HUMAN RESOURCES

# GUIDE TO INTERNAL ADMINISTRATION

# AUTOMATED WORKFLOW & MANAGER SELF SERVICE

This Guide provides information required by Human Resources staff to administer and process HR employee and position related transactions from both a system and procedural perspective.

> Human Resources City of Hamilton 08/29/2022



# **Table of Contents**

QUICK REFERENCE GUIDES	5
KEY TERMS:	5
Standard Authorization Levels:	6
Transaction Type Reference Guide:	7
Transactions Executed ONLINE Via Manager Self Service	7
Transactions Executed OUTSIDE of Manager Self Service	
HR EMPLOYMENT SERVICES	13
EMPLOYMENT SERVICES - 9.2 TALENT ACQUISITION MODULE	
EMPLOYMENT SERVICES SELF SERVICE TRANSACTIONS PAGES:	
EMPLOYMENT SERVICES - TRANSFER NOT POSTED STATUS PAGE:	
EMPLOYMENT SERVICES - MANAGING JOB END DATES:	20
HR RECORDS	21
RECORDS VIEW STATUS PAGES:	21
RECORDS MANAGE HIRE REQUESTS:	24
RECORDS PAY RATE CHANGE REQUESTS:	
RECORDS TRANSFER NOT POSTED REQUESTS:	
RECORDS REQUEST & RETURN FROM UNPAID LOA >30 DAYS:	50
RECORDS POSITION DATA CHANGE REQUEST:	54
RECORDS TERMINATION/RETIRE REQUESTS:	61
RECORDS MERIT NOTIFICATIONS:	69
RECORDS MANAGE OUTSTANDING PENDING TRANSACTIONS	72
HR COMPENSATION	
COMPENSATION POSITION DATA CHANGE STATUS PAGE:	74

COMPENSATION POSITION DATA CHANGE REQUESTS:	77
HR RETURN TO WORK SERVICES (RTWS)	80
RTWS ASP TRIGGER NOTIFICATION:	80
RTWS OUTSTANDING MEETING ALERT NOTIFICATION:	82
FINANCE PAYROLL	
FINANCE PAYROLL WORKLIST:	
HR WORKFLOW ADMINISTRATOR (HR WFA)	
WFA ADD DELEGATION REQUEST:	88
WFA ADMINISTER (REVOKE) DELEGATION:	91
WFA MAINTAIN DELEGATED AUTHORIES (BATCH PROCESS):	94
WFA MONITOR APPROVALS:	
WFA REASSIGN PENDING TRANSACTIONS REPORT:	101
WFA REASSIGN PENDING TRANSACTIONS TERMINATED MANAGER	103
HR PROCESS FLOWS	111
NEW HIRES/TRANSFERS POSTED:	111
NEW HIRES/TRANSFERS NOT POSTED:	119
Extension to Temporary Contracts:	121
POSITION DATA CHANGES:	123
JOB EVALUATION CHANGES:	126
PAY RATE CHANGES	130
Step Progression or Merit:	130
Change In Qualifications:	133
Add/Remove Additional Duties Pay:	135
Probation Complete – School Crossing/Fire	137
TRANSFERS NOT POSTED	139 2

	Employer/Employee Initiated Movements:	. 139
	Return to Previous Position:	. 141
	Seasonal Transfers:	. 143
	Short Term Coverage:	. 145
	Temporary Internal Secondment/ Minor Reorganizations:	. 147
	Confirm To Permanent:	. 149
	Acting (Non-Union) OR Temporary Deployment >1 month (Union):	. 151
	Training Complete – Fire Only:	. 153
	Probation Complete – ATU Only:	. 155
	Internal Posting to Bargaining Unit (Fire, ONA & HPS Only):	. 157
ι	JNPAID LEAVE OF ABSENCE >30 DAYS	. 159
٦	ERMINATIONS	. 164
	Voluntary Terminations:	. 164
	Involuntary Terminations:	. 167

#### **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

## What if a 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 <b>not handled through the</b> <b>posting process</b> , or to initiate on behalf of a Manager who has delegated this responsibility to you.	Manager or Delegate
Transactions Execut	ed ONLINE Via Manager Self S	Service Cont'd

Transaction Type	Description	Initiated By
<b>Transfer</b> Reason – Employer/Employee Initiated	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
<b>Transfer</b> 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
<b>Transfer</b> 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
<b>Transfer</b> 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
<b>Transfer</b> Reason – Internal Posting Process (Fire Local 288, HPS, and ONA ONLY)	This transaction and reason is to be used when the department internally posts a role in one of the stated unions (as a result of CBA language or practice which provides opportunity to union members in advance of a formal city- wide internal posting).	Manager or Delegate
Transfer	This transaction and reason is	Manager or
Complete-ATU	of Bus Operators to their home position upon completion of their training.	Delegate
Transactions Execut	ed ONLINE Via Manager Self S	Service Cont'd

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

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

Unpaid Leave of Absence (> 30 days)	For an Unpaid Leave or Return from leave of Absence greater than 30 days, including, personal unpaid leaves, professional development leaves, or legislated job protected leaves (i.e. Maternity, Compassionate Care, Military, Organ onor 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
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
<b>Transfer</b> Reason – Temporary Internal Secondment/Minor Reorg	When transferring an employee as a result of an <u>internal secondment</u> 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	HR Employment Services

		-
	Resources will facilitate system and employee notifications. A "Minor Reorganization" would be one that is contained within a division and is within the approved budget	
Transfer	In order to process a Transfer	HR Employment
Reason – Acting	due to an Acting assignment	Services
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 –	For terminations considered to	HR Labour
Involuntary	be involuntary typically as a	Relations
	result of discipline, frustration	
	of contract, salary	
	continuance, AWOL, working	
	notice, layoff.	

## HR EMPLOYMENT SERVICES

## **EMPLOYMENT SERVICES - 9.2 TALENT ACQUISITION MODULE**

Refer to the training manual provided to the Recruiting team for detailed instructions on how to use the new Recruiting functions.

**TAM Re-Implementation** 

**Delta Training - Recruiters** 

June 13, 2017

## **EMPLOYMENT SERVICES SELF SERVICE TRANSACTIONS PAGES:**

#### **Purpose:**

Use the Self Service Transaction Status Pages to view the status of certain non Recruiting transactions at any time and as a historical reference of those workflow transactions submitted. HR Employment Services have access to the Job Requisition (pre July 2017), Manage Hire and Transfer Employee Request Status pages.

Note:

The Job Requisition Status page only contains Historical Job Requisitions pre July 2017 (from the former 9.1 system). To view the status of a 9.2 Job Opening, select Browse Job Openings on the Recruiting Home page.

#### **Procedure:**

Follow the steps below to access the Status pages:

Step	Action	
1	Navigation: HR Tab>HR Self Service Home Page>Transfer Employee Requests, Job Requisition Requests, Manage Hire Requests	
2	Click on applicable Request Status link Help HR Self Service Home Page Transfer Employee Requests Job Requisition Requests Manage Hire Requests	X
3	Status default is Awaiting HR Processing. Change default as needed. You can also search by any of the other fields listed.	

	Job Requisition Requests	
	Enter any information you have and click Search. Leave fields blank for a list of all values.	
	Find an Existing Value	
	Limit the number of results to (up to 300): 300	
	Requistion Request ID: begins with 🗸	
	*Effective Date: = V	
	Effective Sequence: = V	
	Job Title: begins with 🗸	
	Position Number: begins with 🗸	
	Job Code: begins with 🗸	
	Department: begins with 🗸	
	Self Service Status Indicator: = V Awaiting HR Processing	
	Awaiting HR Processing Cancelled by HR Denied Errors Encountered In Approval Process Processed by HR	
4	<ul> <li>Self Service Status Indicator:</li> <li>Awaiting HR Processing – Transaction has been routed to HR and waiting to be processed.</li> <li>Cancelled by HR – Transaction has been routed to HR and HR has cancelled it.</li> <li>Denied – Transaction was not routed to HR as an approver in the department chain has denied it which terminates the remainder of the approval chain.</li> <li>Errors Encountered – System generated.</li> <li>In Approval Process – Transaction is pending in the department approval process and will be routed to HR once all approvals are complete.</li> <li>Processed by HR – Transaction has been processed by HR.</li> </ul>	
S	Select from the list the Request Status page you wish to review.	

<b>—</b> .								
Jo	b Requisition Reques	sts						
Ent	ter any information you have	and click Search. L	eave fields blank for a list of all valu	es.				
F	ind an Existing Value						_	
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Re	quistion Request ID:	begins with 🗸						
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Eff	iective Sequence:	= 🗸						
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Po	sition Number:	begins with 🗸	Q					
Jo	b Code:	begins with 🗸						
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	Case sensitive							
	Search Clear Basi	c Search 🕞 Save	Search Criteria					
Se	arch Results							
Vie	ew All							First 💽 1-7 of 7 🕟 Last
Re	quistion Request ID *Effectiv	ve Date Effective Se	quence Job Title	Position Num	ber Job Cod	de Department	Department Description	Self Service Status Indicator
00	000025 06/04/2	015 1	Dir HR Systems & Operatio	ns 00006294	6420	320525	CityMgr-HR-COD-Compensation	HR Process
00	000027 06/04/2	015 1	Admin Asst I Scheduler	00005010	<u>6411</u>	<u>300105</u>	Councillor's Office-Mayor'sOff	HR Process
00	000028 06/04/2	015 1	HR Records Coord	00006331	<u>1313</u>	320525	CityMgr-HR-COD-Compensation	HR Process
00	000029 06/04/2	015 1	Admin Asst I Councillor	00004986	6411	300075	CouncillorsOffice-Ward12	HR Process
00	000053 06/05/2	015 1	Mgr Payroll & Pensions	00005102	6426	336212	CorpServ-FS-Payroll&Pen-Payro	I HR Process
00	000054 06/05/2	015 1	Sr Administrator Lodges	00004739	6089	636005	CES-Lodge-ML-Admin	HR Process
	nd of proc	edure.						
		caarer						

## **EMPLOYMENT SERVICES – TRANSFER NOT POSTED STATUS PAGE:**

## **Purpose:**

Use the View Transfer Status Page as a reference for Transfer Requests that have been cancelled by HR Records for reasons such as the Department not following the posting process or perhaps request should have been processed by an offer letter, etc. HR Records would refer these to Staffing via email for review.

#### **Procedure:**

Follow the steps below to access the View Transfer Status page:

Step	Action
1	Navigation: HR Tab>HR Self Service Home Page>Transfer Employee Requests
2	Click on Transfer Employee Requests link Help HR Self Service Home Page Job Requisition Requests Manage Hire Requests
3	Status default is Awaiting HR Processing. Change default to applicable status. In the example below, the transfer status is <b>Cancelled by HR</b> to retrieve a Short Term Coverage request that HR Records cancelled and referred to Staffing as the duration exceeds the appropriate length.

	Transfer Employee Req	uests		
	Enter any information you have	and click Search. Lea	ave fields blank for a list	of all values.
	Find an Existing Value			
	Limit the number of results to (	up to 300): 300		
	Empl ID:	begins with 🗸		
	Empl Record:	= 🗸		
	*Effective Date:	= 🗸	31	1
	Effective Sequence:	= 🗸		
	Name:	begins with 🗸		
	Last Name:	begins with 🗸		
	Department:	begins with 🗸	Q	
	Pay Group:	begins with 🗸	Q	
	Self Service Status Indicator:	= 🗸 Car	ncelled by HR	
4	Click Search to retrieve Enter emplid, name, or search.	ve all "Cancelled other selection	d by HR" transact criteria to narrow	ions V YOU Awaiting HR Processing Cancelled by HR Denied Errors Encountered In Approval Process Processed by HR
5	Select from the list the	Status page yo	u wish to review.	
		,		
	Transfer Employee Requests			
	Enter any information you have and click Search. Leav	e fields blank for a list of all values.		
	Find an Existing Value			-
	Limit the number of results to (up to 300): 300			
	Empl ID: begins with V Empl Record: = V			
	*Effective Date: = V	31		
	Name:			
	Last Name: begins with V			
	Pay Group:			
	Self Service Status Indicator: = 🗸 Can	celled by HR 🗸		
	Search Clear Basic Search 🛃 Save Sea	arch Criteria		
	Search Recutts			
	Empl ID         Empl Record         Effective Date         Effective Sequent           04507G0         07/06/2015         1           104272 0         06/15/2015         1	ce Name Department De Mike Manager 720004 Pr Sarah Van Sickle 679164 C	epartment Description Pay &ED-T&C-Director'sOffice-Admn SAI ES-CHMS-ChIdCareAdm100%Fund SAI	Group Std Hours From Std hour 35 35 35
	1185750         06/30/2015         1           1205030         04/15/2015         1	Eric Employee 720100 P Brooke Monaghan 632010 C	&ED-T&C-HRM-DundurnCastle SAI ES-Lodge-WL-ResidentSocServ WA	<u>35 .01</u> <u>.01 .01</u>

Startming to receiver.         Transfer Date:       OT06/2015         Reason for Transfer:       VAC Short Term Coverage         Workflow Status:       Cancelled by HR         Effective Sequence:       1         Requester:       Debbie Director         Transfer Information         New Info         Debtie Director         Transfer Information         Department:       720000       P&ED-T&C-HRM-MgrM&H       70004       P&ED-T&C-Director'sOffice-Adr         Department:       720000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director'sOffice-Adr         Job Code:       6425       Mgr 8       6421       Dir 10         RegrIfemp:       Regular       Empl Class:       Regular         Full/Part Time:       Full-Time       S100       S35.00       Salary Plan:       CA       Non Union Mgrtt Professional       CA       Non Union Mgrtt Professional         GA       Nourly Rate:          Union:       CA       Non Union Mgrtt Professional       GM Planning & Econ Dev <th col<="" th=""><th>The request</th><th>t details a</th><th>along with any comr</th><th>nents are</th><th>available for</th></th>	<th>The request</th> <th>t details a</th> <th>along with any comr</th> <th>nents are</th> <th>available for</th>	The request	t details a	along with any comr	nents are	available for
Transfer Date:       07/06/2015         Reason for Transfer:       VAC         Short Term Coverage       End Date:         Workflow Status:       Cancelled by HR         Effective Sequence:       1         Requester:       Debble Director         Transfer Information       New Info         Department:       720000         Position:       00007339         Mgr Heritage Resource Mngmnt       00007337         Dir Tourism&Culture         Department:       720000         Position:       00007339         Mgr 8       6421         Job Code:       6426         Mgr 8       6421         Job Code:       6426         Standard Hours:       35.00         Salary Plan:       CA         Kapp:       Hourly Rate:         Union:       CA         Non Union Mgmt Professional       CA         Step:       Hourly Rate:         Union:       CA         Non Union Mgmt Professional       Rev Planning & Econ Dev		eview.				
Transfer Date:       07/06/2015         Reason for Transfer:       W.C. Short Term Coverage         Workflow Status:       Cancelled by HR         Effective Sequence:       1         Requester:       Debble Director         Transfer Information       Current Info         Position:       00007339       Mgr Heritage Resource Mngmnt       00007337       Dir Tourism&Culture         Department:       720000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director'sOffice-Adr         Job Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Regr/Temp:       Regular       Empl Class:       Regular       Full-Time         Standard Hours:       35.00       35.00       35.00       35.00         Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10       10       10       10         Step:       Hourly Rate:            Union:       CA       Non Union Mgmt Professional       GM Planning & Econ Dev         Reports To:       00007337       Dir Tourism&Culture	Transfer Details					
Reason for Transfer:       V.C.       Short Term Coverage         Workflow Status:       Cancelled by HR         Effective Sequence:       1         Requester:       Debbie Director         Transfer Information       New Info         Position:       00007339       Mgr Heritage Resource Mngmnt       00007337       Dir Tourism&Culture         Department:       720000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director'sOffice-Adr         Location Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Regular       Empl Class:       Regular       Full-Time         Full/Part Time:       Full-Time       Standard Hours:       35.00       35.00         Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10            Union:       CA       Non Union Mgmt Professional           Union:       CA       Non Union Mgmt Professional           Mino:       CA       Non Union Mgmt Professional	Transfer Date:	07/06/2015				
Workflow Status:       Cancelled by HR         Effective Sequence:       1         Requester:       Debbie Director         Transfer Information       New Info         Position:       00007339       Mgr Heritage Resource Mngmnt       00007337       Dir Tourism&Culture         Department:       720000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director's Office-Adr         Department:       720000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director's Office-Adr         Job Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Reg/Temp:       Regular       Empl Class:       Regular       Full-Time         Full/Part Time:       Full-Time       Standard Hours:       35.00       35.00         Stalary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10       10       10       10         Step:       Hourly Rate:            Union:       CA       Non Union Mgmt Professional           Reports To:       00007337       Dir Tourism&Cultu	Reason for Transfer:	VAC Short 1	Ferm Coverage End Date:	09/28/2015		
Effective Sequence:       1         Requester:       Debble Director         Transfer Information       New Info         Position:       00007339       Mgr Heritage Resource Mngmnt       00007337       Dir Tourism&Culture         Department:       720000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director's Office-Adr         Location Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Reg/Temp:       Regular       Empl Class:       Regular       Full-Time         Standard Hours:       35.00       Job       Non Union Mgmt Professional       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Step:       Hourty Rate:          Location Get Step Store       GM Planning & Econ Dev         Union:       CA       Non Union Mgmt Professional       GM Planning & Econ Dev       GM Planning & Econ Dev	Workflow Status:	Cancelled by	HR			
Requester:       Debbie Director         Transfer Information       Current Info       New Info         Position:       00007339       Mgr Heritage Resource Mngmnt       00007337       Dir Tourism&Culture         Department:       720000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director's Office-Adr         Location Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Reg/Temp:       Regular       Empl Class:       Regular       Full-Time         Full/Part Time:       Full-Time       Full-Time       Full-Time       Full-Time         Standard Hours:       35.00       35.00       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10       Interpretional       Interpretional       Interpretional         Union:       CA       Non Union Mgmt Professional       Interpretional       Interpretional         Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev	Effective Sequence:	1				
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Position:       00007339       Mgr Heritage Resource Mngmnt       00007337       Dir Tourism&Culture         Department:       72000       P&ED-T&C-HRM-MgrM&H       72004       P&ED-T&C-Director'sOffice-Adr         Location Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Reg/Temp:       Regular       Empl Class:       Regular       Full-Time         Full/Part Time:       Full-Time       Full-Time       Standard Hours:       35.00         Standard Hours:       35.00       Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Step:       Hourly Rate:             Union:       CA       Non Union Mgmt Professional       GM Planning & Econ Dev         Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev		Current Info		New Info		
Department:       72000       P&ED-T&C-HRM-MgrM&H       720004       P&ED-T&C-Director'sOffice-Adr         Location Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Reg/Temp:       Regular       Empl Class:       Regular       Full-Time         Full/Part Time:       Full-Time       Full-Time       Full-Time       Standard Hours:       35.00         Standard Hours:       35.00       Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       Interference       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Union:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev         Transfer Appproval Chain       Chain       Standard Planning & Econ Dev       Standard Planning & Econ Dev	Position:	00007339	Mgr Heritage Resource Mngmnt	00007337	Dir Tourism&Culture	
Location Code:       BLD005       Lister Block       BLD005       Lister Block         Job Code:       6426       Mgr 8       6421       Dir 10         Reg/Temp:       Regular       Empl Class:       Regular       Full/Time         Full/Part Time:       Full-Time       Full-Time       Full-Time       Full-Time         Standard Hours:       35.00       35.00       35.00       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       -       10       -       -       -         Vinon:       CA       Non Union Mgmt Professional            Vinon:       CA       Non Union Mgmt Professional            Vinon:       CA       Non Union Mgmt Professional           Vinon:       CA       Non Union Mgmt Professional           Vinon:       CA       Non Union Mgmt Professional           Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev	Department:	720000	P&ED-T&C-HRM-MgrM&H	720004	P&ED-T&C-Director'sOffice-Adn	
Job Code:       6426       Mgr 8       6421       Dir 10         Reg/Temp:       Regular       Empl Class:       Regular       Full-Time         Full/Part Time:       Full-Time       Full-Time       Full-Time         Standard Hours:       35.00       35.00       Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10            Union:       CA       Non Union Mgmt Professional           Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev	Location Code:	BLD005	Lister Block	BLD005	Lister Block	
Reg/Temp:       Regular       Empl Class:       Regular         Full/Part Time:       Full-Time:       Full-Time:       Full-Time:         Standard Hours:       35.00       35.00       35.00         Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10       10       10       10         Step:       Hourly Rate:         10	Job Code:	6426	Mgr 8	6421	Dir 10	
Full/Part Time:       Full-Time:       Full-Time:         Standard Hours:       35.00       35.00         Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10       10       10       10       10       10         Step:       Hourly Rate:          10	Reg/Temp:	Regular	Empl Class:	Regular		
Standard Hours:       35.00       35.00         Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10       10         Step:       Hourly Rate:           Union:       CA       Non Union Mgmt Professional          Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev	Full/Part Time:	Full-Time		Full-Time		
Salary Plan:       CA       Non Union Mgmt Professional       CA       Non Union Mgmt Professional         Grade:       8       10       10         Step:       Hourly Rate:           Union:       CA       Non Union Mgmt Professional          Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev	Standard Hours:	35.00		35.00		
Grade:       8       10         Step:       Hourly Rate:          Union:       CA       Non Union Mgmt Professional         Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev         Transfer Approval Chain       Kentione Chain       Kentione Chain       Kentione Chain       Kentione Chain	Salary Plan:	CA	Non Union Mgmt Professional	CA	Non Union Mgmt Professional	
Step:     Hourly Rate:        Union:     CA     Non Union Mgmt Professional       Reports To:     00007337     Dir Tourism&Culture     00001504     GM Planning & Econ Dev       Transfer Approval Chain	Grade:	8		10		
Union:       CA       Non Union Mgmt Professional         Reports To:       00007337       Dir Tourism&Culture       00001504       GM Planning & Econ Dev         Transfer Approval Chain       Chain       Comparison of the second se	Step:		Hourly Rate:			
Reports To:         00007337         Dir Tourism&Culture         00001504         GM Planning & Econ Dev           Transfer Approval Chain         Culture         00001504         GM Planning & Econ Dev	Union:	CA	Non Union Mgmt Professional			
Transfer Approval Chain	Reports To:	00007337	Dir Tourism&Culture	00001504	GM Planning & Econ Dev	
	Transfer Approva	l Chain				
	Departmental Ap	proval	\∽ <u>viewinide</u>	Comments		
Departmental Approval	Self Approve <u>Debbie Dire</u> Workflow Re 07/10/15 - 09	d ector quest Initiator :47 AM	Approved Gary GM Approval Step #1 07/10/15 - 09:48 AM			
Departmental Approved ✓ <u>Debbie Director</u> Workflow Request Initiator 07/10/15 - 09:47 AM  ✓ <u>Gary GM</u> Approval Step #1 07/10/15 - 09:48 AM	☐ Comments					
Comments       Approved         Approved       Approved         ✓       Debbie Director         Workflow Request Initiator       O7/10/15 - 09:47 AM         ✓       Comments	Administrate Term Covera letter.	DGULAS at 07/1 or Cancelled-DG, age. Staffing to re	0/15 - 09:49 AM this request exceeds the duration allowe view with Department and possibly issue	d for Short an offer		
Approved       Approved         Departmental Approval         Self Approved         Pebbie Director         Workflow Request Initiator         07/10/15 - 09:47 AM         Comments         Diane Gulas-DGULAS at 07/10/15 - 09:49 AM         Administrator Cancelled-DG, this request exceeds the duration allowed for Short Term Coverage. Staffing to review with Department and possibly issue an offer letter.	End of proc	edure				

# **EMPLOYMENT SERVICES – MANAGING JOB END DATES:**

# Purpose:

Employment Services to provide Departments with a monthly listing of Employee(s) that have an expected end date in PeopleSoft in the following month and one of the following actions is required: Transfer – Return to Previous Position, Position Extension or Termination.

Step	Action
1	Navigation: Main Menu>Reporting Tools>Query>Query Viewer
	Enter Begins with: <b>N_HR_JOBENDDT_TEMPASSIGNMENT</b> and click Search
	Select Run to Excel
	Enter any information you have and click Search. Leave fields blank for a list of all values.  Search By: Query Name begins with N_HR_JOBENDDT_TEMPASSIGNMENT
	Search Results         Folder View:         Customize   Find   View All   <sup>[2]</sup>   <sup>[2]</sup>
	Enter EndDtFrom and EndDtTo – use the following month
	File Edit View Favorites Tools Help         N_HR_JOBENDDT_TEMPASSIGNMENT         EndDtFrom:       [1012015]         EndDtTo:       [11302015]         View Results
	Dept Descr Division Descr Dept ID Name ID Empl Record Job Code Job Titled Sal Plan Grade Empl Class Descr Job Entry Date Expected End Date
2	Complete letter Template ( <i>Staffing to create</i> ) and attach listing with instructions on what action is required and Email to Department
	End of Procedure.

## HR RECORDS

#### **RECORDS VIEW STATUS PAGES:**

#### **Purpose:**

Use the Self Service Status Pages to view the status of a transaction at any time and as a historical reference of workflow transactions submitted. You may also wish to use these pages to monitor pending transactions (in approval process) that could potentially result in overpayments. HR Records have access to Transfer Employee Requests, Pay Rate Change Requests, Term/Retire Requests, Position Data Requests and Manage Hire Requests.

#### **Procedure:**

Follow the steps below to access the Status pages:

Step	Action
1	Navigation: HR Tab>HR Self Service Home Page>Self Service Transactions
2	Click on applicable Request link. Note Manage Hires link is a shortcut that will take you directly to the Manage Hires page in Workforce Administration>Personal Information>Manage Hires           HR Self Service Home Page           Self Service Transactions           Image Hires           Manage Hire Requests           Position Data Change Requests           Manage Hire Requests           Manage Hire Requests
3	Status default is Awaiting HR Processing. Change default as needed. You can also search by any of the other fields listed. (i.e. change Effective Date to: < <i>enter date</i> and Status to: <i>In Approval Process</i> to identify transactions that are for the current pay period but have not yet been routed to you.

	Fransfer Employee Requests
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value
	.imit the number of results to (up to 300): 300   Empl ID: begins with ♥   Empl Record: =   'Effective Date: =   = Imit the number of results to (up to 300):   'Effective Date: =   : :   : <t< th=""></t<>
	Self Service Status Indicator: =
	Search Clear Basic Search Criteria
4	<ul> <li>Self Service Status Indicator:</li> <li>Awaiting HR Processing – Transaction has been routed to HR and waiting to be processed.</li> <li>Cancelled by HR – Transaction has been routed to HR and HR has cancelled it.</li> <li>Denied – Transaction was not routed to HR as an approver in the department chain has denied it which terminates the remainder of the approval chain.</li> <li>Errors Encountered – System generated.</li> <li>In Approval Process – Transaction is pending in the department approval process and will be routed to HR once all approvals are complete.</li> <li>Processed by HR – Transaction has been processed by HR.</li> </ul>

5	Select from	the list	the Requ	est St	atus page you	ı wis	sh to i	reviev	Ν.
	Transfer Employee R	equests							
	Enter any information you have	and click Search. I	eave fields blank for a lis.	t of all values.					
	Limit the number of results to (	up to 300): 300							
	Empl ID:	begins with 🗸							
	Empl Record:	= 🗸							
	*Effective Date:	= 🗸		31					
	Effective Sequence:	= 🗸		7					
	Name:	begins with 🗸		7					
	Last Name:	begins with 🗸		7					
	Department:	begins with V							
	Pav Group:	begins with V							
	Self Service Status Indicato	r: = 🗸	Processed by HR	×					
					I				
	Search Clear Bas	ic Search 🛛 😽 Sav	e Search Criteria						
	Search Results								
	View All							F	irst 🔳 1-14 of 14
	Empl Empl *Effectiv	e Effective	Name	Department	Department Description	Pay	Std Hours	Std Hours	Self Service Stat
	003957 0 09/15/20	5 1	Yolanda Sinha	492026	PW-Env-PrksCem-CemClear	WAL	40	40	Processed
	034850 0 01/01/20	5 1	June Hannah-Cook	632010	CES-Lodge-WL-ResidentSocServ	SAL	35	.01	Processed
	052750 1 06/01/20 111447 0 06/08/20	<u>5 1</u>	Donald Duck Minnie Mouse	811010 720140	P&ED-EcDev-BusDev-Investmntlni P&ED_T&C_HRM_GriffinHouse	SAL	<u>35</u>	35	Processed
	<u>112246 1</u> 04/27/20	5 1	Daisy Duck	806110	P&ED-Building-Engineerng&Zone	WAL	.01	35	Processed
	113998 0 05/01/20 115055 0 00/00/20	5 1	Ryan Wheeler	<u>632010</u>	CES-Lodge-WL-ResidentSocServ	WAL	.01	20	Processed
	115655 0 06/08/20	5 1	Jessica Pannozzo	679160	CES-CHMS-ChidCareEeeSubsAdmi	IVVAI	1/5	1/5	Processed
	End of proce	euure.							

## **RECORDS MANAGE HIRE REQUESTS:**

#### **Purpose:**

The Self Service Transaction Page is for HR Records staff to process Manage Hire Requests (New Hire, Rehires and Transfers) initiated through Recruiting OR Smart HR Templates initiated through Self Service Smart HR Transactions. Once HR Records approves the transaction, it can be routed to COH Payroll Worklist with instructions for further processing if required.

#### Important:

Approving a transaction off the Manage Hire Request page does not automatically update PeopleSoft; you must manually process the transaction in PeopleSoft. Once a transaction is marked as approved or cancelled by HR Records it will be removed from the HR Records Worklist and an automated email will be generated to the Hiring Manager (if via Recruiting) or Initiator and FA II that the transaction has been processed/cancelled.

IF Hire Sequence ID	Then
Starts with 90000	The transaction was initiated via
	Smart HR Template Hire
Does not start with 90000	The transaction was initiated via
	Recruiting
IF	THEN following Template was
	used
Hiring/rehiring a High School co-op	COH_COOP_HS
student	
Hiring/rehiring a College/University	COH_COOP_POST
co-op student	
Hiring/rehiring a School Crossing	COH_CROSSING_01
Guard	
Hiring/rehiring a miscellaneous	COH_GENERAL_SAL
salary	
Hiring/rehiring a miscellaneous wage	COH_GENERAL_WAL
(i.e.ATU Winddown, Student Intern)	
Hiring/rehiring a Library non-union	COH_LIBRARY
part time	

#### **Procedure:**

Follow the steps below to access Self Service Transactions on the **HR Tab**:

Step		Action
1	Navigation: HR Tab>	Self Service Transactions
	Employee HR Personalize Content   Layout Menu C Search: Manager Self Service Manager Self Service Workforce Administration Benefits Compensation Benefits Compensation Date Compensation Date C	Hep
2	Click Manage Hire F default as: Awaiting	<b>Request.</b> Self Service Status Indicator will HR Processing. This can be changed by clicking
	Hire Requests Enter any information you have a Find an Existing Value	and click Search. Leave fields blank for a list of all values.
	Limit the number of results to (up Hire Sequence ID:	p to 300): 300
	*Effective Date:	
	Effective Sequence:	
	Name:	begins with
	Job Opening ID:	
	Applicant ID:	= V
	Department:	begins with V
	Pay Group:	begins with V
	Self Service Status Indicator:	= ► Awaiting HR Processing ► ►

	Awaiting HR Processing
	Cancelled by HR
	Denied
	Errors Encountered
	In Approval Process
	Processed by HR

Hire								1.0	st 💽 1-24 of 24
and up non	ID Date	Effective Sequence	Name	Job Openi	ng Applicant	Departmen	t Department Description	Pay Group	Self Service Sta
3750	07/01/2015	1	Horvath, Mariann	10534	32835	750230	Library-Community-Sherwood	WAL	HR Process
<u>3797</u>	06/01/2015	1	Vargas, Andrea Paola	10469	331492	315022	CorpServ-CustServ-ContactCtre	(blank)	HR Process
3800	06/01/2015	1	Cavic, Aleksandar	10252	<u>123679</u>	<u>530150</u>	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3801	06/01/2015	1	mohammadi,ali mohammad	10252	287684	530150 520150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3802	06/01/2015	1	Rurrows Ion	10252	320710	530150 530150	PW-Transptn-TransitOperath-Ops	(blank)	HR Process
3804	06/01/2015	1	Nelson, Rachel Leigh	10252	242447	530150	PW-Transptr-TransitOperatin-Ops	(blank)	HR Process
3805	06/01/2015	1	Hewitt, Kristie Nicole	10252	317565	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3806	06/01/2015	1	Perusello, James John	10252	292813	<u>530150</u>	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3807	06/01/2015	1	Hood, Christopher Andrew	<u>10252</u>	<u>320103</u>	<u>530150</u>	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3808	06/01/2015	1	Leckie, Chad	<u>10252</u>	317788	<u>530150</u>	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3809	06/01/2015	1	Parasram, Sonya Mae Jean subotic vlado	10252	31/893	530150 530150	PW-Transptn-TransitOperath-Ops	(blank)	HR Process
3812	06/01/2015	1	Ross Gael	10252	223366	530150	PW-Transptn-TransitOperatin-Ops	(blank)	HR Process
3815	06/01/2015	1	Norsworthy, Theresa	10578	34470	750100	Library-Central-CustomerServ	WAL	HR Process
3817	06/01/2015	1	Gowling, Rose Mayer	10562	<u>1514</u>	750140	Library-Admin-TechnicalServ	WAL	HR Process
3819	06/22/2015	1	Tanvir, Rehan	10542	213394	750035	Library-Admin-BusinessOffice	SAL	HR Process
3820	06/08/2015	1	Smith, Joanne M. Drennan-Scace Kathleen	10538	1832	750205	Library-OlusterB-Barton	SAL	HR Process
200000004	05/28/2015	1	Draft,Save as	0	0	465010	P&ED-PrkngByLw-MLE-SchoolCross	WAL	HR Process
00000010	05/28/2015	1	burtch,karen	0	<u>0</u>	352125	CityMgr-Clerk-POA	WAL	HR Process
<u>300000021</u>	06/03/2015	1	Lemplate, WAL	0	0	632025	CES-Lodge-WL-HousekpngServ	<u>WAL</u>	HR Process
30000023	06/02/2015	1	Position #,Library	0	0	750250	Library-System-ChildrensServ	SAL	HR Process

4	The Manage Hire Request page will display, review the information				
	ensure the information is correct. Note the <b>Requesters</b>				
	Comments/Instructions.				
	Manage Hire Request				
	Hire Request #90000050 Review the details of the requested transaction and then manually process the transaction via Manage Hires. Once all processing is complete, if required, enter instructions for any post transaction updates and assign to a worklist then press Save to close this transaction.				
	Hire Request				
	Hire Request ID:	90000050			
	Template ID:	COH_COOF	P_HS		
	Effective Date:	08/15/2015			
	Position Number:	00008010	High School Coop Student		
	Job Code:	2957	High School Coop Student		
	Department:	720150	P&ED-T&C-HRM-FieldcoteMus		
	Workflow Status:	Awaiting HR	Processing		
	Sequence:	1			
	Requester ID:	Daffy Duck	ns		
	Comment:	Please send m			
	Candidate Details				
	Applicant Type:	External - Ne	2W		
	Name:	Brad Pitt			
5	Manage Hir	e Annro	val Chain – as there is no approval required for		
0	Manago Hiro	Change	s only the name of the initiator (Smart HP		
	Tomplate Hi		ing Managar (via Descuiting) and data (time		
	remplate Hire) or Hiring Manager (via Recruiting) and date/time				
	submitted will display at the bottom of Page.				
	Manage Hire	Approval	Chain		
	5				
	Departmental Approval Self Approved				
	→ Daffy Duck				
	Workf	low Request In	itiator		
		/15 - 11:54 AM			
	06/22				
6	Click Go To Mana	ige Hires to	open a new window and complete the Manage		
6	Click Go To Mana	ge Hires to	open a new window and complete the Manage		
6	Click Go To Mana Hire. Note:	ge Hires to	o open a new window and complete the Manage e two types under Source (Smart HR		
6	Click <u>Go To Mana</u> Hire. Note: Transactions	ge Hires to there are and Rec	o open a new window and complete the Manage two types under Source (Smart HR cruiting Solutions).		

	<ul> <li>Current Transaction Status: Awaiting HR Processing</li> <li>Select this option to approve the transaction. You will be required to manually update the database.</li> <li>Select this option to cancel the transaction.</li> </ul>							
Save Go To Manage Hires								
Manage Hires The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.								
	*Select	Transactions	s Where Start	Date 🗸				
	From 0	4/03/2017	<b>To</b> 07/14	/2017	Refresh			
	Hire Transactions							
	Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By
		05/15/2017	Requested	Lindsey Reaume		Hire	Recruiting Solutions	Grace Figliola-Laufman
		05/15/2017	Requested	Rebeka Eisbrenner		Hire	Recruiting Solutions	Andree Verticchio
		05/15/2017	Requested	Shannon Clarke		Hire	Recruiting Solutions	Varghese George
		05/23/2017	Requested	Nathan Brown	NEW	Hire	Smart HR Transactions	Susan Harding-Cruz
		05/23/2017	Requested	Stephanie Frick	NEW	Hire	Smart HR Transactions	Susan Harding-Cruz
		05/23/2017	Requested	Walter Rau	NEW	Hire	Smart HR Transactions	Susan Harding-Cruz
		05/23/2017	Requested	Jesse Brodati	NEW	Hire	Smart HR Transactions	Susan Harding-Cruz
		05/23/2017	Requested	Tyler Smith	NEW	Hire	Smart HR Transactions	Susan Harding-Cruz
		06/01/2017	Requested	Josh Donaldson	NEW	Hire	Smart HR Transactions	Martin White
		06/13/2017	Requested	Jose Bautista	NEW	Hire	Smart HR Transactions	Martin White
	Select All Cancel S Iote: Cancel Si	Deselect All selected Trans	actions	Cancelling a in Manage	a transa Hires,	action, y as well	ou must so as the the	elect Transaction

8	Administrator Processing will display your name. Although you have the ability to enter comments, these comments will only be seen by HR Records as there is no status page for Manage Hires, and the Smart HR Template status page does not display comments.					
	Comment:					
9 If routing to COH Payroll Worklist click ∠ to select COH Payro Worklist User and add required instructions.						
	Note: these comments are only visible to HR Records and Finance Payroll.					
	*Route to:					
	*Instructions:					
10	Administrator Actions has two options for you to select:					
	<b>Approve-</b> will update the Current Transaction Status to Processed by HR and generate an email to the Initiator and F&A Support Staff that the transaction is complete.					
	Note: do not select this action until you have click <sup>Go To Manage Hires</sup> , which will open a new window and take you to Manage Hires for you to manually updated.					
	<b>Cancel</b> -will update the Current Status to Cancelled by HR and generate an email to <b>only</b> the Initiator.					
	Both actions will remove the transaction from the HR Worklist ( <i>currently we are not using</i> ).					

	Administrator Actions				
	Current Transaction Status: Awaiting HR Processing				
	<ul> <li>Select this option to approve the transaction. You will be required to manually update the database.</li> <li>Select this option to cancel the transaction.</li> </ul>				
	Save Go To Manage Hires				
11	Click Save to complete the transaction (generate email, update status and remove from HR Records Worklist) you will receive a warning message reminding you to update Position Data accordingly. Select Yes to continue.				
	Message				
	Approval Processing (6605,610) Selecting "Yes" will change the status to "Processed by HR". You will then be required to manually update the database with this transaction. Selecting "No" will cancel your approval and the status will remain "Awaiting HR Processing." Yes No				
12					
12	Click ow you will be taken back to the completed transaction				

1	Hammon					
	Favorites Main Menu > Workforce Administration > Self Service Transactions > Manage Hire Requests					
	Manage Hire Request					
	Save Confirmation  The Save was successful.					
	OK					
13	The transaction is now complete and saved. Note the Current Transaction Status has updated to Processed by HR.					
	Candidate Details					
	Applicant Type: External - New					
	Name: Brad Pitt					
	Route to other Groups Find First T 1 of 1 Last					
	Role Name:       COH Payroll Worklist User         HR Records to insert comments to Finance Payrollstill to be determined, should include new employee number         Instructions:       employee number					
	lanage Hire Approval Chain					
	C :Approved					
	Departmental Approval					
	Self Approved Daffy Duck Workflow Request Initiator 06/22/15 - 11:54 AM					
	Comments Tracey Jaremey-TJAREMEY at 06/22/15 - 12:10 PM Administrator Approved-I have hired employee under number 122643-0					
	Administrator Actions					
	Go To Manage Hires					
	Return to Search 1 Previous in List Next in List Notify					
	Note: Next in List will take you to the next transaction to be processed, depending on your sort.					

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( :

# **View Status:**

The status of any transaction can be viewed at any time by navigating to the Manager Hire Requests page.

# **RECORDS PAY RATE CHANGE REQUESTS:**

## Purpose:

The Self Service Transaction Page is for HR Records staff to process (approve/cancel) or view a Pay Rate Change Request initiated through Manager Self Service. Once HR Records saves the transaction, it can be routed to COH Payroll Worklist with instructions for further processing if required.

## Important:

Approving a transaction off the Transaction Request page does not automatically update PeopleSoft; you must manually process the transaction in PeopleSoft. Once a transaction is marked as approved or cancelled by HR Records it will be removed from the HR Records Worklist and an automated email will be generated to the Initiator and FA II that the transaction has been processed/cancelled. Refer to HR Process documents for direction for Pay Rate Change reasons not listed below.

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 has completed their probation and is entitled to move to the next step.	ProbComplete-SchoolCrossng/Fire
Unionized employee in ONA, ATU or Fire is entitled to an automatic Step Progression as per the collective agreement. (Note: workflow transaction for Pay Rate - Step Progression for employees in ONA and ATU are not required, these increases will be processed directly by HR Records.	Step Progression

Step

Action

Follow	the steps below to access Self Service Transactions on the HR Tab:
1	Available of the second
2	Click <b>Pay Rate Change Requests.</b> Self Service Status Indicator will default as: Awaiting HR Processing. This can be changed by clicking

			Awaiting HR Processing			
			Denied by HR			
			Errors Encountered			
			Processed by HR			
			<b>O</b>			
	Pay Rate Change Reg	iests				
	Fay Rate Change Requests					
Enter any information you have and click Search. Leave fields blank for a list of all values.						
	Find an Existing Value					
	Limit the number of results to (	p to 300): 300				
	Empl ID:	begins with V				
	Empl Record:					
	*Effective Date:		31			
	Effective Sequence:	begins with				
	Name:	begins with				
	Department:	begins with V				
	Pay Group:	begins with V				
	Self Service Status Indicato	= V Awaiting HR P	rocessing V			
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2	Caraab					
3	Click search to v	ew all pending Pay I	Rate Change Request			
	transactions. Click	on any of the Heade	rs to change the sort. You			
	may wish to click o	, the <b>Department</b> I	Description to sort by your			
	nortfolio					
	Click the transpetie	link you wish to se				
		i link you wish to pr	ULESS.			


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	Current Compensation Information
	A Low Place Non Union Mamt Professional
	Salary Plan: Non onion Mgnit Professional
	Annual Rate: \$110139.12 Hourly Rate \$60.516
	Annual Rate is calculated based on standard weekly hours X hourly rate and may not be accurate for employees whose hours
	vary each week
	Requested Pay Rate Change
	Change Percent: 3.200
	Annual Rate: \$113663.57 Hourly Rate: \$62.453
	Note: If Add/Remove Addtal Duty Pay is being removed, the Change
	Percent will be a "-".
	Requested Pay Rate Change
	Has a PA been completed?
	Change Percent: -8.000
	Annual Rate: \$101328.50 Hourly Rate: \$55.675
5	Pay Rate Change Approval Chain is displayed at the bottom of the page, including the approval status, and date/time for each completed approval. HR Mandatory Approval Level for Pay Rate Change is: 2 levels of approval, with a minimum of a Manager. Click View/Hide Comments to view approver's added comments.
	<b>Important Note</b> : The following condition will prevent the Standard approval levels in the workflow chain from being met and further action is required:
	<b>Pay Rate Change</b> - If the workflow chain passes up through two levels (i.e. Supervisor – Superintendent) and the last level is a Manager position that is vacant the transaction will workflow directly to HR Worklist; not meeting the required level of approval 2 levels at least a Manager.
	<b>Workaround</b> - HR Records will be required to notify the Department that approval level has not been met and require an approval from

	either another Manager or Director via email. HR Records can copy							
	the email approval in the comments section (Step 8) of the							
	Transaction.							
	Pay Rate Change Approval Chain							
	Departmental Approval							
	Self Approved       Self Approved       Approved         Debbie Director       Debbie Director       Gary GM         Workflow Request Initiator       06/22/15 - 08:23 AM       06/22/15 - 08:23 AM							
	Gary GM-E121398 at 06/22/15 - 08:24 AM Would like a copy of the PA							
6	Click Go To Job, which will open a new window and take you to the employee's <b>Job Data – Work Location</b> for you to manually process the transaction in PeopleSoft.							
	Administrator Actions							
	Administrator Actions							
	Current Transaction Status: Awaiting HR Processing							
	<ul> <li>Select this option to approve the transaction. You will be required to</li> </ul>							
	manually update the database.							
	Select this option to cancel the transaction.							
	Save							
	Go To Job							
7	Once Job Data has been updated, return to the Transaction Status							
	Request window.							
Q	Administrator Processing will display your name. Enter your							
0	Initials to time stamp transaction and comments as required.							
	Note: any comments entered here will be visible by all Approvers in							
	the approval chain including Finance Payroll and FAII staff.							

	Administrator Pro	cessing
	Administrator:	Tracey Jaremey
	Comment:	<u>م</u>
9	If routing Worklist U and ":" (i.	to COH Payroll Worklist click $\succeq$ to select COH Payroll Jser and add required instructions prefixed with your Initials e. TJ:).
	Note: inst Pavroll.	ructions entered are only visible to HR Records and Finance
	,	COH Benefits Worklist User
	Route to other Gr	oups COH Payroll Worklist User Last
	*Route to:	
	*Instructions:	
10	Administ	rator Actions has two options for you to select:
	Approve HR and ge access that	-will update the Current Transaction Status to Processed by enerate an email to the Initiator and FAII with DeptID at the transaction is complete.
	<b>Cancel</b> -w generate	ill update the Current Status to Cancelled by HR and an email to <b>only</b> the Initiator.
	Both actic ( <i>currently</i>	ons will remove the transaction from the HR Worklist we are not using).

	Administrator Actions
	<ul> <li>Current Transaction Status: Awaiting HR Processing</li> <li>Select this option to approve the transaction. You will be required to manually update the database.</li> <li>Select this option to cancel the transaction.</li> </ul>
	Save Go To Job
11	Click Save to complete the transaction (generate email, update status and remove from HR Records Worklist). You will receive a warning message reminding you to update Job Data accordingly. Select Yes to continue. Note: this warning will only appear with the Approve option.
12	Click ok you will be taken back to the completed transaction
	Employee Pay Rate Change Reque Save Confirmation
13	The transaction is now complete and saved with your instructions to COH Finance and Comments.

Route to other Groups         Role Name:       COH Payroll We HR Records and Instructions:         Pay Rate Change Approval         Instructions:         Pay Rate Change Approval         Self Approved         Departmental Approval         Self Approved         Debbie Director         Workflow Request Initiator 06/22/15 - 08:23 AM         Comments         Tracey Jaremey-TJAREI         Administrator Approved.         Gary GM-E121398 at 06/         Would like a copy of the P         Administrator Actions         Current Transaction Status:         Go To Job         Return to Search       Terevious in Lit         Note: Next in List will	rklist User I Finance Payroll to decide on the pro Chain → Self Approved → Debbie Director Approval Step #1 06/22/15 - 08:23 AM VEY at 06/22/15 - 08:29 AM Jupdated (note HR Records to detern A Vertice of the proved Approved Step #1 06/22/15 - 08:23 AM Vertice of the proved Approved Step #1 06/22/15 - 08:23 AM A	End       First         roper format for instructions         Image: Comparison of the propert of the propert format for         Image: Comparison of the proper format for
Role Name:       COH Payroll We HR Records and Instructions:         Pay Rate Change Approval         Instructions:         Pay Rate Change Approval         Image: Self Approved         Departmental Approval         Self Approved         Pebbie Director         Workflow Request Initiator         06/22/15 - 08:23 AM         Comments         Tracey Jaremey-TJARE!         Administrator Approved-T         Comments         Gary GM-E121398 at 06/         Would like a copy of the P         Administrator Actions         Current Transaction Status:         Go To Job         Return to Search         Terevious in Lit         Note: Next in List will	A Finance Payroll to decide on the pro Chain Self Approved Pebbie Director Approval Step #1 06/22/15 - 08:23 AM Jupdated (note HR Records to detern 22/15 - 08:24 AM A Yrocessed by HR Yrocessed by HR	Proper format for instructions
Pay Rate Change Approval         ✓ :Approved         Departmental Approval         Self Approved         ✓ Debbie Director         Workflow Request Initiator         O6/22/15 - 08:23 AM         Comments         Tracey Jaremey-TJAREI         Administrator Approved-Tictor         Comments         Gary GM-E121398 at 06/         Would like a copy of the P         Administrator Actions         Current Transaction Status:         Go To Job         Charles Return to Search         Terevious in Lit         Note: Next in List will	Chain Self Approved Pebbie Director Approval Step #1 06/22/15 - 08:23 AM MEY at 06/22/15 - 08:29 AM Updated (note HR Records to detern 22/15 - 08:24 AM A Processed by HR	Proved
<ul> <li>C :Approved</li> <li>Departmental Approval</li> <li>Self Approved</li> <li>Debbie Director</li> <li>Workflow Request Initiator</li> <li>06/22/15 - 08:23 AM</li> <li>Comments</li> <li>Tracey Jaremey-TJARE[ Administrator Approved-T.</li> <li>Comments</li> <li>Gary GM-E121398 at 06/ Would like a copy of the P</li> <li>Administrator Actions</li> <li>Current Transaction Status:</li> <li>Go To Job</li> <li>Return to Search</li> <li>Tervious in Lit</li> <li>Note: Next in List will</li> </ul>	Self Approved Debbie Director Approval Step #1 06/22/15 - 08:23 AM MEY at 06/22/15 - 08:29 AM Jupdated (note HR Records to deter 22/15 - 08:24 AM A	← View/Hide Comments Approved Approval Step #2 06/22/15 - 08:24 AM rmine the proper format for
Departmental Approval Self Approved  Pebbie Director Workflow Request Initiator 06/22/15 - 08:23 AM Comments Tracey Jaremey-TJAREI Administrator Approved-T. Comments) Gary GM-E121398 at 06/ Would like a copy of the P Administrator Actions Current Transaction Status: Go To Job Create Search Terevious in List Note: Next in List will	Self Approved → Debbie Director Approval Step #1 06/22/15 - 08:23 AM MEY at 06/22/15 - 08:29 AM Jupdated (note HR Records to deter 22/15 - 08:24 AM A Processed by HR	Approved Approval Step #2 06/22/15 - 08:24 AM rmine the proper format for
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Current Transaction Status: <u>Go To Job</u> Return to Search <u>T</u> Previous in Li Note: Next in List will	Processed by HR	
Return to Search the Previous in Li Note: Next in List will		
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Workflow will generat -to the initiator once either processed it or -to all FAII with Dept1 processed the transac email is generated to	e an email at variou HR Records has rev cancelled it; D access to the em tion. If HR Records FAII's.	us stages: viewed the transactior pployee once HR Reco s cancels the transact

# **RECORDS TRANSFER NOT POSTED REQUESTS:**

## Purpose:

The Self Service Transaction Page is for HR Records staff to process (approve/cancel) or view a Transfer Employee Request initiated through Manager Self Service. Once HR Records saves the transaction, it can be routed to COH Payroll Worklist with instructions for further processing if required.

## Important:

Approving a transaction off the Transaction Request page does not automatically update PeopleSoft; you must manually process the transaction in PeopleSoft. Once a transaction is marked as approved or cancelled by HR Records it will be removed from the HR Records Worklist and an automated email will be generated to the Initiator and FA II that the transaction has been processed/cancelled. Refer to HR Process documents for direction for Transfer Employee reasons not listed below.

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
Departmental Internal process for Employee's in Union – ONA/Fire/OPSEU or Hamilton Public Library	Internal Process- ONA/Fire/OPSUE/HPL
Employee is returning to their previous job	Return to Previous Job
Employee is in a Permanent Dual Classification (Recreation in Winter and Parks in Summer)	Seasonal
Employee is covering another position temporarily for less than 1 month (max 4 weeks) as a result of vacation, union business or sick	Short Term Coverage
A Probationary Firefighter has completed training and moving to a station	Training Complete-Fire
It is a temporary departmental Internal posting process for Employee's in Hamilton Public Library	Under120(Library)
ATU employee has completed their training and needs to be assigned to a home Bus Operator position	Probation Complete-ATU

Follow the steps below to access Self Service Transactions on the **HR Tab**:

JUCP		Action	
1	Navigation: HR Tab>Se	f Service Transactions	
_			
	Hamilton Favorites Main,Menu	Home Worklist Ac	Id to Favorites Sign ou
	Personalize Content   Layout		Help
	Menu 😌 – 🗙 Search:	HR Self Service Home Page	
	Saff Sanica	Transfer Employee Requests Pay Rate Change Requests Torm/Rative Requests	d transfers from Recruiting.
	Manager Self Service     Workforce Administration	Manage Hire Requests     Manage Hire Requests	
	<ul> <li>▷ Benefits</li> <li>▷ Compensation</li> </ul>		
	Time Reporting     Attendance		
	Payroll for North America     Workforce Development     Organizational Development		
	Set Up HRMS     Tree Manager		
	Reporting Tools     PeopleTools		
	COH Custom Change My Password		
	– My Personalizations – My Dictionary		
2	Click Transfer Employ	ee Requests Self Service Status In	dicator
2	will default ac Awaiting	HD processing This can be changed	by
	will default as: Awaiting	TR Processing. This can be changed	Dy
	clicking 🗸		
	Transfer Employee Re	quests	
	Enter any information you have a	and click Search. Leave fields blank for a list of all va	lues.
	Find an Existing Value		
	Limit the number of results to (up	p to 300): 300	
	Limit the number of results to (up Empl ID:	begins with	
	Limit the number of results to (up Empl ID: Empl Record:	begins with	
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3	Click Search of the Heade <b>Departmen</b> Click the tra	to vie ers to ch t Descr nsactior	ew all pendin nange the so r <b>iption</b> to so n link you wi	ng Transfe ort. You m ort by your sh to proc	r transa ay wish portfo ess.	actions. Cl n to click o lio.	ick on any n the
	Search Clear Basic S	iearch 🛛 🔐 Save Se	arch Criteria				
	earch Results						
	Tew All	Title shires			Devi	Odd Llaws	First 1-6 of 6 Lat
	mpl ID         Compl         Threetive           52750         1         06/01/2015           52750         1         06/01/2015           08938         0         06/08/2015           13998         0         05/15/2015           14108         0         06/15/2015           19745         1         07/01/2015	Effective Sequence 1 2 1 1 1 1 1 1 1	Name         Department           Donald Duck         811010           Donald Duck         806132           Martha Chung         720001           Ryan Wheeler         632010           Shannon Crain         632020           Lynn Hampson         632010	Department Description P&ED-ECDev-BusDev-Inve P&ED-PrkngByLw-LIC-Lotte P&ED-T&C-HRM-CapPrjMc CES-Lodge-WL-ResidentSi CES-Lodge-WL-ResidentSi CES-Lodge-WL-ResidentSi	stmntini SAL eries SAL am WAL ocServ WAL rsing WAL ocServ WAL	Sta Hours         Sta Hours           From         To           35         35           35         35           01         01           01         01           35         35           35         35	HR Process HR Process HR Process HR Process HR Process HR Process HR Process HR Process HR Process
4	The Transfer	- Employ	vee page wil	l display,	review	the inform	ation to
•	ensure accu	rate. No	te the Requ	esters Cor	nments	/Instructio	ons.
						,	
	Eric Employee (ID:1	18575 Dodt	t: 0)			T6 the a m	
	Review the details of the r	equested transa	r. 0) ction and then manually p	rocess the transaction	ı in Job Data.	Transfe	r is Short
	Once all processing is con assign to a worklist then p Transfer Details	mplete, if require ress Save to clo	d, enter instructions for ar se this transaction.	y post transaction up	dates and	Term C (VAC) <b>t</b>	overage <b>he End</b>
	Transfer Date:	06/01/2015				Date w	ill display
	Reason for Transfer:	VAC Short T	erm Coverage	End Date: 06/08	5/2015		
	Workflow Status:	Awaiting HR Pr	rocessing				
	Effective Sequence:	1					
	Requester:	Sally Supervise	or				
	Requester Comments/	Instructions					
	comment: Eric	is filling in temp	orarily for Donald Duck				
	Transfer Information						
		Current Info			New Info		
	Position:	00007384	File/Admin Clk		00007383	Historical Int-Griffi	n
	Department:	720150	P&ED-T&C-HRM-Field	IcoteMus	720140	P&ED-T&C-HRM	GriffinHouse
	Location Code:	BLD040	Fieldcote Museum		BLD041	Griffin House	
	Job Code:	636	File/Admin Clk		6452	Historical Interpret	er
	Reg/Temp:	Regular	Empl Class:		Regular		
	Full/Part Time:	Full-Time			Part-Time		
	Standard Hours:	35.00			0.01		
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	Transfer Information		
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	Job Code:	636	
	Reg/Temp:	Regular	Empl Class:
	Full/Part Time:	Full-Time	
	Standard Hours:	25.00	
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5	Transfer Appr including the approval. HR approval, wit approver's ac Transfer Appro Compartment Self Appr Sally St Workflo 06/17/1 Comment Mike M Happrov	roval Ch approva Mandat h a min Ided cor oval Chai oval Chai ved al Approval oved upervisor w Request In 5 - 03:44 PM s lanager-E04 re	hain is displayed at the bottom of the page, al status, and date/time for each completed cory Approval Level for Transfer is: 1 level of imum of a Manager. Click view/Hide Comment to view mments.
6	Click Go To Job employee's J process the tr Administrator Action Current Transact O Select this manually O Select this Save	, which <b>Job Dat</b> ransactions tion Status: s option t update th s option t	will open a new window and take you to the <b>a</b> – <b>Work Location</b> for you to manually on in PeopleSoft. Awaiting HR Processing o approve the transaction. You will be required to e database. o cancel the transaction.

7	Once Job Data has been updated, return to the <b>Transaction Status Request</b> window.
8	<b>Administer Processing</b> will display your name. Enter your Initials to time stamp transaction and comments as required.
	the approval chain including Finance Payroll and FAII staff.
	Administrator Processing
	Administrator:     Tracey Jaremey       Comment:     Image: Comment in the second sec
9	If routing to COH Payroll Worklist click 🞽 to select <b>COH Payroll</b>
	<b>Worklist User</b> and add required instructions prefixed with your Initials and ":" (i.e. TJ:).
	Note: these comments are only visible to HR Records and Finance Payroll.
	Route to other Groups
	*Route to:
	*Instructions:
10	Administrator Actions has two options for you to select:
	<b>Approve-</b> will update the Current Transaction Status to Processed by HR and generate an email to the Initiator and FAII with DeptID access that the transaction is complete.
	<b>Cancel</b> -will update the Current Status to Cancelled by HR and generate an email to <b>only</b> the Initiator.
	Both actions will remove the transaction from the HR Worklist ( <i>currently we are not using</i> ).

e 3



# **RECORDS REQUEST & RETURN FROM UNPAID LOA >30 DAYS:**

#### Purpose:

To provide HR Records with a process to place an employee on an Unpaid Leave of Absence that is greater than 30 days and to return employee once their leave is complete.

#### Important:

If the employee's request is denied the Department is required to send the denied form to HR Records for filing.

IF	THEN
Leave of Absence is greater than 1 month and	Employee completes
includes the following:	Leave of Absence Request
Personal Unpaid Leaves	Form. In the case where
Professional Development	the employee due to
Maternity, Parental, or Adoption Leave	sudden absence cannot
Military Leave	complete the form, the
Family Medical Compassionate Care Leave	department will complete
Critically Ill Child Care Leave	on the employee's behalf
Organ Donor Leave	and approval obtained
Crime-related Child Death/Disappearance	and the form forwarded to
Leave	HR Records.
Family Caregiver Leave	

## **Procedure:**

Follow the steps below to put an employee on a Paid/Unpaid LOA that is greater than 30 days

Step	Action
1	Navigate: Main Menu>Workforce Administration>Job
	Information>Job Data – enter:
	Effective Date, Action, Reason and Expected Return Date and
	Save

	Mark Location	action Job Labor Payro	Il Salan Plan Co	monsation	🖆 New Window 🕜 Help 🛛 🗹 Customizi
				npensation	
	Eric Employee		Empl ID: Empl Record:	118575	
	Work Location		Empiricoord.	0	Find First 1 of 2 Last
	*Effective Date:	07/03/2015	)		
	Effective Sequence:	0	*Action:	Paid Leave of Absence	$\overline{}$
	HR Status:	Active	Reason:	Maternity	$\checkmark$
	Payroll Status:	Leave With Pay	*Job Indicator:	Primary Job	~
					Current
	Position Number:		File/Admin Clk		
		Use Position Data	Job Opening II	):	
	Position Entry Date:	06/09/2014	Record		
	*Regulatory Region:	CAN	Canada		
	Company:	COH	City of Hamilton		
	*Business Unit:	HAMLT	City of Hamilton		
	*Department:	720150	P&ED-T&C-HRM-Fi	eldcoteMus	
	Department Entry Date:	06/09/2014			
	*Location:	BLD040	Fieldcote Museum		
	Establishment ID:				Date Created: 07/03/2015
	Last Start Date:	07/03/2013			
	Expected Job End Date:	B1			
	Expected Return Date:		Override Last [	Date Worked	
	Last Data Worked	07/00/0045			
2	Navigate: M	1ain Menu>A	Attendance	>Attendan	re
_	Information		heancas		
2	Information		absences	Search	
2	Enter Emplic	d of employe	e and clicl	< Ocaron	
	Add/View Abs	ences			
	Enter any informa	ation you have and	I click Search T	eave fields blan	k for a list of all values
	Enter any morne	aton you have and	Control Control 2	cave nerao bian	
	Find on Evision	- 1/-1			
	Find an Existing	g value			
	Limit the number	of results to (up to	o 300): 300		
	Empl ID: b	egins with 🔨 118	3575		
	Empl Decords -				
	Empl Record: =				
	Empl Record: = Name: b	egins with 🗸			
	Empl Record: = Name: b	egins with 🗸			
	Empl Record: = Name: b Last Name: b	egins with V			
	Empl Record: = Name: b Last Name: b Include Histo	egins with V egins with V	istory 🗌 Cas	e Sensitive	
	Empl Record: = Name: b Last Name: b Include Histo	egins with V egins with V	istory 🗌 Cas	e Sensitive	
	Empl Record: = Name: b Last Name: b Include Histo	egins with ✓ egins with ✓ ory ✓ Correct Hi Clear Basic Se	istory 🗌 Cas	e Sensitive Search Criteria	
	Empl Record: = Name: b Last Name: b Include Histo	egins with ✓ egins with ✓ ory ✓ Correct Hi Clear <u>Basic Se</u>	istory 🗌 Cas arch 👸 Save	e Sensitive Search Criteria	

to insert a new ro - first working d - last working day you are returning	ow and enter the ay employee is of leave, leave the employee	e follow off blank t	ving fields: to enter end da
<b>ype</b> – type of leav <b>ode</b> – if military,	/e (see chart bel enter code 06	ow)	
dule – defaults ir	1 OR select appli	cable s	schedule OR
	2 III WEEK I Q Z	(11011 5	lanuaru)
EMP	ID:	118575	Empl Record:
		Find   Vi	ew All First   2 of 3   ▲
07/03/2015	Duration:		Cat Drive Elizibility E
	Duration:		Get Prior Eligibility P
Maternity Leave			Link Prior Absenc
	Occasion:		General Empl Info
S7	Daily Hours:	Fliaibility:	
	regul/ Duo Dato	Ligion.j.	Penort Date: 07/21/2
	Tecvu/ Due Date		
Mon Tues	Wed Thurs	Fri	Sat Sun
7.00 7.00	7.00 7.00	7.00	
Ditto 7.00 7.00	7.00 7.00	7.00	
urn to Search			
Descr	iption		
Compassionate C	Care Leave		
Leave Critically II	ll Childcare		
Leave Crime Child	d Death		
Disappearance	<u> </u>	_	
Disappearance Leave Family Car	egiver		
Disappearance Leave Family Car Leave Organ Don	regiver Ior		
Disappearance Leave Family Car Leave Organ Don Abs with perm no	regiver Ior Ion pd >1 month		
Disappearance Leave Family Car Leave Organ Don Abs with perm no	regiver for on pd >1 month		
Disappearance Leave Family Car Leave Organ Don Abs with perm no Military Leave no Maternity Leave	regiver or on pd >1 month n pd>1 month		
	to insert a new ro - first working day vou are returning ype – type of leav ode – if military, edule – defaults in ter work schedule EMP (7/03/2015) Maternity Leave S7 Doctor note S7 Doctor note S7 Doctor note S7 Doctor note S7 Doctor note S7 Doctor note S7 Doctor note S7 Doctor note Descr Compassionate C Leave Critically I Leave Crime Chil	to insert a new row and enter the a – first working day employee is of last working day of leave, leave you are returning the employee ype – type of leave (see chart belonde – if military, enter code 06 edule – defaults in OR select applinter work schedule in Week 1 & 2 EMP ID:	to insert a new row and enter the follow a – first working day of leave, leave blank to you are returning the employee ype – type of leave (see chart below) ode – if military, enter code 06 solule – defaults in OR select applicable so ther work schedule in Week 1 & 2 (non soluter) EMP ID: 118575 Find Vi 07/03/2015 Duration: Maternity Leave Occasion: 57 Daily Hours: Eligibility: Doctor note recvd/ Due Date Mon Tues Wed Thurs Fri 7.00 7.00 7.00 7.00 7.00 Ditto 7.00 7.00 7.00 7.00 Description Compassionate Care Leave Leave Critically III Childcare Leave Crime Child Death

Retur	n from Leave of Absence
1	HR Records run query: N_HR_EXPECTEDRETURNDT_BY_MONTH with an effective date one month in advance.
2	Send query listing to department to confirm employee return dates
3	If return date is changing update "Expected Return Date"; If date is correct: Return Employee on Job Data and update Attendance by entering the end date on the absence and clicking ave.
	End of Procedure

## **RECORDS POSITION DATA CHANGE REQUEST:**

#### **Purpose:**

The Self Service Transaction Page is for HR Records staff to process Position Data Changes (**New, Update or Inactivate**) initiated through Admin Self Service. Once HR Records approves the transaction, and if required, it can be routed to COH Payroll Worklist with instructions.

#### Important:

Only FAII will be able to initiate Position Data Changes (and HPL HR, HR Compensation).

Approving a transaction off the Position Data Request page does not automatically update PeopleSoft; you must manually process the transaction in PeopleSoft. Once a transaction is marked as approved or cancelled by HR Records it will be removed from the HR Records Worklist and an automated email will be generated to the Initiator and FA II that the transaction has been processed/cancelled.

IF	THEN use reason
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 Head Count	Update Position
Changing Budgeted/Unbudgeted	Update Position
Changing Regular/Temporary	Update Position
Changing Part Time/Full Time	Update Position
Inactivating a Position	Inactivate Position

# Note: For Title changes and the addition of brand new positions, Departments should contact HR Compensation section.

# **Procedure:**

Follow the steps below to access Self Service Transactions on the **HR Tab** 

Step	Action
1	Navigation: HR Tab>Self Service Transactions
2	Click <b>Position Data Change Request.</b> Self Service Status Indicator will default as: Awaiting HR Processing. This can be changed by clicking V

	Position Change Requisition Sector Se	Image: Sector
	Posn #/Request ID:	begins with V
	Effective Secuence:	
	Position Title	begins with V
	Department:	begins with V
	Self Service Status Indicator	= V Awaiting HR Processing V
	Case Sensitive	
	Search Clear Basi	Search Save Search Criteria
3	Click Search to vi transactions. Click of the transaction link	ew all pending Position Data Request n any of the Headers to change the sort. Click you wish to process

	Self Service Status Indicato	r: = V Awaiting HR Processin	g V
	Search Clear Bas	ic Search 🔎 Save Search Criteria	
	Search Results View All		First 🕢 1.4 of
	Pesn #/Request ID *Effective 00001514 05/25/201	Date Effective Sequence Request Type	Position Title         Department         Department         Department           Financial Asst 1         811105         P&ED-CorpServ-CT-Finance&Admin HR Process
	00001523 05/25/2013 00001526 05/25/2013	1         Update           1         Update	GIS Planning Techn 814020 P&ED-Plng-ComPlong&Dsgn-GIS HR Process GIS Planning Techn 814065 P&ED-Plng-PolPingZonBL-OpRfrm HR Process
	00007384 06/22/201	2 <u>1</u> <u>Update</u>	File/Admin Cik 1/20150 P&EU-1&C-HRM-FieldcoteMUS HR Process
4	The Position [	Data Request page	e will display, review the information
	ensure the in	formation is correct	ct. Note, the <b>Requesters</b>
	Comments/	Instructions. Not	te: for Update Position Changes <b>only</b>
	the information	on that is changing nation has change	g is required; in this example the
	Select Position Red	uest Type	
	New Position	Update Position	Inactivate Position
	Select Position to L	Jpdate	
	Position Number:	00007384	
	Effective Date:	06/22/2015	
	Status:	Active	
	Workflow Status:	Awaiting HR Processing	
	Sequence:	1	
	Requester ID:	Daffy Duck	
	Requester Comme	nts/Instructions	
	Comment:	This is no longer a budgeted	position
	Position Request D	etails	
	Position Title:		
	Job Code:		
	Department:		
	Location Code:		
	Reports To:		
	Union Code:		
	Standard Hours:	(	Budget Information
	Reg/Temp:		Budgeted Position
	Full/Part:	$\sim$	Head Count: 99
	Salary Plan:		FTE: 0.000000

5	If routing to COH Payroll Worklist click $\checkmark$ to select <b>COH Payroll</b> <b>Worklist</b> User and add required instructions prefixed with your Initials and ":" (i.e. TJ:). <i>Note: these comments are only visible to HR Records and Finance</i>		
	Route to other Groups		
	*Route to:		
	*Instructions:		
6	Position Data Approval Chain – as there is no approval required for Position Data Changes only the name of the initiator (FAII/HR Comp/HR HPL) and date/time will display at the bottom of Page. <b>Position Change Approval Chain</b>		
	Departmental Approval           Self Approved           Daffy Duck           Workflow Request Initiator           06/22/15 - 10:31 AM		
7	<b>Administrator Processing</b> will display your name. Enter your Initials to time stamp transaction and comments as required ( <i>For</i> <i>New Positions, enter the Position Number in the comments section</i> ).		
	Note: any comments entered here will be visible to Finance Payroll and FAII/Admin support staff.		
	Administrator Processing		
	Administrator: Tracey Jaremey Comment:		

8	Administrator Actions has two options for you to select: Approve-will update the Current Transaction Status to Processed by HR and generate an email to the Initiator and F&A Support Staff that the transaction is complete. Note: do not select this action until you have click Go To Position Data , which will open a new window and take you to Position Data for you to manually updated.				
	generate an email to <b>only</b> the Initiator.				
	Both actions will remove the transaction from the HR Worklist ( <i>currently we are not using</i> ).				
	Administrator Actions				
	Current Transaction Status: Awaiting HR Processing				
	<ul> <li>Select this option to approve the transaction. You will be required to manually update the database.</li> <li>Select this option to cancel the transaction.</li> </ul>				
	Save Go To Job				
9	Click Save to complete the transaction (generate email, update status and remove from HR Records Worklist). You will receive a warning message reminding you to update Position Data accordingly. Select Yes to continue.				
	<i>Note: this warning will <b>only</b> appear with the Approve option.</i>				
	Message 🔀				
	Approval Processing (6605,610) Selecting "Yes" will change the status to "Processed by HR". You will then be required to manually update the database with this transaction. Selecting "No" will cancel your approval and the status will remain "Awaiting HR Processing."				
	Yes No				
10	Click ok you will be taken back to the completed transaction				

	Position Data Change Request         Save Confirmation         ✓         The Save was successful.
11	The transaction is now complete and saved. Note the Current Transaction Status has updated to Processed by HR. Position Change Approval Chain
	Administrator Processing         Administrator:       Tracey Jaremey         Comment:       Administrator Approved-I updated the changes to the PDC         Administrator Actions       Image: Current Transaction Status:         Processed by HR       Go To Position Data
12	Workflow will generate an email at various stages: -to the initiator (which will be FA II staff) once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the position once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's. End of procedure.

## **RECORDS TERMINATION/RETIRE REQUESTS:**

## Purpose:

The Self Service Transaction Page is for HR Records staff to process (approve/cancel) or view a Term/Retire Request initiated through Manager Self Service. Once HR Records saves the transaction, it can be routed to COH Payroll Worklist with instructions for further processing if required.

## Important:

Approving a transaction off the Transaction Request page does not automatically update PeopleSoft; you must manually process the transaction in PeopleSoft. Once a transaction is marked as approved or cancelled by HR Records it will be removed from the HR Records Worklist and an automated email will be generated to the Initiator and FA II that the transaction has been processed/cancelled. Refer to HR Process documents for direction for Term/Retire reasons not listed below.

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's has completed their	Dismissal-EndTempEmployment
temporary employment with the	
City of Hamilton	
Employee is voluntarily resigning	Resignation
from the City of Hamilton other than	
the 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 access Self Service Transactions on the **HR Tab**:

Step	Action
1 1	Action Action
2	Click <b>Term/Retire Requests</b> . Self Service Status Indicator will default as: Awaiting HR Processing. This can be changed by clicking

					Av Ca De Er In Pr	vaiting HR ancelled by enied rors Encou Approval F ocessed b	Processi / HR untered Process by HR	ng
				C	3			
	Pay Rate Change Re	equests						
	Enter any information you ha	- ave and click Search. L	eave field	ls blank for a list of all val	ues.			
	Find an Existing Value							
	Limit the number of results t Empl ID: Empl Record: "Effective Date:	o (up to 300): 300 begins with V		Þ				
	Effective Sequence: Name:	begins with						
	Last Name:	begins with V						
	Department: Pay Group:	begins with V		Q				
		tor: = V	Awaiting L	IR Processing	$\checkmark$			
	Self Service Status Indica		-waiting r	inter recording				
	Self Service Status Indica Search Clear	Basic Search 🛃 Save	e Search	Criteria				
	Self Service Status Indica	Basic Search 🛃 Save	e Search	Criteria				
3	Click Search to Click on any of th Headers to chang Department De Click the transact	view all pend ne Headers to ge the sort. Y scription to tion link you w	ding T chan 'ou m sort t	Criteria Ferm/Retire Re age the sort. C ay wish to clic by your portfol co process.	eque lick k o io.	est tr on a n the	ansa ny o	ctions. f the
3	Click Search to Click on any of th Headers to chang <b>Department De</b> Click the transact	view all pend the Headers to ge the sort. Y scription to tion link you w	ding T chan chan cou m sort t wish t	Criteria Term/Retire Re age the sort. C ay wish to clic by your portfol co process.	eque lick k o io.	est tr on a n the	ansa ny o	ctions. f the
3	Click Search to Click on any of th Headers to chang Department De Click the transact Self Service Status Indicator:	view all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing	ding T chan 'ou m sort t wish t	Criteria Ferm/Retire Re age the sort. C ay wish to clic by your portfol to process.	eque lick k o io.	est tr on a n the	ansa ny o	ctions. f the
3	Self Service Status Indica         Search       Clear       E         Click       Search       to         Click on any of th       Headers to change         Department       De         Click the transact         Self Service Status Indicator:       Image: Clear         Search       Clear         Basic Search       Image: Clear         Search       Clear         Basic Search       Image: Clear         Search       Clear         Basic Search       Image: Clear	view all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing Save Search Criteria	ding T chan chan cou m sort t wish t	Criteria Cerm/Retire Re age the sort. C ay wish to clic by your portfol co process.	eque lick k o io.	est tr on a n the	ansa ny o	ctions. f the
3	Click Search to Click on any of th Headers to chang Department De Click the transact Self Service Status Indicator:	view all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing Save Search Criteria	ding T chan 'ou m sort t wish t	Criteria Ferm/Retire Re age the sort. C ay wish to clic by your portfol to process.	eque lick k o io.	est tr on a n the	ansa ny o	ctions. f the
3	Self Service Status Indica Search Clear E Click Search to Click on any of th Headers to chang Department De Click the transact Self Service Status Indicator: = ~ Search Clear Basic Search Search Results View All Empl Empl Effective Effective Sequence	view all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing Save Search Criteria	ding T chan 'ou m sort t wish t	Criteria Term/Retire Re age the sort. C ay wish to clic by your portfol co process.	eque lick k o io.	est tr on a n the std Hours From	ansa ny o s s std Hours to	ctions. f the
3	Self Service Status Indicators         Search       Clear         Click       Search       to         Click on any of th       Headers to change         Department De       Click the transact         Self Service Status Indicator:	View all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing Save Search Criteria	bepartment 2 Search 2 Chan 2 Chan	Criteria Ceriteria Con process. Ceriteria Con concess. Ceriteria Concessiona Concessiona Ceriteria Concessiona Concess	Pay Group WAI	est tr on a n the std Hours From 25	ansa ny o Std Hours To 25	ctions. f the <sup>1/28 of 28</sup> <u>self Service Sta</u> Indicator HR Process
3	Self Service Status Indica         Search       Clear       p         Click       Search       to         Click on any of th       Headers to change         Department De       Click the transact         Self Service Status Indicator:       =       v         Search       Clear       Basic Search       @         Meeord       Date       Sequence       O15155 0       O0001/2015 1         O15155 0       O5/20/2015 1       O5/20/2015 1       O       O11641 0       O5/20/2015 1	View all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing Save Search Criteria	bepartment population popula	Criteria Criteria Cerm/Retire Read age the sort. C bay wish to clic by your portfol co process. Department Description P&ED-T&C-HRM-HeraticeFacCap CityMgr-HR-COD-Compensation CorpServ-IT-BusinessApplicatn	Pay Group WAL SAL	est tr on a n the std Hours From 35 35	ansa ny o' S Std Hours Io 35 35	ctions. f the f the self service Sta Indicator HR Process HR Process
3	Self Service Status Indica Search Clear g Click Search to Click on any of th Headers to chang Department De Click the transact Self Service Status Indicator: = v Search Clear Basic Search Search Clear Basic Search Search Results View All Empl Empl Effective Effective Bener Sequence O15155 0 0050472015 1 01641 0 05/28/2015 1 115840 0 05/28/2015 1	View all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing Save Search Criteria	bepartment Department Department 2000 m 2000 m 20050 250049 200540 250044	Criteria Criteria Cerm/Retire Read age the sort. C bay wish to clic by your portfol co process. Cepartment Description P&ED-T&C-HRM-HeratigeFacCap CityMgr-HR-LOD-Compensation CorpServ-IT-BusinesSApplicath CityMgr-HR-LR-LabourRelation	Pay Group WAL SAL SAL SAL	est tr on a n the state From 04 35 35 35 35	ansa ny o' Std Hours 35 35 35 35	ctions. f the 128 of 28 self Service Sta Indicator HR Process HR Process HR Process HR Process
3	Self Service Status Indica Search Clear g Click Search to Click on any of th Headers to chang Department De Click the transact Self Service Status Indicator: = Search Clear Basic Search Search Clear Basic Search Search Results View All Empl Empl Effective Effective Effective Sequence O15155 0 05/27/2015 1 011641 0 05/28/2015 1 111888 0 05/28/2015 1	View all pend ne Headers to ge the sort. Y scription to tion link you w Awaiting HR Processing Save Search Criteria	bepartment point in the search point in the searc	Criteria Criteria Cerm/Retire Read age the sort. C bay wish to clic by your portfol co process. Department Description P&ED-T&C-HRM-HeratigeFacCap CityMgr-HR-COD-Compensation CorpServ-IT-BusinessApplicatn CityMgr-HR-LabourRelation CorpServ-IT-Infastructure&Opr P&ED-T&C-Director'sOffice-Admn	Pay Group WAI SAL SAL SAL SAL	est tr on a n the <u>std Hours</u> From <u>41</u> 35 35 35 35 35	ansa ny o' s <u>std Hours</u> to <u>of</u> 35 35 35 35 35	ctions. f the self service Sta Indicator HR Process HR Process HR Process HR Process HR Process HR Process HR Process

4	The Termina information Comments/	ation/Re ensure Instructi	tirement Request page will display, review the the information is correct. Note the Requesters ions.	
	Termination/Retireme	nt Information		
	Separation Type:	TER		
	Termination Date:	08/15/2015		
	Reason for Leaving:	RET Resig	gnation-Return to School	
	Eligible for Rehire:	Yes		
	.ast Day Paid:	08/10/2015	Last Day Paid is Last Day the Employee worked or had a paid absence	
	Norkflow Status:	Awaiting HR	Processing	
	Effective Sequence:	1		
	Requester ID:	Sally Supervi	sor	
	Requester Comments	Instructions		
	Comment: Wo	nderful employe	ee will be missed	
	Current Job Informatio	on		
	Position Nbr:	00007384	File/Admin Clk	
	Department: 720150 P&ED-T&C-HRM-FieldcoteMus			
	Location:	Socation:         BLD040         Fieldcote Museum		
	Union Code:	C1		
	Reg/Temp:	Regular		
	Full/Part Time:	Full-Time		
	Standard Hours:	35.00		
	Reports To:	00007369		
	Current Compensation	n Information		
	Pay Group:	SAL		
	Salary Plan	CUPE Local 5	187. Inside	
5	Term/Retire including th approval. H minimum of comments.	Approv e approv R Manda a Mana	al Chain is displayed at the bottom of the page, val status, and date/time for each completed atory Approval Level is: 1 level of approval, with a oger. Click View/Hide Comments to view approver's added	

	Term/Retire Approval Chain
	✓ :Approved
	Departmental Approval         Self Approved         Sally Supervisor         Workflow Request Initiator         06/22/15 - 08:51 AM         Comments         Mike Manager-E045070 at 06/22/15 - 08:52 AM         Make sure to complete a PA
6	Click Go To Job , which will open a new window and take you to the employee's Job Data – Work Location for you to manually process the transaction in PeopleSoft.          Administrator Actions         Current Transaction Status:       Awaiting HR Processing         Select this option to approve the transaction. You will be required to manually update the database.         Select this option to cancel the transaction.
7	Once Job Data has been updated, return to the <b>Transaction Status Request</b> window.
8	<b>Administrator Processing</b> will display your name. Enter your Initials to time stamp transaction and comments as required
	<i>Note: any comments entered here will be visible by all Approvers in the approval chain including Finance Payroll and FAII staff.</i>

	Administrator Processing
	Administrator: Tracey Jaremey
	Comment:
9	If routing to COH Payroll Worklist click $\checkmark$ to select <b>COH Payroll</b> <b>Worklist</b> User and add required instructions prefixed with your Initials and ":" (i.e. TJ:).
	Note: Instructions entered here are only visible to HR Records and Finance Payroll.
	Route to other Groups
	*Route to:
	*Instructions:
10	Administrator Actions has two options for you to select:
	<b>Approve-</b> will update the Current Transaction Status to Processed by HR and generate an email to the Initiator and FAII with DeptID access that the transaction is complete.
	<b>Cancel</b> -will update the Current Status to Cancelled by HR and generate an email to <b>only</b> the Initiator.
	Both actions will remove the transaction from the HR Worklist ( <i>currently we are not using</i> ).

	Administrator Actions
	Current Transaction Status: Awaiting HR Processing
	<ul> <li>Select this option to approve the transaction. You will be required to manually update the database.</li> </ul>
	<ul> <li>Select this option to cancel the transaction.</li> </ul>
	Save
11	Click Save to complete the transaction (generate email, update status and remove from HR Records Worklist) you will receive a warning message reminding you to update Job Data accordingly. Select Yes to continue.
	Note: this warning will <b>only</b> appear with the Approve option.
	Message 🔀
	Approval Processing (6605,610)
	Selecting "Yes" will change the status to "Processed by HR". You will then be required to manually update the database with this transaction. Selecting "No" will cancel your approval and the status will remain "Awaiting HR Processing."
	Yes No
12	Click OK you will be taken back to the completed transaction
	Favorites Main Menu > Workforce Administration > Self Service Transactions > Term/Retire Requests
	Termination/Retirement Request
	Save Confirmation
	The Save was successful.
	OK

13	The transaction is now complete and saved with your instructions to COH Finance and Comments.
	<i>Note: the Current Transaction Status has updated to Processed by HR.</i>
	Term/Retire Approval Chain
	C :Approved
	Departmental Approval
	Self Approved       Self Approved       Approved         ✓ Sally Supervisor       ✓ Sally Supervisor       ✓ Mike Manager         Workflow Request Initiator       06/22/15 - 08:51 AM       ✓ Mike Manager         06/22/15 - 08:51 AM       06/22/15 - 08:51 AM       ✓ Mike Manager
	Comments
	Tracey Jaremey-TJAREMEY at 06/22/15 - 09:16 AM Administrator Approved-TJ updated (note HR Records to determine the proper format for comments)
	Mike Manager-E045070 at 06/22/15 - 08:52 AM Make sure to complete a PA
	Administrator Actions
	Current Transaction Status: Processed by HR
14	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
	email is deperated to FAII's
	End of procedure.

## **RECORDS MERIT NOTIFICATIONS:**

A new process **N\_MERIT** will replace the Anniversary Increase Notice report and is **scheduled to run every other Thursday (Wage Pay)** with a Run through Date of Monday to Sunday (i.e. Run Date – October 29th for Nov 9<sup>th</sup> to Nov 22<sup>nd</sup>, with Hrs effective date Oct 12th). The report will pick all employees that are eligible on **from and to dates** (11 days after run date for date based and 17 days prior is the common effective date for hours based). Note, if the process is run ad hoc, it will continue to use the Thursday Run Date. If the process is run more than once for the same dates and Generate eMail data is selected, an email will not be generated a second time.

When the process is run emails are generated using PeopleSoft Position Hierarchy. 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\_NOTIFICATIONS)** to monitor notifications that were generated.

## Copy of Email Generated

Subject: Employees Eligible for Merit Increase

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

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

Disclaimer

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

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

# FA Query: N\_HR\_MERIT\_ALERT\_NOTIFICATIONS

	Empl			Salary			New	Merit	Hour				T
	Reco			Admin		New	Hourly	Increase	s	eMail	Rept.to.P		
)	rd	Dept ID	Employee Name	Plan	Grade	Step	Rate	Date	Flag	Sent Dt	osnNbr	eMail List	S
20321	0	812012	Pitt, Brad	C3	6	2	47.735	7/07/15		6/24/15	00001714	pshrtest@hamilton.ca	6/
19459	0	362241	Jolee, Angela	CA	6	0	48.353	6/08/15	*	6/24/15	00001745	pshrtest@hamilton.ca	6/
21658	0	367017	McClaughlin, Sarah	CA	4	0	35.409	7/14/15		6/24/15	00001753	pshrtest@hamilton.ca	6/
03807	0	812040	Twain, Shinia	CA	6	0	47.890	7/07/15		6/24/15	00001811	pshrtest@hamilton.ca	6/
06423	0	311005	Winkle,Perry	C1	1	3	31.434	7/15/15		6/24/15	00001918	pshrtest@hamilton.ca	6/
11326	1	817006	Hulk,Henry	C3	5	3	44.467	7/15/15		6/24/15	00007592	pshrtest@hamilton.ca	6/
15405	0	806134	Buffit,Jimmy	C3	6	3	50.247	7/15/15		6/24/15	00007592	pshrtest@hamilton.ca	6/
05389	0	362106	Clause,Santa	СМ	то	1	0.000	6/08/15	*	6/24/15	00008448	pshrtest@hamilton.ca	6/

**N\_HR\_EE\_OUTSTANDING\_MERIT** query was created for HR Records to identify employees that have not received their merit increase. HR Records will run this query semi-annually and provide the Director HR Systems & Operations with a listing of employees with outstanding merits to follow up with the GM of each department. Note: HR Records will cancel Non Union merits if they have not received a Performance Appraisal after 30 days of being on their worklists.

## **SQR** Criteria

Hrs based – Hrs based – would be all salary plans where Full/Part = P and std hrs < 35

Exclude Salary Plan C1, C5 & C2P where Full/Part = P and std hrs < 35 and where Sal\_Admin\_Plan in ('RE','RT','C6') and full\_part\_time='P' and std\_hours > 34

And exclude any employee in Salary Plan CR & CJ

Exclude Salary Plan C1, C5 & C2P where Full/Part = P (note as requested by HR Records - C1 & C5 part time are excluded, HR Records will calculate manually as their increase is based on hrs worked in the classification). Exclude Salary Plan C2 as they are as step progression based on exam qualifications – Department tracks

Effective April 21, 2016 – step progression pay rate increase email notifications for employees in Salary Plan RC, RT, R3 and R8 will go directly to HR Records (Debbie Heidt/Tracey Jaremey) for processing. As per respective Collective Agreements, departmental approval is not required.

Hours criteria per Salary Plan:

- RE 1830 RT 1500
- CK 1820
- CA 1820 C3 - 2184
- $C_{3} = 2104$
- C6 2184
- RC 1400

Exclude the following from eMail Alerts DELETE FROM PS\_N\_PY\_ANINCR WHERE N\_DEPT\_CD='HLIBRARY' DELETE FROM PS\_N\_PY\_ANINCR WHERE N\_DEPT\_CD='HPOLICE' DELETE FROM PS\_N\_PY\_ANINCR WHERE N\_DEPT\_CD='HHECFI' DELETE FROM PS\_N\_PY\_ANINCR WHERE SAL\_ADMIN\_PLAN IN ('C2P','C2') -FIRE DELETE FROM PS\_N\_PY\_ANINCR WHERE SAL\_ADMIN\_PLAN IN ('RE','RT','C6') AND FULL\_PART\_TIME='P' AND STD\_HOURS > 34 DELETE FROM PS\_N\_PY\_ANINCR WHERE FULL\_PART\_TIME = 'P' AND STD\_HOURS < 35 - NON-HOURS BASED CRITERIA

Run Date From Date		Thru Date	Hours Based	
	Date Based	Date Based	Effective Date	
25-Jun-2015	06-Jul-2015	19-Jul-2015	08-Jun-2015	
09-Jul-2015	20-Jul-2015	02-Aug-2015	22-Jun-2015	
23-Jul-2015	03-Aug-2015	16-Aug-2015	06-Jul-2015	
06-Aug-2015	17-Aug-2015	30-Aug-2015	20-Jul-2015	
20-Aug-2015	31-Aug-2015	13-Sep-2015	03-Aug-2015	

Note: If run prior to Thursday use the next Thursday to start schedule E.g. Submitted Tuesday August 18, 2015 therefore default to August 20th (From August 31 to September 13) Process Name and Recurrence Definition: N MERIT

Process Detail			
Process Name: Main Job Instance:	N_MERIT 766384	Ref	esh
Left Right 766384 - N ME 766385 - N 766386 - N	RIT Queued TOLIST Queued ANINCR Pending		
➡ <u>766387 - N</u>	ANINCR Pending		

Tables Created for this process:

- 1. N\_PY\_ANINCR This table will be refreshed after the Anniversary Notice process is run every other Thursday.
- N\_PY\_ANNCR\_MER This table holds all the history after each process run. The query (N\_HR\_MERIT\_ALERT\_NOTICFICATIONS is created using this table

*Note:* After go-live the Anniversary Increase Notice is no longer required and will be removed from the COH Custom menu.

# **RECORDS MANAGE OUTSTANDING PENDING TRANSACTIONS**

## Purpose:

To manage pending AWF transactions Requests (Transfer, Pay Rate Change, Term/Retire, Manage Hire) that are less than the current pay period.

## **Important:**

This process is subject to change, should the volume of these transactions increase.

## **Procedure:**

Biweekly, HR Records will review the pending transactions in MSS – AWF to determine if a transaction is outstanding. If yes, HR Records will contact the Department to determine reason and required action as noted below. Note: for Manage Hire transactions, HR Records will cancel any duplicates and follow-up with HR Staffing for those that are questionable.

Step	Action
1	Navigation:
	HR Tab>Self Service Home Page>Self Service Transactions
2	Click on the applicable Request link. The same process is followed for
~	asch Transaction Type request
2	
3	Status default is Awaiting HR Processing. Change default to In
	Approval Process.
4	Click on the Effective Date column to sort by Date to identify
_	pending transaction with an effective that is less than the current
	Jdy.
	Empl ID: begins with V
	Em pl Record:
	*Effective Date: = V III
	Linective sequence:
	Last Name: begins with
	Department: begins with V
	Pay Group: begins with V
	Self Service Status Indicator: = V In Approval Process V
	Search Clear Basic Search 🖓 Save Search Criteria
	Search Results
	View All First 🛃 1-11 of 11
	Emp ID Emp Breative Breative Department Department Description Pay Std Hours
	121860 0 11/13/2015 1 Janette Baker 336/226 Corp.Serv.FS.Acc/PayRecFA.APSup SAL 35 5 In Process
	0092310 12/10/2010 1 2010/2010 1 Salissi Failson 00/100 Fail-Prindpike/and-E-Lini/00/2008 244, 325 325 in Process 120/277.0 01/01/2016 1 Nataliya Divilska 674105 PH-HithProtect/VectorBorneDis SAL 35 35 in Process
	Click on the two neo stice to view the Annual Chain south at the
5	Click on the transaction to view the Approval Chain, contact the
	department to determine the required action, note below are
	nossible situations and their solutions:
	possible situations and their solutions.
	<ul> <li>Duplicate Transaction – Contact department to deny the</li> </ul>
	transaction: if not possible contact WFA to deny on behalf of
	the department
• If Manager to approve is not at work (i.e. off sick, WSIB, etc.)	
--	
contact WFA to have transaction Re-assigned.	
• If Manager to approve is no longer in Position – contact WFA to	
have transaction Re-assigned.	

# HR COMPENSATION

# **COMPENSATION POSITION DATA CHANGE STATUS PAGE:**

#### **Purpose:**

Use the Position Data Change Status Page to view the status of a transaction at any time and as a historical reference of Position Data Changes submitted.

### **Procedure:**

Follow the steps below to access the Status page:

Step	Action
1	Navigation: Organizational Development>Position Management>Maintain Positions/Budgets>FA Workflow Requests>View Position Change Status
2	Click on View Position Change Status
	Organizational Development FA Workflow Requests
	Position Data Change Request
3	Select the Transaction you wish to review by clicking on the Position Title. <b>Show Transactions</b> : Default is "Linked to me" which will display Position Data Changes that you have initiated. Change to "I have access to" to see all Position Data Changes submitted.
	Linked to me: displays all transactions where you were involved in the Manager Self Service transaction. This could be as an initiator, an approver, or a delegate.
	I have access to: should be used only by core users: this will display all transactions tied to DeptIDs that you have access to.
	Filter by status: Default is "Show all". Change status as needed.
	Filter by status: Default is "Show all". Change status as nee

The list below cont requests.	ains position requests. Sel	ect a position request to	o view details. Note: R	equest#'s are as	Awaiting HR Processing Cancelled by HR Denied
Show transaction:	s: Linked to me	Filter by status:	Show all	$\sim$	Errors Encountered In Approval Process Processed by HR
Position Data Cha	ange Requests			Find   🗖	First 🎦 1-2 of 2 🔛 Last
Position/Request #	# Position	Request Type	*Effective Date	Effective Sequence	Workflow Status
00007384	File/Admin Clk	Update	06/29/2015	1	Processed by HR
00007384	File/Admin Clk	Update	06/29/2015	2	Awaiting HR Processing
Self Serv	ice Status In HR Processi	dicator:	ction has h	een route	ed to HR and
Self Serv Awaiting waiting to Cancelled cancelled.	ice Status In HR Processin be processed. I by HR – Trai	<b>dicator:</b> <b>ng</b> – Transa nsaction has	ction has b been route	een route ed to HR	ed to HR and and HR has
Self Serv Awaiting waiting to Cancelled cancelled. Denied – denied wh for PDC)	ice Status In HR Processin be processed. I by HR – Tran Transaction w ich terminates	dicator: ng – Transa nsaction has vas not route s the remain	ction has b s been route ed to HR as der of the a	een route ed to HR an appro approval	ed to HR and and HR has over has chain.(n/a
Self Serv Awaiting waiting to Cancelled cancelled. Denied – denied wh for PDC) Errors En In Approv process ar complete.	ice Status In HR Processin be processed. I by HR – Tran Transaction w ich terminates countered – val Process – nd will be route (n/a for PDC)	dicator: ng – Transa nsaction has vas not route the remain System gen Transaction ed to HR ond	ction has b s been route ed to HR as der of the a erated n is pending ce all appro	een route ed to HR an appro approval g in the a vals are	ed to HR and and HR has over has chain.(n/a pproval

Note: Request # is o	nly used for tracking r	new posit	tion requests. On	ce the transaction I	has bee
Select Position Re	ssed it will be assigne quest Type	ad a posi	tion #.		
O New Position	Update Posit	ion	O Inactivate Po	sition	
Select Position to U	Jpdate				
Position Number:	00007384	File/Adm	in Clk		
Effective Date:	06/29/2015				
Status:	Active				
Workflow Status:	Processed by HR	>			
Sequence:	1				
Requester ID:	Lombardo Borrelli				
Position Request D	etails				
Position Title:					
Job Code:					
Department:	720150	P&ED-T	&C-HRM-Fieldco	teMus	
Location Code:					
Reports To:					
Union Code:					
Standard Hours:			Budget Informa	tion	
Reg/Temp:			✓ Budgeted P	osition	
Full/Part:			Head Count:	99	
Salary Plan:			FTE:	1.000000	
Salary Grade:					
P Current Position I	mo				
Requester Commer	risinstructions				
Comment: U	Ipdate grade to B and	place bo	th employees ste	p 2. Please advis	e wher
Administrator Com	ments				
Comments:	iane Gulas-DGULAS	-Adminis	trator Approved-cl	hanges have been	made
fo	orwarded to Finance F	ayroll for	processing.		

# **COMPENSATION POSITION DATA CHANGE REQUESTS:**

## **Purpose:**

Use the Position Data Change Request to process a change to an employee's classification/pay grade as a result of the Job Evaluation (JE) process.

## **Choosing the Correct Reason:**

IF	THEN use Position Request Type
Position changes as a result of JE	Update Position
Title Change	Update Position

#### **Procedure:**

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

Action
Navigation: Organizational Development>Maintain Positions/Budgets>FA Workflow Requests>Position Data Change Request
Select Position Request Type = Update Select Position Request Type New Position Update Position O Inactivate Position
Enter the <b>Position Number.</b> Use the Look Up icon to search for a position number. Enter the <b>Effective Date</b> for the change. Status will default to <b>Active.</b> Select Position to Update Position Number:

Position	vequest L	Jetans		need to e	enter one	unchang	ged value	s, you will sti e to prevent
Departme	ent: 🔇	720150	F	the error	message	e when sa	aving.	
Location	Code:			At least one t	field in Positio	on Request De	tails area mu	ust be supplied.
Reports T	To:			(26010,12) When Updat	e Position ha	s been selecte	d, at least Of	NE of the fields in th
noporto i			•	Position Rec	quest Details	must be suppl	ied before re	quest is accepted.
Standard	l Hours:		L	Budg	jet Informa	ation		
Reg/Tem	p:		~		Budgeted	Position		
Full/Part:			~	Ноа	d Count:	99		
				FTE:		1.000		
The pos	sition's	current a	attribute	es and in	icumbe	nts are	listed of	on the
nago								
paye.								
▼ Current P	Position Inf	fo						
Current P	Position Inf	io File/Admin	Clk					
Description Job Code:	Position Inf	io File/Admin 636	Clk	File/Admin C	lk			
Description Job Code: Departmer	Position Inf m: nt: C	fo File/Admin 636 720150		File/Admin C P&ED-T&C-H	lk IRM-Fieldco	teMus		
Description Job Code: Departmen Location C	Position Inf n: nt: <	fo File/Admin 636 720150 BLD040		File/Admin Cl P&ED-T&C-H Fieldcote Mus	lk IRM-Fieldco seum	teMus		
Description Job Code: Departmen Location C Reports To	Position Inf vn: nt: Code: D:	fo File/Admin 636 720150 BLD040 00007369		File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum 9 Supv	teMus		
Description Job Code: Departmen Location C Reports To Union Code	Position Inf nt: Code: D: e:	File/Admin 636 720150 BLD040 00007369 CUPE Loca	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum 9 Supv	teMus		
Description Job Code: Departmen Location C Reports To Union Code Standard H	Position Inf on: t: Code: o: e: Hours:	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00	Clk <b>&gt;</b> al 5167 Inside	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum e Supv udget Inforr	teMus nation		
Description Job Code: Departmen Location C Reports To Union Code Standard H Reg/Temp:	Position Inf on: nt: Code: o: le: Hours: :	fo File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum Supv udget Inforr V Budgete	teMus nation d Position		
Description Job Code: Departmen Location C Reports To Union Code Standard H Reg/Temp: Full/Part Ti	Position Inf on: tt: Code: c: e: Hours: : ime:	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum Supv udget Inforr Ø Budgete Head Count:	teMus nation d Position 99		
Description Job Code: Departmen Location C Reports To Union Code Standard H Reg/Temp: Full/Part Ti Salary Plan	Position Inf on: nt: Code: o: le: Hours: : ime: n:	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time C1	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum ≥ Supv udget Inforr ✓ Budgete Head Count: TE:	teMus nation d Position 99 1.000000	0	
Current P Description Job Code: Departmer Location C Reports To Union Code Standard H Reg/Temp: Full/Part Ti Salary Plan Salary Gra	Position Inf on: Tode: Code: o: le: Hours: c ime: n: ide:	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time C1 C	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum ≥ Supv udget Inforr ✓ Budgete Head Count: FTE:	teMus nation d Position 99 1.000000	D	
Current P     Description     Job Code:     Departmer     Location C     Reports To     Union Code     Standard H     Reg/Temp:     Full/Part Ti     Salary Plan     Salary Plan     Salary Gra	Position Inf on: nt: Code: c: Hours: c: ime: n: ide: cumbents	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time C1 C	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site	lk IRM-Fieldco seum ≥ Supv udget Inforr ✓ Budgete Head Count: FTE:	teMus nation d Position 99 1.000000	0	
Current P Description Job Code: Departmer Location C Reports To Union Code Standard H Reg/Temp: Full/Part Ti Salary Plan Salary Gra	Position Inf on: nt: Code: co: e: Hours: c ime: n: ide: cumbents mpl	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time C1 C	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site B B H F F	Ik IRM-Fieldco seum Supv udget Inforr Budgete Head Count: TE:	teMus nation d Position 99 1.000000	) Effective	Date
▼ Current P         Description         Job Code:         Department         Location C         Reports To         Union Code         Standard H         Reg/Temp:         Full/Part Ti         Salary Plant         Salary Grame         Current Internet         Empl ID         R         117227	Position Inf on: t: Code: c: Hours: t: ime: n: ide: cumbents mpl kecord	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time C1 C	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site B B H F F F F F F F F F F F F F F F F F	Ik IRM-Fieldco seum Supv udget Inforr Budgete Head Count: FTE: Empl Status	teMus mation d Position 99 1.000000	) Effective	Date 14
▼ Current P         Description         Job Code:         Departmer         Location C         Reports To         Union Code         Standard H         Reg/Temp:         Full/Part Ti         Salary Plan         Salary Gra         Current Int         Empl ID       Er         117227       0	Position Inf on: Code: c: e: Hours: c: ime: n: ide: cumbents mpl ecord N	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time C1 C C	Clk	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site B B B B B B B B B B B B B B B B B B B	lk IRM-Fieldco seum ≥ Supv udget Inforr ✓ Budgete Head Count: FTE: Empl Status 1 Active	teMus nation d Position 99 1.000000	0 Effective 11/17/20	Date 14
▼ Current P         Description         Job Code:         Department         Location C         Reports To         Union Code         Standard H         Reg/Temp:         Full/Part Ti         Salary Plant         Salary Gram         Current Int         Empl ID         R         117227	Position Inf on: Int: Code: Code: Code: Position Inf Code:	File/Admin 636 720150 BLD040 00007369 CUPE Loca 35.00 Regular Full-Time C1 C Xame Elmer Fudd	Clk al 5167 Inside Full/Part Part-Time	File/Admin Cl P&ED-T&C-H Fieldcote Mus Fieldcote Site B B B B B B B B B B B B B B B B B B B	Ik IRM-Fieldco seum ≥ Supv udget Inforr ✓ Budgete Head Count: FTE: Empl Status 1 Active	teMus mation d Position 99 1.000000 Override N	D Effective 11/17/20	Date 14

	Records als Records, F Records.	so in the Comments. Your comments will be visible by HR AII with DeptID access and Finance Payroll if routed by HR				
	Comment/Additional Instructions					
	Comment:	JE grade change from C to B effective June 11/15. Place incumbents at step 2 of new grade.				
6	Click Sub routed dire	. As there are no approvals, this transaction will be ectly to HR Records for review and processing.				
7	HR Records Comments	s also has the ability to route this transaction with any /Instructions to Finance Payroll for review and processing.				
	Route to other Gro	pups Find First K 1 of 1 D Last				
	*Role Name:	COH Payroll Worklist User				
	*Instructions:	Please pay retro to Eric Employee effective June 11/15.				
8	Workflow v	vill generate an email at various stages:				
	-to the init either proc	iator once HR Records has reviewed the transaction and essed it or cancelled it;				
	-to all FAII processed email is ge <i>Note: HR</i>	with DeptID access to the position once HR Records has the transaction. If HR Records cancels the transaction, no nerated to FAII's. <i>Compensation as the Initiator and with DeptID access will</i>				
	receive bot End of proc	<i>th of these emails.</i> cedure.				

# **View Status:**

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

# HR RETURN TO WORK SERVICES (RTWS)

### **RTWS ASP TRIGGER NOTIFICATION:**

#### **Purpose:**

To generate email notifications to Managers advising that his/her employee has triggered under the Attendance Support Program.

#### Important:

FA staff will no longer be responsible for running and distributing the Monthly ASP Department report as this will replace that process.

RTWS can continue to run and save the Monthly ASP Department report to capture all triggers for the month.

The notification process uses PeopleSoft Position Hierarchy. 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\_AT\_TRIGGER\_ALERT\_NOTIFICATION) to monitor notifications that were generated.

#### **Procedure:**

Once a month, on the second Tuesday, the process will run to generate emails to each employee's Manager advising that his/her employee has triggered under ASP. One email notification will be sent per employee. **Note: no change to current, process runs for the previous month, eg. second Tuesday of March generates report for February** 

Below are the steps involved:

Step	Navigation	Action	By Whom
1	Attendance>Attendance	Run the Monthly ASP	Absence
	Processes>Monthly ASP	Trigger Process	Management
	Trigger Process	(N_ASMP01) the second	Coordinator has
		Tuesday of each month.	scheduled to run
		This process determines	in HR9PROD
		who has triggered and	with recurrence
		inserts the TRI row in the	code N_ASMP01

		employee's attendance history.	
2 NEW	Attendance>Attendance Processes>Monthly ASP Trigger Alerts	Run the Monthly ASP Trigger Alerts Process (N_ASP02A) the second Tuesday of each month. This process generates the monthly ASP Trigger Alert Table for input to ASP Email Alerts.	ITS will schedule to run. Need new recurrence set up for N_ASP02A.
3	Attendance>Attendance Reports>Monthly ASP Department Report	RTWS can run the Monthly ASP Department Report (N_ASMP02) the second Tuesday of each month (after the process in Step 1 is complete). This is the full report of ASP Triggers for the month. FA's will no longer have the ability to run this report.	Absence Management Coordinator has scheduled to run in HR9PROD with recurrence code N_ASMP02_RTW
4 NEW	Query available for FAII's, Hamilton Public Library HR and RTWS as required	(N_AT_TRIGGER_ALERT_ NOTIFICATION) is available for FAII's and Hamilton Public Library HR and RTWS to run to allow them to review the emails that were generated that month and to whom	FAII, HPL HR, RTWS
	End of procedure		

## Note:

- ITS will schedule the App Engine Process (N\_ASP\_EMAIL1). This process generates the Email notifications and will be scheduled after Step 2.

# **RTWS OUTSTANDING MEETING ALERT NOTIFICATION:**

### Purpose:

To generate email notifications to Managers advising that his/her employee has ASP Meetings that are outstanding.

### Important:

FA staff will no longer be responsible for running and distributing the Outstanding MTG report as this will replace that process.

RTWS can continue to run and save the Outstanding MTG report if they wish. However, this report will differ from the Outstanding MTG Alert Notifications due to the following recommended changes that were made during the development of the Alert Notifications:

-No email notifications for outstanding meetings will be generated if the employee status is not active eg. on maternity leave, LTD, etc. Once the employee status becomes active, Managers will then receive emails for any meetings that are outstanding for that employee (report includes these).

- As these email notifications are being run and sent on the same day as the monthly trigger alert notifications, the outstanding meeting notifications will exclude employees who have just triggered that day (report includes these). -Will be missing who the emails were sent to

The notification process uses PeopleSoft Position Hierarchy. 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 query (N\_AT\_MEETING\_ALERT\_NOTIFICATION) to monitor notifications that were generated.

### **Procedure:**

Once a month, on the second Tuesday, the process will run to generate email notifications to each employee's Manager advising that his/her employee has ASP meeting/s outstanding. Each email can include multiple employees if there is more than one reporting to the same Manager with outstanding meetings. The Manager will receive an email notification every month until a MTG is entered in PeopleSoft. Below are the steps involved:

Step	Navigation	Action	By Whom
1 NEW	Attendance>Attendance Processes>Monthly ASP Meetings Alerts	Run the Monthly ASP Meetings Alerts (N_ASP05A) process to identify who has meetings outstanding	ITS will schedule. Need new recurrence set up for N_ASP05A
2	Attendance>Attendance Reports>ASP Outstanding MTG Report	Run the ASP Outstanding MTG Report (N_ASMP05) at any time to review who has Meetings that are outstanding and to enter MTG n/a for employees who have retired/terminated or on leave employees with triggers back 12 months or greater. Note: this report will differ from the Emails generated and departments will no longer have access to run this report	RTWS
3 NEW	Query available for FAII's, Hamilton Public Library HR and RTWS as required	(N_AT_MEETING_ALERT_ NOTIFICATION) is available for FAII's and Hamilton Public Library HR and RTWS to run to allow them to review the email notifications that were generated that month and to whom	FAII, HPL HR, RTWS
	End of procedure		1

# Note:

- ITS will schedule the App Engine process (N\_ASP\_EMAIL2) which generates the Email notifications. This process is run after Step 1 above.

# FINANCE PAYROLL

### FINANCE PAYROLL WORKLIST:

### **Purpose:**

Use the Worklist to process transactions routed by HR Records.

### Important:

Finance Payroll users that are granted permission to the Worklist will only see transactions that are "actioned" on the same date security access becomes effective. Pending transactions prior to this date will need to be processed by co-worker.

### **Procedure:**

Follow the steps below to access the COH Finance Payroll Worklist:

Step	Action
1	Navigation: Main Menu>Worklist
2	Click on Worklist link Home Works: Add to Favories Sign out
3	When you access the Worklist you will see your name appearing in the top left, however, there is only one Worklist. All Finance Payroll retrieve and use the same Worklist. Click to search for specific transaction types.

Wo	JEKIIST FUTOP			$\sim$	Refresh	1	Pay Rate Change Position Data Change Ferminate/Retire					
	orklist				rtenesii		Transfer Employee					-
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Lin	ık	Transaction Name	Date	Transaction For	Dept ID	<u>Departme</u>	<u>ent</u>	Reque	st ID	ID	Rcd# Pa	<u>ay</u> roup
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Viev	w Transaction	Pay Rate Change	05/01/2015	Burtch,Karen Rita	320525	CityMgr-H	R-COD-Compensation			064796	0 SA	۹L
View	w Transaction	Pay Rate Change	05/30/2015	Filice, Anna Maria	320525	CityMgr-H	R-COD-Compensation	_		119615	0 SA	AL
Vie	w Transaction	Terminate/Retire	05/03/2015	Burtch Karen Rita	320525	CES-Loag	R-COD-Compensation			096125	0 SA	AL
Viev	w Transaction	Manage Hire Request	05/28/2015	Test,Hudson	465010	P&ED-Prk	ngByLw-MLE-SchoolCross			NEW		
Viev	w Transaction	Manage Hire Request	06/01/2015	Krnetic,Adriana	332015	CorpServ-	F&ARevGen-Fin&Admin			NEW		
Viev	w Transaction	Manage Hire Request	06/01/2015	Chegou,Abe (Abderahim)	332015	CorpServ-	F&ARevGen-Fin&Admin			121742		
Viev	w Transaction	Manage Hire Request	05/15/2015	McDaniel,Mallory	634005	CES-Lodg	e-ML-DayProgAdmin			114289		
Viev	w Transaction	Manage Hire Request	06/01/2015	Test,Janice	750068	Library-Ce	entral-NonFiction			NEW		
Viev	w Transaction	Manage Hire Request	04/15/2015	McDaniel,Luke	465010	P&ED-Prk	mgByLw-MLE-SchoolCross	000070	00	NEW	2	
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	ansaction Name <sup>*Effect</sup> Date	ive Transaction For	Dept ID Department	Position #/ Request ID	Rcd# Pay Biandard Hours Group From Hours To Date
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5	Click on the transaction	e applicat	le View Transactio	on link to re	etrieve the
	Link Transaction View T	Ction Name         "Effective Date           Data Change         05/25/20           le Change         05/16/20           le Change         05/17/20           le Change         05/27/20           le Change         05/0/20           le Change         05/0/30/20           le (Hertire         05/0/3/20	Transaction For         Dept ID         Departm           15         test         709103         P&ED-T           16         Hampson,Lynn         632010         CES-Lot           15         Michelle         632005         CES-Lot           16         Moffatt,Lori Jean         632005         CES-Lot           15         D'Ambrosio,Anna         320525         CityMgr-           15         Burtch,Karen Rita         320525         CityMgr-           15         Filice,Anna Maria         320525         CityMgr-           15         Burtch,Karen Rita         320525         CityMgr-	Rent &C-AE&G-Events dge-WL-ResidentSocServ dge-WL-Admin HR-COD-Compensation HR-COD-Compensation dge-ML-Admin HR-COD-Compensation	Position.#/ Request ID         ID         Rcd#/ Eroup         Pay Group         Standar Hours From           90000002         0         0         0           119745         1         WAL         35.0           057607         0         SAL         35.0           020003         0         SAL         35.0           064796         0         SAL         35.0           096125         0         SAL         35.0           064796         0         SAL         35.0
6	The Transa Groups: ( instruction: Transfer Information	action Req COH Payr s from ins	uest form will disp oll Worklist Use tructions from HR	olay. <b>Rout</b> r is where Payroll.	<b>e To other</b> you will review the
	De sitis es	current mo	57 (A.L. ). OI	New Into	
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	Job Code:	636	File/Admin Clk	6452	Historical Interpreter
	Reg/Temp:	Regular	Empl Class:	Regular	ristorical interpreter
	Full/Part Time:	Full-Time		Part-Time	
	Standard Hours:	35.00		0.01	
	Salary Plan:	C1	CUPE Local 5167 Inside	C1	CUPE Local 5167 Inside
	Grade:	С		E	
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	Route to other Gro	oups			Find First <b>I of 1 D</b> Last
	Route to: Instructions:	COH Payroll Worklis HR Records and Fir	st User aance Payroll to decide on a proper for	mat for instructions	>
	Update Notes:				¥

7	Enter your form and Once you the Workli	r processing <b>Notes</b> . All comments will be saved on the are visible to Finance Payroll and HR Records. click <b>Save Notes</b> , the transaction will be removed from st.
	Route to other Gro	pups Find First C 1 of 1 D 1
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	Instructions:	ply pay diff of two rates for 100 hours
	Notes:	Finance Payroll enters their processing notes here.
(	Save Notes	
8	Click on W	<b>Jorklist</b> at the top right corner, to refresh your Worklist
_	with new i	tems routed to you by HR Records.
	End of pro	ocedure.

# **View Status:**

- The status of any transaction can be viewed at any time by navigating to the applicable transaction status pages.

# HR WORKFLOW ADMINISTRATOR (HR WFA)

### WFA ADD DELEGATION REQUEST:

#### **Purpose:**

Use the **Add Delegation Request** to create a delegation request as the WFA on behalf of a Manager who is Active in PeopleSoft but unable to create their own request. (ie. off sick, on extended vacation, manager position is over allocated and not routing to highest emplid, etc.)

### Important:

- WFA will be notified by email to create this delegation by the Manager's Department. WFA to save these emails in a folder set up by year on the H:\ drive. The subject line standard is Last Name, First Name of the Manager we are delegating on behalf of.
- Direction to the WFA should come from either the absent Manager, the higher emplid Manager (if over allocated), or the next level in the chain.
- If Approval is being delegated, all pending transactions will move to the Proxy for review and approval.
- Delegation Requests cannot be created for a Manager who is not active, ie. off job on leave or terminated (the system sees this is a vacant position and it will be skipped in the approval chain). The responsibility to initiate transactions for the off job Manager lies with the Director or the Director's delegate; or the vacant position should be backfilled.
- Off job on leave Manager can initiate transaction but they will not auto approve, not route to them for approval, as Manager is not active (we will not communicate this)

### **Procedure:**

Follow the steps below to **Add Delegation Request**:

Step	Action
1	In the case of Approval requests, WFA to discuss with Requesting Manager if additional transaction types also need to be delegated; how long will the Manager be off/is there an end date?
2	Navigation: HR Tab>Approvals and Delegation>Add Delegation Request

3	Enter the Emplid/Last Name of the Manager you are creating the delegation request on behalf of and click Search.
	Add Delegation Request
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value
	Limit the number of results to (up to 300): 300
	EmpID: begins with 🗸 000509
	Empl Record: = V
	Name: begins with 🗸
	Last Name: begins with V
	Search Clear Basic Search
4	<ul> <li>(Note: you need to know the Emplid of the Proxy to enter on this page)</li> <li>From Date: Enter the date you want the delegation to be Active from Note: date must be equal to or greater than today's date</li> <li>To Date: Enter the last date you want the delegation to be active for (process will revoke the next day) or leave blank to make the delegation open-ended</li> <li>Transaction Name: Use the Lookup icon to select transaction. If delegating multiple transactions click to insert a new row.</li> <li>Proxy: Enter the Emplid of the proxy or use the Lookup icon Notify Delegator: n/a (we have stopped this email generated to delegator each time the proxy initiates/approves a transaction on</li> </ul>
	their behalf)
	Add Delegation Request
	Martin White Employee Emplid: 000509 Empl Record: 0
	Add Delegation Request
	From Date To Date Trans Type Transaction Name Proxy Name Delegator
	07/02/2015 1 Initiate N HR TERM Q 002699 Diana Aquila
	07/02/2015 B B Initiate N_HR_TRANSFER Q 002699 Diana Aquila
	07/02/2015 🛐 📑 Initiate N_HR_JOBREQ 🔍 002699 🔍 Diana Aquila 🗌 🕂 🖃
5	Click .

6	Email will be generated to the Proxy advising of a delegation request requiring their acceptance/reject. Refer to "MSS Emails Generated via Workflow document, Ref #7"
7	Email will be generated to the Delegator advising of proxy acceptance/reject. Refer to "MSS Emails Generated via Workflow document, Ref #8 or #9.
8	If Approve Transactions was delegated, Proxy needs to be aware to action any pending transactions that have moved over to them. WFA to advise proxy that they should check their Approve links in case there are pending transactions that have now transferred to them and require their approval.
	End of Procedure

# WFA ADMINISTER (REVOKE) DELEGATION:

## Purpose:

Use the **Administer Delegation** as the WFA to review delegations and revoke delegation requests on behalf of a Manager who is either Active in PeopleSoft but unable to revoke their own request due to off sick; on extended vacation; has transferred to a non-management position and has pre-existing delegation; he/she is Inactive due to off job leave of absence.

# Important:

- WFA to monitor Manager's movement such as transfers to nonmanagement position by running the following query N\_WFA\_XFRS\_MGR\_NON
- WFA to monitor Manager's terminations before userids are deleted by running the following query N\_WFA\_TERMS
- WFA will be notified by email to create this delegation by the Manager's Department. WFA to save these emails in a folder set up by year on the H:\ drive. The subject line standard is Last Name, First Name of the Manager we are delegating on behalf of.
- Direction to the WFA should come from either the absent Manager, or the next level in the chain.
- This may be required in situations where the Proxy transfers or terminates and Manager unable to revoke delegations due to off sick, extended vacation or off job leave of absence
- If Approval is being revoked all pending transactions will move back to the Manager for review and approval.

# Procedure:

Follow the steps below to review or revoke delegations on behalf of a Manager:

Step	Action
1	WFA Query identified, or department has emailed WFA to revoke
	delegations
2	Navigation:
	HR Tab>Approvals and Delegation>Administer Delegation
3	Enter Selection Criteria for the delegation requests that you want to
	retrieve:
	Delegator: Enter the delegator's Emplid to retrieve his/her
	delegation requests. Use the Lookup Icon $\stackrel{<}{\triangleleft}$ to search from a list of
	delegators with existing requests or leave blank to retrieve all
	requests based on Proxy.
	<b>Proxy:</b> Leave blank to retrieve all requests based on Delegator.
	<b>Transaction:</b> Enter the transaction you wish to retrieve or leave
	blank to retrieve all requests based on criteria entered.

	retrieve all request <b>To Date:</b> Enter a retrieve all request <b>Request Status:</b> retrieve or leave entered. <b>Delegation Stat</b> want to retrieve of criteria entered.	sts base a date to sts base Enter to blank to <b>us:</b> Ent or leave	e to view specific o view specific r ed on criteria en the status of the o retrieve all req er the delegation blank to retriev	lc reque tered. equests tered. e reques uests ba uests ba n status e all rea	s or leave blank to or leave blank to st you want to ased on criteria s of the request you quests based on
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	Delegator: 00	0509	C Eror	n Date:	Accepted
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4	Click Search				Active
5	Search Results Will Status or click on Search Results Delegation Request Request Detail		view both pages	uest De s on one	e page.
	Description	Delegator	Name	Drown	
				РТОХУ	Name
	View Employee Info-Initiate #1	000509	Martin White	002699	Name Diana Aquila
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	<ul> <li>View Employee Info-Initiate #1</li> <li>View Employee Info-Initiate #1</li> <li>View Employee Info-Initiate #2</li> <li>View Employee Info-Initiate #2</li> </ul>	000509 000509 000509 000509	Martin White Martin White Martin White Martin White	002699 002699 102038 102038	Name Diana Aquila Diana Aquila Kimberley Wyskiel Kimberley Wyskiel
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Revoke									
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Terminate/Retire-Initiate #1	000509	Martin White	002699	Diana Aquila	07/02/2015		Accepted	Active	<b>v</b>
Transfer Employee-Initiate #1	000509	Martin White	002699	Diana Aquila	07/02/2015		Accepted	Active	
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# WFA MAINTAIN DELEGATED AUTHORIES (BATCH PROCESS):

#### **Purpose:**

Use the **Maintain Delegated Authorities** to run a batch job to process delegated transactions. This is a scheduled job that is run nightly to activate/inactivate delegation requests as the dates are reached. This process also searches for inactive proxies and sends an email to the delegator that action is required.

### Important:

#### **Procedure:**

Follow the steps below to run the Maintain Delegated Authorities batch job:

Step	Action
1	Navigation: HR Tab>Approvals and Delegation>Maintain Delegated Authorities
2	On the <b>Maintain Delegated Authorities</b> page enter A Run Control ID.
	Maintain Delegated Authorities
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value Add a New Value
	Limit the number of results to (up to 300): 300
	Case Sensitive
	Search Advanced Search
3	On the Maintain Delegation Authority page click Process Request .
	<i>Note: the <b>As of Date</b> defaults to the date you are running</i>

	Maintain Delegation Auth	ority
	User ID: VSIKORASA	Report List Process Monitor Process Request
	Run Control ID: Testing	
	As Of Date: 07/02/2015	
	🔚 Save 🔯 Return to Search 🔛 Notif	/ Add Dypdate/Display
4	On the <b>Process Schedu</b>	ler Request page click ok.
	Process Scheduler Request	
	User ID: VSIKORASA	Run Control ID: Testing
	Server Name: PSNT 🗸	Run Date: 07/02/2015
	Recurrence:	Run Time: 5:12:40PM Reset to Current Date/Time
	Process List	Burner Burner Turn HTurn Hturnet Birthibular
	HCDL_BATCH	Process Name     Process Type     Type     Format     Distribution       HCDL_BATCH     Application Engine     Web     TXT     Distribution
	OK Cancel	
5		the Maintain Delegation Authority page
5	You will be taken back to	the Maintain Delegation Authority page.
5	Click <b>Process Monitor</b> I	ink.
5	Click Process Monitor	ink.
5	Click Process Monitor	ority
5	You will be taken back toClick Process Monitor IMaintain Delegation AuthUser ID:VSIKORASA	ority Report List Process Monitor Process Request
,	You will be taken back to         Click Process Monitor I         Maintain Delegation Auth         User ID:       VSIKORASA         Run Control ID:       Testing	ority <u>Report List</u> <u>Process Monitor</u> <u>Process Instance:766322</u>
,	You will be taken back to         Click Process Monitor I         Maintain Delegation Auth         User ID:       VSIKORASA         Run Control ID:       Testing         As Of Date:       07/03/2015	ority <u>Report List</u> <u>Process Monitor</u> <u>Process Instance:766322</u>
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,	You will be taken back to         Click Process Monitor I         Maintain Delegation Auth         User ID:       VSIKORASA         Run Control ID:       Testing         As Of Date:       07/03/2015         Image: Save Image	y The Maintain Delegation Authority page. ink. Process Monitor Process Request Process Instance:766322 Process Instance:766322

6	Process is complete when <b>Run Status</b> =Success and <b>Distribution</b> <b>Status</b> =Posted
	Process List Customize   Find   View All   🔤   🛗 First 🚺 1-6 of 6 🗳 Last
	Select Instance Seq. Process Type Process Name User Run Date/Time Run Status Ofstribution Details
	766322 Application Engine HCDL_BATCH VSIKORASA 07/03/2015 3:41:57PM EDT Success Posted Details
7	By running this process the following will happen: -Email will be generated to delegator if their proxy is inactive. Refer to "MSS Emails Generated via Workflow document, Ref #11." -Delegation requests will be made Active/Inactive based on the From and To dates being reached
	End of Procedure

# WFA MONITOR APPROVALS:

# Purpose:

Use the Monitor Approvals to take required action on pending approvals that are stuck with an approver. The possible action could be:

- Reassign WFA can reassign pending transactions that belong to a specific approver to another approver (must be at the same level in order to meet COH minimum approval levels). Reassign would be used in the case of pending transactions that are sitting with a Manager who is off sick, off job on leave, transferred to non- management position, terminated if userid is still active.
- Deny WFA can deny a pending transaction that is still in the departmental approval chain which will cancel it. Deny would be used in circumstances such as a transaction that was submitted in error, duplicate transactions submitted, etc but preference is for initiator to contact the approver who currently has the transaction and ask them to deny it in the department chain.
- Approve, Pushback, Resubmit, Restart n/a WFA will not be using these functions.

# Important:

- WFA will be notified to Reassign/Deny/Restart by the Manager's Department.
- WFA will be notified by email to create this delegation by the Manager's Department.
- Direction to the WFA should come from either the absent Manager, or the next level in the chain.
- Monitor Approval page does not filter properly. You will need to run first the custom "Reassign Pending Transactions Report" (refer to Pending Transactions Report document) to ensure all pending transactions for the approver are identified.

Navigation: HR Tab>Approvals and Delegation>Monitor Approvals

Step	Action
1	Run the <b>Reassign Pending Transactions Report</b> to identify pending transactions sitting with the approver (refer to document Pending Transactions report)

	Enter the <b>App</b>	rover ID and	Heade	r Status	of Per	nding to re	etrieve
	the pending tr	ansactions you	u need t	to action	and cl	ick Se	earch
	Monitor Approva	ls					
	👻 Search Criteria						
	Approval Process:		Q	Definition ID:			<b>Q</b>
	Header Status:	Pending		Last Modified	:		31
	Approver:	E009457		Debbie Direc	tor		
	Approver Status:		~				
	Originator:		Q,				
	Requester:		Q,				
	Search						
	Search						
3	Director that n	ntified 5 Pay R leed to be acti	oned.	anges per Workina f	rom tl	ne report <i>.</i>	find and
	select the tran	sactions that i	need to	be reass	ianed.		
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					. <u>.</u>		
	🗢 Approval Process	: Request Employee I	Rate Increa	ISE			
	<ul> <li>Approval Process</li> <li>Empl ID:</li> </ul>	: Request Employee I	Rate Increa	Empl Record	l:		
	<ul> <li>Approval Process</li> <li>Empl ID:</li> <li>Termination Date:</li> </ul>	: Request Employee I	Rate Increa	Empl Record Effective Sequence:	l:		
	Approval Process     Empl ID:     Termination Date:     Filter	: Request Employee I	Rate Increa	Empl Record Effective Sequence:	l:		
	Approval Process     Empl ID:     Termination Date:     Filter	: Request Employee I	Rate Increa	Empl Record Effective Sequence:	l:		
	Approval Process     Empl ID:     Termination Date:     Filter      Filter	: Request Employee I	Rate Increa	Empl Record Effective Sequence:	Empl Record	Termination Date	Effective Sequence
	Approval Process      Empl ID:     Termination Date:     Filter      1	: Request Employee I Toggle Header <u>Modified</u> <u>Never</u>	Rate Increa	Empl Record Effective Sequence: <u>Empl ID</u> 102172	Empl Record	Termination           Date           2015-01-05	Effective Sequence 1
	Approval Process Empl ID: Termination Date: Filter 1 2 ✓	: Request Employee I Toggle Header Modified Never 2015-06-05	Rate Increa	Empl Record Effective Sequence:	Empl Record 0	Termination Date           2015-01-05           2015-05-25	Effective Sequence 1 1
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	<ul> <li>Approval Process</li> <li>Empl ID:</li> <li>Termination Date:</li> <li>Filter</li> <li>1</li> <li>2</li> <li>4</li> <li>5</li> <li>✓</li> </ul>	: Request Employee I Toggle Header <u>Modified</u> <u>Never</u> 2015-06-05 <u>Never</u> 2015-06-05	Rate Increa	Empl Record Effective Sequence: 2011 20172 2011 20172 2012 2012 2012 20	Empl Record Q Q Q Q 1	Termination Date           2015-01-05           2015-05-25           2015-06-01           2015-06-04	Effective Sequence 1 1 1 1 1 1 1 1
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4	Under Administrative Actions: To Reassign – preferred option; enter the Approver's Oper ID and
	the ID of who you wish to reassign to and click Reassign Selected.
	✓ Administrative Actions
	The selected approver does not currently have an alternate approver selected in their user profile. You must
	manually select an alternate approver to reassign pending tasks.
	Approver's Oper ID: 4009457
	Reassign To: E121398 Allow Self-Approval
	Comment:
	Reassign Selected Approve Selected Deny Selected
	A message will appear advising that Reassignment was successful.
	Message
	Reassignment Successful (18081,5513)
	ОК
	You will see the transaction has now been reassigned.
	Pay Rate Change Approval Chain
	¬:Pending
	Departmental Approval
	Self Approved         Self Approved         Pending           Mike Manager         Mike Manager         Gary GM for Debbie Director
	Workflow Request Initiator 06/01/15 - 03:30 PM 06/01/15 - 03:30 PM Approval Step #2
	Comments
	Note: WFA must send an email to the reassigned approver advising
	that there is a transaction awaiting his approval.
5	<b>To Deny</b> – select the transaction, enter the following mandatory
	fields Approver's Oper ID and comments. Click Deny Selected.

<ul> <li>Administrat</li> <li>The selected ap manually select</li> </ul>		
The selected ap manually select	ive Actions	
manually select	prover does not currently have an alternate approv	er selected in their user profile. You must
Approver's O	ner ID F121398	ow Auto Approval
Reaseign To:		
Reassign TO.		ow Self-Approval
Comment:	As per Gary GM WFA is denying this	transaction. It will be resubmitted.
Reseign S	Selected Approve Selected Denv Sele	oted
reassigne	Approve Gelecied	
A moscad	o will appear advising that the	Donial was successful
Message		Demai was successiui.
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comments page but i them.	also appear on Mike Manager not on Gary GM's or Debbie Di	's Pay Rate Change Status rector's as not linked to
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# WFA REASSIGN PENDING TRANSACTIONS REPORT:

# Purpose:

WFA will use this report to identify pending transactions (Job Requisition, Pay Rate Change, Terminations and Transfers) for a Manager/Delegate.

### **Procedure:**

Follow the steps below to run the Reassign Pending Transactions Report

Step	Action	
1	Navigation: COH Custom>Workflow/MSS-Custom>Reassign Pending Transactions	
	Hilling Home Worklist MultiChannel Console Add to Favorites Sign of Favorites Main Menu > COH Custom COH Custom COH Custom	
	Workflow/MSS - Custom Edit "Workflow/MSS - Custom" Folder	
	that is used to filter MSS/Workflow prompts.	
2	Enter User ID or click the Lookup Icon $\bigcirc$ to search from a list of Users.	Step
	<b>Instance Status</b> will default with Pending but you can change as requir Note: Process Scheduler Request the Type and Format is: Web CSV	ed.

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	Hami avorites	Main Me	enu > (	COH Cus	tom >	Workflo	w/MSS -	Custom	> Rea	assign Pe	nding Tra	nactions	Home	Work	list
	Run Cont	rol													<u>z</u>
F	tun Cont	rol ID:	test					Report N	lanager	Proces	ss Monito	r F	Run		
	Process	Request	Paramet	ers									_		
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# WFA REASSIGN PENDING TRANSACTIONS TERMINATED MANAGER

## Purpose:

WFA will need to reassign pending transactions for a manager who has terminated prior to their userid being deleted.

### **Procedure:**

Follow the steps below for the process:

1 The WFA will be notified by email from the Weekly Userid Delete process of any managers who have terminated and have pending transactions.	Step	Action
Sample email:	1	The WFA will be notified by email from the Weekly Userid Delete process of any managers who have terminated and have pending transactions.

	Subject: The Process Instance (747770 - Process: (N_WFPND2) completed successfully)          Message       JobReport.htm (4 KB)         Process Instance:       747770         Process Name:       N_WFPND2         Process Type:       SQR Process
2	WFA logs into Peoplesoft and clicks on the <b>JobReport.htm</b> contained in the email to open it.
3	Click on the process name N_WFPND2 link to open.
	Instance Process Name Description Process Run Status Run Control ID Type Output Format Server Begin Date/Time End Date/Time
	747770     Image: Constraint of the image: Co
4	Click on the <b>N_WFPND2.csv</b> file. The report will list any managers who have terminated and have pending transactions.

	COH_Rec	questRate	Increase	e transaction	s found for Op	orid: E10435	3 - Name: Jo	ose Bautista						
	Oprid	Orig Oprid	Step Status	Date Created	Date Modified	Originator Id	Requestor Id	Record Name	Xrf Date Modified	Request Id				Trans Effdt
	E104353	E104353	Р	03/10/2015	03/10/2015	E115789	E104353	N_HR_RATE_DAT			122194	0	Marcus Stroman	03/02/2015
	E104353	E104353	Р	03/10/2015	03/10/2015	E115789	E104353	N_HR_RATE_DAT			122205	0	David Price	03/09/2015
	E104353	E104353	P	03/10/2015	03/10/2015	E115789	E104353	N_HR_RATE_DAT			122205	0	David Price	03/02/2015
	COH_Ter	minateEm	ployee	transactions	found for Op	rid: E104353	- Name: Jo	se Bautista						
	Oprid	Orig	Step	Date	Date	Originator	Requestor	Record Name	Xrf Date		Emplid	Empl	Employee Name	Trans Effdt
	E104353	E104353	P	03/11/2015	03/11/2015	E115789	E104353	N_HR_TERM_DAT	03/11/2015		112831	0	Ryan Goins	03/09/2015
	COH_Tra	nsferEmpl	oyee tr	ansactions fo	ound for Oprid	: E104353 -	Name: Jose	Bautista						
	Oprid	Orig Oprid	Step Status	Date Created	Date Modified	Originator Id	Requestor Id	Record Name	Xrf Date Modified		Emplid	Empl Rcd	Employee Name	Trans Effdt
	E104353	E104353	Р	03/11/2015	03/11/2015	E115789	E104353	HR_TRANSFER_DAT			112831	0	Ben Revere	03/09/2015
	"rep have Not the mal trar Not man terr rep trar	vorts e per mai mai ke s nsac re: i nsac mina ort a nsac	to' ndii nag ure tio f th er's nte and tio	' and ng tra <b>n rea</b> ger yo the ns. ne Wi s tran d mai d mai d thei ns ar	Will ne Insacti Insacti Insaction In	eed to ons a ing t e rea ct ID unab ons L will rid w ssigr	le to contrans ssign is a le to contrans contra contrans contrans contrans contrans	ail them t ing their sactions hing to h ssigned reassig e next F tinue to ot be de and appr	appro alwa as co the p riday appe leted oved	vise f val. ys c pre pro ar c unt	that the ting on t til t	th ck or nat ss he he	to see E ID to ted run, th weekly	if e V
6	Onc wee user does user appr	e the kly u rid w s not rid w rove	e re usei her t ap vill r d.	eassig rid de n it is oprove not be	ned "r lete pi run th e the p e delet	roces ne ne pendi ed ar	ts to" s will xt Fri ng tra nd wi	approve delete tl day. If t ansactior ll remain	is the he ter he rea is by t on th	trar min assig the e re	isac ateo gneo next por	tio d m d " t Fi t u	ns, the nanager reports riday, th ntil it is	′s to″ າe
7	Liste	ed be	elov	w are	the te	chnic	al sp	ecs for tl	ne pro	ces	ses	tha	at are ru	ın.
	Supe trans	rviso actior	r and 1s th	d above at need	e userid l to be r	is dele e-assig	eted (F gned.	Friday a.m.)	and st	ill ha	s per	ndin	ıg workflo	DW
	Reso A net role o abov	<b>lutio</b> w vie query e that	<u>n</u> w: F for are	PS_N_V superv inactiv	WF_INA isors an ve in JO	ACTO d abov B.	P_VW /e and	/ was create modified to	ed usin o pick u	g the up op	sql f rid's	fron s of	n the dyna superviso	amic ors and

New SQR: N\_WFPND2 will be scheduled to run prior to the Friday a.m. userid delete process. N\_WFPND2 uses the input record: PS\_N\_WF\_INACTOP\_VW looks for pending transactions for inactive oprid's in the Workflow transactions: - COH\_JobRequisition - COH RequestRateIncrease - COH\_TerminateEmployee - COH\_TransferEmployee and writes out a .csv file as well as the new record PS N WF INACTV OPR. New record: PS\_N\_WF\_INACTV\_OPR will be used in the Friday a.m. Delete User App. Engine pgm: N\_DEL\_USER to: - keep these oprid's active - lock out their user profile - delete their hint response record so they can't use Forgot Password The new record: PS\_N\_WF\_INACTV\_OPR is also used to: - create an error message for security administrators that try and unlock the user profile - remove the oprid from the search records that the IT Help Desk use so they can't be unlocked Once the pending transaction have been re-assigned the oprid will not be in the PS\_N\_WF\_INACTV\_OPR record and will be deleted from PeopleSoft in the Friday a.m. Delete User process. Test in HR9DMO Supervisors and above that are inactive in JOB:

•		
	OPRID	
1	E088203	
2	E113367	
2	E116803	
4	E000863	
5	E115647	
6	E062776	
7	E015755	
8	E069020	
9	E027530	
10	E005990	
11	E121398	
12	E107427	
13	E062849	
14	E028691	
<u>Nev</u> Opr	<u>v SQR: N_WFPND2 - Log</u> id: E121398 Opr Name: Donald (Jason) Thorne Total COH_JobRequisition transactions found: Total COH_RequestRateIncrease transactions found:	1 4
Opr	id: E107427 Opr Name: Holly Odoardi	1
	Total COH_JobRequisition transactions found: Total COH_RequestRateIncrease transactions found: Total COH_TerminateEmployee transactions found: Total COH_TransferEmployee transactions found:	2 1 1 2


General ID Roles	Workflow Audit Links User ID Queries
UserID: E107427	Account Locked Out?
Description: Holly Odoard	Message
Symbolic ID:	
Password:	User has Workflow Pending Transactions (26099,12)
Confirm Password	User is inactive in JOB but still has workflow pending transactions that need to
User ID Alias:	re-assigned then the user's profile will be deleted. This user profile cannot be
Edit Email Addresses	
General Attributes	OK
Language Code:	
Currency Code:	V
IT Help Desk trying to Unlock Euser + Cha	<u>o Unlock User Profile – E107427</u> ange Password

<u>New record: PS_N_WF_INACTV_OPR – Oprid's removed manually similating</u>
Pending Transactions re-assigment
1 ⊂ 🚰 🖬 🗐   ¾ 🛍 🖻 🗹 #A   ∽   🖽 ▼   ✓ 🕨 📕   🚺 HR9DMO 💽
DELETE FROM PS_N_WF_INACTV_OPR
SELECT * FROM PS_N_WF_INACTV_OPR
•
OPRID
Delete Haen Ann Engine nome N. DEL USED Log
<u>Delete User App. Engine pgm: N_DEL_USER – Log</u>
Emplid[107427] - UserID [E107427] (0,0)
Warning Select OK to confirm deletion of User Definition or select Cancel. (48,122)
* Success: Oprid [E107427] deleted for Emplid-Name[107427-Holly Odoardi] (0,0)
Emplid[121398] - UserID [E121398] (0,0)
Warning Select OK to confirm deletion of User Definition or select Cancel. (48,122)
* Success: Oprid [E121398] deleted for Emplid-Name[121398-Donald (Jason) Thorne] (0,0)

# 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	g
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<b>1</b> <i>Complete</i> <i>this step</i> <i>for new</i> <i>positions</i> <i>only</i>	Obtain job description & Compensation data for new positions	Work with HR Compensation section to determine position Salary Grade <b>for new position</b>	Hiring Manager HR Compensation	HR Compensation creates new Position in PeopleSoft
Steps	Task	Task Details	Assigned To	Processing/Filing
2	Request approval to fill a vacancy	Create the <b>Job Opening</b> 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 posting to the hiring Department & determine (in collaboration if the posting is internal/external or both)	HR Employment Services	Email information to hiring Department – 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	HR Employment Services	
		Cross references JD and job posting to ensure no significant changes to role	HR Receptionist	
		Runs process to put posting on S drive and sends email to print and mail		
6	Screen Resumes	Following close of posting,	HR Employment	Route shortlisted
		be provided to hiring manager	Services	department

		Provide email offer template with instructions for hiring manager		
7	Determine Candidates to be assessed/interviewed	Review resumes and select top 3 to 5 candidates for face to face meetings Communicate top candidates to HR Employment Services	Hiring Manager	View resumes online and assign interest levels to top candidates. Email list to HR Employment Services
8	Provide Assessment/Interview Template	Prepare assessment/interview tool to be used to assess candidates during the interview process based on needs of department	HR Employment Services	Email tool to Hiring Manager
Steps	Tack	Taali Datalla		
01000	IdSK	lask Detalls	Assigned to	Processing/Filing

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

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

				appropriate with copy of offer letter.
14	Push Candidate to Prepare for Hire	Close call file, push candidate from "offer accepted" to "prepare for hire" In comments section include EMPL class and vacancy reason	HR Employment Services	Workflow routes to HR Records Worklist
15	Prepare Regret Notices	Letters issued to unsuccessful applicants	HR Employment Services	Electronic notice to applicants
16	Complete the recruitment file	Complete the recruitment file	HR Employment Services	File in HR recruitment competition file
Steps	Task	Task Details	Assigned To	Processing/Filing

18	Obtain Benefits Enrolment Information	Insert comments for payroll adjustments where applicable Email/mail the relevant Benefit package once the employee appears on the Staff Movement Report as a new hire request	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. File in tracking file
		completion of the package		
Steps	Task Drococc Day	Task Details	Assigned To	Processing/Filing
19	FIDLESS Fay	Calculate and process pay	Finance	
	adjustments	adjustments according to	Payroll	
	adjustments	adjustments according to comments on transaction	Payroll	

#### 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 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
  - Contact Employment Services for Recruitment Process
- School Crossing Guards
- Part-time Library staff

# *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 drive: Human Resources > Common > Manager Resources	Supervisor or FAII	Email hire package to new employee to be returned to HR Records
Steps	Task	Task Details	Assigned To	<b>Processing/Filing</b>
2	Action New Hire in PeopleSoft	Initiate Smart HR Template transaction in PeopleSoft Manager Self Service New Hire information is keyed into PeopleSoft including: - Hire Date/effective date of rehire - Name - Position # - Expected end date for temp assignments - Comments (special instructions, notes)	Supervisor or FAII	Transaction Workflow generates a work list item for HR Records

3	HR Processing	Hire or transfer the employee from PeopleSoft Manage Hire based on information received in new hire package Insert comments for payroll adjustments where applicable	HR Records	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
1 a)	Identify	Run Query to determine upcoming	HR Employment	Follow up with
	upcoming	contract end dates.	Services	Manager/Supervisor

	contract terminations	Follow up with manager/supervisor who have staff coming up to end date.		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	<b>Processing/Filing</b>
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	The extension letter is provided to	HR Employment	Original letter to HR
	Extension		Services	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.

# **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
- Reports to Change
- Increase/Decrease Head Count
- $\circ$   $\,$  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) form for submission to FA staff	Supervisor/Manager/Director or designate	Sends to approvers
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 <b>Position Data Change</b> transaction in PeopleSoft MSS effective up to 6 months retroactive from the date HR received the fully signed request	HR Compensation Specialist HR Compensation Specialist	Workflow routes Position Data Change transaction to HR Records Worklist
Steps	Task	Task Details	Assigned To	<b>Processing/Filing</b>
5	HR Processing	Position data information is updated in PeopleSoft. Job data is then updated with new rate, title, job code as applicable for affected employee.	HR Records	If applicable, HR Records routes to Finance Payroll Worklist. Email notification to FAII advising that transaction has been processed. Position Data Status page in

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

### **PAY RATE CHANGES Step Progression or Merit:**

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

# Introduction:

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

- Step progression
- Merit Performance Based

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Merit Alert	For Step Progression/Merit Performance Based, the Supervisor receives automated email notification that pay rate change is pending Note: Departments will no longer receive Merit alerts for employees in ATU and ONA 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	<b>Processing/Filing</b>

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

- 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 and ONA 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	<b>Processing/Filing</b>
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 <b>Pay</b> <b>Rate Change-Change in</b> <b>Qualifications</b> 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	<b>Processing/Filing</b>
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	

- 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 Additional Duty Pay

## **Process Summary:**

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

#### 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 of the Additional Duty Pay at the same time, future dating the end of the pay change.
- Additional duty pay is always 8% of the employee's salary

# **Probation Complete – School Crossing/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 - School Crossing/Fire.

Steps	Tasks Details	Action	Assigned to	Process/Filing
1	Notification of Probation Complete	School Crossing Guards – HR will run report monthly to identify employees who have completed their 6 month probation period.	HR Records	School Crossing - HR to send Email to supervisors.
		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 – School Crossing/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	<b>Processing/Filing</b>
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	<b>Processing/Filing</b>
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	<b>Processing/Filing</b>
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 <b>Transfer – Seasonal</b> 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	<b>Processing/Filing</b>
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 <b>Transfer – Short Term</b> <b>Coverage</b> 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	<b>Processing/Filing</b>
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	<b>Processing/Filing</b>
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	<b>Processing/Filing</b>
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	<b>Processing/Filing</b>
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	<b>Processing/Filing</b>
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.	HR Records	Email Finance Payroll if any pay adjustments required. File signed agreement
		Enter Expected End Date for monitoring purposes		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	<b>Processing/Filing</b>
1	Supervisor identifies position employee is	Conversation between Supervisor and employee(s) to confirm position change and effective date.	Supervisor	Conversation with employee to confirm details of new position
	transferring to	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	<b>Processing/Filing</b>

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 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):

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

### **UNPAID LEAVE OF ABSENCE >30 DAYS**

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

#### Introduction:

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

- Personal Unpaid Leaves
- Professional Development
- Maternity, Parental, or Adoption Leave
- Military Leave
- Family Medical/Compassionate Care Leave

- Critically Ill Child Care Leave
- Organ Donor Leave
- Crime-related Child Death/Disappearance Leave
- Family Caregiver leave

Steps	Task	Task Details	Assigned To	<b>Processing/Filing</b>
Steps 1	Task Request for leave of Absence	Task Details 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 &	<b>Assigned To</b> Employee	<b>Processing/Filing</b> Sends form to Supervisor for approval
		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.		
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 File a copy of letter
-	Impacts	report. Assess the type of leave and related benefit impacts & issue letter with options form to EE regarding benefit/pension continuation		in employee file
Steps	Task	Task Details	Assigned To	<b>Processing/Filing</b>
5	Complete	The form is completed indicating the preferred course of action with respect	Employee	The form (with cheques if reg/d) is
	form	to the continuation of benefits for the leave period		sent to HR Benefits within 30 days of receipt
6	Process Benefit Options form	Depending on the elections made by the employee, terminate or leave relevant benefits active in PeopleSoft	HR Benefits	sent to HR Benefits within 30 days of receipt File options form in employee file and photocopy of cheques in financial file

7	Issue ROE	Prepare and issue ROE in accordance with LOA	Finance Payroll	Send the ROE to Service Canada and file in the case of paper copies.
Return	n from Unpaid L	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	Assigned To	Processing/Filing
Steps 3	<b>Task</b> Reactivate Benefits	Task DetailsReturn is identified on the staffmovement report. Letter is issued toemployee in the case where benefitswere terminated notifying ofreactivation and requesting new formsbe completedWhere benefits were continued, aletter notifying confirmation of activestatus and return of excess cheques to	<b>Assigned To</b> HR Benefits	Processing/Filing Original letters and forms sent to employee Copies of letters placed in employee file
Steps 3	Task Reactivate Benefits	Task DetailsReturn is identified on the staffmovement report. Letter is issued toemployee in the case where benefitswere terminated notifying ofreactivation and requesting new formsbe completedWhere benefits were continued, aletter notifying confirmation of activestatus and return of excess cheques toemployee	Assigned To HR Benefits	Processing/Filing Original letters and forms sent to employee Copies of letters placed in employee file

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	<b>Processing/Filing</b>
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	<b>Processing/Filing</b>
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 D 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	<b>Processing/Filing</b>
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	HR Admin Coordinator HR Records	File Info in salary continuance file File email in
		Finance Payroll of termination and relevant calculations		
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

 $\circ~$  HR Admin Coordinator/ HR Records repeat step ~4 & 5 & Finance Payroll to make adjustments as necessary