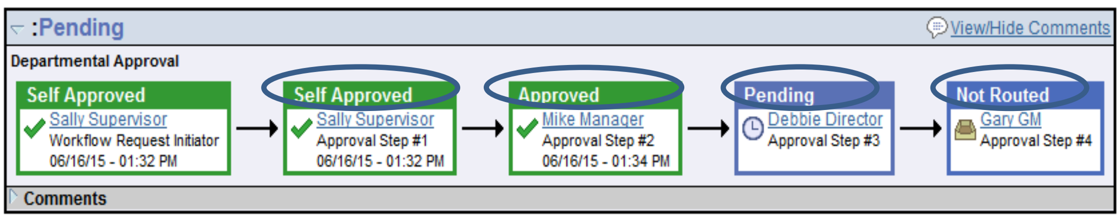
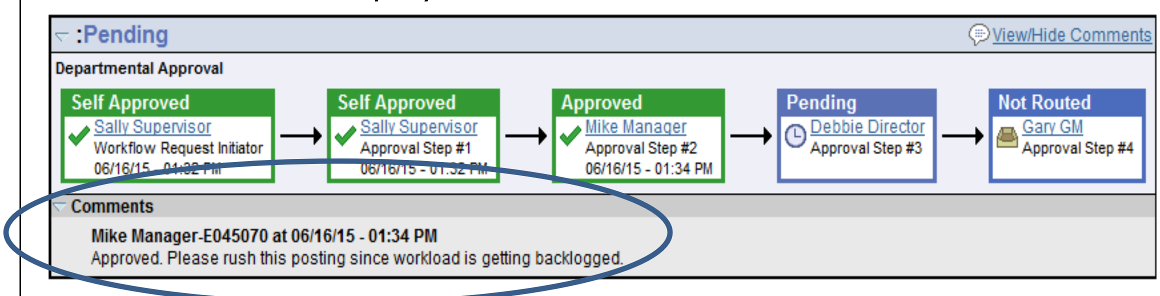
Approved transactions do not automatically update an employee's HR record. They must first be reviewed and approved by HR staff, and are then processed in the system.

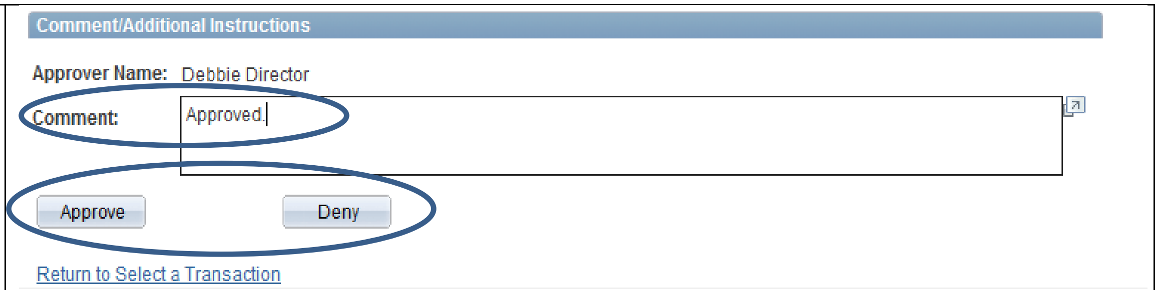
If a Manager is going on a leave of absence or terminating, all pending transactions residing with the Manager must be approved before the Manager exits. If they are not, these pending transactions will be in limbo and require rerouting by the HR Workflow Administrator or resubmitting by the department depending on the circumstances.

Procedure:

Follow the steps in the below table to approve (or deny) a transaction that has been routed to you. Although the page shots below are for approving a Pay Rate Change transaction, they also apply to approving the following transactions: Transfer Employees; Termination/Retirements.

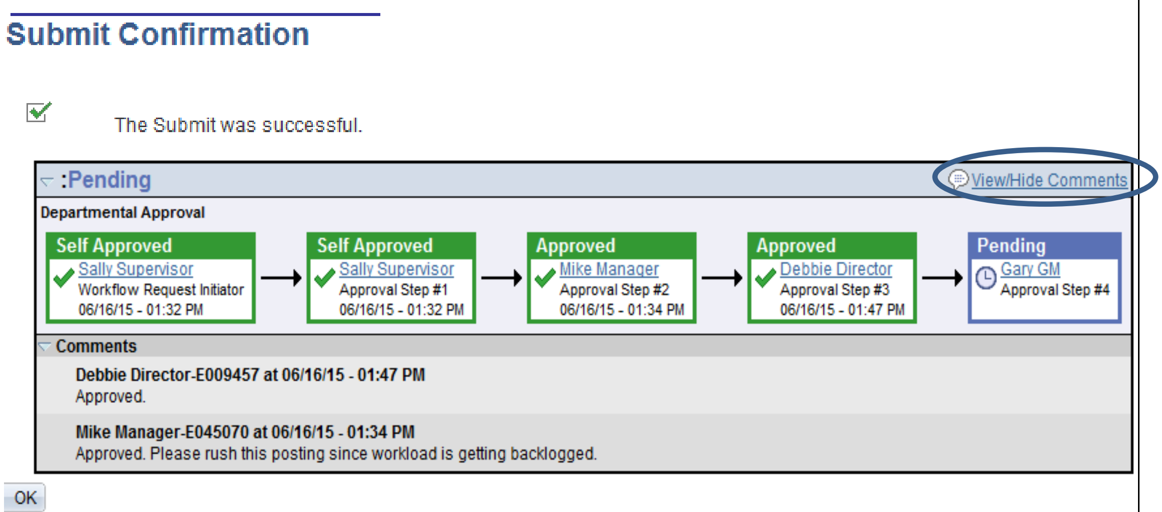
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>When a transaction is routed to you requiring your approval, an email notification is automatically sent to you by the system to alert you that a transaction is awaiting your review. Click on the hyperlink in the email and you will be taken directly to the My HR Info (PeopleSoft) Sign in page. (If you are already logged in, you will go directly to the Approve page).
e.g.

Subject: Approval Required Pay Rate Change - Eric Employee
A request is awaiting your approval.
Transaction Name: Pay Rate Change
Employee Name: Eric Employee
Employee Id: 118575
Originator Name: Daffy Duck
To approve or deny this request, go to:
http://hathoruat.hamilton.ca:7001/psp/hr9cprd/EMPLOYEE/HRMS/c/N_WF_MSS.N_HR_RATE_APPR.GBL?Page=N_HR_RATE_EE&Action=U&EMPLID=118575&EMPL_RCD=0&ACTION_DT_SS=2015-06-17&EFFSEQ=1
This is an automated message. Please do not respond to this email.</td></tr>
<tr><td>2</td><td>Enter your userid and password and click .
</td></tr>
</table>

3	Once you have signed in, you will be taken directly to the appropriate Approve page for that specific transaction. e.g. Approve Employee Pay Rate Change Approve Transfer Approve Termination/Retirement **Approve Training Requests** Each page will provide the relevant details of the request for your review.
4	The defined approval chain for this transaction is displayed at the bottom of the Approve page, including the approval status, and date/time for each completed approval. In the example below, the transaction is awaiting Debbie Director's review. 
5	If a prior approver added comments, the following icon will appear above the approval chain View/Hide Comments. Click the icon and the comments will be displayed. 
6	Review the details of the transaction and decide if you approve or deny this request. Enter your **Comment/Additional Instructions** if applicable. Your Comment will be seen by everyone in the approval chain, including HR and FAII's. Click the appropriate button that corresponds with your decision Approve Deny to route the transaction as appropriate.

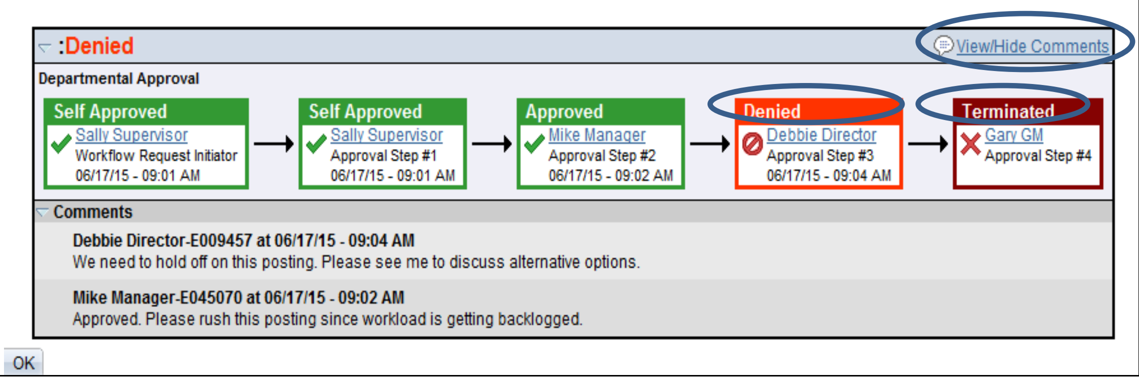


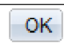
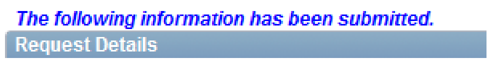
7 Once you have made your decision, you will be presented with a Submit Confirmation page, along with the updated approval chain where status of your decision is reflected, along with the date/time.

In the example below, Debbie Director has approved the transaction and it has now routed to the next approver in the chain.



In the example below, Debbie Director has Denied the transaction. As a result, the approval chain for this transaction has terminated.



	Again, if a prior approver added comments, the following icon will appear above the approval chain . Click the icon and the comments will be displayed.
8	Click  and you will be presented with the **Request Details** for this specific transaction which outlines what has been submitted. 
9	Workflow will generate an email at various stages: -to the next approver in the chain notifying of pending approval; -to the initiator if an approver in the chain denies a transaction; -to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the employee once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of procedure.

View Status: The routing status of a transaction that you initiated can be viewed at any time by navigating to the appropriate transaction's status page.

JOB OPENING

Initiate a Job Opening:

Purpose
Use the Create Job Opening transaction to initiate the job posting process for replacement of staff or filling a new position, or to initiate on behalf of a Manager who has delegated this responsibility to you.

HR Mandatory Approval Level
2 levels of approval, with a minimum of a Director level approval.

Choosing the Correct Reason
The table below describes the Reason for Vacancy and when to use them.

IF	THEN use reason....
You have an increase to your staff complement OR You have additional funding/gapping for a position	Additional Staff
You have a newly created job or position that previously did not exist OR You are replacing an existing position with a new position (i.e. re-purposing a position – an existing position is being replaced by other positions)	New Job/Position
You have a periodic posting that is to hire unfilled anticipated vacancies within the same classification.	Periodic Posting
You are replacing an employee who is on modified work	Replacement - Accommodation
You are replacing an employee who is currently on a maternity/parental leave of absence	Replacement – Mat/Par Leave
You are replacing an employee who is on a leave (i.e. military leave of absence, a leave of absence not covered under one of the other replacement categories, etc.)	Replacement - Other
You are replacing an employee who has been promoted to another position	Replacement - Promotion

IF	THEN use reason....
You are replacing an employee who has resigned or terminated employment with the City	Replacement – Resign/Terminate
You are replacing an employee who has retired from the City	Replacement - Retired
You are replacing an employee who is currently on short term or long term disability or WSIB	Replacement – STD/LTD/WSIB
You are replacing an employee who has been seconded to a position outside of the City	Replacement - Secondment
You have an employee who has vacated or been temporarily re-assigned to a position due to a special assignment outside the regular scope of their duties/position OR you are replacing an employee in a temporary project/special assignment with a definite term or task	Replacement – Spcl Assignment
You are replacing an employee who has transferred from their current position to another position, location, etc.	Replacement - Transfer
You have a temporary position for a project/special assignment with a definite term or task with no current incumbent	Special Assignment
You have permanent full-time dual positions of the same classification of the said vacancy which is posted internally only	VacancyNotifctn-DualCapcityEEs

Procedure:
Follow the steps in the table below to create a job opening for one of your positions:

Step	Action
1	Navigation: Manager tab>Job Openings>Create Job Opening
2	If you are a Manager or a proxy, the steps to create a job opening are the same: Enter the **Position Number** you wish to post. If you enter the position number, the Job Code, Department and Job Posting Title will default. If not posting by Position (i.e. periodic postings), you must enter all fields. Note: if you have multiple vacancies or periodic posting with the same job code, deptID, job title and location, you can create one job opening.  The Icon will let you change the search preferences for the position number field. Search Preferences are automatically populated with the GM position of your Department and restricts the list of positions that are displayed in your search results to only positions within your Department. If you are posting a position outside your Department you will need to change the the Search Preferences to the GM of that Department. *Note: Once you have created your job opening, don't forget to change your Search Preferences back to your GM.*
3	Enter the **Recruiting Location**. The recruiting location selected will be the primary recruiting location i.e. department or division and is a mandatory field.

<table>
<tr><td>4</td><td>Click the Continue button.</td></tr>
<tr><td>5</td><td>

Confirm the **Openings To Fill** - from the drop-down, select:

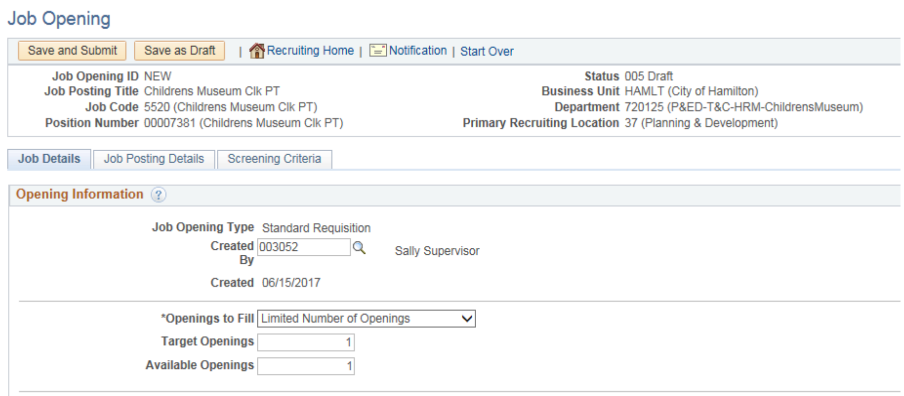
- Limited Number of Openings (Use this where the specified number is known)
- Unlimited Number of Opening (use this for periodic postings where the number is unknown)

</td></tr>
<tr><td>6</td><td>

Confirm the **Target and Available Openings:** Enter the number of openings.

These fields represent the number of positions that are to be filled and should match. You can add multiple Target Openings if you have multiple vacancies (i.e. Same Job code, location, dept ID, job title).

If the Unlimited Number of Openings was chosen, the target & available openings fields will not be available to enter.

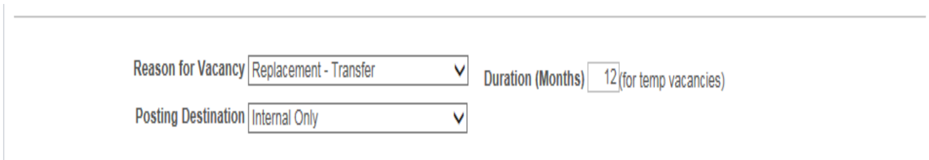


*Note: the **Created By** and **Created** fields will automatically populate and will display the Initiator's ID and Created date. These fields should not be changed.*

</td></tr>
</table>

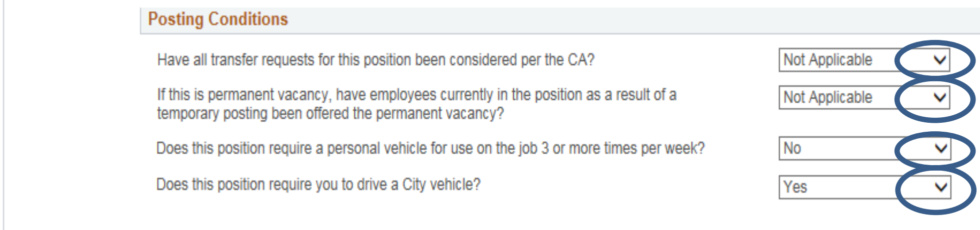
<table>
<tr><td>7</td><td>

Enter the **Reason for Vacancy, Posting Destination** and **Duration** (for Temp Vacancies).



</td></tr>
<tr><td>8</td><td>

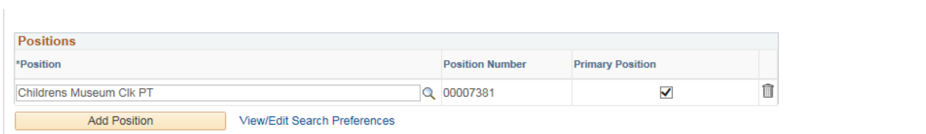
Enter your responses to the four **Posting Conditions** questions.



</td></tr>
<tr><td>9</td><td>

The position number entered under the Primary Job Opening Information screen will default in the **Position** field.

Additional positions numbers (same Job code, location, dept ID, job title) can also be entered however one primary position number must be selected.



Note: Periodic Postings do not require additional position numbers to be entered.

</td></tr>
<tr><td>10</td><td>

If this is an existing position, enter the employee(s) being replaced.

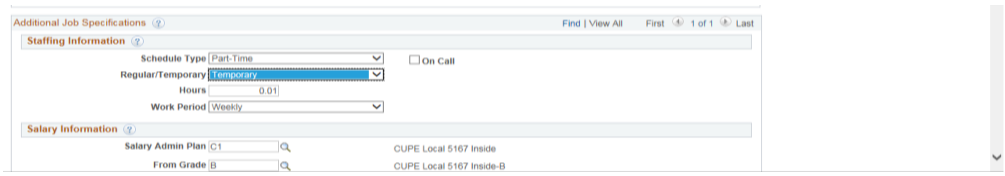
You can enter the employee ID number(s) or use the "look-up" magnifier icon to search by Empl ID or Name and enter all that you are replacing. *Note the look-up search will only display employees that are currently active or on a leave in PeopleSoft.*

</td></tr>
</table>

<table>
<tr><td>11</td><td>

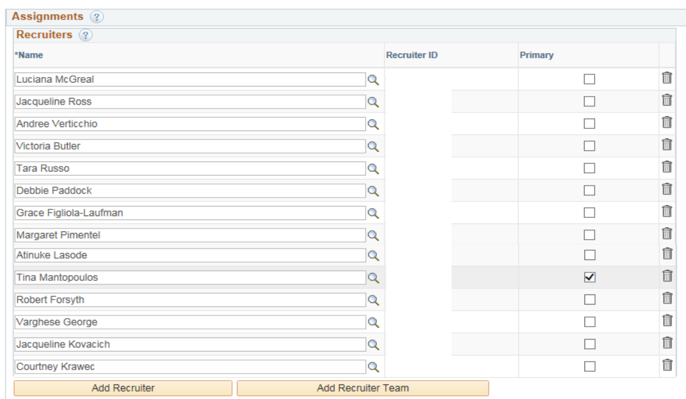
Verify the **Staffing Information** details and update as required. These fields default from the position number or job code selected. Identify if temporary or on-call and select as appropriate.

The **Salary Information** fields default from the position number or job code and do not change.



</td></tr>
<tr><td>12</td><td>

Identify the **Primary Recruiter** and select the applicable box. This field is mandatory.

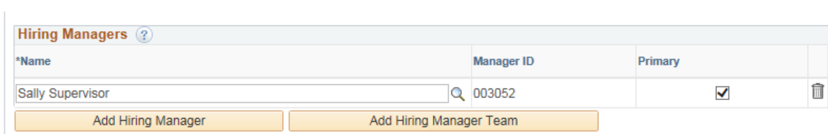


</td></tr>
<tr><td>13</td><td>

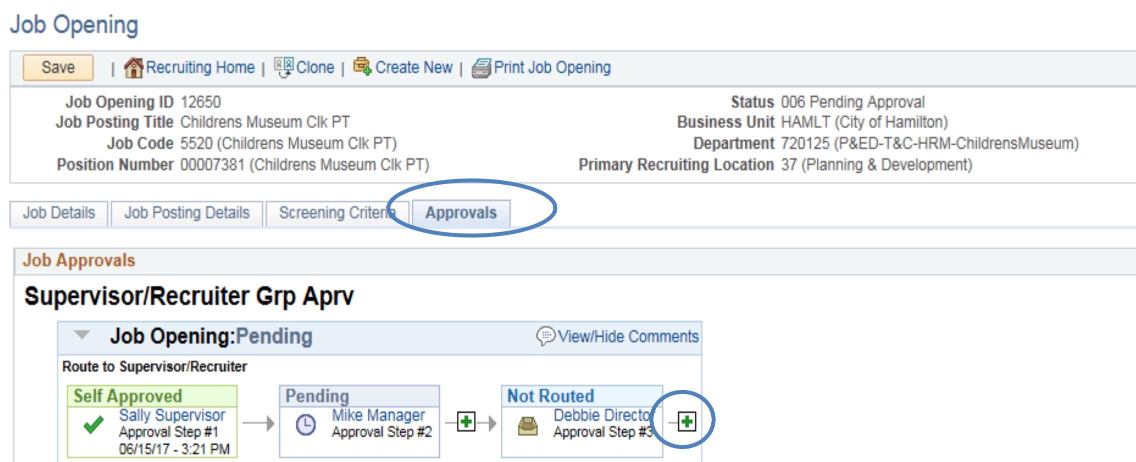
Validate the defaulted **Hiring Manager**.

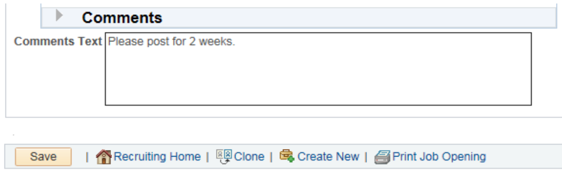
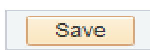
If you use Job Code instead of position number to create the job opening, you will need to enter the Hiring Manager manually.

Note: The Hiring Mgr/Supv ID is used to define the approval chain. If the Hiring Manager is vacant or on a leave it will not populate. You must manually enter a Hiring Mgr/Supv ID to build the approval chain.



</td></tr>
</table>

14	Click on Save and Submit to save the job opening and trigger the approval process. Once the job opening has been saved the, a Job Opening ID will be automatically assigned and the Status will change to Pending Approval. Please ensure that you make note of the Job ID # for your records.
15	Once saving and submitting your job opening, click on the Approvals tab to review the defined approval chain. You can use the icon to add Optional Approvers to meet department specific approval requirements. An Optional Approver must have employees reporting to them.  Use the Look Up icon to search User ID (Employee ID).  *Important Note: If the Director's position is currently vacant and the displayed Defined Approval Process does not include the next level up, then you are required to add an Optional Approver (another Director or higher).*

16	Enter your **Comments/Instructions** here. Your Comments/Instructions will be seen by everyone in the approval chain and HR Employment Services.  *Note: Under normal hiring conditions, HR does not require the Vacancy Management Protocol form. If Departments wish to use this form, it will be managed at the Department level outside of Automated Workflow/Manager Self Service tools. Alternatively, you may choose to use this Comments section to add notes to justify your rationale for filling a position.*
17	Click .
18	The initiator of the Job Opening will receive an email notification as confirmation that the approval process was triggered. Email notifications will be generated at various stages throughout the defined approval chain: ○ to the next approver in the chain notifying of pending approvals; ○ to the Initiator if an approver in the chain denies a Job Opening
	End of Procedure

Browse Job Openings:

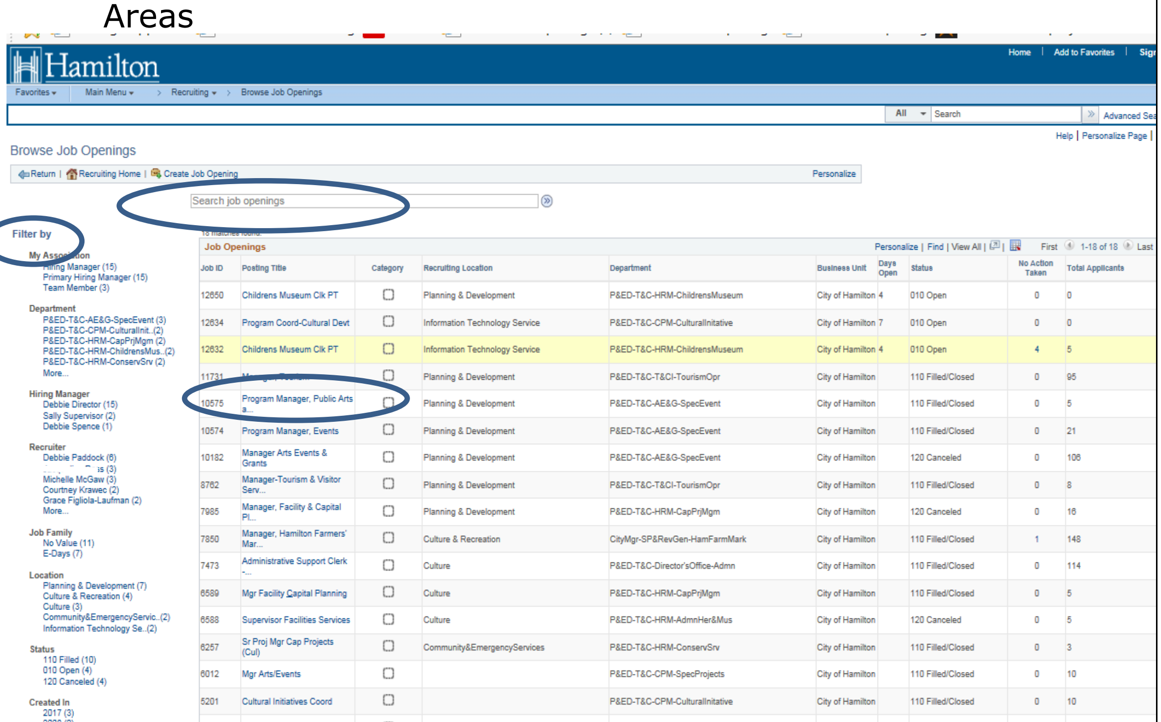
The routing status of a job opening that you created can be viewed by navigating to the **Browse Job Openings** page. You can browse and access your draft, assigned or associated with you job openings. You can perform a keyword search or choose filtering criteria to search for job openings.

Note: This search option relies on a system process refresh for newly created jobs. The process refresh occurs twice daily, first thing in the morning and early afternoon.

Note: This page is only available to Managers who will see only those Job Openings for which they are the hiring Manager and/or Approvers in workflow approval chain.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation:
Manager tab>Job Openings>Browse Job Openings</td></tr>
<tr><td>2</td><td>For Browse Job Opening, select the Job Opening you wish to view by either:

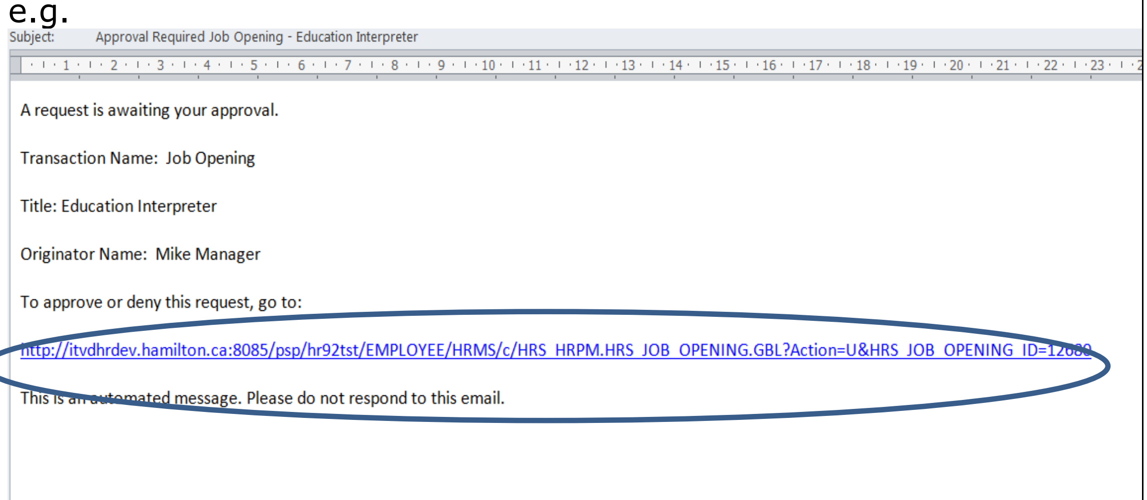
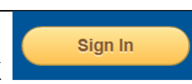
clicking on the Posting Title Name under Job Openings
Use Search Job Openings field to perform keyword search
Use Filter by and click on any of the links under each of the Areas



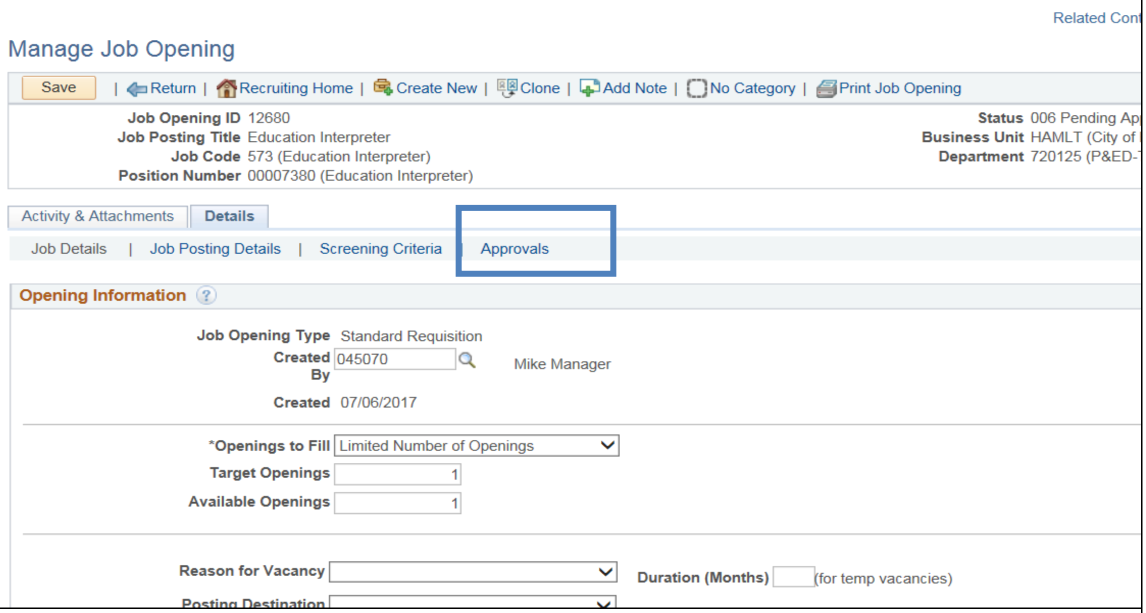
</td></tr>
<tr><td></td><td>End of Procedure</td></tr>
</table>

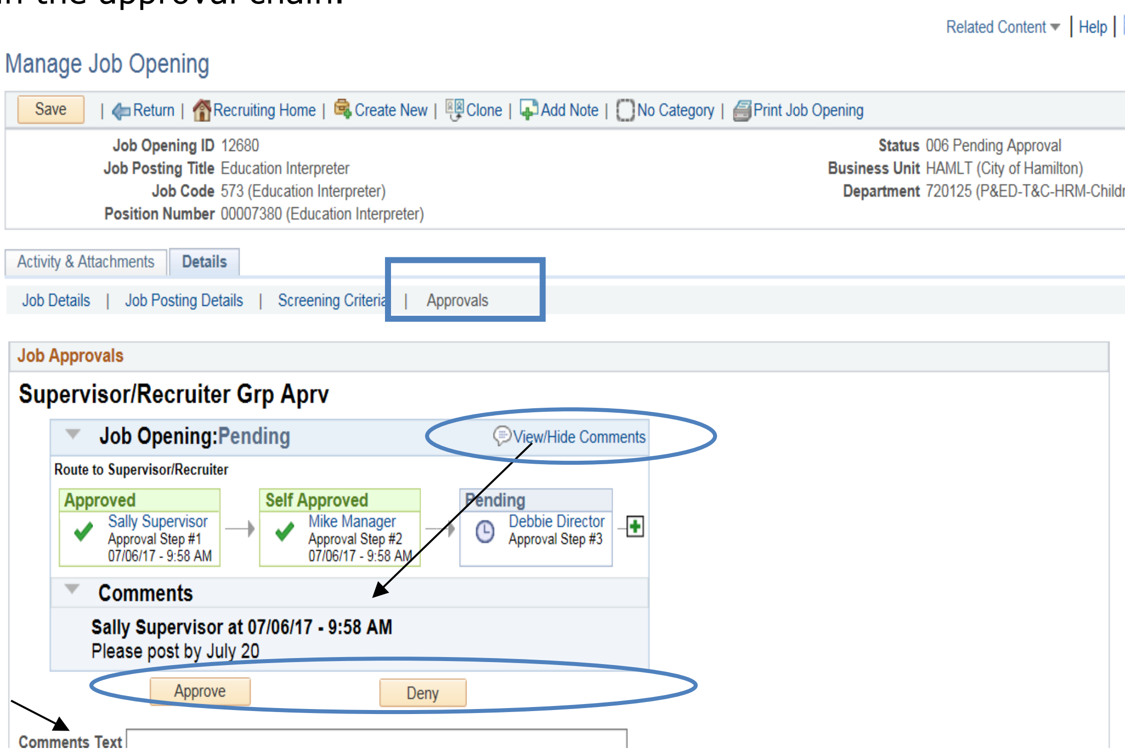
Approve a Job Opening:

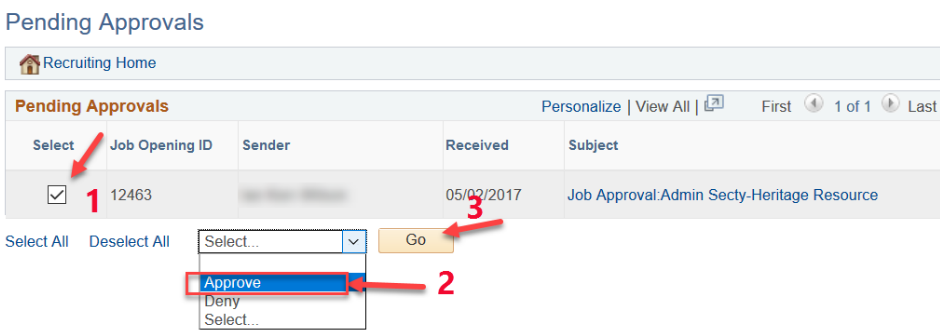
Once a Job Opening has been created,

Step	Action
1	When a transaction is routed to you requiring your approval, an email notification is automatically sent to you by the system to alert you that a transaction is awaiting your review. Click on the hyperlink in the email and you will be taken directly to the My HR Info (PeopleSoft) Sign in page. (If you are already logged in, you will go directly to the Manager Job Opening page). e.g.  Subject: Approval Required Job Opening - Education Interpreter A request is awaiting your approval. Transaction Name: Job Opening Title: Education Interpreter Originator Name: Mike Manager To approve or deny this request, go to: http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HRS_HRPM.HRS_JOB_OPENING.GBL?Action=U&HRS_JOB_OPENING_ID=12080 This is an automated message. Please do not respond to this email.
2	Enter your userid and password and click  . 

<table>
<tr><td>3</td><td>Once you have signed in, you will be taken directly Manage Job Opening Page

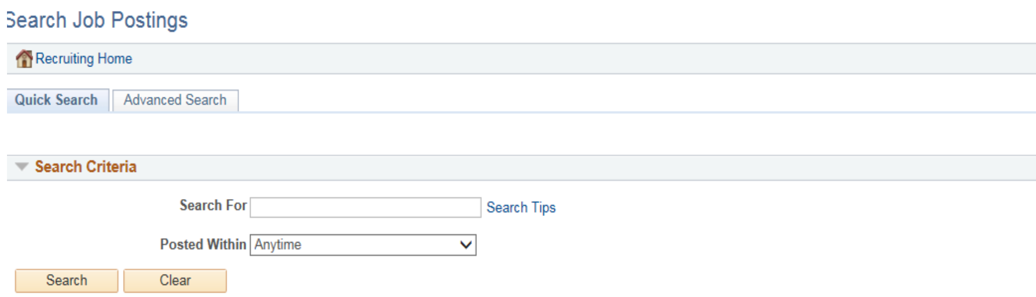

</td></tr>
<tr><td>4</td><td>Click on the "Approvals tab" to approve or deny the Job Opening. Click on the View/Hide Comments box to review others comments. You can also enter comments/additional instructions in the Comments Text box. Note your Comments will be seen by everyone in the approval chain.


</td></tr>
</table>

4a	Alternatively, you can navigate to the "Pending Approvals" page to view or act on pending approval requests. Manager tab>Job Openings>Approve Job Openings Select the Job Opening to approve, select Approve or Deny from the drop drown and then click on "Go".  The Job Opening will be pending in the defined department approval chain and will be routed to Human Resources once all approvals are complete.
5	Email notifications will be generated at various stages throughout the defined approval chain: ○ to the next approver in the chain notifying of pending approvals; ○ to the hiring manager if an approver in the chain denies a Job Opening.
	End of Procedure

Search Job Postings:

Once a job opening has been approved and posted, you can search all currently posted job opportunities within the internal (My Employee Info) & external (COH Careers) site. The postings are in “view” status only.

Step	Action
1	Navigation: Manager tab>Job Openings>Search Job Postings 
2	Workflow will generate an email at various stages: -to the next approver in the chain notifying of pending approval; -to the initiator if an approver in the chain denies a transaction.
	End of Procedure

Interview Calendar:

The Interview Calendar can be accessed from your ‘Manager Self Service Home Page > Job Openings’ where you can view completed and upcoming candidate interviews. From the ‘Manage Job Openings’ page, you are able to schedule candidate interviews through the Interview tab. Currently, this feature is not being used as it does not integrate with COH’s Microsoft Outlook.

INITIATE A SMART HR TEMPLATE HIRE (NEW HIRE NOT POSTED):

Purpose

Use the Smart HR Template Hire transaction to hire/rehire employees that are not facilitated through a posting/processed by HR Employment Services staff.

This typically pertains to **School Crossing Guards; Hamilton Public Library non-union part time; other miscellaneous non posted hires**.

This feature is available to both Managers and FAII's.

HR Mandatory Approval Levels

Approval should be obtained according to your departmental processes prior to completing the Smart HR Template Hire as there are no approvals in the workflow.

Choosing the Correct Template

IF	THEN use Template..
Hiring/rehiring a School Crossing Guard	COH_CROSSING_01
Hiring/rehiring a miscellaneous salary	COH_GENERAL_SAL
Hiring/rehiring a miscellaneous wage	COH_GENERAL_WAL
Hiring/rehiring a Hamilton Public Library non-union part time	COH_LIBRARY

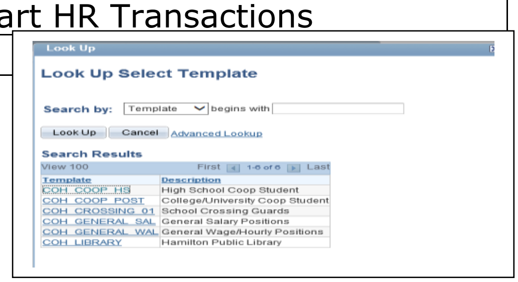
Important

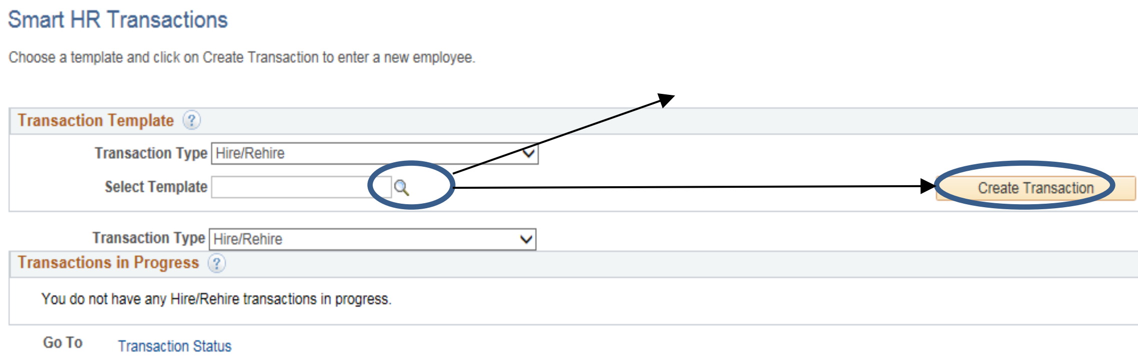
Employee hires/rehires for reasons that are not listed above are not initiated through the Manager Self Service Smart HR Template Hire function. Please refer to the HR Process documents for direction.

Procedure

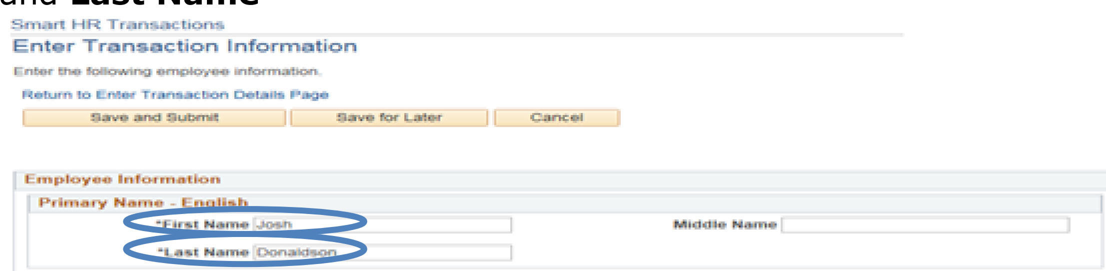
Follow the steps in the table below to enter a Hire/rehire:

Step	Action
1	Navigation: Manager tab>Smart HR Template>Smart HR Transactions
2	Select the Template you are using and



<table>
<tr>
<td></td>
<td>click Create Transaction


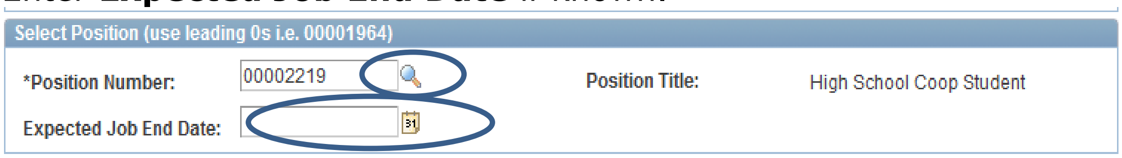
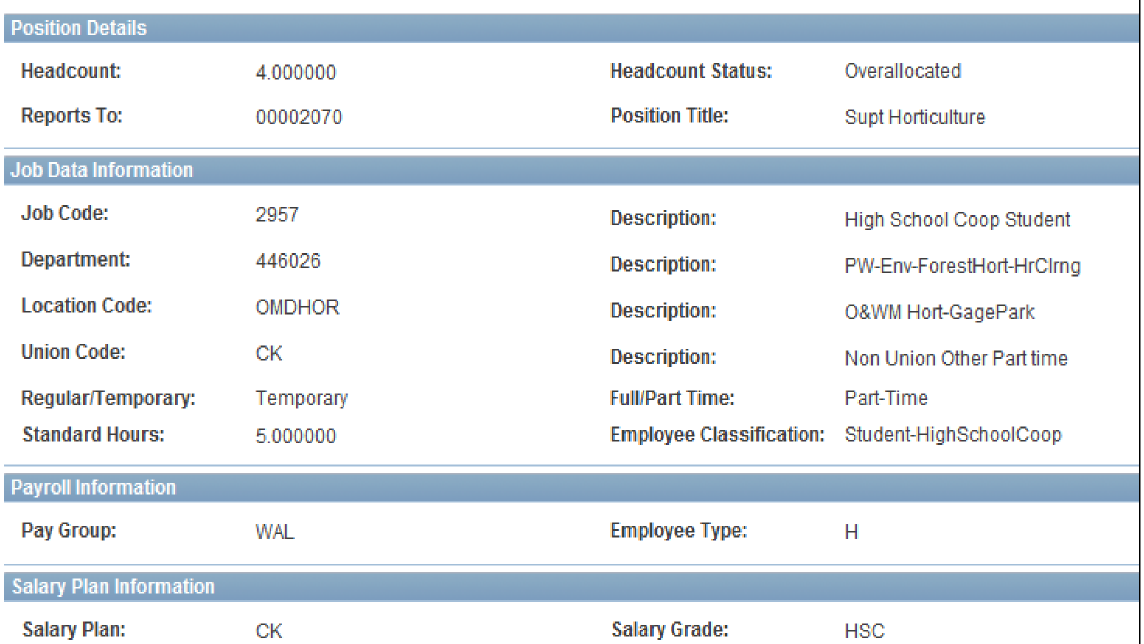
</td>
</tr>
<tr>
<td>3</td>
<td>Enter the Hire/Rehire date in the Job Effective Date field.
Click Continue.
Template name will default.
EmplID will default to NEW.
Action will default to Hire (HR Records will adjust for Rehire).
Reason Code will default to New Hire.

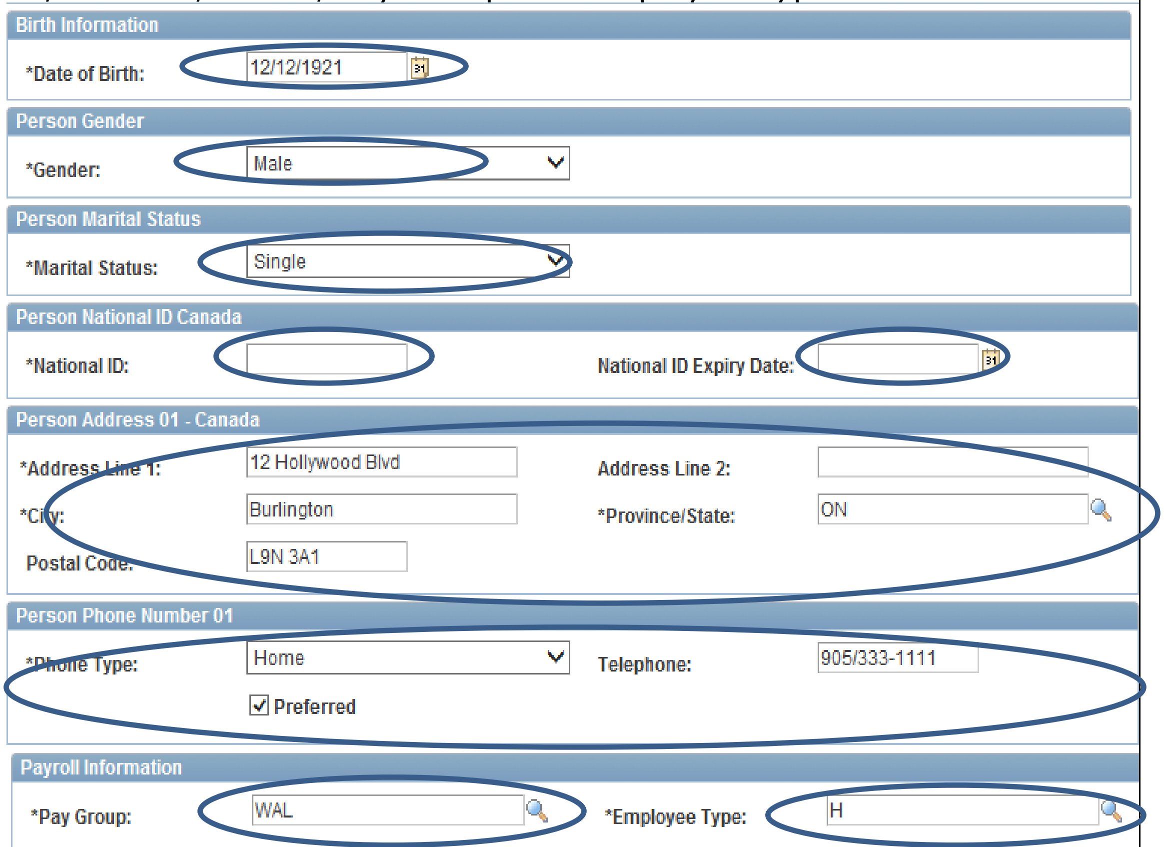
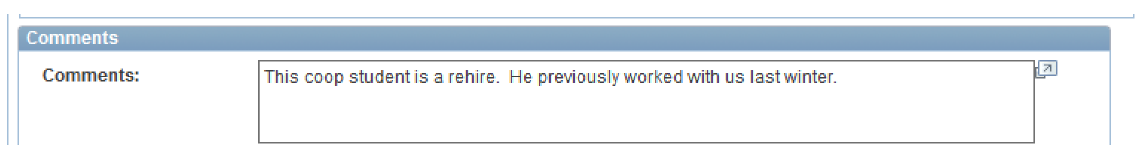

</td>
</tr>
<tr>
<td>4</td>
<td>Enter Employee Information: First Name, Middle Name (optional) and Last Name


</td>
</tr>
</table>

<table>
<tr><td>5</td><td>Enter the Position Number. (Typically, a position number in Position Management is entered without leading zeros; however, Smart HR Template Position Numbers require the full 8 digits, therefore, you must enter leading zeros then the number) or use the Look Up icon to select from a list.

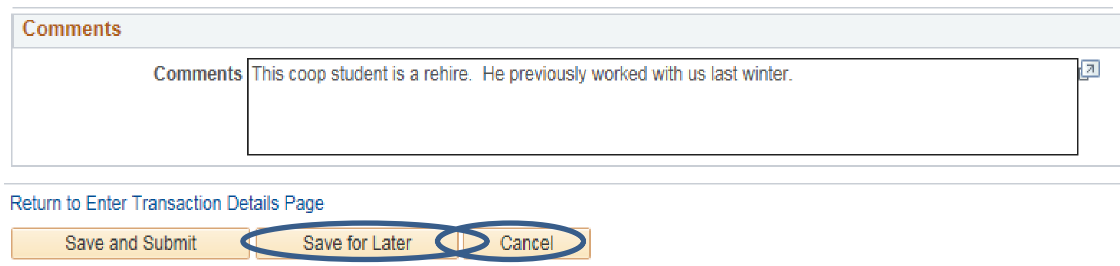
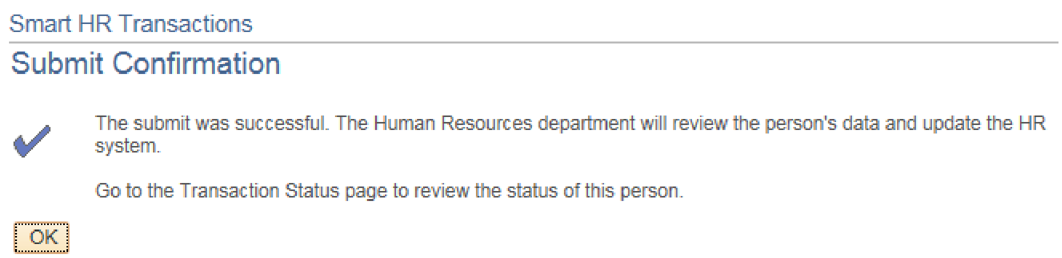
Note: The list of available Position Numbers is limited to the template type that you selected.

Position Title will default in.
Enter Expected Job End Date if known.

Select Position (use leading 0s i.e. 00001964)
*Position Number: 00002219 Position Title: High School Coop Student
Expected Job End Date:</td></tr>
<tr><td>6</td><td>Review Position Details, Job Data Information, Payroll Information, Salary Plan Information that defaults in from the Position number to make sure you have selected the correct position #.

Position Details
Headcount: 4.000000 Headcount Status: Overallocated
Reports To: 00002070 Position Title: Supt Horticulture
Job Data Information
Job Code: 2957 Description: High School Coop Student
Department: 446026 Description: PW-Env-ForestHort-HrClrng
Location Code: OMDHOR Description: O&WM Hort-GagePark
Union Code: CK Description: Non Union Other Part time
Regular/Temporary: Temporary Full/Part Time: Part-Time
Standard Hours: 5.000000 Employee Classification: Student-HighSchoolCoop
Payroll Information
Pay Group: WAL Employee Type: H
Salary Plan Information
Salary Plan: CK Salary Grade: HSC</td></tr>
</table>

<table>
<tr><td>7</td><td>For Hamilton Public Library Template only: the following sections must also be entered: Date of Birth, Gender, Marital Status, National ID, Address, Phone, Pay Group and Employee Type.

</td></tr>
<tr><td>8</td><td>Enter any Comments/Instructions here. Your Comments/Instructions will be seen by HR Records.

</td></tr>
<tr><td>9</td><td>Click Save and Submit . As there are no approvals, this transaction will be routed directly to HR Records for review and processing.

Click Save for Later to save your template in draft. It will not be routed to HR Records Worklist until you click on Save and Submit .

Click Cancel to cancel your template. Your template will not be saved.</td></tr>
</table>

	Click Return to Enter Transaction Details Page to return to the previous page. 
10	Once you click Save and Submit a Submit Confirmation will appear Click OK 
11	Workflow will generate an email at various stages: -to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the employee once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of procedure.

View Status:
The status of a Smart HR Template Hire transaction can be viewed at any time only by the person who initiated the Template.

INITIATE A PAY RATE CHANGE:

Purpose

Use the Request Pay Rate Change transaction to initiate a pay rate change for an employee, or to initiate on behalf of a Manager who has delegated this responsibility to you.

Important

Employee Pay Rate Changes resulting from reasons that are not listed below are not initiated through the Manager Self Service Employee Pay Rate Change function. I.e. Acting Pay - Please refer to the HR Process Flow documents for further direction.

HR Mandatory Approval Levels

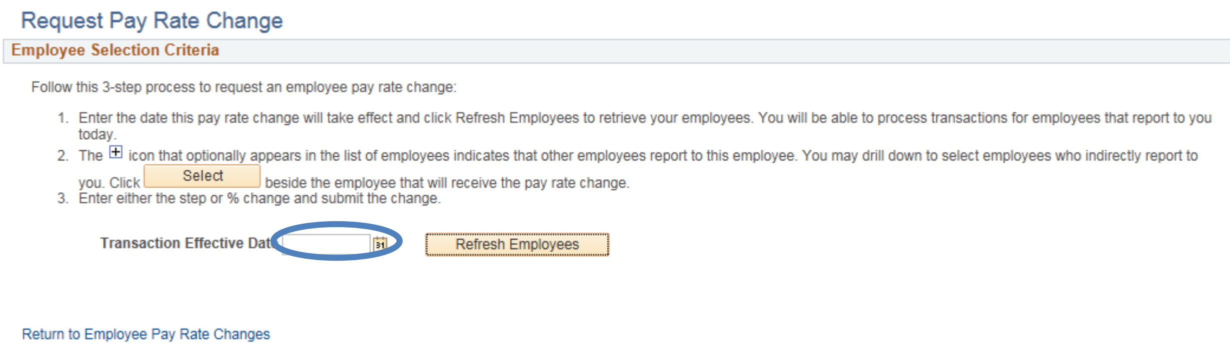
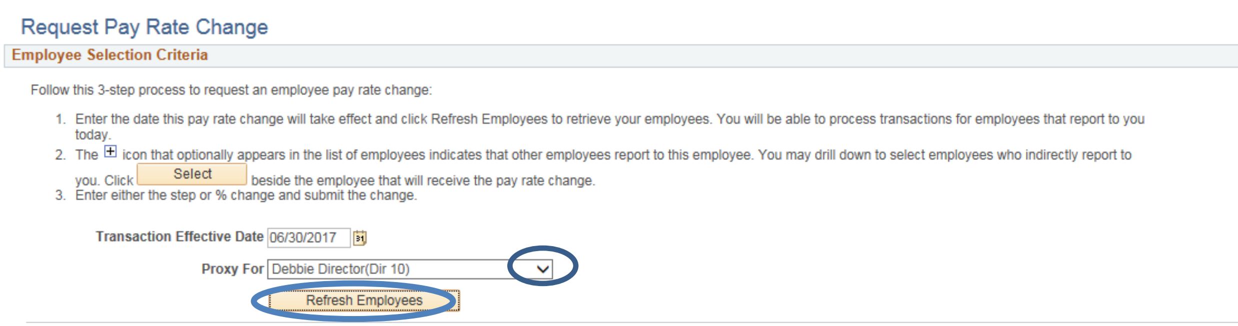
2 levels of approval, with a minimum of a Manager level Approval.

Choosing the Correct Reason

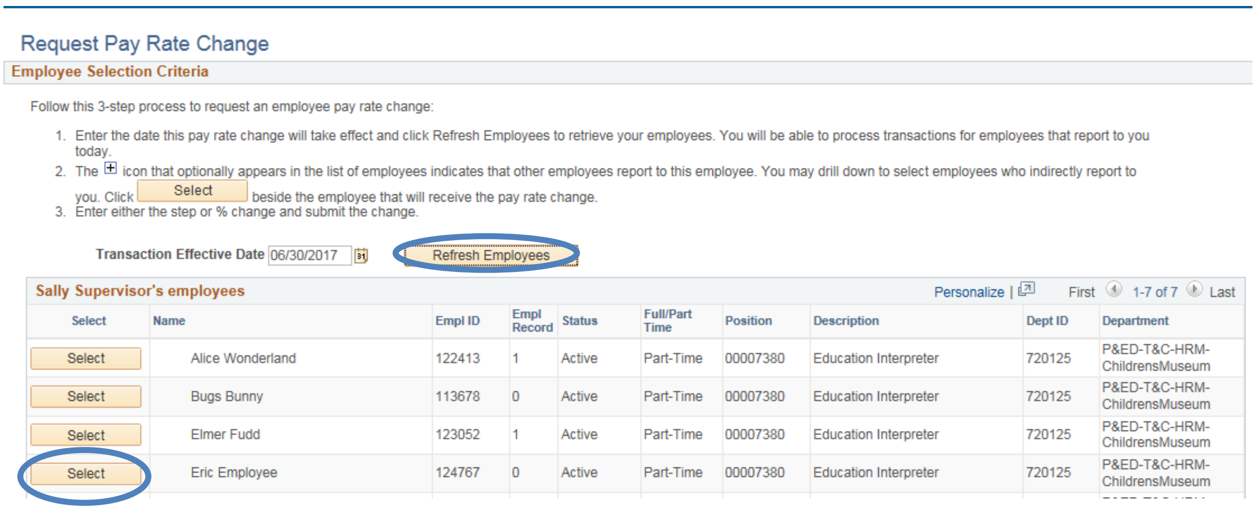
The Table below describes the reasons for Pay Rate Change and when to use them.

IF	**THEN use reason....**
An employee's rate is increasing or decreasing based on a certification or license change.	Change in Qualifications
Non-union employee is eligible for 3.2% merit increase and a Performance Review has been completed. Unionized employee is eligible to move to the next step based on performance.	Merit-Performance Based
Employee is in Fire and has completed their probation and is entitled to move to the next step.	ProbComplete- Fire
Unionized employee is in **Fire** and is entitled to an automatic Step Progression as per the collective agreement.	Step Progression

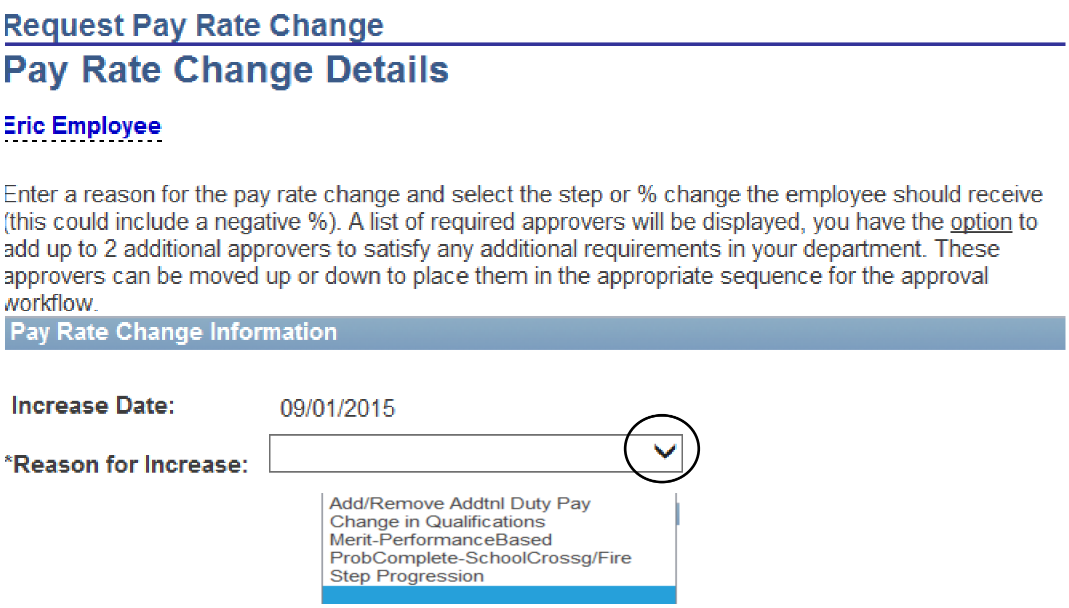
Procedure:
Follow the steps in the table below to initiate a Pay Rate Change for an employee:

Step	Action
1	Navigation: Manager tab>Employee Pay Rate Changes>Request Pay Rate Change
2	Enter the **Effective Date** (mm/dd/yyyy) of Pay Rate.  If you are a Manager wishing to initiate for your employees, proceed to step 3. If you are a proxy wishing to initiate on behalf of a Manager who delegated to you, follow the instructions below: Select the Manager for whom you would like to process transactions by clicking in the drop down "Proxy For" box. Then Click Refresh Employees .  *Note: Although you will see an option to* Process my own Employees*, if you are not a Manager and you select this, you will receive a message that there are no direct reports since you have no employees reporting to you.*

3 Click **Refresh Employees**. If you see a ⊞ that optionally appears in the list of employees this indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. To select an employee click the **Select** button beside the employee's name.



4 The employee's current job and compensation information will display. Click ⌄ to select **Reason for Increase**.



5 If the Pay Rate Change is for the following: **Change in Qualifications, Prob Complete- Fire, Step Progression** then enter the **New Step or** click to Look Up New Step. The PA box is for information purposes only.

Pay Rate Change Information

Increase Date: 09/01/2015

***Reason for Increase:** Step Progression

Current Job Information

Position Nbr:	00007384	File/Admin Clk
Department:	720150	P&ED-T&C-HRM-FieldcoteMus
Location:	BLD040	Fieldcote Museum
Reg/Temp:	Regular	
Full/Part Time:	Full-Time	
Standard Hours:	35.00	
Reports To:	00007369	Fieldcote Site Supv

Current Compensation Information

Salary Plan:	CUPE Local 5167 Inside		
Grade:	C	**Step:**	1
Annual Rate:	$38354.68	**Hourly Rate:**	$21.074

Annual Rate is calculated based on standard weekly hours X hourly rate and may not be accurate for employees whose hours vary each week

Requested Pay Rate Change

☐ **Has a PA been completed?**

New Step:

Annual Rate: **Hourly Rate:**

OR

If the Pay Rate Change is for a Non Union employee enter the **Change Percent**. The PA box is for information purposes only.

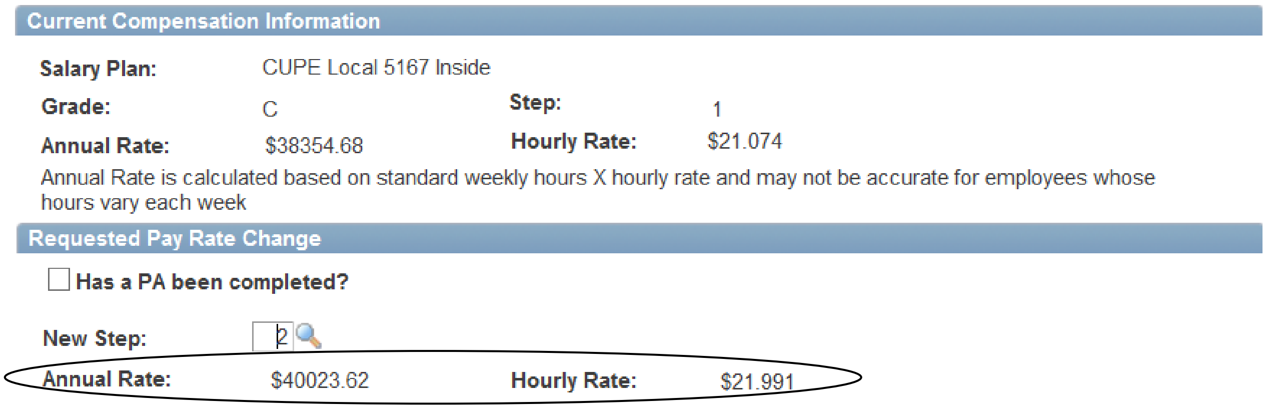
Requested Pay Rate Change

☐ **Has a PA been completed?**

Change Percent:

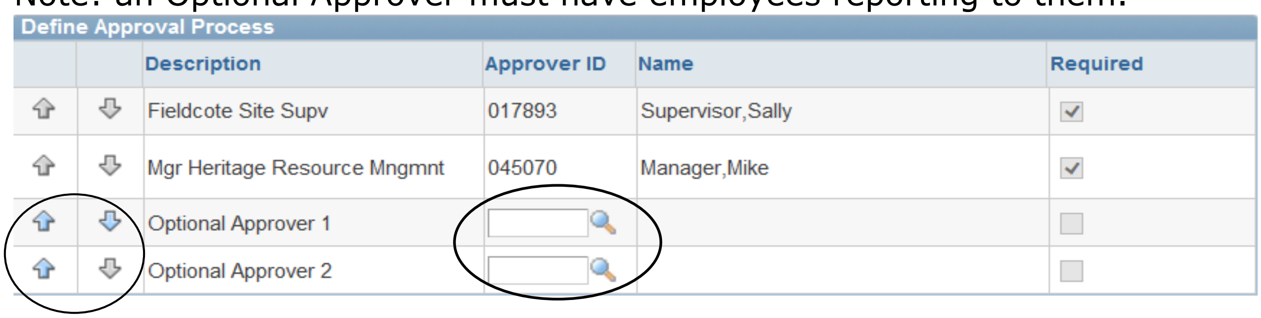
Annual Rate: **Hourly Rate:**

6 Tab out and the new Annual and Hourly Rate will display



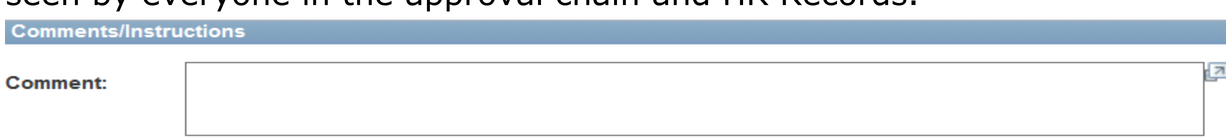
7 The defined approval for this transaction is displayed. You can also assign 2 Optional Approvers to meet department specific approval requirements. Use the Look Up icon to search Approver ID (Employee ID). Click the to change the order of the Optional approvers in the chain.

Note: an Optional Approver must have employees reporting to them.



Important Note: If the Manager's position is currently vacant and the displayed Defined Approval Process boxes above do not include the next level up then you are required to add an Optional Approver (another Manager or higher).

8 Enter your Comments/Instructions here. Your comments/Instructions will be seen by everyone in the approval chain and HR Records.



Note: for Change in Qualifications: where there is a classification change, make note of the new classification and rate in the Comments section.

9 Click Submit.

10	Workflow will generate an email at various stages: -to the next approver in the chain notifying of pending approval; -to the initiator if an approver in the chain denies a transaction; -to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the employee once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of Procedure

View Status:
The routing status of a transaction that you initiated can be viewed at any time by navigating to the View Pay Rate Change Status page.

INITIATE A TRANSFER (NOT DUE TO A POSTING):

Purpose:
Use the Transfer Employee transaction to initiate a transfer for an employee to different position # due to employee movement that is not handled through the posting process, or to initiate on behalf of a Manager who has delegated this responsibility to you.

Important:
Employee transfers resulting from reasons that are not listed below such as a competition from a posting are not initiated through the Manager Self Service Transfer (Non-Posted) Employee function. Please refer to the HR Process Flow documents for New Hire/Transfer Posted for direction.

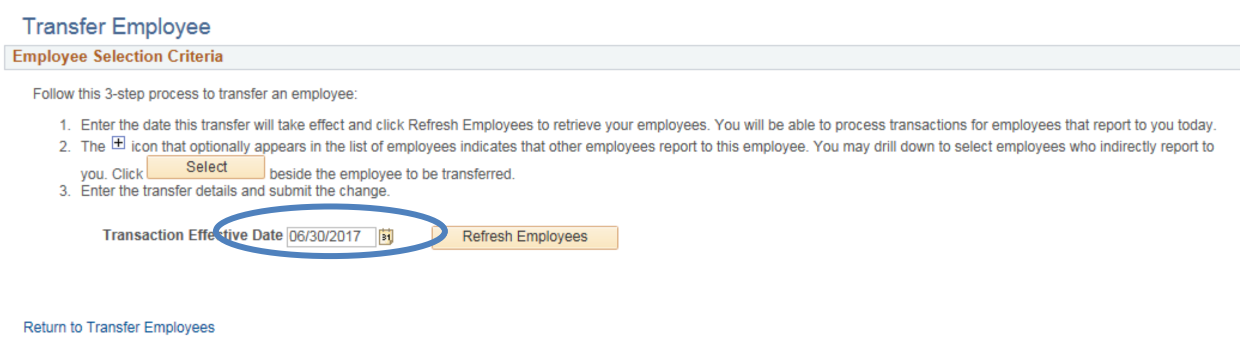
HR Mandatory Approval Levels:
1 level of approval, with a minimum of a Manager level Approval.

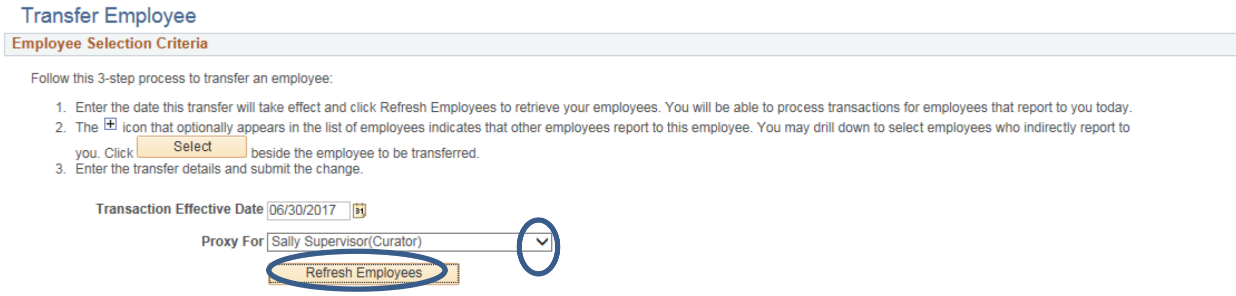
Choosing the Correct Reason:
The Table below describes the reasons for Transferring and when to use them.

IF	THEN use reason....
Employee is requesting to be moved to another location/shift	Employee Request
Employer is requesting an employee be moved to another location/shift	Employer Initiated
It is a departmental Internal process for Employee's in Union – ONA/Fire/ OPSEU or Library	Internal Process-ONA/Fire/OPSEU or Library
ATU employee has completed their training and needs to be assigned to a home Bus Operator position	Probation Complete-ATU
Employee is returning to their previous Position	Return to Previous Position
Employee is in a Dual Classification (i.e. Recreation in Winter and Parks in Summer)	Seasonal
IF	**THEN use reason....**

Employee is covering another position temporarily for less than 1 month (max 4 weeks) as a result of vacation, union business, sick or WSIB	Short Term Coverage
A Probationary Firefighter has completed training and is moving to a station	Training Complete-Fire
It is a temporary departmental Internal posting process for Employee's in Hamilton Public Library	Under120(Library)

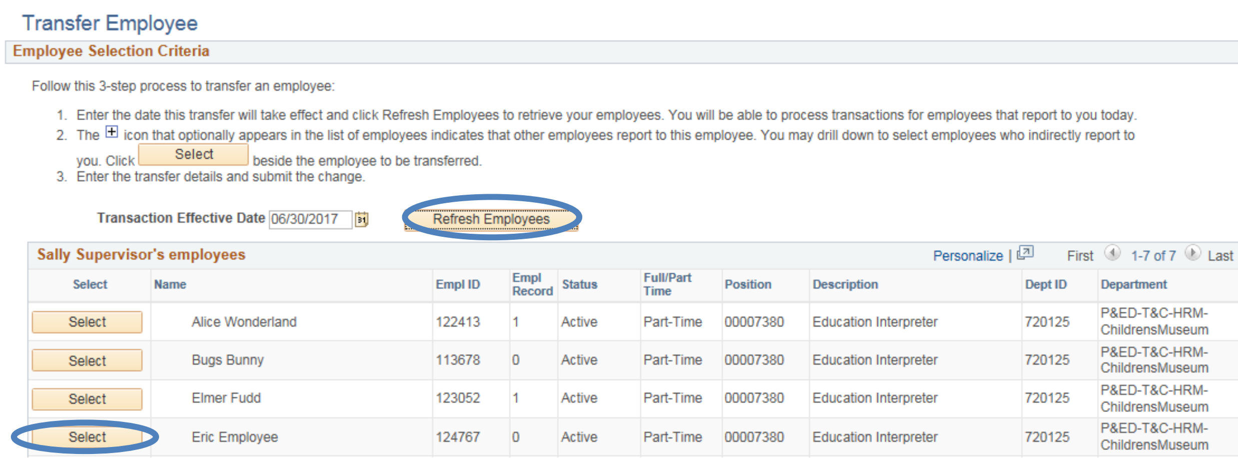
Procedure:
Follow the steps in the table below to transfer an employee **due to a non-posted position change:**

Step	Action
1	Navigation: Manager tab>Transfer Employees>Transfer Employee
2	Enter the **Effective Date** (mm/dd/yyyy) of Transfer.  If you are a Manager wishing to initiate for your employees, proceed to step 3. If you are a proxy wishing to initiate on behalf of a Manager who delegated to you, follow the instructions below: Select the Manager for whom you would like to process transactions by clicking in the drop down "Proxy For" box. Then Click Refresh Employees.



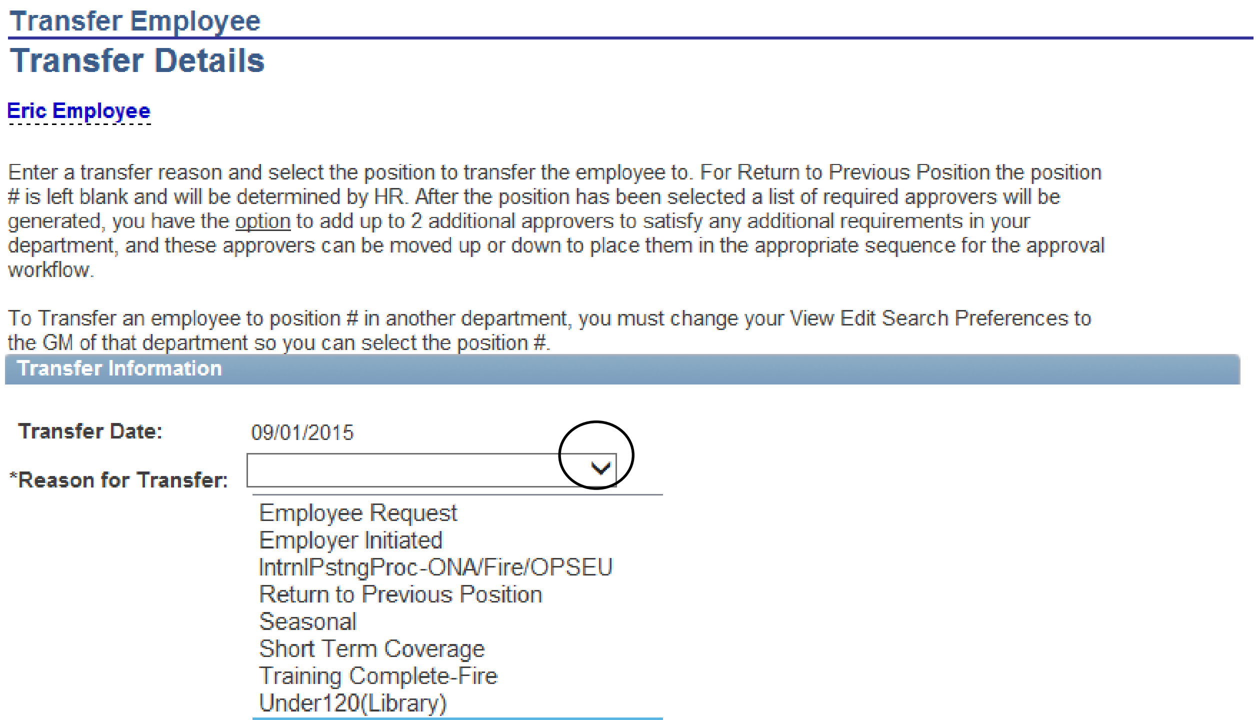
Note: Although you will see an option to Process my own Employees*, if you are not a Manager and you select this, you will receive a message that there are no direct reports since you have no employees reporting to you.*

3 Click **Refresh Employees**. If you see a ⊞ that optionally appears in the list of employees this indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. To select an employee click the **Select** button beside the employee's name.

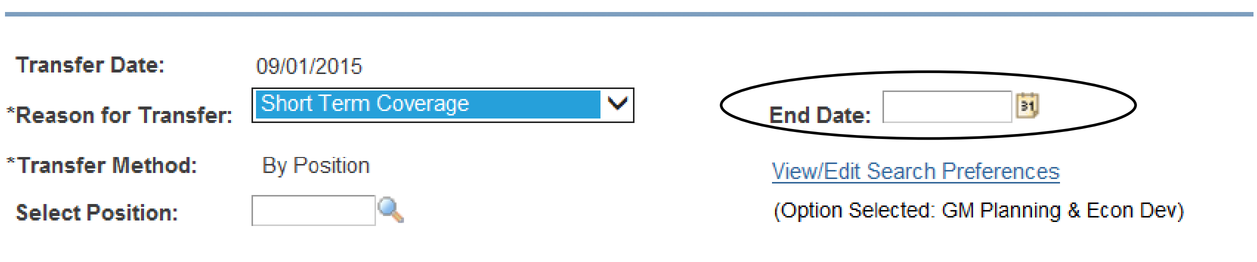


4

Click to select **Reason for Transfer.**

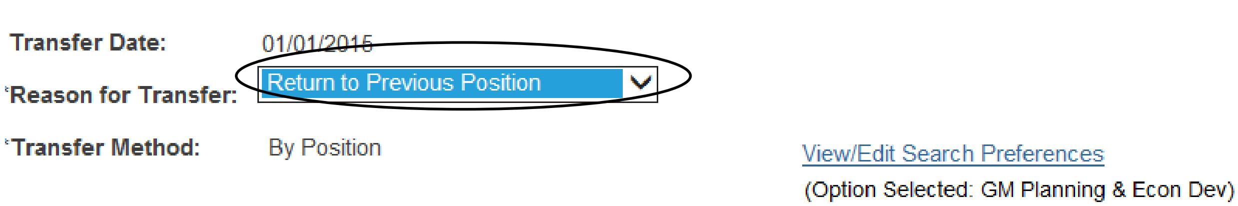


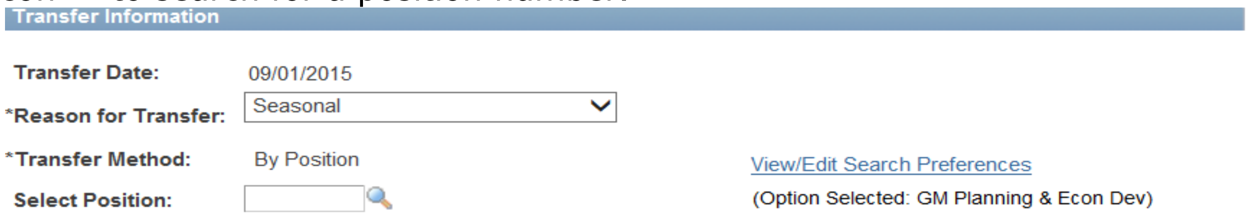
If the transfer is due to a **Short Term Coverage** the End Date field will open and you will be required to enter the last day the employee is providing coverage.

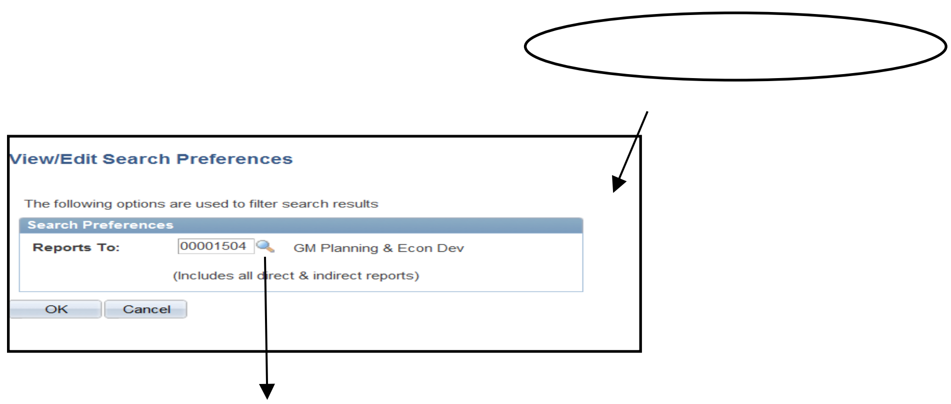


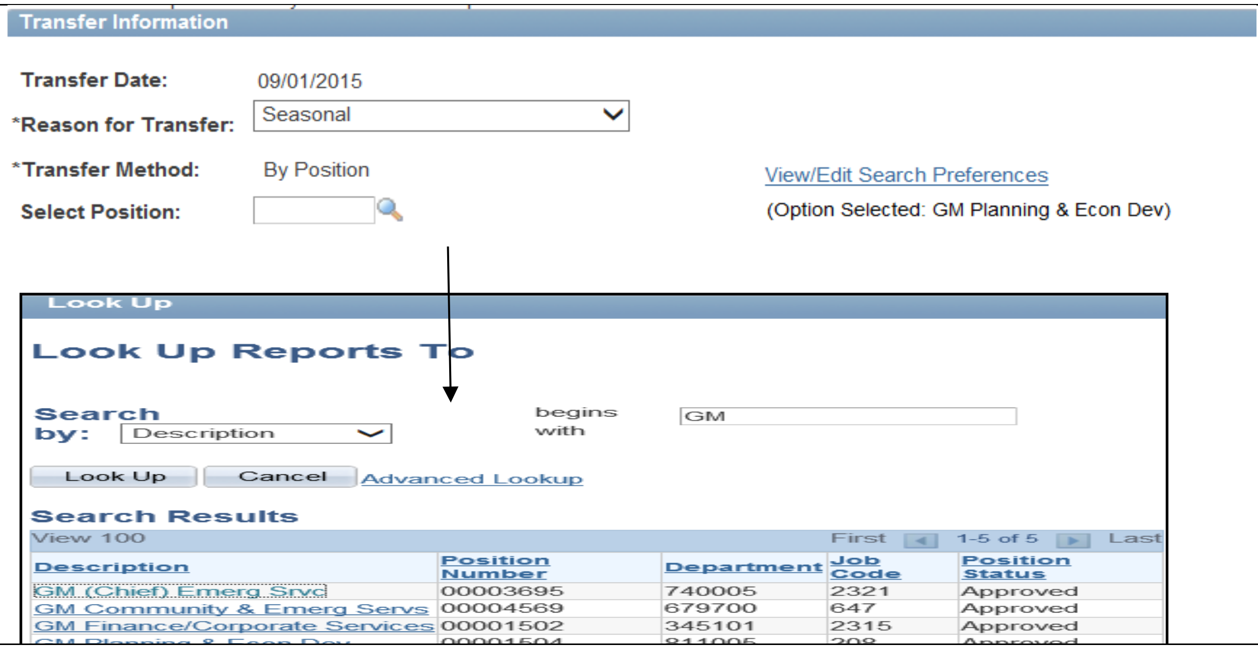
OR

If the employee is **Returning to Previous Position** the option to **Select Position** is not available; HR Records will determine the position number the employee will be returned to. Proceed to Step 8.



<table>
<tr><td>5</td><td>Enter the Position number the employee is transferring to. Use the Look Up icon to search for a position number.

</td></tr>
<tr><td>6</td><td>View Edit Search Preferences is automatically populated with the GM position of your Department and restricts the list of positions that are displayed in your search results to only positions within your Department. If you are transferring an employee to a position outside your Department you will need to change the the Search Preferences to the GM of that Department.
To change the GM/Preferences:
Click <u>View/Edit Search Preferences</u> enter the GM's position number or click on the Look Up icon .

Note: once you have submitted your transaction, don't forget to change your View/Edit Search Preferences back to your GM.

</td></tr>
</table>

	
7	Once you **Select a Position** and tab out the **New Info** will display; verify all information to ensure that you selected the correct position #.

Transfer Information

Transfer Date:	09/01/2015			
*Reason for Transfer:	Employee Request			
*Transfer Method:	By Position		View/Edit Search Preferences	
Select Position:	00007383		(Option Selected: GM Planning & Econ Dev)	

	Current Info		New Info	
Position Nbr:	File/Admin Clk	00007384	Historical Int-Griffin	00007383
Department:	P&ED-T&C-HRM-FieldcoteMus	720150	P&ED-T&C-HRM-GriffinHouse	720140
Location:	Fieldcote Museum	BLD040	Griffin House	BLD041
Job Title:	File/Admin Clk	636	Historical Interpreter	6452
Reg/Temp:	Regular **Empl Class:**	TempPosn-Backfill	Regular	
Full/Part Time:	Full-Time		Part-Time	
Standard Hours:	35.00		0.01	
Salary Plan:	CUPE Local 5167 Inside	C1	CUPE Local 5167 Inside	C1
Grade:	C		E	
Step:	1 **Hourly Rate:**	21.074000	---	
Union:	CUPE Local 5167 Inside	C1		
Reports To:	Fieldcote Site Supv	00007369	Fieldcote Site Supv	00007369

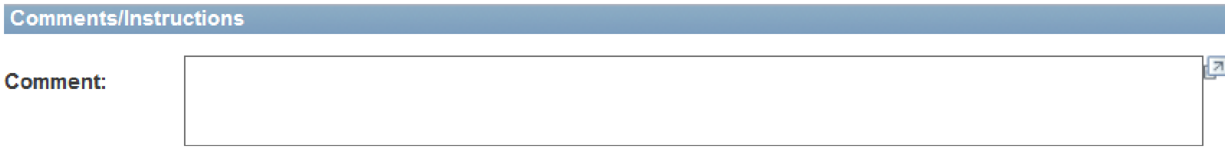
8 The defined approval for this transaction is displayed. You can also assign **2 Optional Approvers** to meet department specific approval requirements. Use the Look Up icon to search Approver ID (Employee ID). Click the ⇧ ⇩ to change the order of the Optional approvers in the chain.

Note: an Optional Approver must have employees reporting to them.

Define Approval Process

		Description	Approver ID	Name	Required
⇧	⇩	Fieldcote Site Supv	017893	Supervisor,Sally	☑
⇧	⇩	Mgr Heritage Resource Mngmnt	045070	Manager,Mike	☑
⇧	⇩	Optional Approver 1			☐
⇧	⇩	Optional Approver 2			☐

9 Enter your **Comments/Instructions** here. Your comment/Instructions will be seen by everyone in the approval chain and HR Records.

	
10	Click  .
11	Workflow will generate an email at various stages: -to the next approver in the chain notifying of pending approval; -to the initiator if an approver in the chain denies a transaction; -to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the employee once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of Procedure

View Status:
The routing status of a transaction that you initiated can be viewed at any time by navigating to the View Transfer Status page.

INITIATE A TERMINATION OR RETIREMENT:

Purpose

Use the Terminate/Retire Employee transaction to initiate a voluntary termination or retirement for an employee, or to initiate on behalf of a Manager who has delegated this responsibility to you.

HR Mandatory Approval Levels

1 level of approval, with a minimum of a Manager level approval.

Important

Involuntary Employee Terminations resulting from reasons that are not listed below (typically due to discipline or frustration of contract etc) are not initiated through the Manager Self Service system. Any involuntary terminations will be processed by the Labour Relations department in Human Resources. Please refer to the HR Process Flow document for Involuntary Terminations for direction.

Choosing the Correct Reason for Termination/Retirement

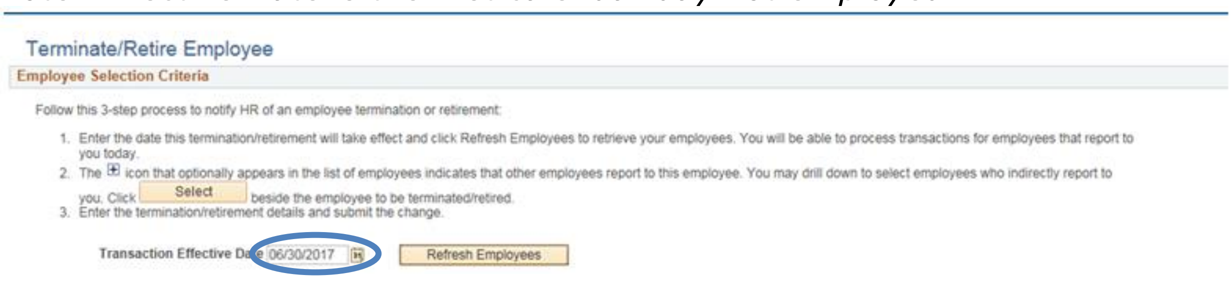
The Table below describes the reasons for terminating or retiring and when to use them

IF	THEN use reason....
Employee is retiring between 55 and 64 years of age or if Fire Local 288 between 50 and 59 years of age.	Early Retirement
Employee is retiring at age 65 or 60 if Fire Local 288.	Normal Retirement
Employee has passed away	Death
Employee has completed their temporary employment with the City of Hamilton.	Dismissal-End Temp Employment
Employee is voluntarily resigning from the City of Hamilton other than the 3 reasons listed below.	Resignation
Employee is resigning from the City of Hamilton due to Illness or Injury.	Resignation-Illness/Injury
Employee is resigning from the City of Hamilton for personal and/or family reasons.	Resignation-Personal/Family
Employee is returning to school.	Resignation-Return to School

Procedure:
Follow the steps below to initiate a Termination/Retirement for an employee:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation:
Manager tab>Termination/Retirements>Terminate/Retire Employee</td></tr>
<tr><td>2</td><td>

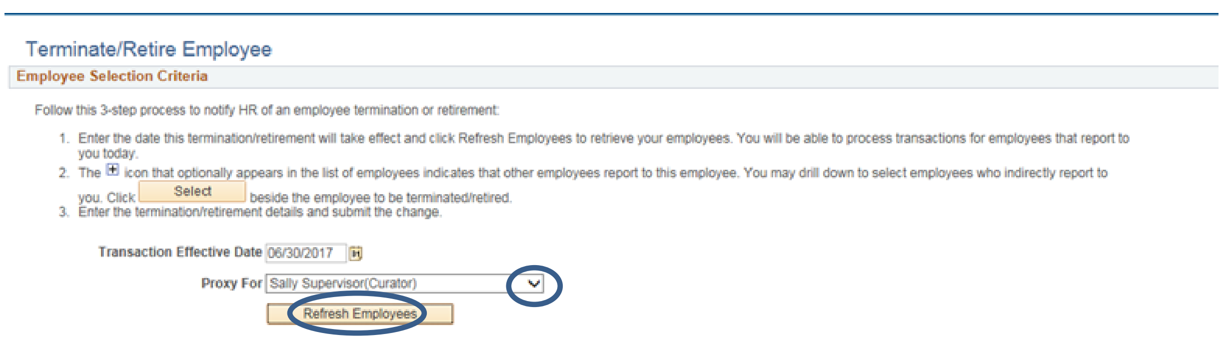
Enter the **Effective Date** (mm/dd/yyyy) of Termination/Retirement.
Note: Effective Date is the first calendar day not employed.



If you are a Manager wishing to initiate for your employees, proceed to step 3.

If you are a proxy wishing to initiate on behalf of a Manager who delegated to you, follow the instructions below:

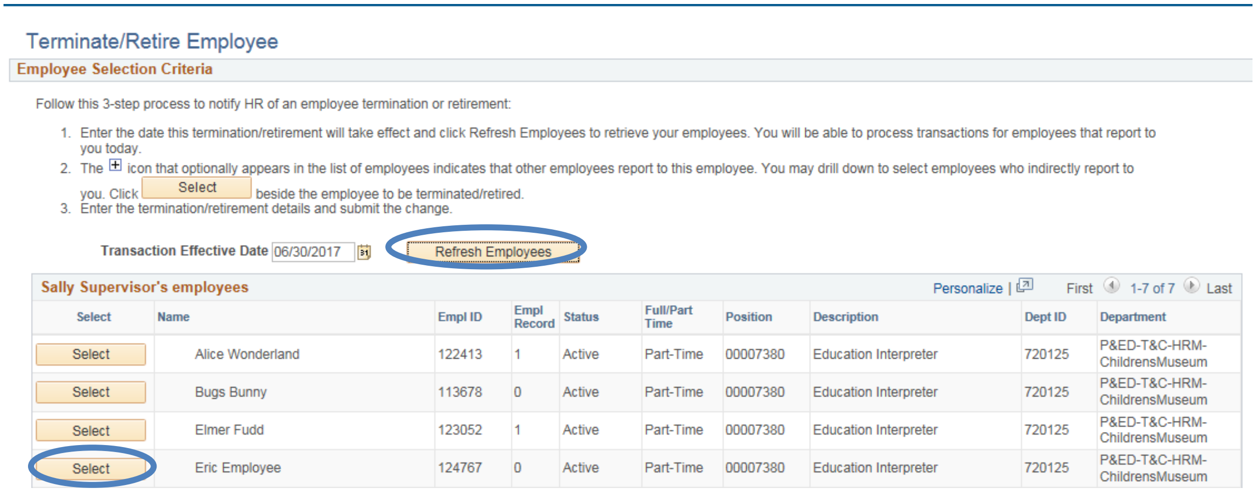
Select the Manager for whom you would like to process transactions by clicking in the drop down "Proxy For" box.
Then Click Refresh Employees .



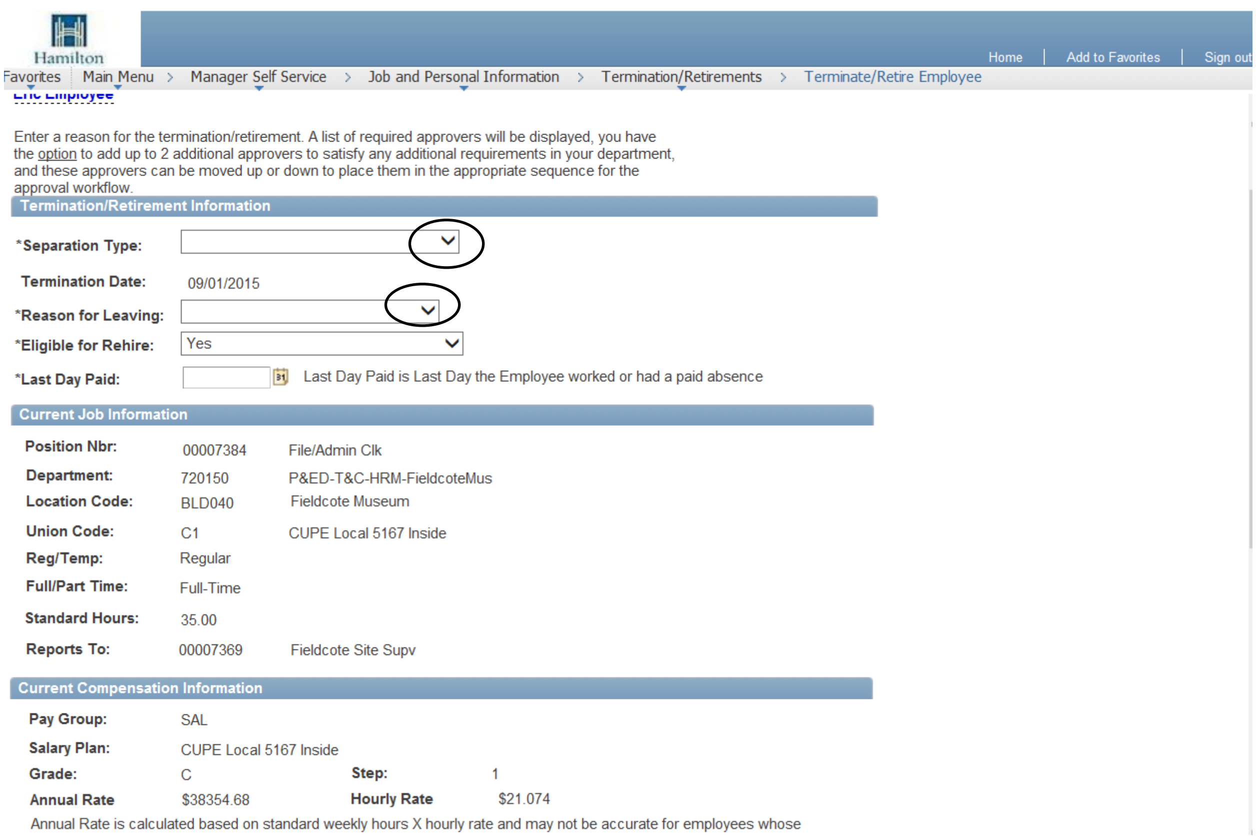
Note: Although you will see an option to Process my own Employees*, if you are not a Manager and you select this, you will receive a message that there are no direct reports since you have no employees reporting to you.*

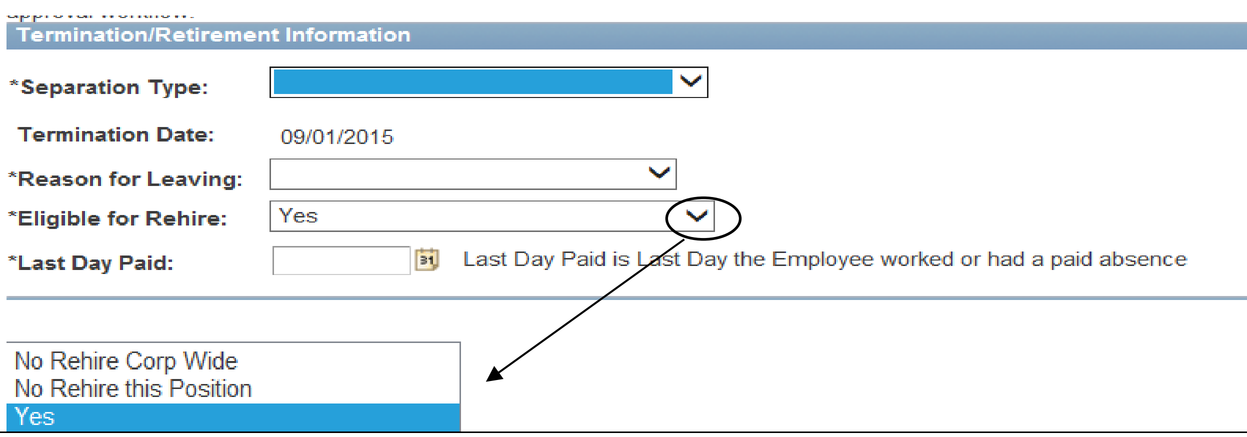
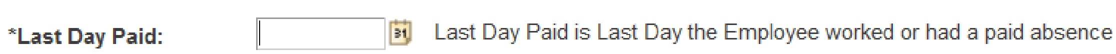
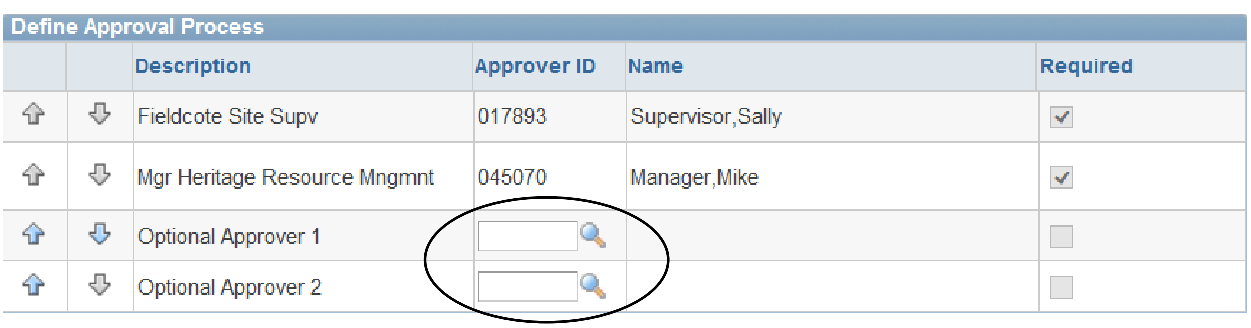
</td></tr>
</table>

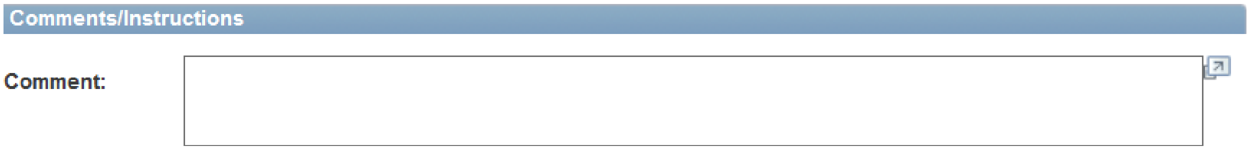
Step	Instruction
3	Click **Refresh Employees**. If you see a ⊞ that optionally appears in the list of employees this indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. To select an employee click the **Select** button beside the employee's name.



Step	Instruction
4	The employee's current job and compensation information will display. Click ⌄ to select **Separation Type** and ⌄ to select **Reason for Leaving**.



5	Eligible for Rehire will default to "yes". If **not eligible for rehire**, click to change the default. *Note: if you select **No Rehire This Position** then you must have supporting documentation; if you select **No Rehire Corporate Wide** you must have approval from Human Resources and supporting documentation.* 
6	Enter the **Last Day Paid** (mm,dd,yyyy) 
7	The defined approval for this transaction is displayed. You can also assign **2 Optional Approvers** to meet department specific approval requirements. Use the Look Up icon to search Approver ID (Employee ID). Click the to change the order of the Optional approvers in the chain. *Note: an Optional Approver must have employees reporting to them.* 

8	Enter your **Comments/Instructions** here. Your comment/Instructions will be seen by everyone in the approval chain and HR Records. 
9	Click .
10	Workflow will generate an email at various stages: -to the next approver in the chain notifying of pending approval; -to the initiator if an approver in the chain denies a transaction; -to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the employee once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of Procedure

View Status:
The routing status of a transaction that you initiated can be viewed at any time by navigating to the View Term/Retire Status page.

INITIATE A POSITION DATA CHANGE:

Purpose:
Use the Position Data Change Request to create new positions and process changes to position attributes.

Important:
Only the FAII will be able to submit Position Data Change Requests. Please refer to the HR Process documents for direction.

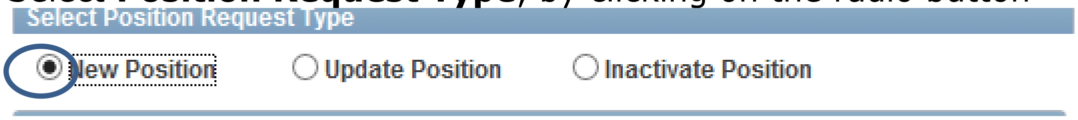
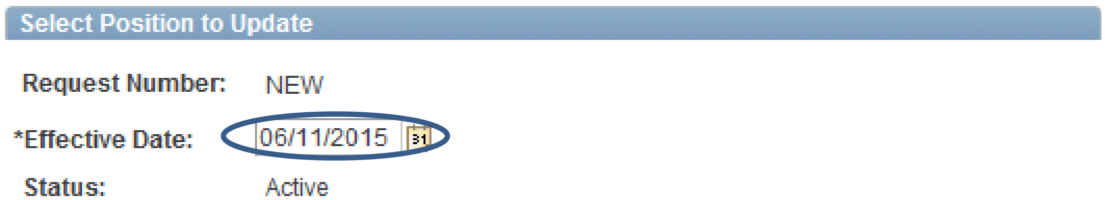
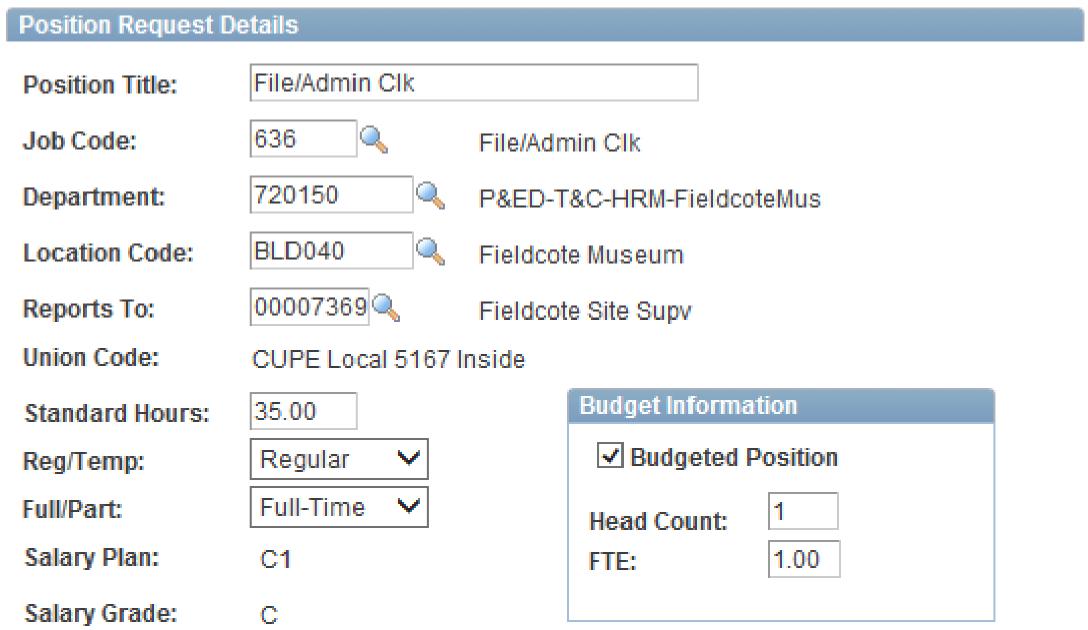
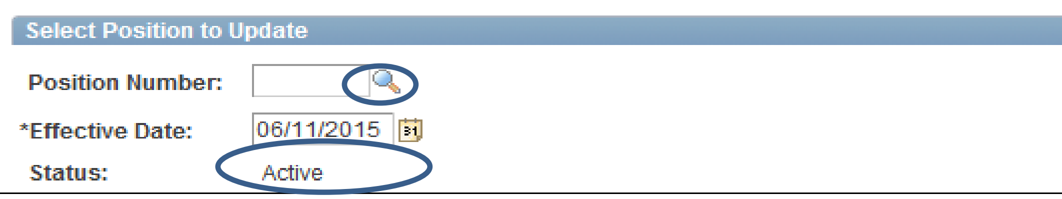
HR Mandatory Approval Levels:
Approval should be obtained according to your departmental processes prior to completing the Position Data Change Request as there are no approvals in the workflow.

Choosing the Correct Reason:

IF	**THEN use Position Request Type..**
Creating a New Position (additional staff to existing classification only)	New Position
Changing a DeptID	Update Position
Changing a Location	Update Position
Changing a Reports to	Update Position
Changing Standard Hours	Update Position
Changing FTE	Update Position
Changing Budgeted/Unbudgeted	Update Position
Changing Head Count	Update Position
Changing Regular/Temporary	Update Position
Changing Part Time/Full Time	Update Position
Inactivating a Position	Inactivate Position
Note: For Title changes and the addition of brand new positions, Departments should contact the HR Compensation section.	

Procedure:
Follow the steps below to submit a Position Data Change request:

Step	Action
1	Navigation: Admin tab>Position Data Changes>Position Data Change Request

2	Select **Position Request Type**, by clicking on the radio button 
3	If Position Request Type= **New Position**: Enter the **Effective Date** for the new position. Request Number will default to **NEW.** Status will default to **Active.** 
4	Enter **<u>all</u>** fields in **Position Request Details** 
5	If Position Request Type= **Update Position**: Enter the **Position Number.** Use the Look Up icon to search for a position number. Enter the **Effective Date** for the change. Status will default to **Active.** 

6

Enter in the **Position Request Details** only the field(s) that you are updating.

Position Request Details

Department: 720120 P&ED-T&C-HRM-WhitehernMuseum

Location Code:

Reports To:

Standard Hours:

Reg/Temp:

Full/Part:

Budget Information

☑ Budgeted Position

Head Count: 99

FTE: 1.000(

Note: the Current Position Information and Current Incumbents in the position will display below your change. (in this example, deptid 720150 is being updated to 720120. Incumbents in the position will also be updated to 720120).

Current Position Info

Description: File/Admin Clk

Job Code: 636 File/Admin Clk

Department: 720150 P&ED-T&C-HRM-FieldcoteMus

Location Code: BLD040 Fieldcote Museum

Reports To: 00007369 Fieldcote Site Supv

Union Code: CUPE Local 5167 Inside

Standard Hours: 35.00

Reg/Temp: Regular

Full/Part Time: Full-Time

Salary Plan: C1

Salary Grade: C

Budget Information

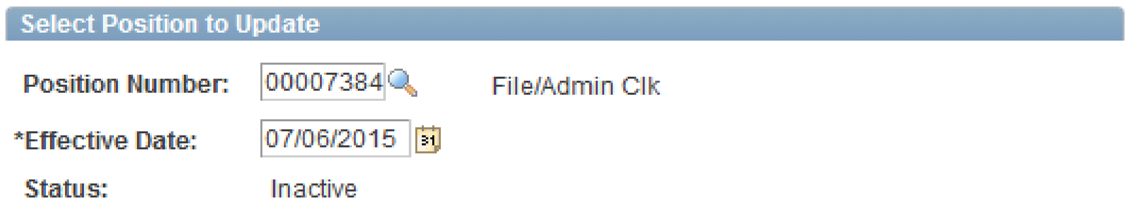
☑ Budgeted Position

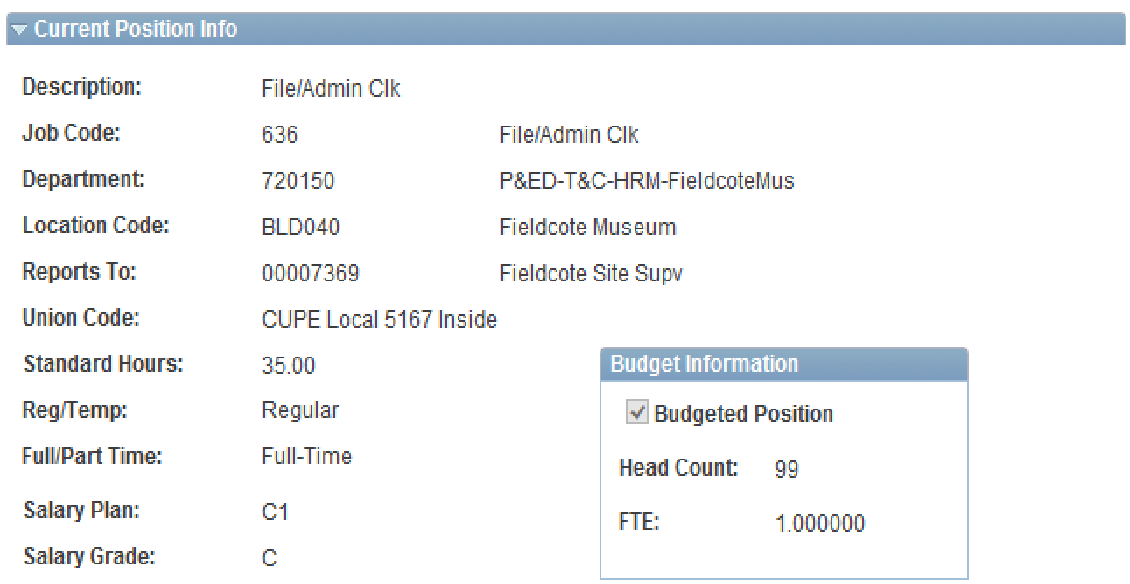
Head Count: 99

FTE: 1.000000

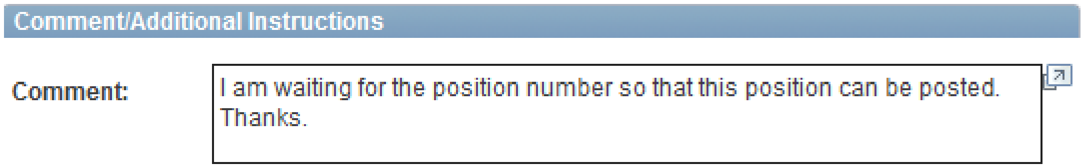
Current Incumbents

Empl ID	Empl Record	Name	Full/Part	Stnd Hrs/Wk	Empl Status	Override	Effective Date
117227	0	Elmer Fudd	Part-Time	0.01	Active	N	11/17/2014
118575	0	Eric Employee	Full-Time	35.00	Active	Y	01/01/2015

<table>
<tr><td>7</td><td>If Position Request Type= Inactivate Position:
Enter the Position Number. Use the Look Up icon to search for a position number.
Enter the Effective Date to Inactivate.
Status will default to Inactive.


</td></tr>
<tr><td>8</td><td>The current position information will display below


Note: There should be no Current Incumbents displaying as a position must be vacant before it can be inactivated.
</td></tr>
</table>

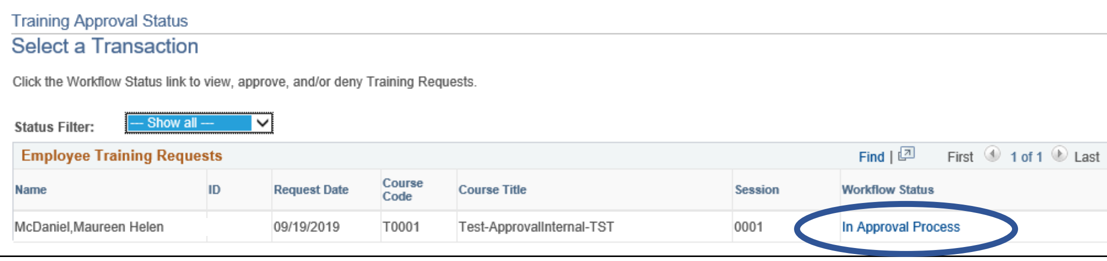
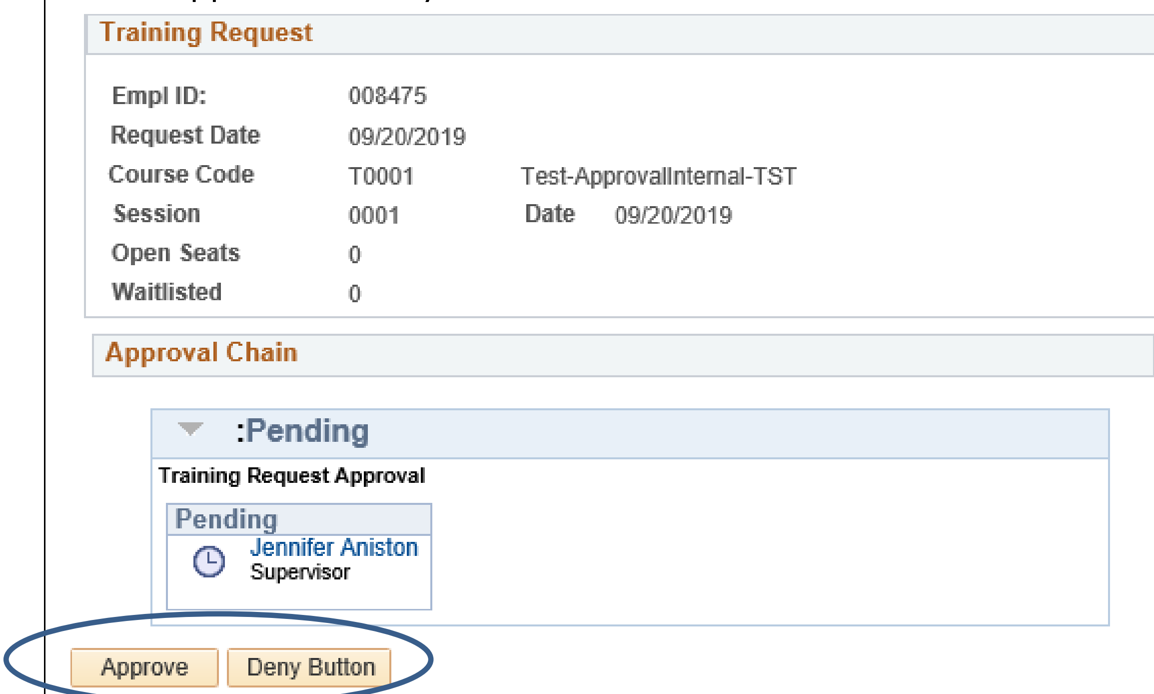
9	Enter your **Comments/Instructions** here. Your Comments/Instructions will be seen by HR Records. 
10	Click . As there are no approvals, this transaction will be routed directly to HR Records for review and processing. *Note: For New Positions, HR Records will enter the new position number in the Comments section.*
11	Workflow will generate an email at various stages: -to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the position once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of procedure.

View Status:
The status of a transaction can be viewed at any time by navigating to the View Position Change Status page.

LEARNING AND DEVELOPMENT:

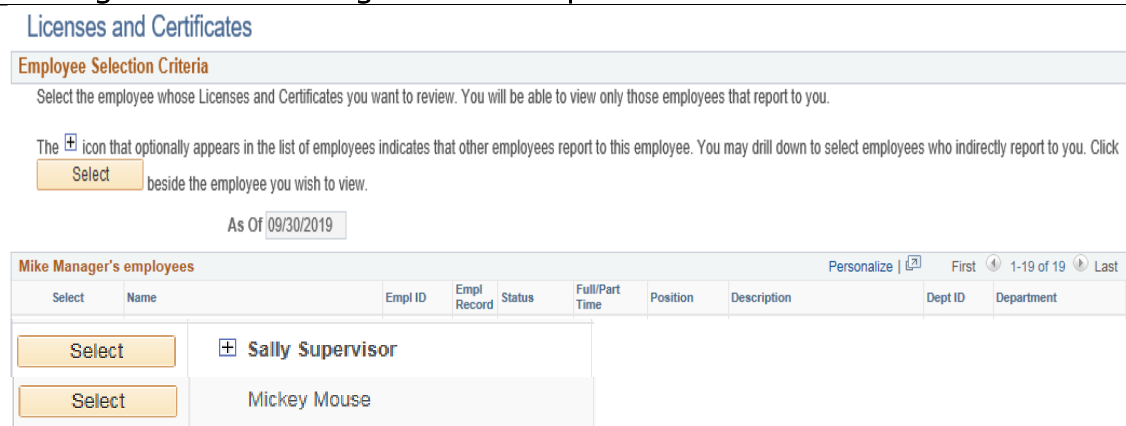
Use to review Training Summary and Licence and Certifications for the employees that report to you. As well as approve Learning and Development requests for your employees that enroll in a course that requires approval.

Approve Training Requests:

1	Navigation: Manager tab>Learning and Development>Approve Training Request
2	Click on the In Approval process link 
3	Select Approve or Deny 
4	Workflow will generate an email -to the employee to advise of enrollment confirmation or waitlist confirmation or; -to the employee to advise the request has been denied
	End of procedure

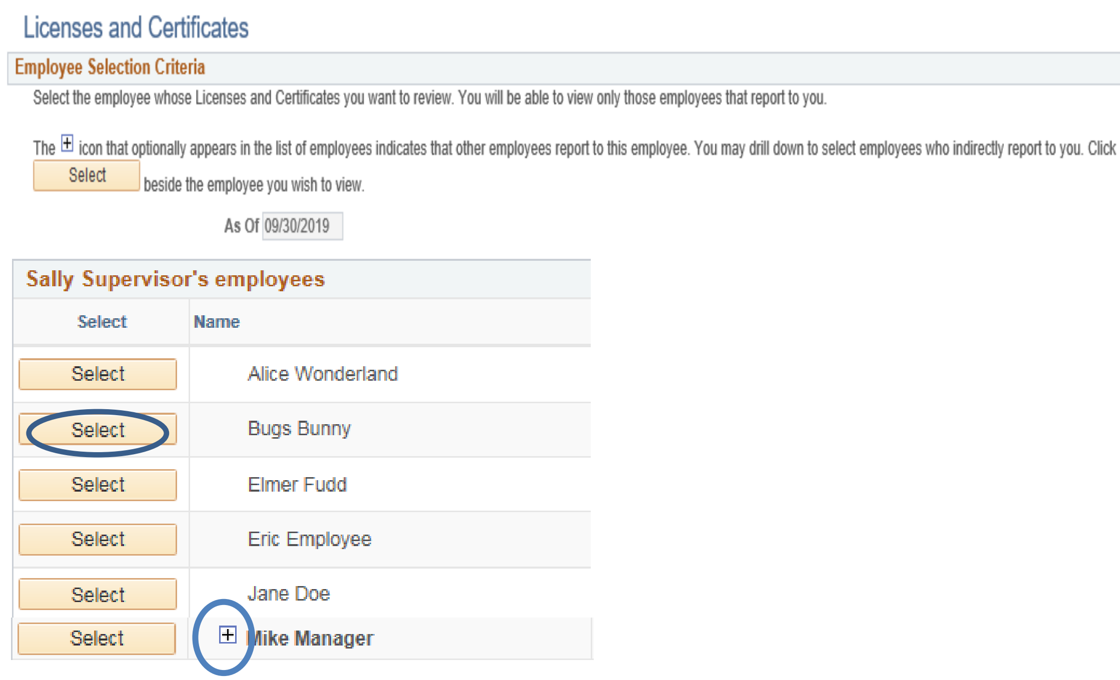
Licences and Certifications:

<table>
<tr><td>1</td><td>Navigation:
Manager tab>Learning and Development>Licences and Certifications</td></tr>
<tr><td>2</td><td>

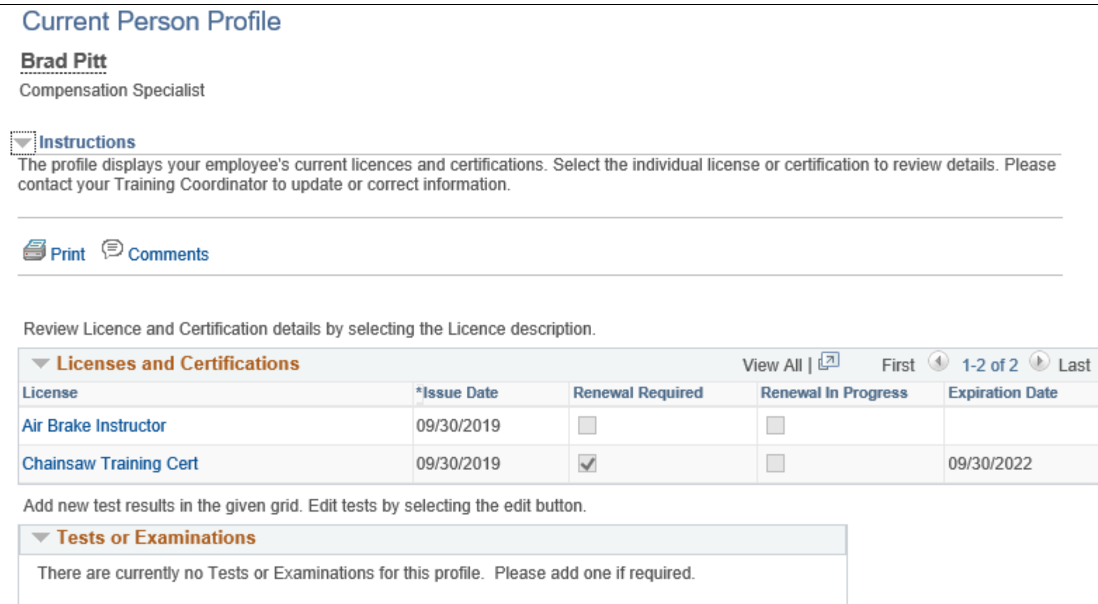


</td></tr>
<tr><td>3</td><td>

If you see a ⊞ that optionally appears in the list of employees this indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. To select an employee click the **Select** button beside the employee's name.

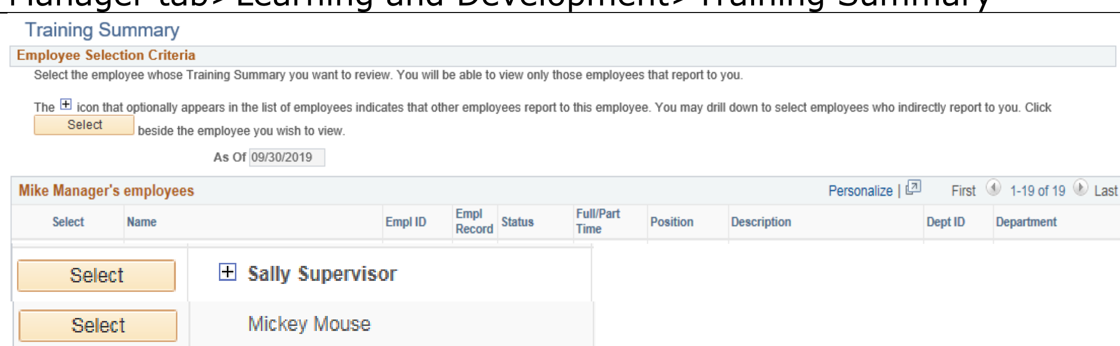


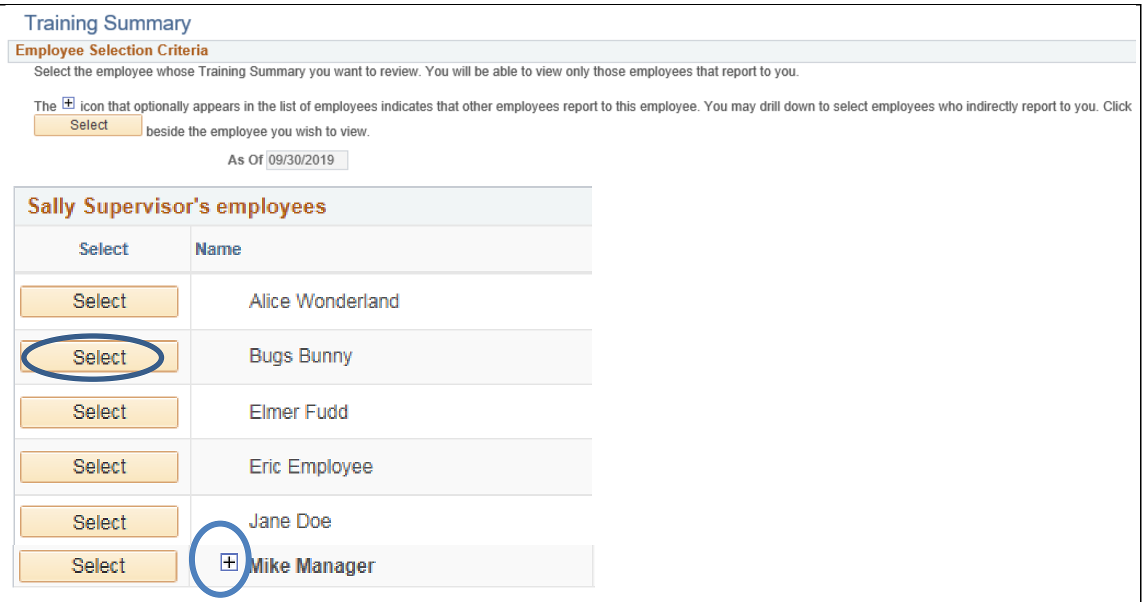
</td></tr>
<tr><td>4</td><td>You are presented with the employee's License and Certifications Summary:</td></tr>
</table>

<table>
<tr><td></td><td>

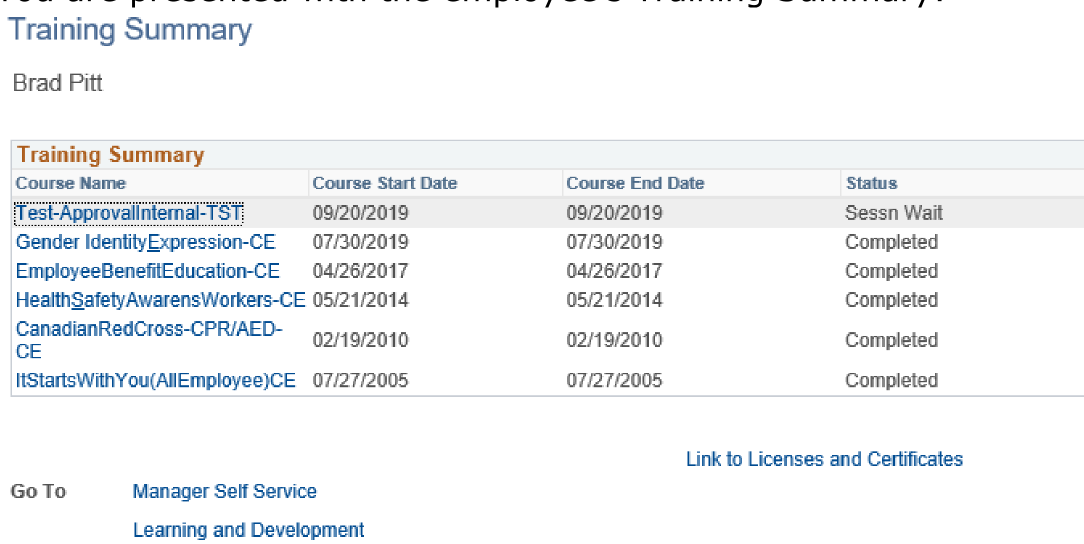
To select another employee to view their license and certifications, click Return to Previous Page .</td></tr>
<tr><td></td><td>End of Procedure</td></tr>
</table>

Training Summary:

<table>
<tr><td>1</td><td>Navigation:
Manager tab>Learning and Development>Training Summary</td></tr>
<tr><td>2</td><td>
</td></tr>
<tr><td>3</td><td>If you see a ⊞ that optionally appears in the list of employees this indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. To select an employee click the Select button beside the employee's name.</td></tr>
</table>



4 You are presented with the employee's Training Summary:



Training Summary

Course Name	Course Start Date	Course End Date	Status
Test-ApprovalInternal-TST	09/20/2019	09/20/2019	Sessn Wait
Gender IdentityExpression-CE	07/30/2019	07/30/2019	Completed
EmployeeBenefitEducation-CE	04/26/2017	04/26/2017	Completed
HealthSafetyAwarensWorkers-CE	05/21/2014	05/21/2014	Completed
CanadianRedCross-CPR/AED-CE	02/19/2010	02/19/2010	Completed
ItStartsWithYou(AllEmployee)CE	07/27/2005	07/27/2005	Completed

End of Procedure

HR PROCESS FLOWS

NEW HIRES/TRANSFERS POSTED:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:

This document describes the typical process used to process a New Hire resulting from a posting, including the processing of both internal transfers (resulting from a posting), and onboarding of external candidates.

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1 *Complete this step for new positions only*	Obtain job description & Compensation data **for new positions**	Work with HR Compensation section to determine position Salary Grade **for new position**	Hiring Manager HR Compensation	HR Compensation creates new Position in PeopleSoft

Steps	Task	Task Details	Assigned To	Processing/Filing
2	Request approval to fill a vacancy	Create the **Job Opening** in PeopleSoft Manager Self Service	Hiring Manager or Delegate	The Job Opening routes through the approval chain and generates email to the next approver advising that action is required. Once the last approver completes, the approved Job Opening routes to HR Employment Services through the Recruiting Home page.
3	Prepare Posting	Issue the manager job posting template or most recent job	HR Employment Services	Email information to hiring Department –

		posting to the hiring Department & determine (in collaboration if the posting is internal/external or both)		Job Opening to post email template including manager job posting template or most recent job posting, job description & Job posting ID and position number.
4	Prepare Posting	Complete the manager job posting template and make applicable updates to job description	Hiring Manager	Email to HR Employment Services for posting.
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
5	Post Job	Create a job posting in recruiting module Put posting in PeopleSoft recruitment library Cross references JD and job posting to ensure no significant changes to role Runs process to put posting on S drive and sends email to print and mail	HR Employment Services HR Receptionist	
6	Screen Resumes	Following close of posting, obtain a short list of resumes to be provided to hiring manager	HR Employment Services	Route shortlisted resumes to hiring department

		Provide email offer template with instructions for hiring manager		
7	Determine Candidates to be assessed/interviewed	Review resumes and select top 3 to 5 candidates for face to face meetings Communicate top candidates to HR Employment Services	Hiring Manager	View resumes online and assign interest levels to top candidates. Email list to HR Employment Services
8	Provide Assessment/Interview Template	Prepare assessment/interview tool to be used to assess candidates during the interview process based on needs of department	HR Employment Services	Email tool to Hiring Manager
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
9	Contact Candidates to set up interviews	Contact candidates to determine if they are still interested in role and to schedule face to face interviews. Conduct interviews	Hiring Manager or delegate Hiring manager and interview panel	 Utilizing interview tool, document and rate each candidate. Forward completed rating tools to Employment services for filing

10	Reference Checks	Once the top candidate is selected, conduct reference checks	Hiring Manager	Forward completed reference check forms to HR Employment Services for filing
11	Extend an Offer	With an understanding of the candidate's offer requirements, complete the offer letter template or job offer details via email by Employment Services	Hiring Manager	Forward completed offer letter template or job offer details via email to HR Employment Services for preparation of Offer Letter, along with interview notes, resume package, and references
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
12 a)	Present Offer to Candidate (External) and Obtain New Hire Information	"Prepare Job Offer" for candidate in recruiting module. Offer letter is prepared for successful candidate and forward the relevant New Hire package to the successful candidate and request completion by the expected return date.	HR Employment services	HR Employment Services forwards formal offer letter to candidate, instructing candidate to sign and return letter and hiring package to HR Employment Services within stated time period. A copy of the offer letter is forwarded to hiring manager.

12 b)	Present Offer to Candidate (Internal)	"Prepare Job Offer" for candidate in recruiting module. Offer letter is prepared for successful candidate.	HR Employment services	HR Employment Services forwards formal offer letter to employee. A copy of the offer letter is forwarded to hiring manager, and HR Records.
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
13	Offer Accepted (External)	The letter and hire package is reviewed, accepted and signed by the candidate. If the offer is not accepted, process ends here.	Candidate	Signs and returns offer letter and hiring package to HR Employment Services, which is then forwarded to HR Records. Approval emails for vacation/benefit exceptions sent to HR Records and HR Benefits as

				appropriate with copy of offer letter.
14	Push Candidate to Prepare for Hire	Close call file, push candidate from “offer accepted” to “prepare for hire” In comments section include EMPL class and vacancy reason	HR Employment Services	Workflow routes to HR Records Worklist
15	Prepare Regret Notices	Letters issued to unsuccessful applicants	HR Employment Services	Electronic notice to applicants
16	Complete the recruitment file	Complete the recruitment file	HR Employment Services	File in HR recruitment competition file
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
17	HR Processing	Hire or transfer the employee from PeopleSoft Manage Hire based on information received in offer letter and new hire package where applicable	HR Records	File offer letter and new hire forms (except benefits forms) in employee file Workflow generates Email to FAII/Hiring Manager advising that transaction has been processed

		Insert comments for payroll adjustments where applicable	HR Records	If applicable, HR Records routes to Finance Payroll Worklist.
18	Obtain Benefits Enrolment Information	Email/mail the relevant Benefit package once the employee appears on the Staff Movement Report as a new hire request completion of the package	HR Benefits	File in tracking file
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
19	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	
20	Enroll in Benefits	Enrolment in benefit program or transfer benefit programs if applicable for internal candidates (notified of pending enrolment via employee staff movement report/benefit waiting period report)	HR Benefits	File in employee file

Note:

- *Transfers from HPL or HPS to COH will follow the External Hire process steps (require signed offer letter).*

Under normal hiring conditions, HR does not require the Vacancy Management Protocol form. If Departments wish to use this form, it will be managed at the Department level outside of Automated Workflow/Manager Self Service tools.

NEW HIRES/TRANSFERS NOT POSTED:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This document describes the typical process used to notify Human Resources of a New Hire/Rehire that was not facilitated through the formal recruitment posting process. These may include:

- ATU Winddown
- Temp/Contract Hires
- Post-Secondary/High School Co-op Students
- School Crossing Guards
- Part-time Library staff

- Contact Employment Services for Recruitment Process

Note: Mass hires such as Recreation Term and Task will continue to be managed through the upload process

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Obtain New Hire Information	New Hire package is sent to successful candidate to be returned at least 1 week before start date. Instruction to return package direct to HR Records is provided. New Hire package is located on the S drive: Human Resources > Common > Manager Resources	Supervisor or FAII	Email hire package to new employee to be returned to HR Records
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
2	Action New Hire in PeopleSoft	Initiate Smart HR Template transaction in PeopleSoft Manager Self Service New Hire information is keyed into PeopleSoft including: - Hire Date/effective date of rehire - Name - Position # - Expected end date for temp assignments - Comments (special instructions, notes)	Supervisor or FAII	Transaction Workflow generates a work list item for HR Records

3	HR Processing	Hire or transfer the employee from PeopleSoft Manage Hire based on information received in new hire package Insert comments for payroll adjustments where applicable	HR Records HR Records	File Employee information forms in employee file Workflow generates Email to FAII/Initiator advising that transaction has been processed If applicable, HR Records routes to Finance Payroll Worklist.
4	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

EXTENSION TO TEMPORARY CONTRACTS:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☐ No ☑

Introduction:
This document describes the typical process used to process an extension to a temporary contract employee.

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing

1 a)	Identify upcoming contract terminations	Run Query to determine upcoming contract end dates. Follow up with manager/supervisor who have staff coming up to end date.	HR Employment Services	Follow up with Manager/Supervisor to determine extension details or to confirm termination date.
1 b)	Determine new end date	Manager/Supervisor identifies need to extend beyond the current stated end date & notifies HR Employment Services that a revised contract is required	Manager/Supervisor	Email to HR Employment Services with new end date
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
2	Extend an Offer	With an understanding of the departments new timelines for the temporary role, Extension letter is prepared for current incumbent. It is assumed that acceptance of the terms has occurred verbally between employee and manager. Where applicable, benefits language may be included	HR Employment Services	Email to employee with cc to manager, and to HR Records

3	Process Extension	The extension letter is provided to HR Records for action in PeopleSoft	HR Employment Services	Original letter to HR Records Copy of Letter to HR Benefits where applicable
4	HR Processing	Process new dates and entitlements in PeopleSoft Enroll in Benefits where applicable	HR Records HR Benefits	File extension letter in Employee file File Benefit forms in employee file

Notes:

- When extended contracts beyond 1 year, incumbents would be entitled to Health and Dental coverage. If the 3 month waiting period has already been satisfied through consecutive service in the current role, then benefits will take effect immediately. Applies to Non Union only.

POSITION DATA CHANGES:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This document describes the typical process used to create new positions and process changes to position attributes such as:

- New Position (additional staff/complement to existing classification only)
- Inactivate Position
- Update Position, including:
  - Dept ID Changes
  - Location Changes
  - Reports to Change
  - Increase/Decrease Head Count
  - Changes to Standard Hours
  - FTE
  - Budgeted/Unbudgeted
  - Regular/Temporary Status
  - Part Time/ Full Time Status

NOTE: for Title Changes and addition of brand new positions, Departments should contact the Compensation section of Human Resources

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Request for Position Data Change	Department representative completes Departmental Position Data Change (PDC)	Supervisor/Manager/Director or designate	Sends to approvers

		form for submission to FA staff		
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
2	Approvals obtained	Department PDC is signed by approvers	Business Administrator	Sends to FAII Representative for processing
3	Notify Human Resources	FA II initiates the Position Data Change transaction in PeopleSoft Manager Self Service	FA II	Workflow routes to HR Records for processing
4	HR Processing	Change is confirmed and position attributes are updated in position management. Ensure that changes are applied to Incumbent in Job Data if applicable	HR Records	Email notification to FAII advising that transaction has been processed. Position Data Status page in PeopleSoft is updated.

JOB EVALUATION CHANGES:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This document describes the typical process used to process a change to an employee's position classification/ pay grade as a result of the Job Evaluation (JE) process.

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	JAQ/JIS & Request to Evaluate changes form is completed	Document is completed indicating the material changes that have occurred to the position Job Description is rewritten and submitted	Employee	Sends updated documents to supervisor for review and approval
2	Approval to Submit JE obtained	Where the Supervisor agrees with the stated changes, signature is provided on the JAQ/JIS & request forms Where the Supervisor disagrees with the submission to the extent that they believe no JE is required, forms with comments to compensation indicating they do not support submission provided	Manager/Director/GM	Approved JAQ/JIS and job description sent to HR Compensation for review HR Compensation files in job description file.

Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
3	Job Evaluation	The JE is reviewed and the job is re-evaluated based on the information provided (For ATU – rating committee rates position)	HR Compensation Specialist	Outcome communicated via email to Employee’s Manager and to submitting Employee Both are filed in the HR job description file and employee file

4	Changes are processed	If there are no changes to the classification/grade, stop after step 3 If the positon goes up or down, changes are processed V**ia Position Data Change** transaction in PeopleSoft MSS effective up to 6 months retroactive from the date HR received the fully signed request	HR Compensation Specialist HR Compensation Specialist	 Workflow routes Position Data Change transaction to HR Records Worklist
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
5	HR Processing	Position data information is updated in PeopleSoft. Job data is then updated with new rate, title, job code as applicable for affected employee.	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. Email notification to FAII advising that transaction has been processed. Position Data Status page in PeopleSoft is updated.

6	Payroll Adjustments	Calculate and process payments for all instances where position goes up in level	Finance Payroll	Finance Payroll to email retro amounts to Compensation staff

PAY RATE CHANGES

Step Progression or Merit:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:

This document describes the typical process used to process a Pay Rate Change, including:

- Step progression
- Merit Performance Based

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing

1	Merit Alert	For Step Progression/Merit Performance Based, the Supervisor receives automated email notification that pay rate change is pending Note: Departments will no longer receive Merit alerts for employees in ATU, ONA, CUPE5167 and CUPE1041 that are eligible for Step Progression. These increases will be processed automatically by HR Records.	System - scheduled process	Email sent to Supervisor
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**

Steps	Task	Task Details	Assigned To	Processing/Filing
2	Recommendation to increase Wage	If the Supervisor determines the employee is eligible, initiate the **Pay Rate Change – Step Progression or Merit Performance Based** transaction in PeopleSoft Manager Self Service In the case of Non-union, a completed Performance Review is required. Where Supervisor determines the employee is not eligible due to performance, a completed PA is required.	Supervisor or delegate	Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist Performance Review is completed in the PAD tool. HR Records updates the step entry date in job data.

3	HR Processing	Process pay rate change in PeopleSoft Job Data. Update comments for Finance Payroll if applicable	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. Email notification to FAII/Initiator advising that transaction has been processed. Pay Rate Change Status page in PeopleSoft is updated.
4	Process pay Adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

NOTE:

- HR Records to follow up on outstanding merits which have not been processed.
- Fire Department does not receive merit alert emails – they track their own eligibility date based on CBA rules.
- Departmental approval for Step Progression increases for employees in ATU, ONA, CUPE1041 and CUPE5167 is no longer required; these increases will be processed automatically by HR Records.

Change In Qualifications:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This document describes the typical process used to process a Pay Rate Change – Change in Qualifications (employee's rate increasing or decreasing based on a certification or license change)

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Advise Manager of a change in qualifications	Provides copy of certification to Manager Manager advised certification levels were not maintained/renewed	Employee Ministry of the Environment (MOE)	Manager reviews
2	Recommendation to increase or decrease Wage	If the Manager determines the employee is eligible, initiate the **Pay Rate Change-Change in Qualifications** transaction in PeopleSoft Manager Self Service	Supervisor or delegate	Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist

Steps	Task	Task Details	Assigned To	Processing/Filing
3	HR Processing	Process pay rate change in PeopleSoft Job Data. Update comments for Finance Payroll if applicable	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. Email notification to FAII/Initiator advising that transaction has been processed. Pay Rate Change Status page in PeopleSoft is updated.
4	Process pay Adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

NOTE:

- Change in Qualification – where there is a job code &/or Classification change (i.e. Mtce Opr II to Mtce Opr I) enter new rate and certification levels in the comment section.

Add/Remove Additional Duties Pay:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☐ No ☑

Introduction:
This document describes the typical process used to process a Pay Rate Change – Add/Remove Additional Duty Pay

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Request approval	Business case is prepared to support the Additional Duty Pay request	Manager	Business case is sent to HR Compensation for review
2	Business case reviewed	Additional Duty Pay request is approved or denied	HR Compensation	Manager is notified of the approval cc to HR Records
3	HR Processing	Process start of additional duty pay, and processes termination of additional duty pay (future dated) in PeopleSoft Job Data Notifies Finance Payroll via email if applicable	HR Records	If applicable, HR Records notifies Finance Payroll via email.
5	Process pay Adjustments	Calculate and process pay adjustments according to comments on transaction instructions provided in email	Finance Payroll	
Removal of Additional Duty Pay				

No steps required as HR Records processes the end of the additional duty pay at the same time it starts in PeopleSoft Job Data.

NOTE:

- HR Records will not process requests to Add Additional Duty Pay without approval by HR Compensation
- HR Records will process the start and end the Additional Duty Pay at the same time
- Additional duty pay is always 8% of the employee's salary

Probation Complete – Fire

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:

This document describe the typical process used to process a Pay Rate Change – Probation Complete - Fire.

Steps	**Tasks Details**	**Action**	**Assigned to**	**Process/Filing**
1	Notification of Probation Complete	Fire – Department keeps track of their employees' probationary periods (12 months).	Fire	Fire to identify employees who have completed probation
2	Increase wage	Initiate Pay Rate Change – Probation Complete - Fire transaction in PeopleSoft Manager Self Service.	Supervisor or Delegate	Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records worklist.

Steps	Tasks Details	Action	Assigned to	Process/Filing
3	HR Processing	Process pay rate change in PeopleSoft Job Data. Update comments for Finance Payroll if applicable.	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. Email notification to FAII/Initiator advising that transaction has been processed. Pay Rate Change Status page in PeopleSoft is updated.
4	Process Pay Adjustments	Calculate and process pay adjustments according to comments on transaction.	Finance Payroll	

TRANSFERS NOT POSTED

Employer/Employee Initiated Movements:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This transaction is used for people movements to new locations/shift/position numbers, while maintaining the same classification/job code.

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Supervisor identifies employee(s) moving to new building/facility	Conversation between Supervisor and employee(s) to confirm location change and effective date. Position number employee is moving to should be active in PeopleSoft Initiate Transfer transaction with reason code "Employer Initiated or Employee initiated" in PeopleSoft Manager Self Service	Supervisor Supervisor or delegate	Conversation with employee to confirm details of location change Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist

Steps	Task	Task Details	Assigned To	Processing/Filing
2	HR Processing	Verify and process transfer in job data	HR Records	Email notification to FAII/Initiator advising that transaction has been processed. Transfer Status page in PeopleSoft is updated.

NOTE:

- In advance of the transfer - Determine new location and position number for employee. If the position number does not exist in the Dept ID/location you are looking for, execute the Position Data Change Request transaction to create that new position

Return to Previous Position:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This document describes the typical process used to process a Transfer Not Posted – Return to Previous Position (RTO):

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Identify upcoming end dates	Run query to identify employees who have an upcoming end date in the following month and follow up with supervisor who currently "owns" employee.	HR Employment Services	Email supervisor
2	Review notification regarding upcoming end date	Initiate Transfer transaction with reason code "Return to Previous Position" in PeopleSoft Manager Self Service	Supervisor or delegate	Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist

Steps	Task	Task Details	Assigned To	Processing/Filing
3	HR Processing	Process the change in job data with reason "Transfer Return to Previous Position" and related adjustments applied	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. Email notification to FAII/Initiator advising that transaction has been processed. Transfer Status page in PeopleSoft is updated.
4	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

NOTE:

- Employee will be returned to the original position number. A separate Transfer transaction is required if the employee is being transferred to a different position number due to employer/employee initiated reasons: Transfer – Employer/Employee Initiated

  Example:

  - FAII currently in a temp FAI position; temp assignment ends returning the FAII to their original position in Public Works. In the meantime, the BA decides that the FAII will now be placed in Public Health, not Public Works (generating another transfer transaction: Transfer – Employer/Employee Initiated).

Seasonal Transfers:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This document describes the typical process used to process a Transfer – Seasonal for *Permanent Dual Classification Staff – Recreation in Summer and Parks in Winter:*

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Supervisors determine tentative effective date of the transfers	Conversation between Supervisors in both Recreation and Parks to set tentative transfer dates	Supervisors	Conversation with the employee to advise of tentative transfer date
2	Supervisors confirm transfer dates	Final conversation between Supervisors to finalize dates Initiate the **Transfer – Seasonal** transaction in PeopleSoft Manager Self Service	Supervisor Supervisor or delegate	Employee verbally notified of transfer date details Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist

Steps	Task	Task Details	Assigned To	Processing/Filing
3	Obtain Approvals	Transaction is approved	Supervisor, and next level (min of a Manager) of receiving department	Workflow sends transaction to HR Records for processing
4	HR Processing	Process the change in job data with reason “Transfer Seasonal” and related adjustments applied	HR Records	Email notification to FAII/Initiator advising that transaction has been processed. Transfer Status page in PeopleSoft is updated. If applicable, HR Records routes to Finance Payroll Worklist.
5	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

Short Term Coverage:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No☐

Introduction:
This document describes the typical process used to process a Transfer due to Short Term Coverage (up to a max of 4 weeks):

- Vacation coverage (union)
- Union Business coverage
- Sick coverage

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Supervisor determines coverage is required for the short term absence	Supervisor selects appropriate employee to provide the coverage	Supervisor	Conversation with the selected employee
2	Initiate Transfer	Initiate the **Transfer – Short Term Coverage** transaction in PeopleSoft Manager Self Service (Note: end date of coverage is mandatory) *Non-Union to Non-Union Short Term Coverage – not applicable as per non-union comp plan *If employee is providing the coverage in a lower classification, no action is required	Supervisor or delegate	Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist

Steps	Task	Task Details	Assigned To	Processing/Filing
3	HR Processing	Process the change in job data (start and end of short term coverage) and related adjustments applied	HR Records	Email notification to FAII/Initiator advising that transaction has been processed. Transfer Status page in PeopleSoft is updated. If applicable, HR Records routes to Finance Payroll Worklist.
4	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

NOTE:

- Changes to end date are communicated by department to HR Records via email and HR Records adjusts end date

Temporary Internal Secondment/ Minor Reorganizations:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☐ No ☑

Introduction:

This document describes the typical process used to transfer an employee as a result of an **internal secondment** to another position (employee continues to be paid by City of Hamilton), usually as a result of project work or for people movements to new positions due to **a minor reorganization**, which repurposes the incumbents' existing position.

A **"Minor Reorganization"** would be one that is contained within a division and is within the approved budget

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Create New Position	In advance of initiating the transfer transaction, Contact HR Compensation to create new position for incumbent if position does not exist	Supervisor	HR Compensation creates position in PeopleSoft HR Compensation flags for follow-up to ensure repurposed position is inactivated
2	Identify transferring Employee	Department Supervisor determines employee to be seconded into a temporary project/position or for a minor reorganization the Supervisor converses with the employee(s) to confirm position change and effective date.	Supervisor	Supervisor notifies HR Employment Services to prepare letter outlining terms and conditions

Steps	Task	Task Details	Assigned To	Processing/Filing
3	Letter Prepared & issued to Employee	Terms and conditions of temporary secondment or repurposed position provided to employee	HR Employment Services	Email letter to Employee with cc to Supervisor
4	Terms Accepted	Employee agrees to terms & signs agreement	Employee	Returns signed letter to HR Employment Services. HR Employment Services sends signed letter to HR Records
5	HR Processing	Transfer employee - Update job data in PeopleSoft	HR Records	Email Finance Payroll if any pay adjustments required. File signed agreement in employee file.
6	Payment adjustments	Calculate and process payments, recovery according to comments on transaction where applicable	Finance Payroll	

NOTE:

- For exception offers (additional benefits or vacation) approvals and a copy of the offer to be sent to Benefits and Records by Employment Services as appropriate.

Confirm To Permanent:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☐ No ☑

Introduction:
This document describes the typical process used to confirm a temporary employee to permanent in their position. An employee can only be confirmed in a position if a competition has already occurred for the original temporary role.

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Determine Employee in temporary assignment is to be confirmed permanent	Assuming competition has occurred at a point in time, approvals have been obtained, and Complement Policy is being adhered to, confirm effective date to make an employee permanent in their role. It is assumed that acceptance of the terms has occurred verbally between employee and manager.	Supervisor	Communicate with HR Employment Services via email to initiate offer letter for Employee HR Employment Services files email in Employee file

2	Offer letter is issued	Letter outlined terms and conditions of role is prepared	HR Employment Services	Email letter to employee with cc to supervisor and copy to HR Records for processing.
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
3	HR Processing	Process the change in job data with reason "Transfer confirmed in Job" and related adjustments applied	HR Records	Letter goes in Employee File If applicable, HR Records sends Email template to Finance Payroll
4	Enroll in Benefits	Enrolment in benefit program or transfer benefit programs if applicable for internal candidates (notified of pending enrolment via employee staff movement report/benefit waiting period report)	HR Benefits	File in employee file
5	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

Acting (Non-Union) OR Temporary Deployment >1 month (Union):

PeopleSoft Automated Workflow/Manager Self Service Component   Yes ☐ No ☑

Introduction:
This document describes the typical process used to process a Transfer due to an Acting assignment (non-union) or Temporary Deployment (union) of greater than 1 month

- Sick coverage
- Filling vacancy pending outcome of a posting

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Vacancy occurs due to resignation/retirement/ involuntary termination/transfers, or sick/leave	Supervisor appoints employee in temporary acting capacity and complete offer template with details of assignment/conditions. It is assumed that acceptance of the terms has occurred verbally between employee and manager.	Supervisor	Sends offer template email to HR Employment Services to direct preparation of letter
2 a)	Appointments of greater than 8 weeks only, letter is prepared	Offer letter outlining terms and conditions of acting appointment is prepared	HR Employment Services	Email letter to employee with cc to Supervisor and forward to HR Records.
2 b)	Appointments of greater than 4 weeks but less than 8 weeks,	Review and forward offer template for processing to HR Records	HR Employment Services	Email offer template to HR Records

	offer template is completed			
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
3	HR Processing	Job Data is updated in PeopleSoft and pay rate is adjusted according to acting policy or CBA language. Enter Expected End Date for monitoring purposes	HR Records	Email Finance Payroll if any pay adjustments required. File signed agreement in employee file.
4	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

NOTE:

- If an Employee successfully places into a position through a posting/competition and is confirmed in role – follow the Transfer Posted process.

Training Complete – Fire Only:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No ☐

Introduction:
This transaction is used for the assignment of Firefighters to their stations upon completion of their training.

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Supervisor identifies position employee is transferring to	Conversation between Supervisor and employee(s) to confirm position change and effective date. Initiate Transfer transaction with reason code "Training Complete (Fire)" in PeopleSoft Manager Self Service	Supervisor Supervisor or delegate	Conversation with employee to confirm details of new position Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist.
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**

2	HR Processing	Process the change in job data with reason “Transfer Training Complete (Fire)” and related adjustments applied	HR Records	Email notification to FAII/Initiator advising that transaction has been processed. Transfer Status page in PeopleSoft is updated. If applicable, HR Records routes to Finance Payroll Worklist.
3	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

Probation Complete – ATU Only:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No ☐

Introduction:
This transaction is used for the assignment of Bus Operators to their home position upon completion of their training.

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Supervisor identifies position employee is transferring to	Conversation between Supervisor and employee(s) to confirm position change and effective date. Initiate Transfer transaction with reason code "Probation Complete (ATU)" in PeopleSoft Manager Self Service	Supervisor Supervisor or delegate	Conversation with employee to confirm details of new position Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist.

Steps	Task	Task Details	Assigned To	Processing/Filing
2	HR Processing	Process the change in job data with reason “Transfer Probation Complete (ATU)” and related adjustments applied	HR Records	Email notification to FAII/Initiator advising that transaction has been processed. Transfer Status page in PeopleSoft is updated.

Internal Posting to Bargaining Unit (Fire, ONA, HPS & Library Only):

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No ☐

Introduction:
This document describes the typical process used to process a Transfer – Internal Posting Process (Fire/HPS/ONA/Library):

- More specifically this reason is to be used when the department internally posts a role in one of the stated unions (as a result of CBA language or practice which provides opportunity to union members in advance of a formal city-wide internal posting)

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Internal posting process	Internal posting process approved and actioned at department level according to collective agreement articles.	Department delegate	
2	Identify Successful Candidate	Department Supervisors agree on successful candidate to be transferred into vacancy Initiate the Transfer – Internal Posting Process transaction in PeopleSoft Manager Self Service	Supervisor Supervisor or delegate	Supervisor notifies successful candidate Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist

Steps	Task	Task Details	Assigned To	Processing/Filing
3	HR Processing	Verify and process Transfer – Internal Posting Process in job data including adjustments, and notes directions for any applicable overpayments and retroactive payments with instructions in the comments section for payroll	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. Email notification to FAII advising that transaction has been processed. Position Data Status page in PeopleSoft is updated.
4	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction	Finance Payroll	

UNPAID LEAVE OF ABSENCE >30 DAYS

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☐ No ☑

Introduction:
This document describes the typical process used to process an Unpaid Leave/Return of Absence of greater than 30 days, including:

- Personal Unpaid Leaves
- Professional Development
- Maternity, Parental, or Adoption Leave
- Military Leave
- Family Medical/Compassionate Care Leave
- Child Death Leave
- Critically Illness Leave (Child & Adult)
- Organ Donor Leave
- Crime-related Child Death/Disappearance Leave
- Family Caregiver leave
- Domestic or Sexual Violence Leave

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing

1	Request for leave of Absence	An employee will request a leave of absence by completing the **Leave of Absence Request form** where advance notice is possible. Form is located on eNet under Policies & Procedures>Human Resources Policies & Procedures>Employee Orientation & Information>Forms. If the employee is unable to complete the form due to sudden illness for example, then the department completes on their behalf, approvals obtained and the form is forwarded to HR Records for processing.	Employee	Sends form to Supervisor for approval
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
2	Approval	The request is approved/denied	Supervisor (up to Director approval depending on type of leave)	Sends approved form to HR Records for processing OR Sends denied form to HR Records for filing In cases where unpaid leaves follow a paid sick leave, RTWS sends email notification to HR Records for processing.

3	HR Processing	The form is reviewed and processed in PeopleSoft and the employee is placed on an unpaid LOA – Absence is entered into attendance and job data Expected return date is entered into PeopleSoft	HR Records	The original form goes in the employee file Copy of form or email notification (where form is not available) to payroll
4	Benefits Impacts	Leave is identified on staff movement report. Assess the type of leave and related benefit impacts & issue letter with options form to EE regarding benefit/pension continuation	HR Benefits	File a copy of letter in employee file
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
5	Complete benefits option form	The form is completed indicating the preferred course of action with respect to the continuation of benefits for the leave period	Employee	The form (with cheques if req'd) is sent to HR Benefits within 30 days of receipt
6	Process Benefit Options form	Depending on the elections made by the employee, terminate or leave relevant benefits active in PeopleSoft	HR Benefits	File options form in employee file and photocopy of cheques in financial file Send cheques to Customer Service officer Tax administration if applicable

7	Issue ROE	Prepare and issue ROE in accordance with LOA	Finance Payroll	Send the ROE to Service Canada and file in the case of paper copies.
Return from Unpaid Leave of Absence (>30days)				
1	Confirm Return from Leave	Query run to identify returning employees & follow up with department to confirm return dates	HR Records	Email FA II to confirm end date
2	HR Processing	Close the absence in attendance and return the employee to active in job data	HR Records	N/A Where retro is owed or attendance requires adjusting, HR Records to notify Payroll of return via email
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
3	Reactivate Benefits	Return is identified on the staff movement report. Letter is issued to employee in the case where benefits were terminated notifying of reactivation and requesting new forms be completed Where benefits were continued, a letter notifying confirmation of active status and return of excess cheques to employee	HR Benefits	Original letters and forms sent to employee Copies of letters placed in employee file
4	Complete Benefits Enrolment Form	Where benefits ceased, the employee completes forms to reenroll in benefits	Employee	Send to HR Benefits for processing

5	Enter Benefits information	Reactivate benefits per the returned enrolment forms	HR Benefits	File the original benefit forms in the employee file or Life insurance file

Notes:

- Where an unpaid leave immediately follows a sick leave that is being managed by Return to Work Services (RTWS), RTWS will forward an email notification to HR Records to inform of the transition date to the unpaid leave, and if available include the expected return date
- As HR Records in now updating attendance in PeopleSoft, F&A no longer need enter attendance data.

TERMINATIONS

Voluntary Terminations:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☑ No ☐

Introduction:
This document describes the typical process used to process a Voluntary Termination, including:

- Resignations
- Retirements
- Death of a current employee
- End of Temporary Assignment

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Supervisor receives staff notification of resignation or retirement Temporary Assignment end date approaching	Supervisor confirms last day worked with employee (preferably via written confirmation or email from departing employee)	Supervisor	N/A

Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**
2	Notify Human Resources of Termination	Initiate Termination transaction in PeopleSoft Manager Self Service	Supervisor or Delegate	Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist
3	HR Processing	Process Termination in Job Data including in comments of final vacation calculations/payouts	HR Records	HR Records routes to Finance Payroll Worklist.
4	Process Benefit change	Process termination of benefits in accordance with last day worked	HR Benefits	Staff Movement report
5	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction and Issue ROE for departing employee	Finance Payroll	
6	Communicate Termination	An announcement is issued to notify staff of employee's departure and to redirect inquiries as appropriate	Supervisor	

Note: Refer to New Hires/Transfer Not Posted (Smart HR Hires) for rehires for ATU Winddown

Involuntary Terminations:

PeopleSoft Automated Workflow/Manager Self Service Component Yes ☐ No ☑

Introduction:
This document describes the typical process used to process an Involuntary Termination, including:

- Terminations (discipline, frustration of contract)
- AWOL
- Salary Continuance
- Working Notice
- Layoff

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Recommendation to terminate is made	In collaboration the Department and HR Labour Relations work together to confirm termination	Department & HR Labour Relations	
2	Documentation Prepared	Severance letter including wage, benefit, sick bank, vacation, and OMERS information/options	HR Labour Relations	Send to Department for Manager Signature
3	Termination Interview	The termination interview is held and employee is presented with letter	Immediate Supervisor with HR Labour Relations	(HR Labour Relations) Copies of letter provided as follows: Original – Employee Copy – HR Records Copy – HR Benefits
Steps	**Task**	**Task Details**	**Assigned To**	**Processing/Filing**

4	HR Processing	Termination/ PeopleSoft action is executed	HR Admin Coordinator – Salary Continuance/ Working Notice HR Records – All other	File letter in salary continuance file File in employee file
5	Benefit Termination	Terminate benefit coverage in accordance with termination letter.	HR Benefits	
6	Payroll Notification	Copy of Salary Continuance letter scanned with payout information in email to Finance Payroll & HR Benefits Email template completed to notify Finance Payroll of termination and relevant calculations	HR Admin Coordinator HR Records	File Info in salary continuance file File email in employee file
7	Complete Termination	Process termination and issue ROE Payroll communicates vacation payout amounts back to HR Admin Coordinator for Salary Continuance cases	Finance Payroll	File in payroll file File in employee file

NOTE:

- **If new terms are negotiated following the original termination letter is issued. Return to Step 3**
    - HR Labour Relations (or HR Admin Coordinator in cases of salary continuance) to communicate changes via summary email with backup attached (i.e. minutes of settlement or revised letter) to both HR Records and HR Benefits
    - HR Admin Coordinator/ HR Records repeat step 4 & 5 & Finance Payroll to make adjustments as necessary