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

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.

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(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 Exe	ecuted ONLINE Via Manager Se	elf 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 not handled through the posting process , 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
TransferThis transaction and reasonReason – Internalto be used when thePosting Process (Firedepartment internally postsLocal 288, OPSEU, androle in one of the stated uniONA ONLY)(as a result of CBA languageor practice which providesopportunity to union memberin 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.	
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</u> <u>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 		
Extension to Temporary Contracts	ts For extensions to temporary contracts, Human Resources will facilitate system and employee notifications.		
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 Execut	ed OUTSIDE of Manager Self S	Service Cont'd
Transaction Type	Description	Contact
Transfer	For the confirmation of a	HR Employment
Reason – Confirm to Permanent	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.	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 <u>a minor</u> <u>reorganizations</u> , which repurposes the incumbents' existing position, Human Resources will facilitate	HR Employment Services

Transfer Reason – 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.	
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 Contact the WFA 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 <u>assign their approval and initiation</u> <u>authority to a delegate/proxy</u> 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 <u>Contact the WFA</u> 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, <u>contact the WFA</u> to create delegations to the Manager with the higher emplid. <u>NOTE</u> – 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.

Step	Action							
1	Navigation:							
	Manager tab>View Employee Personal Info							
2	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.							
	View Employee Personal Information							
	Employee Selection Criteria							
	Select the employee whose job and personal information you want to review. You will be able to view only those employees that report to you.							
	The 🗄 icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click Select beside the employee you wish to view. As Of 06/28/2017 Proxy For Mike Manager(Mgr 8) Refresh Employees							
	Mike Manager's employees Personalize 🖾 First 🚯 1-19 of 19 🛞 Last							
	Select Name Empl ID Empl Record Status Full/Part Time Position Description Dept ID Department							
	Select E Sally Supervisor							

	Select Mickey Mouse
	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.
	View Employee Personal Information
	Employee Selection Criteria
	Select the employee whose job and personal information you want to review. You will be able to view only those employees that report to you. The 🗄 icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click
	Select beside the employee you wish to view.
	As Of 06/28/2017
	Sally Supervisor's employees
	Select Name
	Select Alice Wonderland
	Select Bugs Bunny
	Select Elmer Fudd
	Select Eric Employee
	Select Jane Doe
	Select Hike Manager

Employee Inform Jane Doe File/Admin Clk Actions •	
Personal Information	1
Empl ID:	100467
Employee Status:	Active
Position:	00007381 File/Admin Clk
Job Code:	5520 File/Admin Clk
Job Entry Date:	10/19/2015
Union:	CUPE Local 5167 Inside
Empl Class:	
Standard Hours:	0.01
Sal Plan:	C1 CUPE Local 5167 Inside
Grade:	В
Min Max:	19.267 20.942
Employee's Step:	3
Comp Rate:	20.942
Hire Date:	03/06/2000
Department:	720125 P&ED-T&C-HRM-ChildrensMuseum
Location:	BLD038 Children's Museum
Regular/Temporary:	Regular
Full/Part Time:	Part-Time
Additional Information	on
Additional Information	Email Addresses Phone Numbers Emergency Contacts
Return to Select Employ	her employee to view their current job data, cl

	nformation					
Phone N	umbers					
Eric Employ	ee					
Phone Num	252					
Phone Type	*Telephone	Extension	Preferred	Delete		
Business	905/123-4567					
Home	905/222-1111		 ✓ 			
To view	additional conta	act informat	ion for th	is same (emplovee	
To selec Return to Sel 6 To view Employee	emergency cont opriate link. t another emploe ectEmployees and f the employee's information ddresses	tacts), click byee and vie follow the or	Return to Em ew their in nscreen ir	nformatic	nation and on, click ns.	select
To select Return to Sel 5 To view Employee Email Ad	emergency cont ropriate link. t another emplo <u>ectEmployees</u> and f the employee's information ddresses	tacts), click byee and vie follow the or	Return to Em ew their in nscreen ir	nformatic	nation and on, click ns.	select
To select Return to Sel To view Employee Email Act	emergency cont ropriate link. t another emplor ectEmployees and f the employee's information ddresses	tacts), click byee and vie follow the or	Return to Em ew their in nscreen ir	nformatic	nation and on, click ns.	select
To select Return to Select Return to Select To view Employee Email Addre	emergency cont ropriate link. t another emplo ectEmployees and f the employee's information ddresses vee sses	tacts), click byee and vie follow the or current em	Return to Em	nformatic	mationi and on, click ns. k ^{Email Addr}	select
the appl To selec Return to Sel To view Employee Email Ad Eric Emplo Email Addre Email Addre	emergency cont ropriate link. t another emplor ectEmployees and f the employee's information ddresses ree sses Emericant	tacts), click byee and vie <u>follow the or</u> current em	Return to Em	nformatic	n, click on, click <u>ns.</u> k Email Addr	select

Emergency	Contocto	You will be presen	rgency contacts, ted with a list of (
contacts		by the employee.		ennergente
Employee Ir	formation			
Emergen	cy Conta	cts		
Eric Employe	ee			
Emergency C	ontacts			
Contact Name		Relationship to Employee	Primary Contact	
Evan Employe		Sibling	v	
Emergency	Contact Contacts	Name to view the e	emergency contac	ct detail.
Click the Emergency Emergen Eric Employe	Contact Contacts cy Contacte		emergency contac	ct detail.
Click the Emergency Emergen Eric Employe Address and	Contacts Contacts Cy Contacte Re Telephone	ct Detail	emergency contac	ct detail.
Click the Emergency Emergen Eric Employe Address and Contact Name	Contacts Contacts Cy Contacte relephone	ct Detail Evan Employee	emergency contac	ct detail.
Click the Emergency Emergen Eric Employe Address and	Contacts Contacts Cy Contacte relephone	ct Detail	emergency contac	ct detail.
Click the Emergency Emergen Eric Employe Address and Contact Name	Contacts Contacts Cy Contacte Relephone	ct Detail Evan Employee		ct detail.
Click the Emergency Emergen Eric Employe Address and Contact Name	Contacts Contacts Cy Contacte Relephone	ct Detail Evan Employee Sibling		ct detail.
Click the Emergency Emergen Eric Employe Address and Contact Name Relationship to	Contact Contacts Cy Contacte Relephone	ct Detail Evan Employee Sibling Contact has the same telephon		ct detail.
Click the Emergency Emergen Eric Employe Address and Contact Name Relationship to Phone Type:	Contact Contacts Cy Contacte Relephone	ct Detail Evan Employee Sibling Contact has the same telephon Home		ct detail.
Click the Emergency Emergen Eric Employe Address and Contact Name Relationship to Phone Type: Employee's P	Contacts Contacts Cy Contacts Cy Contacts Periods of the contact of the conta	ct Detail Evan Employee Sibling Contact has the same telephon Home		ct detail.
Click the Emergency Emergen Eric Employe Address and Contact Name Relationship to Phone Type: Employee's P Phone:	Contacts cy Contacts cy Contacts cy Contacts ce Telephone : b Employee: hone 905/222-11	ct Detail Evan Employee Sibling Contact has the same telephon Home		ct detail.

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**:



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 an initiator, an approve			re involved in the Manage	er Self Service transaction. This	could be as		
	I have access to: shou to.	ld be used	only by core users.	inis will display all transa	actions tied to DeptIDs that you	have access		
	Show transactions:	Linked to	me 🗸 Fi	Iter by status: S	how all	Show all Awaiting HR Pro	ocessing	
	Employee Transfer F Name	Empl ID	Transfer Date	Effective Sequence	Find First I 1- Workflow Status	Denied		
	Donald Duck	052750	06/01/2015	1	Awaiting HR Processing	Error. Contact A In Approval Proc Processed by H	cess	
	Donald Duck	052750	06/01/2015	2	Awaiting HR Processing	1.1.000000000,1		
	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			
	page once yo Filter by Stat Awaiting HI waiting to be Cancelled b cancelled it. Denied – Tra department of the approval Errors Enco In Approval	ansact chain h unter	e approved initions: cessing – T ssed. – Transacti- ion was not nas denied ed – Syste ess – Trans	<i>Transaction has been r</i> trouted to HF it which term m generated. saction is pen	as been routed to routed to HR and R as an approver inates the remain ding in the depar	HR and HR has in the ider of		
	approval pro- complete.	cess a	nd will be r	outed to HR o	once all approvals	s are		
		y HR	 Transact 	ion has been	processed by HR.	•		

		-								
			-	-	·	<u>.</u>	<u> </u>	-	Home A	dd to Favori
	<u>H Hamilton</u>									
	Favorites • Main Menu • > Rec	ruiting 👻 🚿	Browse Job Openings					All - Search		~
								Jeditit		leip Perso
	Browse Job Openings									
	Return ARecruiting Home 🔍 Create						Personalize			
_		Search jo	ob openings	ン	0					
	Filter by	18 match	es found. penings				Percr	onalize Find View All 🖉	I First	④ 1-18 c
	My Association Hiring Manager (15)	Job ID	Posting Sile	Category	Recruiting Location	Department	Business Unit Days		No Action Taken	Total Appl
	Primary Hiring Manager (15) Team Member (3)	12650	Childrens Museum Clk PT		Planning & Development	P&ED-T&C-HRM-ChildrensMuseum	City of Hamilton 4	010 Open	0	0
	Department P&ED-T&C-AE&G-SpecEvent (3) P&ED-T&C-CPM-CulturalInit(2)	12634	Program Coord-Cultural Devt	0	Information Technology Service	P&ED-T&C-CPM-CulturalInitative	City of Hamilton 7	010 Open	0	0
	P&ED-T&C-HRM-CapPrjMgm (2) P&ED-T&C-HRM-ChildrensMus(2)	12632	Childrens Museum Clk PT	0	Information Technology Service	P&ED-T&C-HRM-ChildrensMuseum	City of Hamilton 4	010 Open	4	5
	P&ED-T&C-HRM-ConservSrv (2) More	11731	Manager, Tourism	0	Planning & Development	P&ED-T&C-T&CI-TourismOpr	City of Hamilton	110 Filled/Closed	0	95
	Hiring Manager Debbie Director (15)	10575	Program Manager, Public Arts	0	Planning & Development	P&ED-T&C-AE&G-SpecEvent	City of Hamilton	110 Filled/Closed	0	5
	Sally Supervisor (7)	10574	Program Manager, Events	0	Planning & Development	P&ED-T&C-AE&G-SpecEvent	City of Hamilton	110 Filled/Closed	0	21
	Recruiter Debbie Paddock (6)	10182	Manager Arts Events & Grants	0	Planning & Development	P&ED-T&C-AE&G-SpecEvent	City of Hamilton	120 Canceled	0	108
	Jacqueline Ross (3) Michelle McGaw (3) Courtney Krawec (2)	8762	Manager-Tourism & Visitor Serv	0	Planning & Development	P&ED-T&C-T&CI-TourismOpr	City of Hamilton	110 Filled/Closed	0	8
	Grace Figliola-Laufman (2) More	7985	Manager, Facility & Capital	0	Planning & Development	P&ED-T&C-HRM-CapPrjMgm	City of Hamilton	120 Canceled	0	16
	Job Family No Value (11)	7850	Manager, Hamilton Farmers'	0	Culture & Recreation	CityMgr-SP&RevGen-HamFarmMark	City of Hamilton	110 Filled/Closed	1	148
	E-Days (7)	7473	Administrative Support Clerk	0	Culture	P&ED-T&C-Director'sOffice-Admn	City of Hamilton	110 Filled/Closed	0	114
	Location Planning & Development (7) Culture & Recreation (4)	6589	 Mgr Facility <u>C</u> apital Planning	0	Culture	P&ED-T&C-HRM-CapPrjMgm	City of Hamilton	110 Filled/Closed	0	5
	Culture (3) Community&EmergencyServic(2)	6588	Supervisor Facilities Services	0	Culture	P&ED-T&C-HRM-AdmnHer&Mus	City of Hamilton	120 Canceled	0	5
	Information Technology Se(2) Status	6257	Sr Proj Mgr Cap Projects (Cul)	0	Community&EmergencyServices	P&ED-T&C-HRM-ConservSrv	City of Hamilton	110 Filled/Closed	0	3
	110 Filled (10) 010 Open (4)	6012	(Cui) Mgr Arts/Events	0		P&ED-T&C-CPM-SpecProjects	City of Hamilton	110 Filled/Closed	0	10
	120 Canceled (4)			0			City of Hamilton	110 Filled/Closed	0	10
	Created In	5201	Cultural Initiatives Coord	6.1		P&ED-T&C-CPM-CulturalInitative				

5	availa	mart HR Transa ble to the Initia nange the start	tor. All tra	ansactions	appear on (one pa	age. You
	Transa	ction Status					
	The followir	ng transactions are pending, cancele	ed or have been process	ed by Human Resourc	es.		
		HR Review Status All		~			
		Transaction Type Hire/Rehire	1	~			
	Т	ransaction Status All	1	~			
		Start Date From 03/01/2017	To 07/09/2017	31			
		Refresh	Clear				
	Transac	tion Status 🕐			Personalize Find 🔄	First	④ 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					
	De	elete Selected Transactions					
6	Workf	sing View Statu low will generatived the transac	te an emai	l to the in			
		will contain a li		•			•
	End o	f procedure.					

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**:

Step	Action
1	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
2	Click on the View Status page for the applicable Transaction Admin Self Service Home Page View Self service Transactions View Pay Rate Change Status View Pay Rate Change Status View Term/Retire Status
	 Manage Delegation Used to delegate, accept, and revoke responsibility for Manager Self Service transactions. Human Resources Admin. Guide This guide provides detailed information to those responsible for the administration & management of staff, including, People Managers, Administrative Assistants and FA II's.

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 							
	an initiator, an approv	ver, or a dele	gate.		er Self Service transaction. This actions tied to DeptIDs that you			
	Show transactions:	I have ac	cess to V	Filter by status:	how all			
I have access to	Employee Transfer	Requests			Find 🔄 First 🕻 1-10	Awaiting HR Processing		
	Name	Empl ID	Transfer Date	Effective Sequence	Workflow Status	Cancelled by HR Denied Error, Contact Administrator.		
	Donald Duck	052750	06/01/2015	1	Awaiting HR Processing	In Approval Process Processed by HR		
	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	~		
	waiting to be	R Proc e proce	c essing - ⁻ ssed.		s been routed to outed to HR and I			

	Denie	elled it. ed – Transactio tment chain ha					
	-	pproval chain.	s defiled it		minates the		
		s Encountered	1 – Svsten	n generate	ed.		
		oproval Proces	•	-		ne dep	artment
	-	val process and		•	_		
	comp	lete.					
		essed by HR -					
4	availa	mart HR Transa able to the Initia hange the start	tor. All tr	ansaction	s appear on	one p	age. You
	Transa	ction Status					
	The follow	ing transactions are pending, cancel	ed or have been proces	sed by Human Resourc	ces.		
		HR Review Status All		~			
		Transaction Type Hire/Rehire		\checkmark			
		Transaction Status All		~			
		Start Date From 03/01/2017	To 07/09/2017	31			
		Refresh	Clear				
	Transac	ction 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					
	C	Delete Selected Transactions					
5	For Po	osition Data Cha	anaes, sele	ect the tra	nsaction vo	u wish	to view by
2		ng on the Positi			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
		<pre>/ Transactions</pre>		s Linked to	o me. Char	nge to	"I have
		s to" if you wish					
		s. (see definition				-	

	Select a Transaction The list below contains position requests. Select a position request to view details. Note: Request #'s are assigned for new position requests.						
	Show transactions	: I have access to 🔽	Filter by status:	Show all	- •		
	Position Data Cha	inge Requests				First 1-12 of 12 La	
	Position/Request #	Position	Request Type	*Effective Date	Effective Sequence	Workflow Status	
	00001508	Coord Marketing	Inactivate	06/15/2015	1	Processed by HR	
	00001514	Financial Asst I	Inactivate	01/01/2015	1	Cancelled by HR	
	00001514	Financial Asst I	Update	05/25/2015	1	Awaiting HR Processing	
6	Workflow v position or will contair	View Status Pa will generate a nce HR Records n a link to the s s cancels the t	n email to al s has proces status page	ll FAII with sed the tra for that pa	ansaction articular t	; the email ransaction. 1	
	End of pro	a a du wa					

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

	Transaction type has its own email; this table provides a le email for a transaction:
Ref #	Email
1	Subject: Submitted - Job Opening - 12657 - Your request was submitted for approval Image: Interpretent content of the state of the st
2	Subject: Approval Required Pay Rate Change - Fric Employee
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	CL. 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							
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	Your request was c	ancelled.							
	Transaction Name: Manage Hire Request								
	Manage Hire Request ID: 8819								
	Job Code: 6769								
	Position Title: Final	ncial Assistant							
		t Name: Eric Employee							
	Cancelled By: Trac								
		ed message. Please do not respond to this email.							
	This is an automate	a message. Please do not respond to this email.							
8		m Sally Supervisor has been submitted for your review and acceptance							
		istrator on their behalf) has submitted a delegation request to you. Here are the details:							
		Initiator#1, Pay Rate Change-Initiator#1, Terminate/Retire-Initiator#1							
	From: 2017-06-26								
	To:								
		then accept or reject the request, using the link below.							
	Page=HCDL MGR DLG HON	:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL? If&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=JobOpening&TRANS_ALLOWED=I&FROM_DATE=201							
	<u>7-06-26</u>								
	This is an automated messag	e. 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=201 7-06-26
	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 DA E=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 DAT E=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.

	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=1266
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)
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Employee (D: 012345)
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Explanation: Employee Name : Smith,Robert Explanation: Employee ID: 012345 Attendance status : Incomplete Cost of Course : 0.00
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Explanation: Employee ID: 012345 Attendance status : Incomplete
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Explanation: Explanation: Cost of Course : 0.00 Course : CE0005 Course Title :NewEmployeeOrientation-CE
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Explanation: Explanation: Cost of Course : 0.00 Course : CE0005 Course Title :NewEmployeeOrientation-CE Message 2: Employee 'Enrolled' Attendance Status change to : No Show (26003,62)
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Explanation: Explanation: Cost of Course : 0.00 Course : CE0005 Course Title :NewEmployeeOrientation-CE
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith Robert Explanation: 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) Transaction Name: Enrolled Attendance Status Change to "No Show" for an Approved Learning and Development Request Employee Name : Pitt.Brad Employee Name : Pitt.Brad Employee Name : Pitt.Brad
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Explanation: 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) Transaction Name: Enrolled Attendance Status Change to "No Show" for an Approved Learning and Development Request Employee Name : Ditt.Brad Explanation: Explanation: Explanation: Explanation:
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	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith, Robert Explanation: 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) Transaction Name: Enrolled Attendance Status Change to "No Show" for an Approved Learning and Development Request Employee Name : Pitt, Brad Explanation: Employee ID: 012346 Attendance status : No Show Cost of Course : 0.00 Course : HS0009 Course Title :Public Health Fundamentals-HS
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Explanation: Explanation: Exployee 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) 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)
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith, Robert Explanation: 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) Transaction Name: Enrolled Attendance Status Change to "No Show" for an Approved Learning and Development Request Employee Name : Pitt, Brad Explanation: Employee ID: 012346 Attendance status : No Show Cost of Course : 0.00 Course : HS0009 Course Title :Public Health Fundamentals-HS
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee Name : Smith.Robert Explanation: 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) Transaction Name: Enrolled Attendance Status Change to "No Show" for an Approved Learning and Development Request Employee Name : Pitt.Brad Explanation: Employee ID: 012346 Attendance status : No Show Cost of Course : 0.00 Course : House : Sologe Course Title :Public Health Fundamentals-HS Message 3: Employee 'Enrolled' Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status Change to "Late Notice Cancellation" for an Approved Learning and Develop Employee Name : Enrolled Attendance Status Change to "Late Notice Cancellation" for an Approved Learning and Develop Employee Name : Enrolled Attendance Status Change to "Late Notice Cancellation" for an Approved Learning and Develop Employee Name : Enrolled Attendance Status Change to "Late Notice Cancellation" for an App
	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee ID: 012345 Attendance status : Incomplete Cost of Course : 0.00 Course : CE0005 Course Title :NewEmployeeOrientation-CE Message 2: Employee Vame : Enrolled Attendance Status change to : No Show (26003,62) Transaction Name: Enrolled Attendance Status change to : No Show" for an Approved Learning and Development Request Employee Name : Dittl.Brad Explanation: Employee ID: 012346 Attendance status : No Show Coors of Course : 0.00 Course : H50009 Course Title :Public Health Fundamentals-HS Message 3: Employee 'Enrolled' Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status Change to "Late Notice Cancellation" for an Approved Learning and Develop Employee Name :
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	Message 1: Employee 'Enrolled' Attendance Status change to : Incomplete (26003,62) Transaction Name: Enrolled Attendance Status Change to "Incomplete" for an Approved Learning and Development Request Employee ID: 012345 Attendance status : Incomplete Cost of Course : 0.00 Course : CE0005 Course Title :NewEmployeeOrientation-CE Message 2: Employee Vame : Enrolled Attendance Status change to : No Show (26003,62) Transaction Name: Enrolled Attendance Status change to : No Show" for an Approved Learning and Development Request Employee Name : Dittl.Brad Explanation: Employee ID: 012346 Attendance status : No Show Coors of Course : 0.00 Course : H50009 Course Title :Public Health Fundamentals-HS Message 3: Employee 'Enrolled' Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status change to : Late Notice Cancellation (26003,62) Transaction Name: Enrolled Attendance Status Change to "Late Notice Cancellation" for an Approved Learning and Develop Employee Name :
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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)

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Merit Alert Procedure

2	If the Manager determines the employee is eligible for the merit increase, initiate the Request Pay Rate Change transaction in Manager Self Service.
	<i>Note: In the case of non-union, a completed Performance Review is required.</i>
	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 account". FA staff can run the following email query **N_HR_MERIT_ALERT_NOTIFICATION)** to monitor notifications that were generated. When running guery you will be prompted for a Run Date

Procedure:

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	632020	Employee,Eric	CA	7	0	\$50.855	3.20	2015-07-14

2	If the Manager determines the employee is eligible for the merit increase, initiate the Request Pay Rate Change transaction in Manager Self Service.
	<i>Note: In the case of non-union, a completed Performance Review is required.</i>
3	FAII run query
	Navigation: Main Menu>Reporting Tools>Query>Query Viewer Enter beings with: N_HR_MERIT_ALERT_NOTIFICATION
	And click Search
	Home Worklist Add to Favorites
	Favorites ▼ Main Menu ▼ > Reporting Tools ▼ > Query Viewer
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4	You will be prompted to enter a Run Date (Note: Run Date prompt is
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DELEGATIONS

MANAGE DELEGATIONS OVERVIEW:

Purpose

If you are a Manager, you can choose to delegate responsibility for your selfservice 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:

Step	Action
1	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
	Favorites Main Menu > Self Service > Manage Delegation
	Manage Delegation
	Sally Supervisor
	If you are a Manager, you can delegate 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 when a manager delegates responsibility to them.
	Learn More about Delegation
	Note: This link is available to all employees.

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	FAQ 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 elsea 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.
2	Create Delegation Request:
<u> </u>	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.
	Create Delegation Request
	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.

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
	<i>Note: This link becomes available to a Manager once they have created a delegation request.</i>
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
	<i>Note: This link becomes available to any employee when someone initiates a delegation request to them.</i>
	End of Procedure

CREATE A DELEGATION REQUEST:

Purpose

Use Create Delegation Request to delegate responsibility for your selfservice 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
	Navigation:
1	Manager tab>Manage Delegation>Create Delegation Request

2	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 . Create Delegation Request
	Enter Dates
	Solly Supervisor
	Sally Supervisor
	Curator
	Enter the dates for your delegation request. Enter a <i>From Date</i> that is today or later. Enter a <i>To Date</i> that is the same as or later than your <i>From Date</i> . For open-ended delegation requests, leave the <i>To Date</i> blank.
	Delegation Dates
	From Date 06/26/2017
	To Date
	Next Cancel
3	Select the transaction(s) you wish to delegate by clicking the box
	beside the transaction name and click Next.

	delegated to up to three people.
1. tra 2. 3.	Illow this 3-step process to create a delegation request: Select the transaction(s) that you wish to delegate to a proxy and click Next. If you select multi insactions on this page, they will all be delegated to the same proxy. Select/search the employee you wish to delegate to and click Next. Review the Delegation Detail page for accuracy and click Submit. epeat above steps to create further delegation requests to additional proxies.
0	elegate Transactions
	Transaction
[Approve Job Opening
[Approver-Pay Rate Change
[Approver-Terminate/Retire
[Approver-Transfer Employee
\triangleleft	Job Opening-Initiator#1
[Job Opening-Initiator#2
[Job Opening-Initiator#3
9	Pay Rate Change-Initiator#1
[Pay Rate Change-Initiator#2
[Pay Rate Change-Initiator#3
	Z Terminate/Retire-Initiator#1
[Terminate/Retire-Initiator#2
[Terminate/Retire-Initiator#3
	Transfer Employee-Initiator#1
	Previous Next Cancel
	you select multiple transactions, they will all be delegated to me proxy.

.

	and click 💻	Next . Proc	ceed to step 5.	
Create Delega	ation Request			
Select Proxy I	by Hierarchy			
Sally Supervisor				
Curator				
This same displayers			Calastitha andia buttan	
next to the name to s	select that person as a prox	y that you can select as proxies. y. You can also select the Searc		
	utside your hierarchy.			
Search by Name				
Choose Delegate	e Employee			
Name	Status	Job Title	Department	Sup
Aice Wonderla	nd Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sall
O Bugs Bunny	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sall
	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sall
O Elmer Fudd			DAED TAO LIDM OF ILL	
Elmer FuddEric Employee	Active	Education Interpreter	P&ED-T&C-HRM-ChildrensMuseum	Sall
-	Active	Education Interpreter Childrens Museum Clk PT	P&ED-1&C-HRM-ChildrensMuseum	Sall
C Eric Employee				
 Eric Employee Jane Doe 	Active	Childrens Museum Clk PT	P&ED-T&C-HRM-ChildrensMuseum	Sal

Select Proxy by Hierarchy Sally Supervisor Fieldcote Site Supv 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 Employ Employee Job Title Department Supervisor Then enter the Last Name (or partial), and optionally enter the First Name (or partial), and click Search . Create Delegation Request Select Proxy by Name Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy Last Name (duck First Name		equest			
Fieldcote Site Supr Fieldcote Site Supr This page displays persons within your hierarchy that you can asleed 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 yourses outside your hierarchy. Search by Name Choose Dolegate Name Employee Job Title Department Supervisor Then enter the Last Name (or partial), and optionally enter the First Name (or partial), and click Search . Create Delegation Request Select Proxy by Name Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search price of the search By Hierarchy hyperlink to search for your proxy.	elect Proxy by Hier	rarchy			
This page displays persons within your hierarchy that you can select as proxies. Select the radio button search for proxies outside your hierarchy. Search by Name Choose Delegate Then enter the Last Name (or partial), and optionally enter the First Name (or partial), and click Search Create Delegation Request Select Proxy by Name Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy.	lly Supervisor				
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 Supervisor Choose Delegate ImpliD Employee Job Title Department Supervisor Then enter the Last Name (or partial), and optionally enter the Search . First Name (or partial), and click Search . Create Delegation Request Select Proxy by Name Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy Last Name duck	Idcote Site Supv				
Choose Delegate Empl ID Employee Status Job Title Department Supervisor Then enter the Last Name (or partial), and optionally enter the First Name (or partial), and click Search . Create Delegation Request Select Proxy by Name . . Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy Last Name duck .	kt to the name to select that per	rson as a proxy. You can al			
Name EmpliD Employee Status Job Title Department Supervisor Then enter the Last Name (or partial), and optionally enter the First Name (or partial), and click Search . Create Delegation Request Select Proxy by Name . Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy	arch by Name				
Then enter the Last Name (or partial), and optionally enter the First Name (or partial), and click Search . Create Delegation Request Select Proxy by Name Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy Last Name duck	hoose Delegate	Faulaura			
First Name (or partial), and click Search Create Delegation Request Select Proxy by Name Sally Supervisor Curator Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy Last Name duck	Name		Job Title	Department	Supervisor
	elect Proxy by N ally Supervisor				
	earch by Hierarchy Last Name First Name	duck	o select the Search I	By Hierarchy hyperlink to search fo	r
Employee	earch by Hierarchy Last Name First Name Search	duck Clear Employee			r
	earch by Hierarchy	duck	o select the Search I	By Hierarchy hyperlink to search fo]]	r

	Search by Hierarchy				
	Last Name DUCK				
	First Name				
	Search	ar			
	Choose Delegate				
	Name	Employee Status	Job Title	Department	Supervisor
	O Daffy Duck	Active	Recreation Asst PT	CES-Rec-DO-SackvilleSeniorCtr	Laura Loui
	Donald Duck	Active	Financial Asst II	P&ED-CorpServ-FPPAP-Fin&Admn	Vanessa S
	Previous	Next	Cancel		
					c
	5		, ,	annot initiate transactions	
	transactions.	(or ano	ther delegate)	will need to initiate those	е
	transactions.				
5	Review the Deleg	gation D	etail for accura	acy. Then click Submit	
	Prox	y Donald I	Duck		
	From Da	te 06/26/20)17		
	To Da	te			
	Transactions				
	Job Opening-Initiator#1				
	Pay Rate Change-Initiato	r#1			
	Terminate/Retire-Initiator	#1			
	\frown				
•	Submit Pr	revious	Cancel		
	Note: If the Dele	gation L	Detail displayed	d on your screen is not	
		revious	• •	prior screens to make	
	adjustments, or	Cancel		n the request.	
6	You will be prese has been success			that the delegation reque	est

7	Click OK you can review you as well as the histo You have successfully subn the request.	nitted a delegation e Request s is Ina <i>ctive</i>	nd delega egations request Ref Status is 2 Your pr	er to the My	tus for th have sul Proxies page	is requ bmitted to view the che	est, d.
	delegation request	before they	can act	on your	behalf.		
	My Proxies					• •	
	Sally Supervisor						
	Curator						
	This page allows you to view your proxies and the particular status and select <i>Refresh</i> to show the request details. To revoke requests, select the re	matching requests. Select the					
	Show Requests by Status	✓ Refresh					
	Choose Delegate						
	Transaction	Name	Job Title	From Date To Da	te Request Status	Delegation Status	Details
	Job Opening-Initiator#1	Donald Duck	Financial Asst II	06/26/2017	Submitted	Inactive	6
	Pay Rate Change-Initiator#1	Donald Duck	Financial Asst II	06/26/2017	Submitted	Inactive	0
	Terminate/Retire-Initiator#1	Donald Duck	Financial Asst II	06/26/2017	Submitted	Inactive	6
	Return to Manage Delegation	Revoke					
8	An email notificatio	n is automa	tically se	ent by th	e system	to you	ır
	proxy to alert them	n of your red	juest and	lasking	them to a	accept	or
	reject your delegat	ion.	-			•	

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
То:
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.

T F T Y <u>f</u> E	pject: Delegation accepted by Donald Duck Donald Duck has accepted a delegation re- ransaction: Job Opening-Initiator#1, Pay from: 2017-06-26 To: You can review the status of the request u http://itvdhrdev.hamilton.ca:8085/psp/hrf Page=HCDL MGR DLG HOME&Action=U.	quest that you (or an adm Rate Change-Initiator#1, sing the link below. 92tst/EMPLOYEE/HRMS/c	Terminate/Retire-In /HCDL_ALL.HCDL_M	half) submitte itiator#1	ed. Here a	1 1	1 · 20 · 1 · 21 · 1 · :
T F T Y <u>f</u> E	Donald Duc has accepted a delegation re ransaction: Job Opening-Initiator#1, Pay from: 2017-06-26 To: You can review the status of the request u http://itvdhrdev.hamilton.ca:8085/psp/hrf Page=HCDL_MGR_DLG_HOME&Action=Ut	quest that you (or an adm Rate Change-Initiator#1, sing the link below. 92tst/EMPLOYEE/HRMS/c	nistrator on your be Terminate/Retire-In /HCDL_ALL.HCDL_M	half) submitte itiator#1	ed. Here a	1 1	I · 20 · I · 21 · I · ;
T F T <u>Y</u> E	Donald Duc has accepted a celegation re ransaction: Job Opening-Initiator#1, Pay from: 2017-06-26 To: You can review the status of the request u http://itvdhrdev.hamilton.ca:8085/psp/hr Page=HCDL MGR DLG HOME&Action=U	quest that you (or an adm Rate Change-Initiator#1, sing the link below. 92tst/EMPLOYEE/HRMS/c	nistrator on your be Terminate/Retire-In /HCDL_ALL.HCDL_M	half) submitte itiator#1	ed. Here a	1 1	<u>1 · 20 · 1 · 21 · 1 · </u>
т ғ т <u></u> <u></u>	ransaction: Job Opening-Initiator#1, Pay rom: 2017-06-26 fo: You can review the status of the request u http://itvdhrdev.hamilton.ca:8085/psp/hd Page=HCDL_MGR_DLG_HOME&Action=U	Rate Change-Initiator#1, sing the link below. 92tst/EMPLOYEE/HRMS/c,	Terminate/Retire-In /HCDL_ALL.HCDL_M	tiator#1		re the details:	
F T <u>t</u> E	rom: 2017-06-26 To: You can review the status of the request u http://itvdhrdev.hamilton.ca:8085/psp/hr Page=HCDL MGR DLG HOME&Action=U	sing the link below. 92tst/EMPLOYEE/HRMS/c,	/HCDL ALL.HCDL M		ME GRI 2		
Ē	http://itvdhrdev.hamilton.ca:8085/psp/hr9 Page=HCDL MGR DLG HOME&Action=U	92tst/EMPLOYEE/HRMS/c		GR DLG HO			
		&DELEGATOR ID=003052					
	his is an automateu message. Piease uo i	ot respond to this amail	DELEGATOR RCD-	<u>U&TRANSAC</u>	ION NAM	IE=JobOpening	S&TRANS ALLO
		iot respond to this email.					
	lick the link in the er						
y	our proxies and dele	gation status	s. You will	see th	at Re	equest	
-	tatus has changed t	-				-	
	nanged to Active.	,		5			
	-						
My	y Proxies						
Sa	Ily Supervisor						
Cu	irator						
	s page allows you to view your proxies and the ticular status and select <i>Refresh</i> to show the m						
	uest details. To revoke requests, select the rec						
	Show Requests by Status	✓ Refresh					
CI	noose Delegate						
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status
	Job Opening-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Accepted	Active
	Pay Rate Change-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Accepted	Active
	_ Pay Nate Change-Initiator#1						
	Terminate/Retire-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Accepted	Active
		Donald Duck		06/26/2017		Accepted	Active

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.

Step		Action				
1	Navigation: Manager tab>Manage De	legation>Rev	iew My Pro	xies		
2	Select the transaction(s)	-			the bo	ЭХ
	beside the transaction na	me and click	Revoke			
	My Proxies					
	Sally Supervisor					
	Curator					
	This page allows you to view your proxies and the particular status and select <i>Refresh</i> to show the ma					
	request details. To revoke requests, select the requ	lest, then select Revoke.				
	Show Requests by Status	✓ Refresh				
	Choose Delegate					
	Transaction	Name	Job Title	From Date	To Date	Request Status
	Job Opening-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Accepted
	✓ Fay Rate Change-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Accepted
	Ferminate/Retire-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Accepted
	Select All Deselect All	Revoke				
	Return to Manage Delegation					

	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.
	Revoke Delegation Request
	Sally Supervisor
	Curator
	Are you sure you want to revoke the delegation requests that you have selected ?
	Yes - Continue No - Cancel
4	You will then be presented with a message that the delegation request has been successfully revoked.
	You have successfully revoked a delegation request. Refer to the My Proxies page to view revoked delegation requests.
	OK
	Click OK to go to the Review My Proxies screen where you can review your proxies and delegation status.

с	ally Supervisor urator						
_	urator						
TH							
pa	his page allows you to view your proxies and the articular status and select <i>Refresh</i> to show the quest details. To revoke requests, select the re	matching requests. Select th					
	Show Requests by Status	✓ Refre	sh				
C	Choose Delegate						
	Transaction	Name	Job Title	From Date	To Date	Request Status	Dele Stat
	Job Opening-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Revoked	Inad
0	Pay Rate Change-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Revoked	Inac
	Terminate/Retire-Initiator#1	Donald Duck	Financial Asst II	06/26/2017		Revoked	Inac
p	n email notification is roxy advising that yo	ou have revo					
p	roxy advising that your advises that your advises that your advises that your advises the second sec	ou have revo	ked your de	elegatio	on fro	m ther	n.
p st	roxy advising that yo	pervisor	xed your de	elegatio		m ther	n.
p sr	roxy advising that your ubject: Delegation Revoked by Sally Support • • • • • • • • • • • • • • • • • • •	pervisor	xed your de	elegatio		m ther	n.
p st	roxy advising that you ubject: Delegation Revoked by Sally Sup (pervisor • 6 • 1 • 7 • 1 • 8 • 1 • • submitted on their be	xed your de	elegatio		m ther	n.
p si	roxy advising that you ubject: Delegation Revoked by Sally Sup (1) 1 1 1 2 2 1 3 1 4 4 1 5 1 Sally Supervisor (or an administrator Here are the details:	pervisor • 6 • 1 • 7 • 1 • 8 • 1 • • submitted on their be	xed your de	elegatio		m ther	n.
p ss	roxy advising that you ubject: Delegation Revoked by Sally Sup (111111212113114411511 Sally Supervisor (or an administrator Here are the details: Transaction: Terminate/Retire-Initia	pervisor • 6 • 1 • 7 • 1 • 8 • 1 • • submitted on their be	xed your de	elegatio		m ther	n.
p ss	roxy advising that you ubject: Delegation Revoked by Sally Sup Control of the second	ervisor • 6 • 1 • 7 • 1 • 8 • 1 • • submitted on their be ator#1	xed your de	elegatio		m ther	n.
p ss	roxy advising that you ubject: Delegation Revoked by Sally Sup Carbon Revoked by Sally Sup Carbon Revoked by Sally Sup Carbon Revoked by Sally Sup Carbon Revoked by Sally Sup Sally Supervisor (or an administrator Here are the details: Transaction: Terminate/Retire-Initia From: 2017-06-26 To: You can review revoked requests using	ervisor submitted on their be ator#1	ed your de	delegation	n request t	m ther	n.
p s	roxy advising that you ubject: Delegation Revoked by Sally Sup Control of the second	evisor submitted on their be ator#1 ing the link below.	ed your de	delegation	AGR DLG	5:1:16:1: 5:1:16:1: that was ass	n.

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).



	Review My Delegated Authorities
	Manage Delegation
	Donald Duck
	If you are a Manager, you can delegate 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 be a proxy when a manager delegates responsibility to them.
	Cearn More about Delegation
	Select <i>Review My Delegated Authorities</i> to see the list of transactions that have been delegated to y others, and to accept or reject pending delegation requests.
	Review My Delegated Authorities
4	Review the Inactive transactions that have been delegated to you
4	and decide if you agree to accept, or reject, these responsibilities.
4	and decide if you agree to accept, or reject, these responsibilities. Select the transaction(s) and click the appropriate button that
4	and decide if you agree to accept, or reject, these responsibilities.
4	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.
4	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 . My Delegated Authorities
4	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 . My Delegated Authorities Donald Duck
1	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 . My Delegated Authorities
4	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 . My Delegated Authorities Donald Duck Financial Asst II
4	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 . My Delegated Authorities Donald Duck Financial Asst II This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to
4	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 . <u>My Delegated Authorities</u> Donald Duck Financial Asst II This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details. <u>Show Requests by Status</u> <u>Refresh</u>
4	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 . <u>My Delegated Authorities</u> Donald Duck Financial Asst II This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details. Show Requests by Status Refresh
4	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 . <u>My Delegated Authorities</u> Donald Duck Financial Asst II This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details. Show Requests by Status Refresh
4	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 . <u>My Delegated Authorities</u> Donald Duck Financial Asst II This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details. Show Requests by Status Refresh Choose Delegate
4	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 . My Delegated Authorities Donald Duck Financial Asst I This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details. Show Requests by Status Refresh Choose Delegate Transaction Name Job Title From Date To Date Request Statu

5	Multiple Transactions Transaction Terminate/Retire-Initiator#1 Pay Rate Change-Initiator#1	Name Sally Supervisor	From Date			
5	Terminate/Retire-Initiator#1		From Date			
5		Sally Supervisor		To Date	Request Status	Delegation Status
5	Pay Rate Change-Initiator#1	Sally Supervisor	06/26/2017		Submitted	Inactive
5		Sally Supervisor	06/26/2017		Submitted	Inactive
5	Job Opening-Initiator#1	Sally Supervisor	06/26/2017		Submitted	Inactive
	Accept Delegation Request Donald Duck Financial Asst II You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view					
	Click OK page where you car history of all other of		atus of th	is del	legation,	
6	You will see that the decision you made in response to the delegation request is reflected here: the Request Status is <i>Accepted (or Rejected)</i> and the Delegation Status is <i>Active (Inactive).</i>		s is			

	Max Dala material Arather	-141					
	My Delegated Authorities						
	Donald Duck						
	Financial Asst II						
	This page allows you to view you show the matching requests. Se				Refresh to		
	Show Requests by S	itatus	✓ Refr	resh			
	Choose Delegate						
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status
	Multiple Transactions	Sally Supervisor	Curator	06/26/2017		Accepted	Active
	Select All Deselect All Return to Manage Delegation						
	Neturn to manage Delegation						
	Click Home to ret	urn to your l	Home nad	פר			
7	If you are not all				e that	a new t	ab
	appears called "N	•					
	request.	-				-	
	Hamilton Favorites Main Menu						
	My Page Manager						
	Personalize Content Layout Menu Plant Empl Self Service Home Page						
Menu 🔄 🖻 🗶 Empl Self Service Home Page							
	<i>Note: You must log out and log back into My HR Info in order</i> <i>for the system to refresh and initialize your new authority;</i> <i>otherwise you will receive a "not authorized" error message if you</i> <i>try to initiate a transaction on behalf of that Manager without first</i>					order	
						f you	
						first	
	logging out.						
	You are not authorized for this	spage http://hathorijat.h	namilton ca:7001	/psc/hr9cprd/EMI	PLOYEE/	HRMS/c/N WF	MSS N HR I
	PORTALPARAM_PTCNAV						
	Notos If you or	aacconting	a dalag	ation roo	wost	to anny	
	Note: If you are transactions or		-	-			
	will be reassign				_		
	or Denying Tra	-				·	
8	An email notifica	tion is autom	natically s	sent by th		,	
	delegate advising	g of your dec	ision to t	heir deleg	ation	request	

Subject: Delegation accepted by Donald Duck
· · · 1 · · · 2 · · · 3 · · · 4 · · · 5 · · · 6 · · · 7 · · · 8 · · · 9 · · · 10 · · · 11 · · · 12 · · · 13 · · · 14 · · · 15 · · · 16 · · · 17 · · · 18 · · · 19 · · · 20 · · 1
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. <u>http://itvdhrdev.hamilton.ca:8085/psp/hr92tst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?</u> <u>Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=003052&DELEGATOR_RCD=0&TRANSACTION_NAME=JobOpening&TRAN</u>
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.

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 hyperline 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:				
\langle	nctp://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.				
2	Enter your userid and password and click Sign In My HR Info				
	Hamilton				
	P Help				
	A Password				
	Sign In Forget Your Password?				

3	Once you have signed in, you will be taken directly to the appropriate Approve page for that specific transaction. e.g. <u>Approve Employee Pay Rate Change</u> <u>Approve Transfer</u> <u>Approve Termination/Retirement</u> <u>Approve Training Requests</u> 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 will be displayed. Click the icon and the comments will be displayed. Click the icon and the comments Click the icon and the comments
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.

	Comment/Additional Instructions					
	Approver Name: Debbie Director					
	Comment: Approved.					
	Approve Deny					
	Return to Select a Transaction					
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.					
	Submit Confirmation					
	The Submit was successful.					
	Departmental Approval					
	Self Approved Self Approved Approved Pending					
	✓ Sally Supervisor Workflow Request Initiator → ✓ Sally Supervisor Approval Step #1 → ✓ Mike Manager Approval Step #2 → ✓ Debbie Director Approval Step #3 → ⑤ Gary GM Approval Step #4					
	06/16/15 - 01:32 PM 06/16/15 - 01:32 PM 06/16/15 - 01:34 PM 06/16/15 - 01:47 PM					
	Comments Debbie Director-E009457 at 06/16/15 - 01:47 PM					
	Approved.					
	Mike Manager-E045070 at 06/16/15 - 01:34 PM Approved. Please rush this posting since workload is getting backlogged.					
	OK					
	In the example below. Debbie Director bac Depied the transaction					
	In the example below, Debbie Director has Denied the transaction.					
	As a result, the approval chain for this transaction has terminated.					
	✓ :Denied					
	Departmental Approval					
	Self Approved Self Approved Approved Denied Terminated					
	Workflow Request Initiator Approval Step #1 06/17/15 - 09:01 AM 06/17/15 - 09:01 AM 06/17/15 - 09:04 AM					
	Comments					
	Debbie Director-E009457 at 06/17/15 - 09:04 AM					
	We need to hold off on this posting. Please see me to discuss alternative options.					
	Mike Manager-E045070 at 06/17/15 - 09:02 AM Approved. Please rush this posting since workload is getting backlogged.					
	OK					

	Again, if a prior approver added comments, the following icon will appear above the approval chain ^{Sum View/Hide Comments} . Click the icon and the comments will be displayed.
8	Click ok and you will be presented with the Request Details for this specific transaction which outlines what has been submitted. <i>The following information has been submitted.</i> Request Details
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	Additional Staff
OR	
You have additional funding/gapping	
for a position	
You have a newly created job or	New Job/Position
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)	
You have a periodic posting that is to	Periodic Posting
hire unfilled anticipated vacancies	
within the same classification.	
You are replacing an employee who is on modified work	Replacement - Accommodation
You are replacing an employee who is	Replacement – Mat/Par Leave
currently on a maternity/parental	
leave of absence	
You are replacing an employee who is	Replacement - Other
on a leave (i.e. military leave of	
absence, a leave of absence not	
covered under one of the other	
replacement categories, etc.)	
You are replacing an employee who	Replacement - Promotion
has been promoted to another position	
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

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.						
	Primary Job Opening Information						
	Job Details (2) Job Opening Type Standard Requisition *Business Unit HAMLT City of Hamilton Department 720125 P&ED-T&C-HRM-ChildrensMuseum Position Number 00007381 Position Number 00007381 Job Code 5520 Childrens Museum Clk PT *Recruiting Location *Job Posting Title Childrens Museum Clk PT Continue						
	The Icon ^① 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.						
	<i>Note: Once you have created your job opening, don't forget to change your Search Preferences back to your GM.</i>						
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.						

4	Click the Continue button.
5	 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)
6	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. Job Opening
	<i>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.</i>

7	Enter the Reason for Vacancy, Posting Destination and Duration (for Temp Vacancies).
	Posting Destination Internal Only
8	Enter your responses to the four Posting Conditions questions.
	Have all transfer requests for this position been considered per the CA? Not Applicable
	If this is permanent vacancy, have employees currently in the position as a result of a Not Applicable
	temporary posting been offered the permanent vacancy? Does this position require a personal vehicle for use on the job 3 or more times per week? No
	Does this position require you to drive a City vehicle?
9	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.
	Positions Position Number Primary Position "Position Number Primary Position Image: Childrens Museum Clik PT 00007381 Image: Childrens Museum Clik PT Add Position View/Edit Search Preferences View/Edit Search Preferences Image: Children State
	<i>Note: Periodic Postings do not require additional position numbers to be entered.</i>
10	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.
	Employees Being Replaced *Employee ID Name 1 100467 Q Jane Doe

	The Salary Inform job code and do not Additional Job Specifications @ Staffing Information @ Schedule Type (Part-Time		Find View All First		
	RegularTemporary (Temporary Hours 0.01) Work Period (Weekly Salary Information ②				
	Salary Admin Plan C1 Q From Grade 8 Q	CUPE Local 5167 Inside CUPE Local 5167 Inside-B			v
12	Identify the Primar	y Recruite	r and sele	ct the applic	cable box. This
	field is mandatory.				
	Assignments ② Recruiters ②				
	*Name	Recruiter ID	Primary		
	Luciana McGreal Jacqueline Ross	٩			
	Andree Verticchio	٩		Û	
	Victoria Butler	٩		Î	
	Tara Russo Debbie Paddock	Q		Û	
	Grace Figliola-Laufman	٩		Û	
	Margaret Pimentel Atinuke Lasode	٩			
	Tina Mantopoulos	٩		Û	
	Robert Forsyth	٩			
	Varghese George Jacqueline Kovacich	Q.			
	Courtney Krawec	Q		Û	
	Add Recruiter	Add Recruiter Team			
13	Validate the default	ed Hirina M	lanager.		
			lanagen		
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	If you use Job Code	•			-
	opening, you will ne	ed to enter	the Hiring	j Manager m	nanually.
	Note: The Hiring Mg	r/Supv ID i	s used to a	define the a	pproval chain.
	the Hiring Manager				
		а піпіцу м	gi/Supv II		ie appiovai
	must manually ente				
	must manually ente				
	must manually enter chain.				
	must manually ente	M	anager ID Pr	rimary	
	must manually enter chain.	Me		rimary	



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 Save .
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.

Note: Presentation Browse: Job Openings Presentation	Step	Action										
Annager tab>Job Openings>Browse Job Openings 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 Image: Tab and the table of ta	1	Navigation	Navigation:									
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Status OST SP POl Vgr Cap Projects Community&EmergencyServices PRED-T&C-FMM-ConservSrv Cby of Hamiton 110 Filed/Closed 0 3 110 Filed (10) 010 Open (4) 120 Exceeded (4) 6012 Marka Events C PRED-T&C-CPM-SpecProjects Cby of Hamiton 110 Filed/Closed 0 10 Constraint 5201 Cutural Initiatives Coord C PRED-T&C-CPM-Cuturalinitative Cby of Hamiton 110 Filed/Closed 0 10 Constraint 5201 Cutural Initiatives Coord C PRED-T&C-CPM-Cuturalinitative Cby of Hamiton 110 Filed/Closed 0 10		Community&EmergencyServic(2)	6588	Supervisor Facilities Services	0	Culture	P&ED-T&C-HRM-AdmnHer&Mus	City of Hamilton	120 Canceled	O	5	
D10 Open (4) 100 Canceld (4) 8012 Mgr Arts/Events D P8ED-T&C-CPM-SpeeProjects Oty of Hamitton 110 Filled/Closed 0 10 Created In 2017 (0) 5201 Cutural Initiatives Coord D P8ED-T&C-CPM-SpeeProjects Oty of Hamitton 110 Filled/Closed 0 10		Status	6257		O	Community&EmergencyServices	P&ED-T&C-HRM-ConservSrv	City of Hamilton	110 Filled/Closed	0	3	
2017 (b) 9008 (b) 9008 (c)		010 Open (4)	6012	Mgr Arts/Events	0		P&ED-T&C-CPM-SpecProjects	City of Hamilton	110 Filled/Closed	0	10	
			5201	Cultural Initiatives Coord	D		P&ED-T&C-CPM-CulturalInitative	City of Hamilton	110 Filled/Closed	0	10	
End of Procedure		End of Proc	har	Ire	(** 5				1			

Approve a Job Opening:

Once a Job Opening has been created,



3	Once you have signed in, you will be taken of Opening Page	lirectly Manage Job
		Related Cont
	Manage Job Opening	
	Save 👍 Return 🕋 Recruiting Home 🕏 Create New 👰 Clone 📮 Add Note 🚺 No	o Category 🗃 Print Job Opening
	Job Opening ID 12680	Status 006 Pending Ap
	Job Posting Title Education Interpreter Job Code 573 (Education Interpreter) Position Number 00007380 (Education Interpreter)	Business Unit HAMLT (City of Department 720125 (P&ED-
	Activity & Attachments Details	
	Job Details Job Posting Details Screening Criteria Approvals	
	Opening Information ②	
	Job Opening Type Standard Requisition Created 045070 Q Mike Manager	
	Created 07/06/2017	
	*Openings to Fill Limited Number of Openings	
	Target Openings 1	
	Available Openings 1	
	Reason for Vacancy V Duration (Me	onths) (for temp vacancies)
	You can also enter comments/additional inst Comments Text box. Note your Comments w	
	in the approval chain.	Related Content 🔻 Help
	Manage Job Opening	
	Save 👍 Return 🕋 Recruiting Home 🖷 Create New 🕮 Clone 📮 Add Note 🗍 No Category	EPrint Job Opening
	Job Opening ID 12680	Status 006 Pending Approval
	Job Posting Title Education Interpreter Job Code 573 (Education Interpreter)	Business Unit HAMLT (City of Hamilton) Department 720125 (P&ED-T&C-HRM-Childre
	Position Number 00007380 (Education Interpreter)	
	Activity & Attachments Details	
	Job Details Job Posting Details Screening Criteria Approvals	
	Job Approvals	
	Supervisor/Recruiter Grp Aprv	
	Job Opening:Pending	
	Route to Supervisor/Recruiter	
	Approved Sally Supervisor Approval Step #1 07/06/17 - 9:58 AM Self Approved Mike Manager OT/06/17 - 9:58 AM OT/06/17 - 9:58 AM	
	Comments	
	Sally Supervisor at 07/06/17 - 9:58 AM	
	Please post by July 20	

4a	Alternatively, you can nav view or act on pending ap Manager tab>Job Opening Select the Job Opening to drop drown and then click Pending Approvals	proval r js>Appr approve	requests. Tove Job Openings e, select Approve or Deny	
	Pending Approvals		Personalize View All 🔄 First 🚯 1 of 1 🕑 Last	
	Select Job Opening ID Sender	Received	Subject	
	12463	05/02/2017	Job Approval:Admin Secty-Heritage Resource	
	Select All Deselect All Select	2 ending i	•	
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
	Search Job Postings
	Contract Con
	Quick Search Advanced Search
	▼ Search Criteria
	Search For Search Tips
	Posted Within Anytime
	Search Clear
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	COH_CROSSING_01
Guard	
Hiring/rehiring a miscellaneous	COH_GENERAL_SAL
salary	
Hiring/rehiring a miscellaneous	COH_GENERAL_WAL
wage	
Hiring/rehiring a Hamilton Public	COH_LIBRARY
Library non-union part time	

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>Sma	rt HR Transactions
2	Select the Template you are using and	Look Up Select Template
	· · · · · · · · · · · · · · · · · · ·	Look Up Select Template Search By: Template Dok Up Cancel Advanced Lookup Search Results View 100 Pirst ■ teore ■ Last Template Description COL COL COL COL COL COL Search Results

	Click Create Transaction			
	Smart HR Transactions			
	Choose a template and click on Create Transaction to enter a new employee.			
	Transaction Template 🛞			
	Transaction Type Hire/Rehire			
	Select Template Create Transaction			
	Transaction Type Hire/Rehire			
	Transactions in Progress @			
	You do not have any Hire/Rehire transactions in progress.			
	Go To Transaction Status			
3	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.			
	Smart HR Transactions			
	Enter Transaction Details			
	Enter Transaction Details			
	The following information is required before hiring or rehiring an employee.			
	Template High School Coop Student			
	Employee ID NEW			
	*Job Effective Date			
	Action Hire			
	Reason Code New Hire			
	Continue Cancel			
4	Enter Employee Information: First Name, Middle Name (optional)			
•	and Last Name			
	Smart HR Transactions			
	Enter Transaction Information			
	Enter the following employee information. Return to Enter Transaction Details Page			
	Save and Submit Save for Later Cancel			
	Employee Information Primary Name - English			
	*First Name Josh Middle Name			
	*Last Name Donaldson			

5	Position Manag Smart HR Tem therefore, you Look Up icon Note: The list of template type Position Title Enter Expecte	d Job End Date if kn	nout leading ze rs require the f eros then the n <i>umbers is limit</i>	ros; however, ull 8 digits, umber) or use the
	Select Position (use leading *Position Number: Expected Job End Date:		Position Title: H	igh School Coop Student
6	6 Review Position Details, Job Data Information, Payroll Information Salary Plan Information that defaults in from the Position number make sure you have selected the correct position #.			
	Position Details Headcount:	4.000000	Headcount Status:	Overallocated
	Reports To:	4.000000 00002070	Position Title:	Supt Horticulture
	Job Data Information			
	Job Code:	2957	Description	List Ostaal Osaa Otudaat
	Department:		Description:	High School Coop Student
	Location Code:	446026	Description:	PW-Env-ForestHort-HrCIrng
		OMDHOR	Description:	O&WM Hort-GagePark
	Union Code:	СК	Description:	Non Union Other Part time
	Regular/Temporary: Standard Hours:	Temporary 5.000000	Full/Part Time:	Part-Time Student-HighSchoolCoop
		3.000000	Employee elaboriteadem	oladolit Highoonoolooop
	Payroll Information		Frankrus - Turner	
	Pay Group:	WAL	Employee Type:	Н
	Salary Plan Information			
	Salary Plan:	СК	Salary Grade:	HSC

7	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.
	Birth Information
	*Date of Birth: 12/12/1921
	Person Gender
	*Gender: Male V
	Person Marital Status
	*Marital Status: Single
	Person National ID Canada
	*National ID: National ID Expiry Date:
	Person Address 01 - Canada
	*Address Line 1: 12 Hollywood Blvd Address Line 2:
	*City: Burlington *Province/State: ON
	Postal Code: L9N 3A1
	Person Phone Number 01
	*Phone Type: Home Y Telephone: 905/333-111
	✓ Preferred
	Payroll Information
	*Pay Group: WAL *Employee Type: H
8	Enter any Comments/Instructions here. Your
	Comments/Instructions will be seen by HR Records.
	Comments Comments: This coop student is a rehire. He previously worked with us last winter.
9	
-	Click Save and Submit . As there are no approvals, this transaction
	will be routed directly to HR Records for review and processing.
	Save for Later
	Click 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.

	Click Return to Enter Transaction Details Page to return to the previous page.			
	Comments			
	Comments This coop student is a rehire. He previously worked with us last winter.			
	Return to Enter Transaction Details Page			
	Save and Submit Save for Later CD Cancel			
10	Once you click Save and Submit a Submit Confirmation will appear			
	Click			
	Smart HR Transactions			
	Submit Confirmation			
	The submit was successful. The Human Resources department will review the person's data and update the HR system.			
	Go to the Transaction Status page to review the status of this person.			
	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.			

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.	Merit-Performance Based
Unionized employee is eligible to move to the next step based on performance.	
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

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.				
	Request Pay Rate Change				
	Employee Selection Criteria				
	Follow this 3-step process to request an employee pay rate change:				
	 Enter the date this pay rate change will take effect and click Refresh Employees to retrieve your employees. You will be able to process transactions for employees that report to you today. The This is that enterplayees in the list of employees indicates that other employees const to this employee. You may drill down to select employees that report to you today. 				
	 The ^(E) icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click Select beside the employee that will receive the pay rate change. Enter either the step or % change and submit the change. Transaction Effective Dat Refresh Employees 				
	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.				
	Request Pay Rate Change				
	Employee Selection Criteria				
	Follow this 3-step process to request an employee pay rate change: 1. Enter the date this pay rate change will take effect and click Refresh Employees to retrieve your employees. You will be able to process transactions for employees that report to you				
	 today. The B con that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click Select beside the employee that will receive the pay rate change. There either the step or % change and submit the change. 				
	Transaction Effective Date 06/30/2017				
	Proxy For Debbie Director(Dir 10)				
	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.				

Request Pay Rate Change Employee Selection Criteria Follow this 3-step process to request an employee pay rate change: 1. Enter the date this pay rate change will take effect and click Refresh Employees to retrieve your employees. You will be able to process transactions for employees that today. 2. The B con that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indired you. Click Select beside the employee that will receive the pay rate change. 2. Transaction Effective Date [06/30/2017 [6] Transaction Effective Date [06/30/2017 [6] Select Name Select Name A Empl D Select Name Select A lice Wonderland 122413 A ctive Select Bugs Bunny 113678 A ctive Select Elmer Fudd 1224767 A ctive Personalize Select Bunny

Increase Date:	09/01/2015	
*Reason for Increas	Stop Brogroo	assion V
Current Job Inform	ation	
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 Compensat	tion Information	
Salary Plan:	CUPE Local 5	i167 Inside
Grade:	С	Step: 1
		Hourly Rate: \$21.074 tandard weekly hours X hourly rate and may not be accurate for employees whose
	ulated based on st ek e Change	
Annual Rate is calc hours vary each we provested Pay Rate Has a PA been New Step: Annual Rate:	e Change	tandard weekly hours X hourly rate and may not be accurate for employees whose Hourly Rate:
Annual Rate is calc hours vary each we Provested Pay Rate Has a PA been New Step: Annual Rate: OR If the Pay Rate	e Change	tandard weekly hours X hourly rate and may not be accurate for employees whose
Annual Rate is calc hours vary each we Provested Pay Rate Has a PA been New Step: Annual Rate: OR If the Pay Rate	e Change	Hourly Rate: e is for a Non Union employee enter the Chang
Annual Rate is calc hours vary each we provested Pay Rate Has a PA been New Step: Annual Rate: OR If the Pay Rate Percent. T	ate Change he PA box	Hourly Rate: e is for a Non Union employee enter the Chang
Annual Rate is calc hours vary each we provested Pay Rate bas a PA been New Step: Annual Rate: OR If the Pay Rate Percent. T Requested Pay Rate Has a PA been	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang
Annual Rate is calc hours vary each we bas a PA been New Step: Annual Rate: OR If the Pay Rate Percent. T	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang
Annual Rate is calc hours vary each we bas a PA been New Step: Annual Rate: OR If the Pay Ra Percent. T Requested Pay Ra Has a PA been	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang
Annual Rate is calc hours vary each we Provested Pay Rat Has a PA been New Step: Annual Rate: OR If the Pay Ra Percent. T Requested Pay Ra Has a PA been Change Percent:	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang is for information purposes only.
Annual Rate is calc hours vary each we Provested Pay Rat Has a PA been New Step: Annual Rate: OR If the Pay Ra Percent. T Requested Pay Ra Has a PA been Change Percent:	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang is for information purposes only.
Annual Rate is calc hours vary each we protested Pay Rat bas a PA been New Step: Annual Rate: OR If the Pay Rat Percent. T Requested Pay Rat Has a PA been Change Percent:	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang is for information purposes only.
Annual Rate is calc hours vary each we Protested Pay Rat bas a PA been New Step: Annual Rate: OR If the Pay Ra Percent. T Requested Pay Ra Has a PA been Change Percent:	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang is for information purposes only.
Annual Rate is calc hours vary each we protested Pay Rat bas a PA been New Step: Annual Rate: OR If the Pay Rat Percent. T Requested Pay Rat Has a PA been Change Percent:	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang is for information purposes only.
Annual Rate is calc hours vary each we Provested Pay Rat Has a PA been New Step: Annual Rate: OR If the Pay Ra Percent. T Requested Pay Ra Has a PA been Change Percent:	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang is for information purposes only.
Annual Rate is calc hours vary each we Protested Pay Rat bas a PA been New Step: Annual Rate: OR If the Pay Ra Percent. T Requested Pay Ra Has a PA been Change Percent:	ate Change he PA box te Change	Hourly Rate: e is for a Non Union employee enter the Chang is for information purposes only.

6	Tab out and the new Annual	and Hour	ly Rate will display	
	Current Compensation Information			
	Salary Plan: CUPE Local 5167 Insi	de		
	Grade: C	Step:	1	
	Annual Rate: \$38354.68	Hourly Rate		
	Annual Rate is calculated based on standard hours vary each week	weekly hours X h	ourly rate and may not be accurate	for employees whose
	Requested Pay Rate Change			
	Has a PA been completed?			
	New Step: 2			
	Annual Rate: \$40023.62	Hourly Rate	\$21.991	
7	The defined approval for this Optional Approvers to meet the Look Up icon to searc to change the order of the C Note: an Optional Approver	departme h Approve ptional ap	nt specific approval i er ID (Employee ID). pprovers in the chain	requirements. Use Click the 😨 💀
	Define Approval Process Description	Approver ID	Name	Required
		017893	Supervisor, Sally	
		045070	Manager,Mike	Image: A state of the state
	Optional Approver 1			
	¹			
	Important Note: If the Man displayed Defined Approval level up then you are require Manager or higher).	Process bo ed to add	oxes above do not in an Optional Approve	<i>clude the next er (another</i>
8	Enter your Comments/Instru			Instructions will be
	seen by everyone in the app Comments/Instructions	roval cha	n and HR Records.	
				2
	Comment:			
	Nata, fan Changa in Oualifia	- t .:		
	Note: for Change in Qualifica make note of the new classi			. .
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

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)

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.
	Transfer Employee
	Employee Selection Criteria
	Follow this 3-step process to transfer an employee:
	1. Enter the date this transfer will take effect and click Refresh Employees to retrieve your employees. You will be able to process transactions for employees that report to you today. 2. The 🎛 icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to
	you. Click Select beside the employee to be transferred. 3. Enter the transfer details and submit the change.
	Transaction Effective Date 06/30/2017
	Return to Transfer Employees
	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

	Transfer Emp Employee Selection	•								
	 Enter the da The icon you. Click 	rocess to transfer an employee: the this transfer will take effect and click Ret that optionally appears in the list of employ <u>Select</u> beside the employee to b nsfer details and submit the change.	yees indicates that							
	Transac	tion Effective Date 06/30/2017								
		Proxy For Sally Supervisor(Cura Refresh Employ		C)					
	not a Mar	hough you will s nager and you s reports since yo	elect t	his,	you	will r	eceiv	e a message	e that	<i>if you are there are</i>
3	of employ	resh Employee /ees this indicat	es tha	t ot	her e	emplo	yees	report to th	is emp	oloyee.
	-	drill down to se		-	-				-	
	Transfer Empl	employee click								
	Employee Selection	n Criteria								
	1. Enter the da	rocess to transfer an employee: te this transfer will take effect and click Ref that optionally appears in the list of employ								
	you. Click 3. Enter the tra	Select beside the employee to b insfer details and submit the change.	e transferred.							
	Transact	tion Effective Date 06/30/2017	Refresh Em	ployees						
	Sally Supervisor	r's employees						Personali	ze 🗖 🛛 Firs	it 🕚 1-7 of 7 🕑 Last
	Select	Name	Empl ID	Empl Record	Status	Full/Part Time	Position	Description	Dept ID	Department
	Select	Alice Wonderland	122413	1	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T&C-HRM- ChildrensMuseum
	Select	Bugs Bunny	113678	0	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T&C-HRM- ChildrensMuseum
	Select	Elmer Fudd	123052	1	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T&C-HRM- ChildrensMuseum
	Select	Eric Employee	124767	0	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T&C-HRM- ChildrensMuseum

Eric Employee		
# is left blank and will be generated, you have the	and select the position to transfer the employee to determined by HR. After the position has been so option to add up to 2 additional approvers to satis approvers can be moved up or down to place ther	elected a list of required approvers will be sfy any additional requirements in your
	e to position # in another department, you must c int so you can select the position #.	hange your View Edit Search Preferences to
Transfer Date:	09/01/2015	
*Reason for Transfer:		
	Employee Request Employer Initiated IntrnIPstngProc-ONA/Fire/OPSEU Return to Previous Position Seasonal Short Term Coverage Training Complete-Fire Under120(Library)	
open and you		verage the End Date field wi last day the employee is pro
open and you	will be required to enter the	-
open and you coverage. Transfer Date:	09/01/2015	-
open and you coverage. Transfer Date: *Reason for Transfer:	09/01/2015	End Date:
open and you coverage.	will be required to enter the 09/01/2015 Short Term Coverage ✓	e last day the employee is pro
open and you coverage. Transfer Date: *Reason for Transfer: *Transfer Method:	will be required to enter the 09/01/2015 Short Term Coverage ✓	e last day the employee is pro
open and you coverage. Transfer Date: *Reason for Transfer: *Transfer Method: Select Position: OR	will be required to enter the 09/01/2015 Short Term Coverage By Position ■	End Date: <u>View/Edit Search Preferences</u> (Option Selected: GM Planning & Econ E
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Locati	on:	Fieldcote Museum	BLD040	Griffin House	BLD041
Job Ti	tle:	File/Admin Clk	636	Historical Interpreter	6452
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Union	:	CUPE Local 5167 Inside	C1		
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	Comments/Instructions
	Comment:
10	Click Submit
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

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 <u>voluntary</u> 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

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

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

Step	Action
1	Navigation:
	Manager tab>Termination/Retirements>Terminate/Retire Employee
2	Enter the Effective Date (mm/dd/yyyy) of Termination/Retirement.
	<i>Note: Effective Date is the first calendar day not employed.</i>
	Terminate/Retire Employee
	Employee Selection Criteria
	Follow this 3-step process to notify HR of an employee termination or retirement:
	 Enter the date this termination/retirement will take effect and cick Refresh Employees to retrieve your employees. You will be able to process transactions for employees that report to you today. The ¹⁰ icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to
	you, Click Select beside the employee to be terminated/retired. 3. Enter the termination/retirement details and submit the change.
	Transaction Effective Date 06/30/2017 (F) Refresh Employees
	remain Encore Discourse in the rest Employees
	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
	Tomvinete/Detics Frankruse
	Terminate/Retire Employee Employee Selection Criteria
	Follow this 3-step process to notify HR of an employee termination or retirement:
	 Enter the date this termination/retirement will take effect and click Refresh Employees to retrieve your employees. You will be able to process transactions for employees that report to you today.
	 The B icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click Select beside the employee to be terminated/retired.
	3. Enter the termination/retirement details and submit the change.
	Transaction Effective Date (06/30/2017)
	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.

 Enter the date you today. 	Criteria cess to notify HR of an o this termination/retirem nat optionally appears in	ment will take eff								
Follow this 3-step prod 1. Enter the date you today.	cess to notify HR of an this termination/retirem	ment will take eff								
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Sally Supervisor's	s employees							F	Personalize 🔄 Fi	rst 🕚 1-7 o
Select N	lame		Empl ID	Empl Record	Status	Full/Part Time	Position	Description	Dept ID	Departmen
Select	Alice Wonderland	1	122413	1	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T& Childrens
Select	Bugs Bunny		113678	0	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T& Childrensl
Select	Elmer Fudd		123052	1	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T& Childrensl
Select	Eric Employee		124767	0	Active	Part-Time	00007380	Education Interpreter	720125	P&ED-T&
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8	Enter your Comments/Instructions here. Your comment/Instructions will be seen by everyone in the approval chain and HR Records.
	Comments/Instructions
	Comment:
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

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
	Туре
Creating a New Position (additional	New Position
staff to existing classification only)	
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 a	ddition of brand new positions,
Departments should contact the H	IR 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 Select Position Request Type						
	Oupdate Position Oupdate Position						
3	If Position Request Type= New Position :						
	Enter the E ffective Date for the new position. Request Number will default to NEW.						
	Status will default to Active.						
	Select Position to Update						
	Request Number: NEW						
	*Effective Date: 06/11/2015 3						
	Status: Active						
4	Enter all fields in Position Request Details						
	Position Request Details						
	Position Title: File/Admin Clk						
	Job Code: 636 Kile/Admin Clk						
	Department: 720150 Q 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 Budget Information						
	Reg/Temp: Regular V I Budgeted Position						
	Full/Part: Full-Time V Head Count: 1						
	Salary Plan: C1 FTE: 1.00						
	Salary Grade: C						
5	If Position Request Type= Update Position:						
	Enter the Position Number. Use the Look Up icon \bigcirc to search for a						
	position number.						
	Enter the Effective Date for the change. Status will default to Active.						
	Select Position to Update						
	Position Number:						
	*Effective Date: 06/11/2015						
	Status: Active						

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Position	Request	Details						
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7	If Position Requ	uest Type= Ina	activat	e Positior	n:	
	Enter the Posi					arch for a
	position number.					
	Enter the Effective Date to Inactivate. Status will default to Inactive.					
			C .			
	Select Position to	Update				
	Position Number:	00007384 🔍	File/Adm	in Clk		
	*Effective Date:	07/06/2015 🛐				
	Status:	Inactive				
8	The current pos	sition informati	ion will	display be	low	
	- Current Position Info					
	Description:	File/Admin Clk				
	Job Code:	636	File/Admin	n Clk		
	Department:	720150	P&ED-T&G	C-HRM-Fieldcote	Mus	
	Location Code:	BLD040	Fieldcote I	Museum		
	Reports To:	00007369	Fieldcote \$	Site Supv		
	Union Code:	CUPE Local 5167 Insid	ie			
	Standard Hours:	35.00		Budget Informa	tion	
	Reg/Temp:	Regular		✓ Budgeted F	Position	
	Full/Part Time:	Full-Time		Head Count:	99	
	Salary Plan:	C1		FTE:	1.000000	
	Salary Grade:	С				
	Note: There sh position must b					а

9	Enter your Comments/Instructions here. Your Comments/Instructions will be seen by HR Records.							
	Comment/Additional Instructions							
	Comment:	I am waiting for the position number so that this position can be posted. Thanks.						
10	Click Submit . As there are no approvals, this transaction will be routed directly to HR Records for review and processing. <i>Note: For New Positions, HR Records will enter the new position number in the Comments section.</i>							
11	Workflow wi	ll generate an email at various stages:						
	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;							
	processed th	with DeptID access to the position once HR Records has ne transaction. If HR Records cancels the transaction, no erated to FAII's.						
	End of proce	dure.						

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 an	d Development>A	pprov	e Training Request			
2	Click on the In Approval p	rocess link					
	Training Approval Status						
	Select a Transaction						
	Click the Workflow Status link to view, approve, and/or deny Training Requests.						
	Status Filter: Show all V Employee Training Requests			Find 🖅 First 🕚 1 of 1 🕟 Last			
	Name ID Request Date Code	Course Title	Session	Workflow Status			
	McDaniel,Maureen Helen 09/19/2019 T0001	Test-ApprovalInternal-TST	0001	In Approval Process			
3	Select Approve or Deny						
5							
	Training Request						
	Empl ID: 008475						
	Request Date 09/20/2019						
	Course Code T0001	Test-ApprovalInternal-T	ST				
	Session 0001	Date 09/20/2019					
	Open Seats 0						
	Waitlisted 0						
	•						
	Approval Chain						
	Danding						
	Pending						
	Training Request Approval						
	Pending Jennifer Aniston						
	Supervisor						
(Approve Deny Button						
4	Workflow will generate an		_				
	-to the employee to advise	e of enrollment co	nfirma	ition or waitlist			
	confirmation or;						
	-to the employee to advise	e the request has	been o	denied			
	End of procedure						

Licences and Certifications:

1	Navigation:							
	Manager tab>Learning and Development>Licences and Certifications							
2	Licenses and Certificates							
	Employee Selection Criteria							
	Select the employee whose Licenses and Certificates you want to review. You will be able to view only those employees that report to you.							
	The 🗄 icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click							
	Select beside the employee you wish to view.							
	As Of 09/30/2019							
	Mike Manager's employees Personalize 🗐 First 🚯 1-19 of 19 🕑 Last							
	Select Name Empl ID Empl Record Status Full/Part Time Position Description Dept ID Department							
	Select Sally Supervisor							
	Select Mickey Mouse							
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.							
	Licenses and Certificates							
	Employee Selection Criteria							
	Select the employee whose Licenses and Certificates you want to review. You will be able to view only those employees that report to you.							
	The 🗄 icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click							
	Select beside the employee you wish to view.							
	As Of 09/30/2019							
	Sally Supervisor's employees							
	Select Name							
	Select Alice Wonderland							
	Select Bugs Bunny							
	Select Elmer Fudd							
	Select Eric Employee							
	Select Jane Doe							
	Select Itike Manager							
4	You are presented with the employee's License and Certifications Summary:							
	Summary.							

contact your Training Coordinator to up		s. Select the individual lice	nse or certification to rev	view details. Please
Print (D) Comments				
Review Licence and Certification deta	ils by selecting the Licence des	cription.		
Licenses and Certifications	*Issue Date	Demourl Demoired	· ·	1-2 of 2 🕑 L
License Air Brake Instructor	09/30/2019	Renewal Required	Renewal In Progress	Expiration Date
Chainsaw Training Cert	09/30/2019	×		09/30/2022
Add new test results in the given grid.	Edit tests by selecting the edit	button.		
Tests or Examinations				
There are currently no Tests or Exa	minations for this profile. Pleas	e add one if required.		

Training Summary:

1	Navigation:					
	Manager tab>Learning and Development>Training Summary					
2	Training Summary Employee Selection Criteria Select the employee whose Training Summary you want to review. You will be able to view only those employees that report to you. The list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. Click Select beside the employee you wish to view. As of 09/30/2019 Mike Manager's employees Select Name Empl ID Empl ID Empl ID Record Status Full/Part Time Position Description Dept ID Department Select Mane Empl ID Empl ID Record Status Full/Part Time Position Description Dept ID Department Select Mickey Mouse					
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.					

Training Summar	y					
Employee Selection Crit						
			view only those employees that report to yo			
The 🗄 icon that optionally appears in the list of employees indicates that other employees report to this employee. You may drill down to select employees who indirectly report to you. C Select As Of 09/30/2019						
Sally Superviso						
	1	5				
Select	Name					
Select	Alice W	onderland				
Select	Bugs B	unny				
Select	Elmer F	udd				
Select	Eric Em	ployee				
Select	Jane De	be				
Select	🛨 Mike M	anager				
Training Sur Brad Pitt	nmary					
Training Summ	ary					
Course Name	1	Course Start Date	Course End Date	Status		
Test-ApprovalInter	nal-TST	09/20/2019	09/20/2019	Sessn Wait		
Gender IdentityEx	pression-CE	07/30/2019	07/30/2019	Completed		
EmployeeBenefitE	ducation-CE	04/26/2017	04/26/2017	Completed		
HealthSafetyAwar	ensWorkers-CE	05/21/2014	05/21/2014	Completed		
CanadianRedCros	s-CPR/AED-	02/19/2010	02/19/2010	Completed		
ItStartsWithYou(Al	IEmployee)CE	07/27/2005	07/27/2005	Completed		
			Link to Lice	enses and Certificates		
Go To Man	ager Self Servic	e .				
Lear	ning and Devel	opment				
End of Proc	cedure					

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.

Steps	Task	Task Details	Assigned To	Processing/Filing
1 Complete this step for new	Obtain job description & Compensation data for new positions	Work with HR Compensation section to determine position Salary Grade for new position	Hiring Manager	
positions only		oddry ordee <u>ror new position</u>	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	HR Employment Services HR Receptionist	
		posting to ensure no significant changes to role Runs process to put posting on S drive and sends email to print and mail		
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

7	Determine Candidates to be assessed/interviewed	Provide email offer template with instructions for hiring manager 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	Accienced To	Dreeseing/Eiling
			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.	Hiring Manager or delegate	Processing/ rilling

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	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

				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

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	Supervisor or FAII	Email hire package to new employee to be returned to HR Records
		drive: Human Resources > Common > Manager Resources		
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	Supervisor or FAII	Transaction Workflow generates a work list item for HR Records
		assignments - Comments (special instructions, notes)		

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	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.

Steps Task	Task Details	Assigned To	Processing/Filing
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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	HR Records	File extension letter in Employee file
		Enroll in Benefits where applicable	HR Benefits	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
 - \circ Location Changes
 - \circ $\,$ Reports to Change $\,$
 - Increase/Decrease Head Count
 - Changes to Standard Hours

- o 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

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.

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	Manager/Director/GM	Approved JAQ/JIS and job description sent to HR Compensation for review
		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		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 Via 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 5	Task HR Processing	Task Details Position data information is updated in PeopleSoft. Job data is then updated with new rate, title, job code as applicable for affected employee.	Assigned To HR Records	Processing/Filing 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

Steps ⁻	Task	Task Details	Assigned To	Processing/Filing
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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	Rate Change or Merit Perf transaction in Self Service In the case of completed Per required. Where Superv employee is n performance, required.	PeopleSoft Manager Non-union, a formance Review is	delegate Assigned To	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. Processing/Filing
transaction in PeopleSoft Manager Self Servicenext approver advising that action is required. Once last approver completes the transaction routes to HR Records WorklistIn the case of Non-union, a completed Performance Review is required.Performance Review is completed in the PAD tool.Where Supervisor determines the employee is not eligible due to performance, a completed PA is required.HR Records updates the step entry date in job	 ease Wage employee is e		Supervisor or delegate	
completed Performance Review is required.Performance Review is completed in the PAD tool.Where Supervisor determines the employee is not eligible due to performance, a completed PA is required.HR Records updates the step entry date in job	transaction in			next approver advising that action is required. Once last approver completes the transaction routes to HR Records
Where Supervisor determines the employee is not eligible due to performance, a completed PA is required.PAD tool.HR Records updates the step entry date in job	completed Per			Review is
	employee is n performance,	ot eligible due to		PAD tool. HR Records updates the step entry date in job

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)

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Advise Manager of a change in qualifications	Provides copy of certification to Manager	Employee	Manager reviews
		Manager advised certification levels were not maintained/renewed	Ministry of the Environment (MOE)	
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

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	

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.

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	Supervisor	Conversation with employee to confirm details of location change
		Initiate Transfer transaction with reason code "Employer Initiated or Employee initiated" 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
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.

- 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):

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	

- 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:*

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	Final conversation between Supervisors to finalize dates	Supervisor	Employee verbally notified of transfer date details
	dates	Initiate the Transfer – Seasonal 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	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

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	

- 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

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	

- 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.

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 (nonunion) or Temporary Deployment (union) of greater than 1 month

• Sick coverage

• Filling vacancy pending outcome of a posting

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	

- 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.

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.	Supervisor Supervisor or	Conversation with employee to confirm details of new position
		Initiate Transfer transaction with reason code "Training Complete (Fire)" in PeopleSoft Manager Self Service	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

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.

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.	Supervisor	Conversation with employee to confirm details of new position
		Initiate Transfer transaction with reason code "Probation Complete (ATU)" 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
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)

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	Supervisor	Supervisor notifies successful candidate
		Initiate the Transfer – Internal Posting Process 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	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 D 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

Steps Task Task Details	Assigned To	Processing/Filing
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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	Depending on the elections made by	HR Benefits	
	Benefit Options form	the employee, terminate or leave relevant benefits active in PeopleSoft	The Denents	File options form in employee file and photocopy of cheques in financial file Send cheques to Customer Service

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.
		eave 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	Accigned To	Drococcing / Filing
	IUSK	Task Delalis	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	HR Benefits	Original letters and forms sent to employee Copies of letters placed in employee file
	Reactivate	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		Original letters and forms sent to employee Copies of letters placed in employee

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

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

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

- 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
- $_{\odot}~$ HR Admin Coordinator/ HR Records repeat step 4 & 5 & Finance Payroll to make adjustments as necessary