2017

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.

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

Transaction Type	Description	Initiated By
Transfer Reason – Employer/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
Transfer Reason – Return to Previous Position	This transaction and reason is used for employee's moving back to their home position, usually due to the end of a temporary assignment.	Manager or Delegate
Transfer Reason – Seasonal	This transaction and reason is used for the transfer of seasonal staff in permanent dual classifications (i.e. Recreation in Winter and Parks in Summer)	Manager or Delegate
Transfer Reason – Short Term Coverage	This transaction and reason is used for the transfer of staff for a maximum of 4 weeks due to vacation coverage (union), sick coverage, or union business coverage.	Manager or Delegate
Transfer Reason – Internal Posting Process (Fire Local 288, 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 Reason – Probation Complete-ATU	This transaction and reason is to be used for the assignment of Bus Operators to their home position upon completion of their training.	Manager or Delegate
Transactions Executed ONLINE Via Manager Self Service Cont'd		

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

The below Chart summarizes transactions handled **outside** of the Manager Self Service System, typically dealt with via **email or verbal correspondence with Human Resources**. 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 Posted	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 Executed OUTSIDE of Manager Self Service Cont'd		
Transaction Type	**Description**	**Dept Contact**
Transfer Reason – Confirm to Permanent	For the confirmation of a temporary employee as permanent in their position. An employee can only be confirmed in a position if a competition has already occurred for the original temporary role. Human Resources will facilitate system and employee notifications.	HR Employment Services
Transfer Reason – Temporary Internal Secondment/Minor Reorg	When transferring an employee as a result of an **internal secondment** to another City of Hamilton position usually as a result of project work or for people movements to new positions due to **a minor reorganizations**, which repurposes the incumbents' existing position, Human	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 Reason – Acting Assignment	In order to process a Transfer due to an Acting assignment (non-union) or Temporary Deployment (union) of greater than 1 month (due to sick coverage or filling a position while it is being posted), Human Resources will facilitate system and employee notifications.	HR Employment Services
Termination – Involuntary	For terminations considered to be involuntary typically as a result of discipline, frustration of contract, salary continuance, AWOL, working notice, layoff.	HR Labour Relations

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
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:	= ∨	
Effective Sequence:	= ∨	
Job Title:	begins with ∨	
Position Number:	begins with ∨	
Job Code:	begins with ∨	
Department:	begins with ∨	
Self Service Status Indicator:	= ∨	Awaiting HR Processing ∨

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

4	Self Service Status Indicator: **Awaiting HR Processing** – Transaction has been routed to HR and waiting to be processed. **Cancelled by HR** – Transaction has been routed to HR and HR has cancelled it. **Denied** – Transaction was not routed to HR as an approver in the department chain has denied it which terminates the remainder of the approval chain. **Errors Encountered** – System generated. **In Approval Process** – Transaction is pending in the department approval process and will be routed to HR once all approvals are complete. **Processed by HR** – Transaction has been processed by HR.
5	Select from the list the Request Status page you wish to review.

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

Requisition Request ID:	begins with ▾	
*Effective Date:	= ▾	📅
Effective Sequence:	= ▾	
Job Title:	begins with ▾	
Position Number:	begins with ▾	🔍
Job Code:	begins with ▾	🔍
Department:	begins with ▾	🔍
Self Service Status Indicator:	= ▾	Processed by HR ▾

☐ Case Sensitive

[Search] [Clear] Basic Search Save Search Criteria

Search Results

View All								First ◀ 1-7 of 7 ▶ Last
Requisition Request ID	***Effective Date**	**Effective Sequence**	**Job Title**	**Position Number**	**Job Code**	**Department**	**Department Description**	**Self Service Status Indicator**
00000025	06/04/2015	1	Dir HR Systems & Operations	00006294	6420	320525	CityMgr-HR-COD-Compensation	HR Process
00000027	06/04/2015	1	Admin Asst I Scheduler	00005010	6411	300105	Councillor's Office-Mayor'sOff	HR Process
00000028	06/04/2015	1	HR Records Coord	00006331	1313	320525	CityMgr-HR-COD-Compensation	HR Process
00000029	06/04/2015	1	Admin Asst I Councillor	00004986	6411	300075	Councillor'sOffice-Ward12	HR Process
00000053	06/05/2015	1	Mgr Payroll & Pensions	00005102	6426	336212	CorpServ-FS-Payroll&Pen-Payrol	HR Process
00000054	06/05/2015	1	Dir HR Systems & Operations	00006294	6420	320525	CityMgr-HR-COD-Compensation	HR Process
00000059	06/05/2015	1	Sr Administrator Lodges	00004739	6089	636005	CES-Lodge-ML-Admin	HR Process

End of procedure.

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
3	Status default is Awaiting HR Processing. Change default to applicable status. In the example below, the transfer status is **Cancelled by HR** to retrieve a Short Term Coverage request that HR Records cancelled and referred to Staffing as the duration exceeds the appropriate length.

Transfer Employee 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

Empl ID:	begins with ∨	
Empl Record:	= ∨	
*Effective Date:	= ∨	🗓
Effective Sequence:	= ∨	
Name:	begins with ∨	
Last Name:	begins with ∨	
Department:	begins with ∨	🔍
Pay Group:	begins with ∨	🔍
Self Service Status Indicator:	= ∨	Cancelled by HR ∨

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

4	Click [Search] to retrieve all "Cancelled by HR" transactions. Enter emplid, name, or other selection criteria to narrow your search.
5	Select from the list the Status page you wish to review.

Transfer Employee 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

Empl ID:	begins with ∨	
Empl Record:	= ∨	
*Effective Date:	= ∨	🗓
Effective Sequence:	= ∨	
Name:	begins with ∨	
Last Name:	begins with ∨	
Department:	begins with ∨	🔍
Pay Group:	begins with ∨	🔍
Self Service Status Indicator:	= ∨	Cancelled by HR ∨

[Search] [Clear] Basic Search 🖅 Save Search Criteria

Search Results

View All

Empl ID	Empl Record	*Effective Date	Effective Sequence	Name	Department	Department Description	Pay Group	Std Hours From	Std Hour
045070	0	07/06/2015	1	Mike Manager	720004	P&ED-T&C-Director'sOffice-Admn	SAL	35	35
104272	0	06/15/2015	1	Sarah Van Sickle	679164	CES-CHMS-ChldCareAdm100%Fund	SAL	35	35
118575	0	06/30/2015	1	Eric Employee	720100	P&ED-T&C-HRM-DundurnCastle	SAL	35	.01
120503	0	04/15/2015	1	Brooke Monaghan	632010	CES-Lodge-WL-ResidentSocServ	WAL	.01	.01	

6	The request details along with any comments are available for Staffing to review.
	Transfer Details
	Transfer Date: 07/06/2015
	Reason for Transfer: VAC Short Term Coverage **End Date:** 09/28/2015
	Workflow Status: Cancelled by HR
	Effective Sequence: 1
	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'sOffice-Admn
Location Code:	BLD005	Lister Block		BLD005	Lister Block
Job Code:	6426	Mgr 8		6421	Dir 10
Reg/Temp:	Regular	**Empl Class:**		Regular	
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	
Step:		**Hourly Rate:**		---	
Union:	CA	Non Union Mgmt Professional			
Reports To:	00007337	Dir Tourism&Culture		00001504	GM Planning & Econ Dev

Transfer Approval Chain

▽ **:Approved**   ⬚View/Hide Comments

Departmental Approval

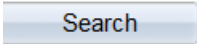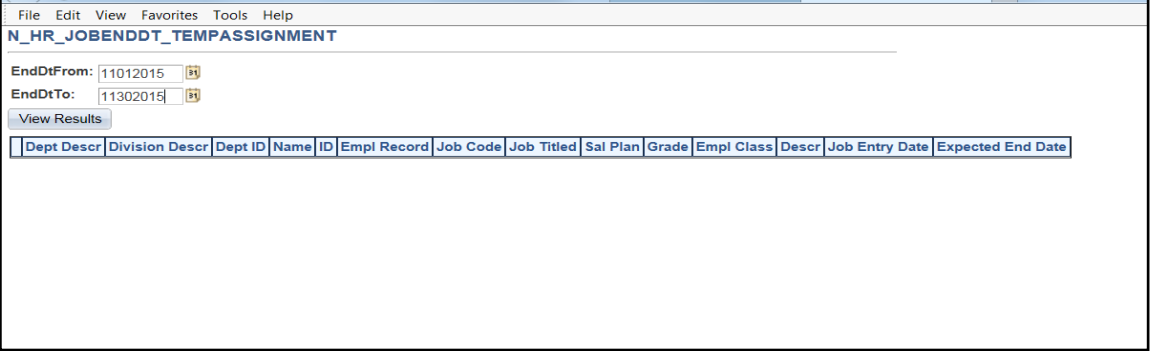| **Self Approved**		**Approved**
✔ Debbie Director	→	✔ Gary GM
Workflow Request Initiator		Approval Step #1
07/10/15 - 09:47 AM		07/10/15 - 09:48 AM

▽ **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 procedure.

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.

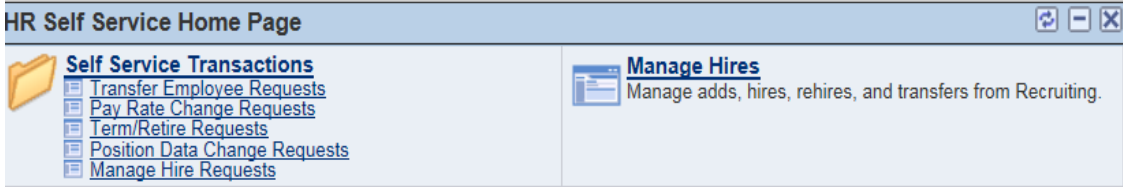| Step	Action
1	Navigation: Main Menu>Reporting Tools>Query>Query Viewer Enter Begins with: **N_HR_JOBENDDT_TEMPASSIGNMENT** and click Search Select **Run to Excel** **Query Viewer** Enter any information you have and click Search. Leave fields blank for a list of all values. Search By: Query Name begins with N_HR_JOBENDDT_TEMPASSIGNMENT Search Advanced Search **Search Results** Folder View: -- All Folders -- Query Customize | Find | View All | First 1 of 1 Last Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule | Add to Favorites N_HR_JOBENDDT_TEMPASSIGNMENT | for Staffing to identify RTO | Public | N_HR | HTML | Excel | XML | Schedule | Favorite Enter **EndDtFrom and EndDtTo** – use the following month File Edit View Favorites Tools Help **N_HR_JOBENDDT_TEMPASSIGNMENT** EndDtFrom: 11012015 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 (*Staffing to create*) 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** Transfer Employee Requests Pay Rate Change Requests Term/Retire Requests Position Data Change Requests Manage Hire Requests **Manage Hires** Manage adds, hires, rehires, and transfers from Recruiting.
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: < *enter date* and Status to: *In Approval Process* to identify transactions that are for the current pay period but have not yet been routed to you.

Transfer Employee 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

Empl ID:	begins with ∨	
Empl Record:	= ∨	
Effective Date:	= ∨	
Effective Sequence:	= ∨	
Name:	begins with ∨	
Last Name:	begins with ∨	
Department:	begins with ∨	
Pay Group:	begins with ∨	
Self Service Status Indicator:	= ∨	Awaiting HR Processing ∨

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

Search | Clear | Basic Search | Save Search Criteria

| 4 | Self Service Status Indicator:

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

5	Select from the list the Request Status page you wish to review.
	Transfer Employee 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
	Empl ID: begins with
	Empl Record: =
	*Effective Date: =
	Effective Sequence: =
	Name: begins with
	Last Name: begins with
	Department: begins with
	Pay Group: begins with
	Self Service Status Indicator: = Processed by HR
	Search Clear Basic Search Save Search Criteria
	Search Results
	View All First 1-14 of 14

Empl ID	Empl Record	*Effective Date	Effective Sequence	Name	Department	Department Description	Pay Group	Std Hours From	Std Hours To	Self Service Status Indicator
003957	0	09/15/2015	1	Yolanda Sinha	492026	PW-Env-PrksCem-CemClear	WAL	40	40	Processed
034850	0	01/01/2015	1	June Hannah-Cook	632010	CES-Lodge-WL-ResidentSocServ	SAL	35	.01	Processed
052750	1	06/01/2015	1	Donald Duck	811010	P&ED-EcDev-BusDev-InvestmntIni	SAL	35	35	Processed
111447	0	06/08/2015	1	Minnie Mouse	720140	P&ED-T&C-HRM-GriffinHouse	WAL	.01	.01	Processed
112246	1	04/27/2015	1	Daisy Duck	806110	P&ED-Building-Engineerng&Zone	WAL	.01	35	Processed
113998	0	05/01/2015	1	Ryan Wheeler	632010	CES-Lodge-WL-ResidentSocServ	WAL	.01	20	Processed
115655	0	06/08/2015	1	Jessica Pannozzo	679160	CES-CHMS-ChldCareFeeSubsAdmn	WAL	17.5	17.5	Processed

End of procedure.

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.
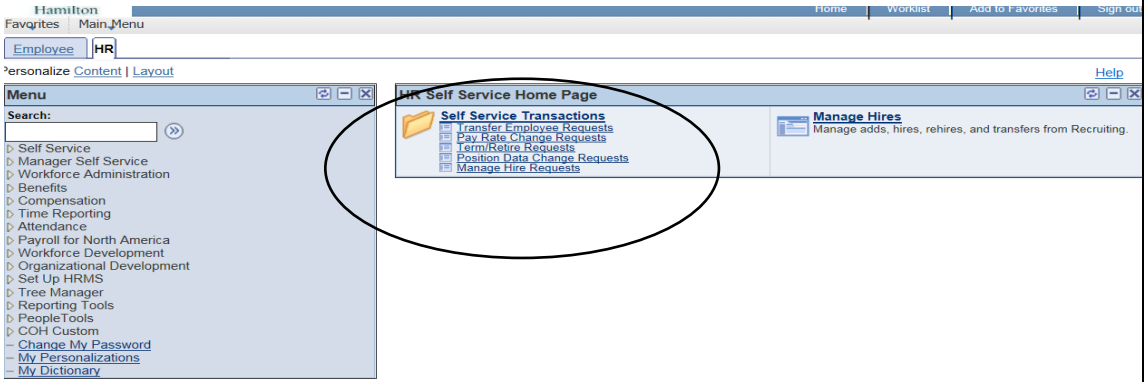
Important:
Approving a transaction off the Manage Hire Request page does not automatically update PeopleSoft; you must manually process the transaction in PeopleSoft. Once a transaction is marked as approved or cancelled by HR Records it will be removed from the HR Records Worklist and an automated email 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 student	COH_COOP_HS
Hiring/rehiring a College/University co-op student	COH_COOP_POST
Hiring/rehiring a School Crossing Guard	COH_CROSSING_01
Hiring/rehiring a miscellaneous salary	COH_GENERAL_SAL
Hiring/rehiring a miscellaneous wage (i.e.ATU Winddown, Student Intern)	COH_GENERAL_WAL
Hiring/rehiring a Library non-union part time	COH_LIBRARY

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 **Manage Hire Request.** Self Service Status Indicator will default as: Awaiting HR Processing. This can be changed by clicking ⌄ ## Hire 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 Hire Sequence ID: = *Effective Date: > Effective Sequence: = Name: begins with Last Name: begins with Job Opening ID: = Applicant ID: = Department: begins with Pay Group: begins with Self Service Status Indicator: = Awaiting HR Processing

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

3	Click **Search** to view all pending Manage Hire Request transactions. Click on any of the Headers to change the sort. You may wish to click on the **Department Description** to sort by your portfolio. Click the transaction link you wish to process. *Note: Hire Sequence ID starting with 9000…are transactions initiated from Manager or FAII Staff via Smart HR Template Hire, all others are initiated by Staffing via Recruiting – Prepare for Hire*

Self Service Status Indicator: [=] [Awaiting HR Processing]

[Search] [Clear] Basic Search | Save Search Criteria

Search Results

View All   First ◄ 1-24 of 24 ► Last

Hire Sequence ID	*Effective Date	Effective Sequence	Name	Job Opening ID	Applicant ID	Department	Department Description	Pay Group	Self Service Status Indicator
3750	07/01/2015	1	Horvath,Mariann	10534	32835	750230	Library-Community-Sherwood	WAL	HR Process
3797	06/01/2015	1	Vargas,Andrea Paola	10469	331492	315022	CorpServ-CustServ-ContactCtre	(blank)	HR Process
3800	06/01/2015	1	Cavic,Aleksandar	10252	123679	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3801	06/01/2015	1	mohammadi,ali mohammad	10252	287684	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3802	06/01/2015	1	Rallis,Gloria	10252	75741	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3803	06/01/2015	1	Burrows,Jon	10252	320710	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3804	06/01/2015	1	Nelson,Rachel Leigh	10252	242447	530150	PW-Transptn-TransitOperatn-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	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3807	06/01/2015	1	Hood,Christopher Andrew	10252	320103	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3808	06/01/2015	1	Leckie,Chad	10252	317788	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3809	06/01/2015	1	Parasram,Sonya Mae Jean	10252	317893	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3810	06/01/2015	1	subotic,vlado	10252	318065	530150	PW-Transptn-TransitOperatn-Ops	(blank)	HR Process
3812	06/01/2015	1	Ross,Gael	10252	223366	530150	PW-Transptn-TransitOperatn-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	1514	750140	Library-Admin-TechnicalServ	WAL	HR Process
3819	06/22/2015	1	Tanvir,Rehan	10542	213394	750035	Library-Admin-BusinessOffice	SAL	HR Process
3820	07/02/2015	1	Smith,Joanne M.	10538	1832	750205	Library-ClusterB-Barton	WAL	HR Process
3821	06/08/2015	1	Drennan-Scace,Kathleen	10537	127572	750240	Library-District-Terryberry	SAL	HR Process
900000004	05/28/2015	1	Draft,Save as	0	0	465010	P&ED-PrkngByLw-MLE-SchoolCross	WAL	HR Process
900000010	05/28/2015	1	burtch,karen	0	0	352125	CityMgr-Clerk-POA	WAL	HR Process
900000021	06/03/2015	1	Template,WAL	0	0	632025	CES-Lodge-WL-HousekpngServ	WAL	HR Process
900000023	06/15/2015	1	Avery,Lisa	0	0	632010	CES-Lodge-WL-ResidentSocServ	SAL	HR Process
900000024	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 **Requesters Comments/Instructions.** **Manage Hire Request** Hire Request #900000050 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: 900000050 Template ID: COH_COOP_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 **Requester Comments/Instructions** Comment: Please send me his employee number asap **Candidate Details** Applicant Type: External - New Name: Brad Pitt
5	**Manage Hire Approval Chain** – as there is no approval required for Manage Hire Changes only the name of the initiator (Smart HR Template Hire) or Hiring Manager (via Recruiting) and date/time submitted will display at the bottom of Page. **Manage Hire Approval Chain** ▽ :Approved **Departmental Approval** **Self Approved** ✓ Daffy Duck Workflow Request Initiator 06/22/15 - 11:54 AM
6	Click Go To Manage Hires to open a new window and complete the Manage Hire. *Note: there are two types under Source (Smart HR Transactions and Recruiting Solutions).*

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.

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.

Manage Hires

*Select Transactions Where Start Date ▾

From 04/03/2017 📅   To 07/14/2017 📅   Refresh

Hire Transactions

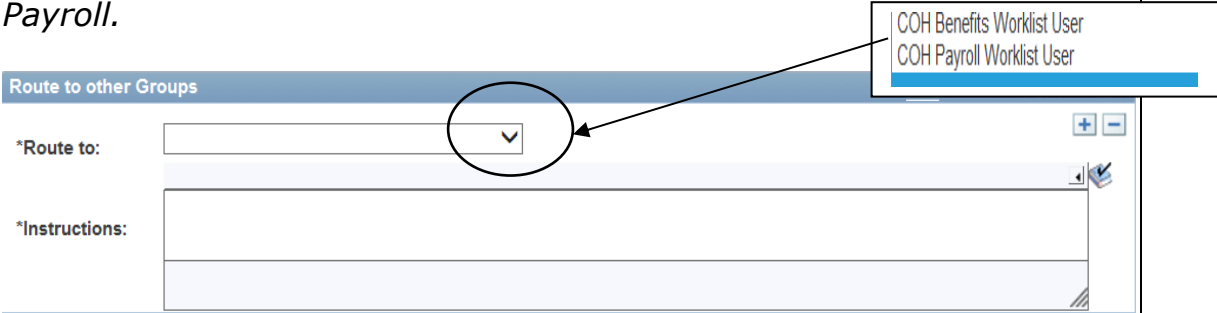| Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By	
☐	05/15/2017	Requested	Lindsey Reaume		Hire	Recruiting Solutions	Grace Figliola-Laufman	⌃
☐	05/15/2017	Requested	Rebeka Eisbrenner		Hire	Recruiting Solutions	Andree Verticchio	
☐	05/15/2017	Requested	Shannon Clarke		Hire	Recruiting 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   Deselect All

Cancel Selected Transactions

Note: if you are cancelling a transaction, you must select
Cancel Selected Transactions *in Manage Hires, as well as the the Transaction*
Status page below.

7	Once you have completed the Manage Hire Transaction, return to **Manage Hire Request** page.

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.
	Administrator Processing
	Administrator: Tracey Jaremey
	Comment:
9	If routing to COH Payroll Worklist click ⌄ to select COH Payroll Worklist User and add required instructions.
	Note: these comments are only visible to HR Records and Finance Payroll.
	COH Benefits Worklist User
	COH Payroll Worklist User
	Route to other Groups
	*Route to:
	*Instructions:
10	**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 Manage Hires, *which will open a new window and take you to Manage Hires for you to manually updated.*
	Cancel-will update the Current Status to Cancelled by HR and generate an email to **only** the Initiator.
	Both actions will remove the transaction from the HR Worklist (*currently we are not using*).

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.

[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.
	*Note: this warning will **only** 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

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 ◀ **1 of 1** ▶ Last

Role Name: COH Payroll Worklist User

Instructions: HR Records to insert comments to Finance Payroll--still to be determined, should include new employee number

Manage Hire Approval Chain

▽ :**Approved**   ⊕ View/Hide Comments

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

Current Transaction Status: (Processed by HR)

Go To Manage Hires

[Return to Search]   [↑ 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.

14	Workflow will generate an email at various stages: -to the initiator or Hiring Manager once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the employee once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of procedure.

View Status:
The status of 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. Unionized employee is eligible to move to the next step based on performance.	Merit-Performance Based
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	Navigation: HR Tab>Self Service Transactions
2	Click **Pay Rate Change Requests.** Self Service Status Indicator will default as: Awaiting HR Processing. This can be changed by clicking ⌄
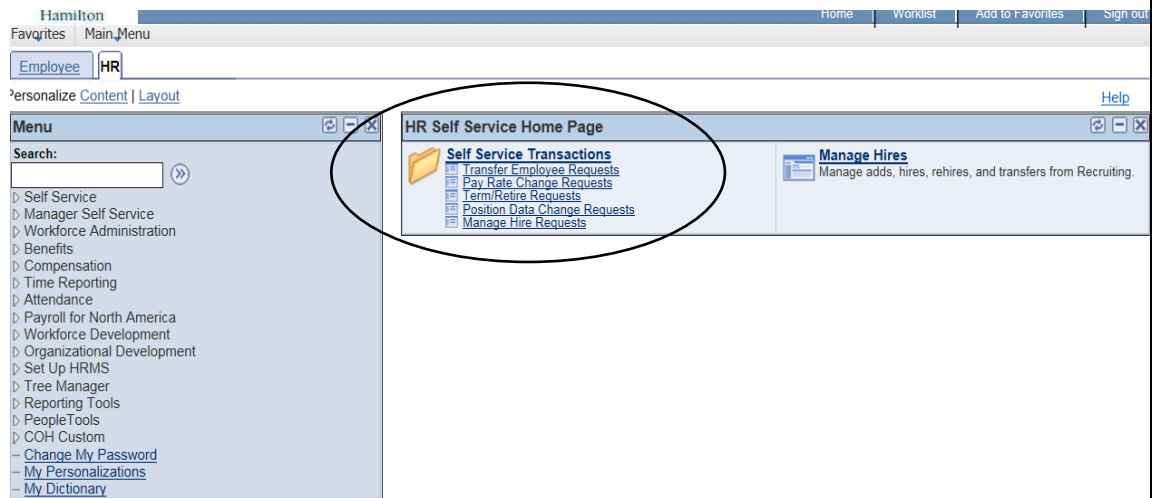
Awaiting HR Processing
Cancelled by HR
Denied
Errors Encountered
In Approval Process
Processed by HR

Pay 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 (up to 300): 300

Empl ID:	begins with	
Empl Record:	=	
***Effective Date:**	=	
Effective Sequence:	=	
Name:	begins with	
Last Name:	begins with	
Department:	begins with	
Pay Group:	begins with	
Self Service Status Indicator:	=	Awaiting HR Processing

Search   Clear   Basic Search   Save Search Criteria

3	Click Search to view all pending Pay Rate Change Request transactions. Click on any of the Headers to change the sort. You may wish to click on the **Department Description** to sort by your portfolio.
	Click the transaction link you wish to process.

	Self Service Status Indicator: = ▾ Awaiting HR Processing ▾ Search Clear Basic Search ⊡ Save Search Criteria **Search Results** View All First ◀ 1-28 of 28 ▶ La... 	Empl ID	Empl Record	*Effective Date	Effective Sequence	Name	Department	Department Description	Pay Group	Std Hours From	Std Hours To	Self Service Status Indicator
---	---	---	---	---	---	---	---	---	---	---
015155	0	06/04/2015	3	Charbonneau,Therese Marie	792630	P&ED-T&C-HRM-HeratigeFacCap	WAL	.01	.01	HR Process
064796	0	05/27/2015	1	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation	SAL	35	35	HR Process
011641	0	05/26/2015	1	Burgess,Philip George	350049	CorpServ-IT-BusinessApplicatn	SAL	35	35	HR Process
115840	0	05/26/2015	1	Marunchak,Kyra	320540	CityMgr-HR-LR-LabourRelation	SAL	35	35	HR Process
111888	0	05/26/2015	1	Spohn,Brandi	350044	CorpServ-IT-Infastructure&Opr	SAL	35	35	HR Process
066323	0	05/25/2015	1	Oliphant,Rebecca Ann	720004	P&ED-T&C-Director'sOffice-Admn	SAL	35	35	HR Process
103740	0	05/25/2015	1	Kenyeres,Cathy	336226	CorpServ-FS-AcctPayRecFA-APSup	SAL	35	35	HR Process
052750	1	05/25/2015	1	Duck,Donald	720150	P&ED-T&C-HRM-FieldcoteMus	SAL	35	35	HR Process

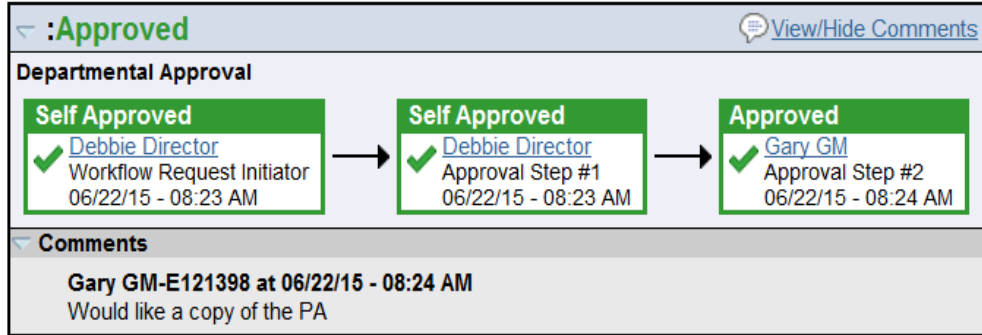|	
4	The Pay Rate Request page will display, review the information ensure the Requested Pay Rate Change is correct. *Note: the Requesters Comments/Instructions. In this example the Employee's increase is step based.* **Reason for Increase:** MER Merit-PerformanceBased **Workflow Status:** Awaiting HR Processing **Effective Sequence:** 3 **Requester ID:** Sally Supervisor **Requester Comments/Instructions** **Comment:** PA to follow **Current Job Information** **Position Nbr:** 00007384 File/Admin Clk **Department:** 720150 P&ED-T&C-HRM-FieldcoteMus **Location:** BLD040 Fieldcote Museum **Reg/Temp:** Regular **Full/Part Time:** Full-Time **Standard Hours:** 35.00 **Reports To:** 00007369 **Current Compensation Information** **Salary Plan:** CUPE Local 5167 Inside **Grade:** C **Step:** 1 **Annual Rate:** $38354.68 **Hourly Rate** $21.074 Annual Rate is calculated based on standard weekly hours X hourly rate and may not be accurate for employees whose hours vary each week **Requested Pay Rate Change** ☑ **Has a PA been completed?** **New Step:** 2 **Annual Rate:** $40023.62 **Hourly Rate:** $21.991 In this example the employee is Non Union and the merit increase is % based

Current Compensation Information

Salary Plan: Non Union Mgmt Professional

Grade: 8   Step:

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

☑ Has a PA been completed?

Change Percent: 3.200

Annual Rate: $113663.57   Hourly Rate: $62.453

Note: If Add/Remove Addtnl Duty Pay is being removed, the Change Percent will be a "-".

hours vary each week

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.

Important Note: The following condition will prevent the Standard approval levels in the workflow chain from being met and further action is required:

Pay Rate Change - 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.

Workaround - 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.
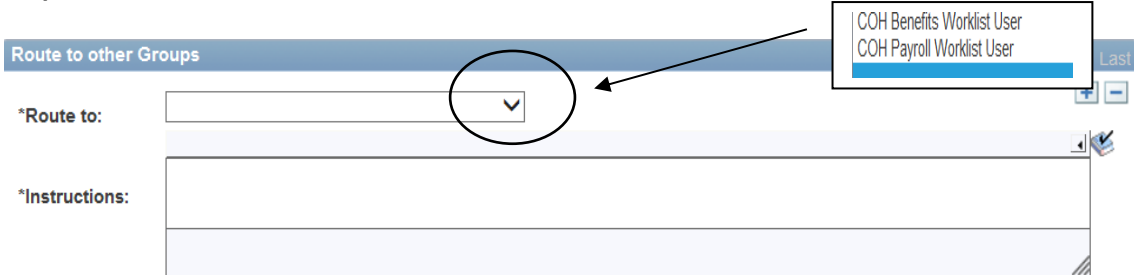
Pay Rate Change Approval Chain

| 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.
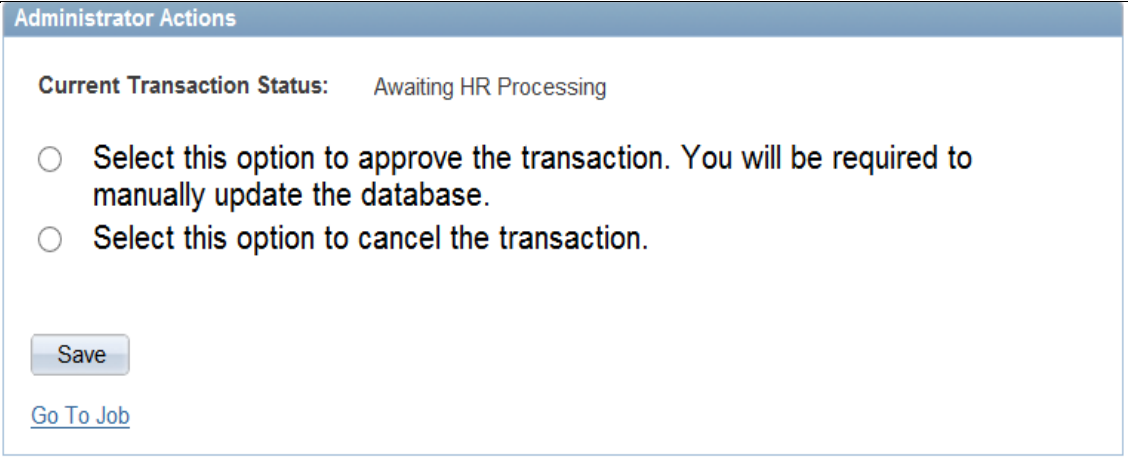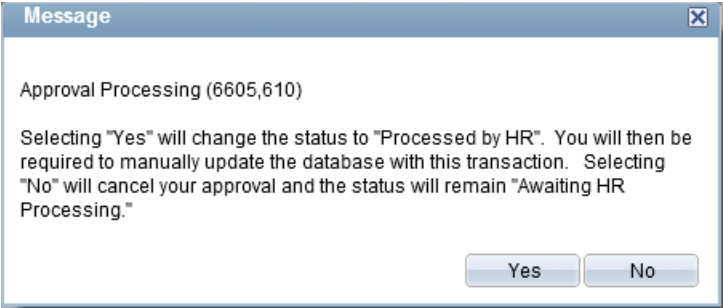
 |
|---|---|
| 7 | Once Job Data has been updated, return to the **Transaction Status Request** window. |
| 8 | **Administrator Processing** will display your name. Enter your Initials to time stamp transaction and comments as required.

Note: any comments entered here will be visible by all Approvers in the approval chain including Finance Payroll and FAII staff. |

	Administrator Processing **Administrator:** Tracey Jaremey **Comment:**
9	If routing to COH Payroll Worklist click ⌄ to select COH Payroll Worklist User and add required instructions prefixed with your Initials and ":" (i.e. TJ:). *Note: instructions entered are only visible to HR Records and Finance Payroll.* COH Benefits Worklist User COH Payroll Worklist User **Route to other Groups** Last *Route to: *Instructions:
10	**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 FAII with DeptID access that the transaction is complete. **Cancel**-will update the Current Status to Cancelled by HR and generate an email to **only** the Initiator. Both actions will remove the transaction from the HR Worklist (*currently we are not using*).

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.

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.*

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

Employee Pay Rate Change Reque

Save Confirmation

✔ The Save was successful.

OK

13	The transaction is now complete and saved with your instructions to COH Finance and Comments.

Note: the Current Transaction Status has updated to Processed by HR.

Note: Next in List will take you to the next transaction to be processed, depending on your sort.

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 processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of procedure.

View Status:
The status of any transaction can be viewed at any time by navigating to the applicable transaction status pages.
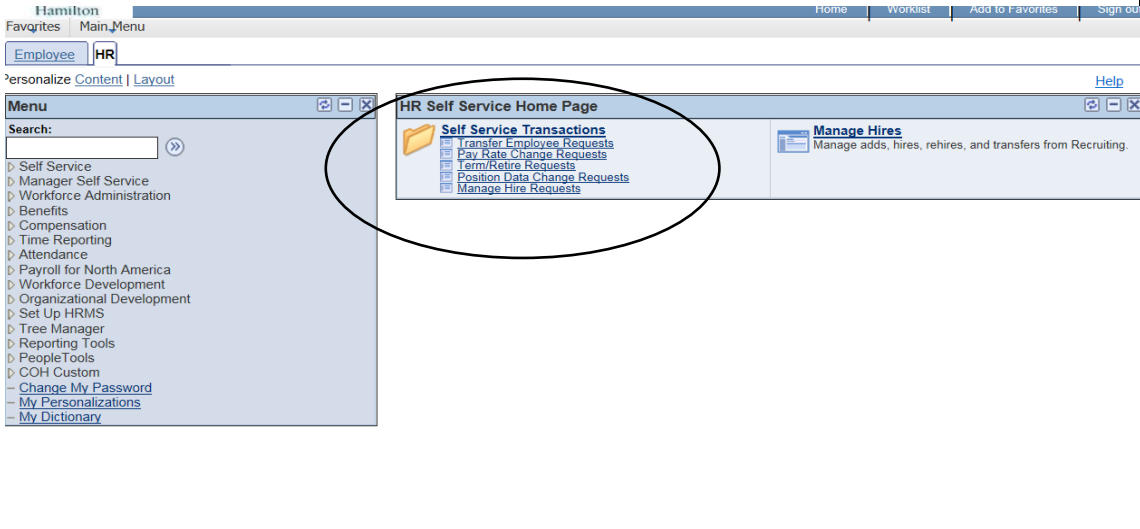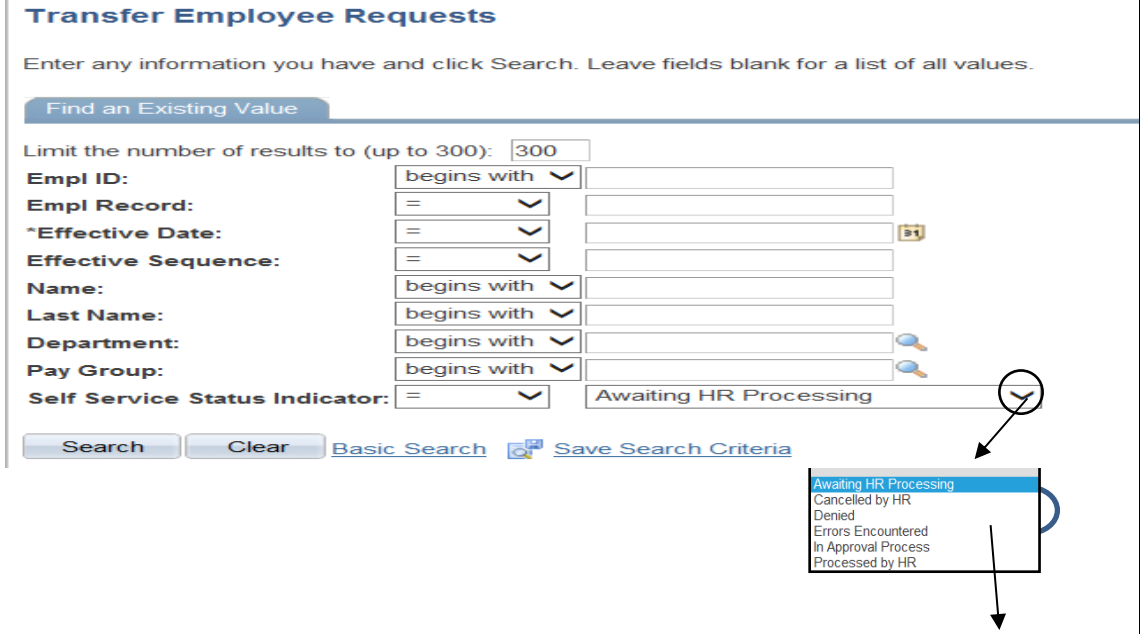
RECORDS TRANSFER NOT POSTED REQUESTS:

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**:

Step	Action
1	Navigation: HR Tab>Self Service Transactions
2	Click **Transfer Employee Requests.** Self Service Status Indicator will default as: Awaiting HR Processing. This can be changed by clicking ⌄

3	Click **Search** to view all pending Transfer transactions. Click on any of the Headers to change the sort. You may wish to click on the **Department Description** to sort by your portfolio. Click the transaction link you wish to process. Self Service Status Indicator: `=` ▾ `Awaiting HR Processing` ▾ [Search] [Clear] Basic Search Save Search Criteria **Search Results** View All First ◀ 1-6 of 6 ▶ Last

mpl ID	Empl Record	*Effective Date	Effective Sequence	Name	Department	Department Description	Pay Group	Std Hours From	Std Hours To	Self Service Status Indicator
52750	1	06/01/2015	1	Donald Duck	811010	P&ED-EcDev-BusDev-Investmntlni	SAL	35	35	HR Process
52750	1	06/01/2015	2	Donald Duck	806132	P&ED-PrkngByLw-LIC-Lotteries	SAL	35	35	HR Process
08936	0	06/08/2015	1	Martha Chung	720001	P&ED-T&C-HRM-CapPrjMgm	WAL	.01	.01	HR Process
13998	0	05/15/2015	1	Ryan Wheeler	632010	CES-Lodge-WL-ResidentSocServ	WAL	.01	.01	HR Process
14108	0	06/15/2015	1	Shannon Crain	632020	CES-Lodge-WL-MedicalNursing	WAL	26.25	.01	HR Process
19745	1	07/01/2015	1	Lynn Hampson	632010	CES-Lodge-WL-ResidentSocServ	WAL	35	35	HR Process

4	The Transfer Employee page will display, review the information to ensure accurate. Note the Requesters Comments/Instructions.

Eric Employee (ID:118575 Rcd#: 0)

Review the details of the requested transaction and then manually process the transaction in Job Data. 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.

Transfer Details

Transfer Date:	06/01/2015		
Reason for Transfer:	VAC Short Term Coverage	End Date:	06/05/2015
Workflow Status:	Awaiting HR Processing		
Effective Sequence:	1		
Requester:	Sally Supervisor		

> If the reason for Transfer is Short Term Coverage (VAC) **the End Date** will display

Requester Comments/Instructions

Comment: Eric is filling in temporarily for Donald Duck

Transfer Information

	Current Info		New Info	
Position:	00007384	File/Admin Clk	00007383	Historical Int-Griffin
Department:	720150	P&ED-T&C-HRM-FieldcoteMus	720140	P&ED-T&C-HRM-GriffinHouse
Location Code:	BLD040	Fieldcote Museum	BLD041	Griffin House
Job Code:	636	File/Admin Clk	6452	Historical Interpreter
Reg/Temp:	Regular	**Empl Class:**	Regular	
Full/Part Time:	Full-Time		Part-Time	
Standard Hours:	35.00		0.01	

	If reason for Transfer is **Return to Previous Job** then the New Info will be blank, it is up to HR Records to determine the Previous Position

Transfer Information

		Current Info	
Position:		00007384	File/Admin Clk
Department:		720150	P&ED-T&C-HRM-FieldcoteMus
Location Code:		BLD040	Fieldcote Museum
Job Code:		636	File/Admin Clk
Reg/Temp:		Regular	Empl Class:
Full/Part Time:		Full-Time	
Standard Hours:		35.00	
Salary Plan:		C1	CUPE Local 5167 Inside
Grade:		C	
Step:		1	Hourly Rate:
Union:		C1	CUPE Local 5167 Inside

5	Transfer 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 Transfer is: 1 level of approval, with a minimum of a Manager. Click View/Hide Comments to view approver's added comments.

Transfer Approval Chain

⊽ :Approved   ⊕View/Hide Comments

Departmental Approval

Self Approved ✔ Sally Supervisor Workflow Request Initiator 06/17/15 - 03:44 PM	→	Self Approved ✔ Sally Supervisor Approval Step #1 06/17/15 - 03:44 PM	→	Approved ✔ Mike Manager Approval Step #2 06/17/15 - 03:46 PM
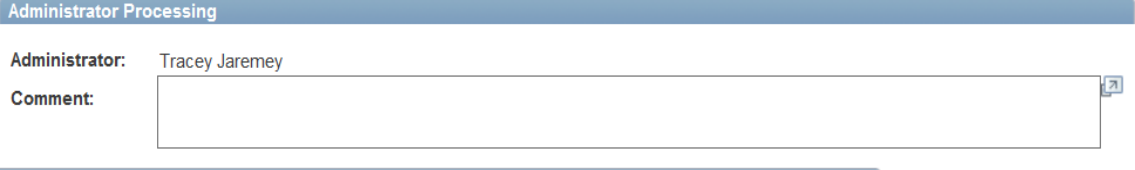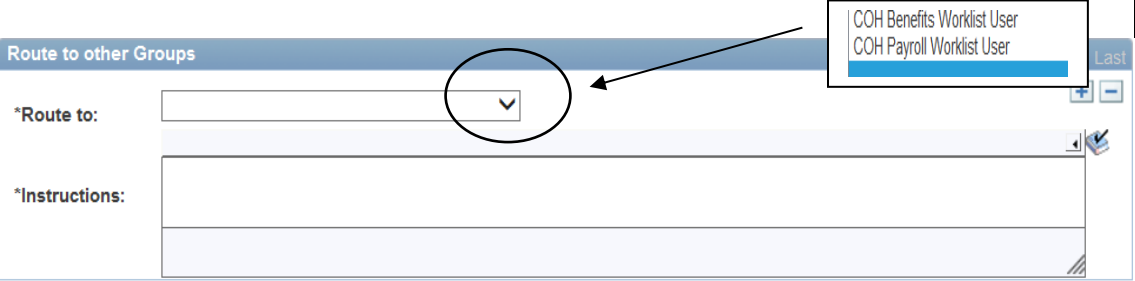
⊽ **Comments**

Mike Manager-E045070 at 06/17/15 - 03:46 PM
I approve

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.

Save

Go To Job

7	Once Job Data has been updated, return to the **Transaction Status Request** window.
8	**Administer Processing** will display your name. Enter your 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 Processing Administrator: Tracey Jaremey Comment:
9	If routing to COH Payroll Worklist click ⌄ to select **COH Payroll Worklist User** and add required instructions prefixed with your Initials and ":" (i.e. TJ:). *Note: these comments are only visible to HR Records and Finance Payroll.* COH Benefits Worklist User COH Payroll Worklist User Route to other Groups *Route to: *Instructions:
10	**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 FAII with DeptID access that the transaction is complete. **Cancel**-will update the Current Status to Cancelled by HR and generate an email to **only** the Initiator. Both actions will remove the transaction from the HR Worklist (*currently we are not using*).

|	
	Note: if cancelling a transfer because the department did not follow the posting process, you will need to refer these to Staffing via email for their review. **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. Save Go To Job
11	Click Save to complete the transaction (generate email, update status and remove from HR Records Worklist). Uou 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.* **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 **Transfer Employee** **Save Confirmation** ✔ The Save was successful. OK

| 13 | The transaction is now complete and saved with your instructions to COH Finance and Comments.

Note: the Current Transaction Status has updated to 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 processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's. |
| | End of procedure. |

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

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 includes the following: 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	Employee completes Leave of Absence Request Form. In the case where the employee due to sudden absence cannot complete the form, the department will complete on the employee's behalf and approval obtained and the form forwarded to HR Records.

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**

2	Navigate: Main Menu>Attendance>Attendance Information>Add/View Absences
3	Enter Emplid of employee and click [Search] .

4	Click the ⊞ to insert a new row and enter the following fields:
	Begin Date – first working day employee is off
	End Date – last working day of leave, leave blank to enter end date at the time you are returning the employee
	Absence Type – type of leave (see chart below)
	Absence Code – if military, enter code 06
	Work Schedule – defaults in OR select applicable schedule OR manually enter work schedule in Week 1 & 2 (non standard)
	Click 🖫 Save .
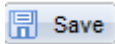
Absence Type	Description
LC	Compassionate Care Leave
LCC	Leave Critically Ill Childcare
LCD	Leave Crime Child Death Disappearance
LFC	Leave Family Caregiver
LOD	Leave Organ Donor
LL	Abs with perm non pd >1 month
LL + code 06	Military Leave non pd>1 month
M	Maternity Leave
N	Parental Leave

	Return 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 ![Save].
	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.
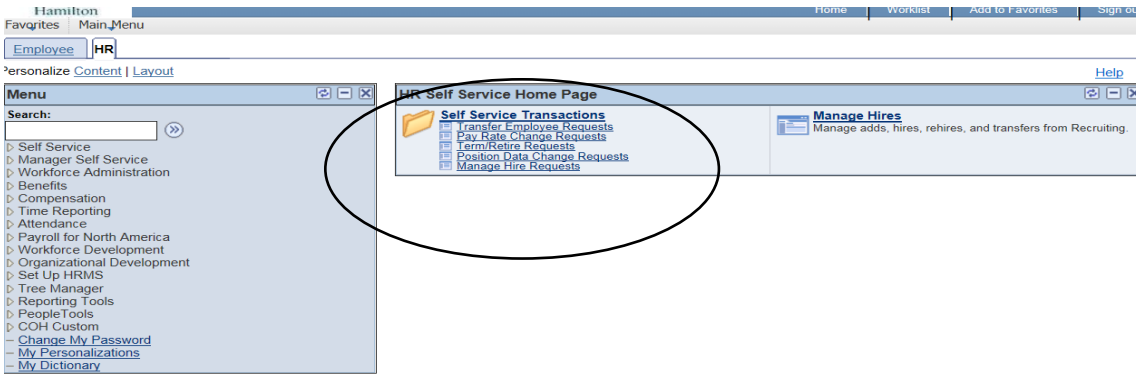
Important:
Only FAII will be able to initiate Position Data Changes (and HPL HR, HR Compensation).

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 staff to existing classification only)	New Position
Changing a DeptID	Update Position
Changing a Location	Update Position
Changing a Reports to	Update Position
Changing Standard Hours	Update Position
Changing FTE	Update Position
Changing 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 **Position Data Change Request.** Self Service Status Indicator will default as: Awaiting HR Processing. This can be changed by clicking ⌄

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

Position 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 (up to 300): 300

Posn #/Request ID:	begins with	
***Effective Date:**	=	
Effective Sequence:	=	
Position Title:	begins with	
Department:	begins with	
Self Service Status Indicator:	=	Awaiting HR Processing

☐ **Case Sensitive**

Search   Clear   Basic Search   Save Search Criteria

3	Click Search to view all pending Position Data Request transactions. Click on any of the Headers to change the sort. Click the transaction link you wish to process

Self Service Status Indicator: =		Awaiting HR Processing	

☐ Case Sensitive

[Search] [Clear] Basic Search 🔲 Save Search Criteria

Search Results

View All							First ◀ 1-4 of
Posn #/Request ID	Effective Date	Effective Sequence	Request Type	Position Title	Department	Department Description	Self Service Status
00001514	05/25/2015	1	Update	Financial Asst I	811105	P&ED-CorpServ-CT-Finance&Admin	HR Process
00001523	05/25/2015	1	Update	GIS Planning Techn	814020	P&ED-Plng-ComPlong&Dsgn-GIS	HR Process
00001526	05/25/2015	1	Update	GIS Planning Techn	814065	P&ED-Plng-PolPlngZonBL-OpRfrm	HR Process
00007384	06/22/2015	1	Update	File/Admin Clk	720150	P&ED-T&C-HRM-FieldcoteMus	HR Process

4	The Position Data Request page will display, review the information ensure the information is correct. Note, the **Requesters Comments/Instructions.** *Note: for Update Position Changes **only** the information that is changing is required; in this example the Budget Information has changed .*

Select Position Request Type

○ New Position   ● Update Position   ○ Inactivate Position

Select Position to Update

Position Number: 00007384

Effective Date: 06/22/2015

Status: Active

Workflow Status: Awaiting HR Processing

Sequence: 1

Requester ID: Daffy Duck

Requester Comments/Instructions

Comment: This is no longer a budgeted position

Position Request Details

Position Title:

Job Code:

Department:

Location Code:

Reports To:

Union Code:

Standard Hours:

Reg/Temp:

Full/Part:
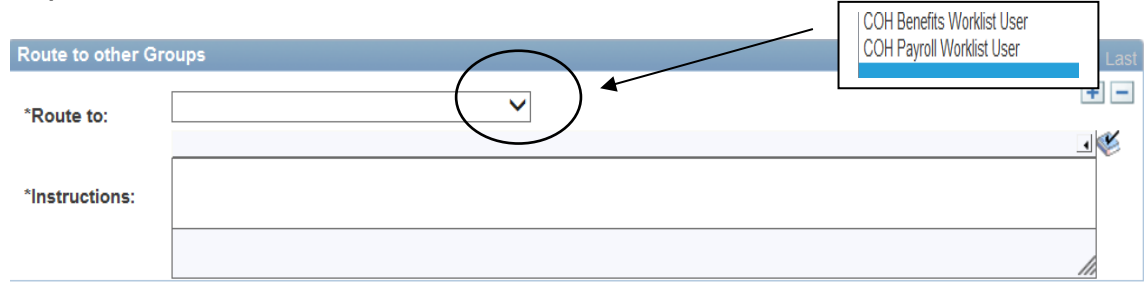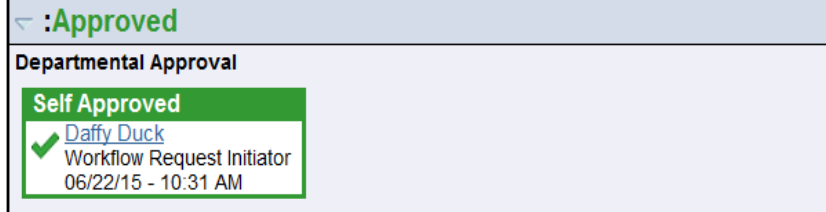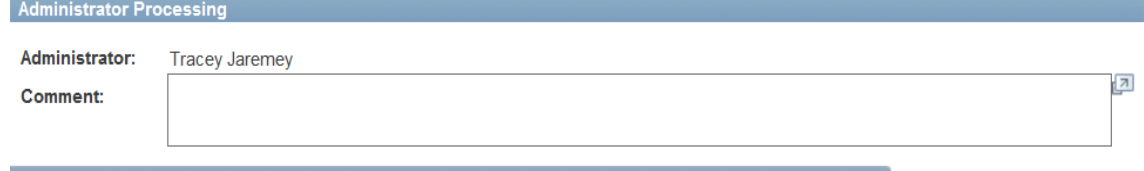
Salary Plan:
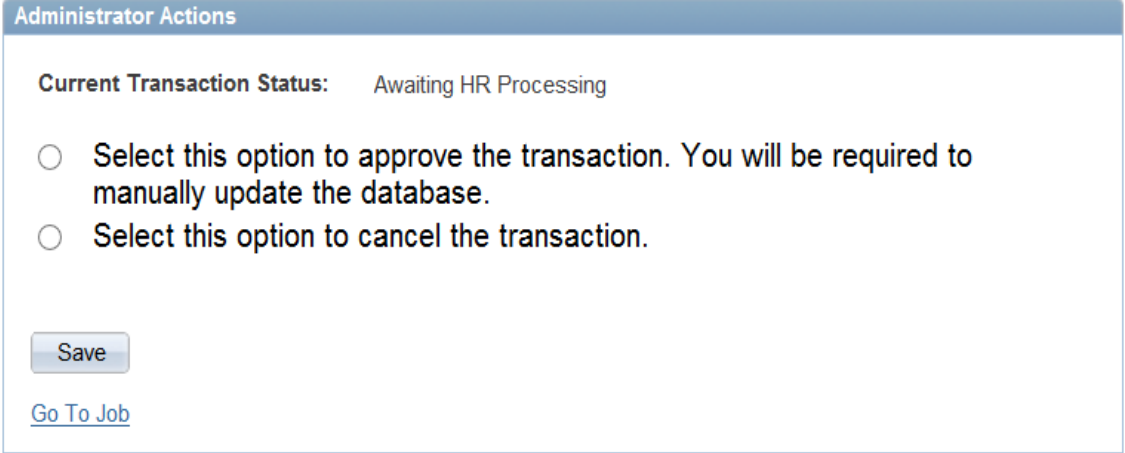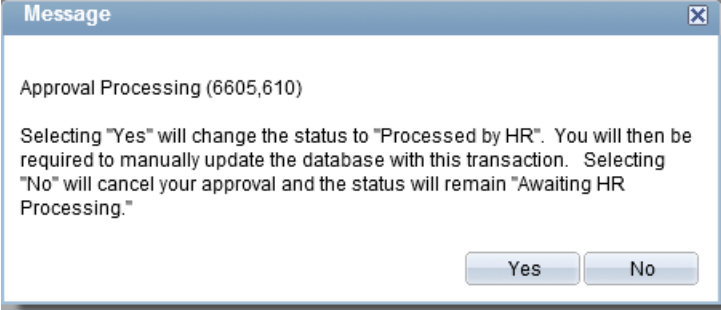
Budget Information
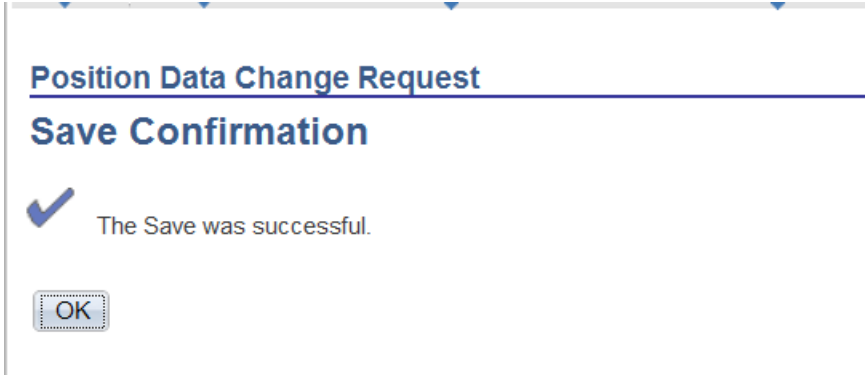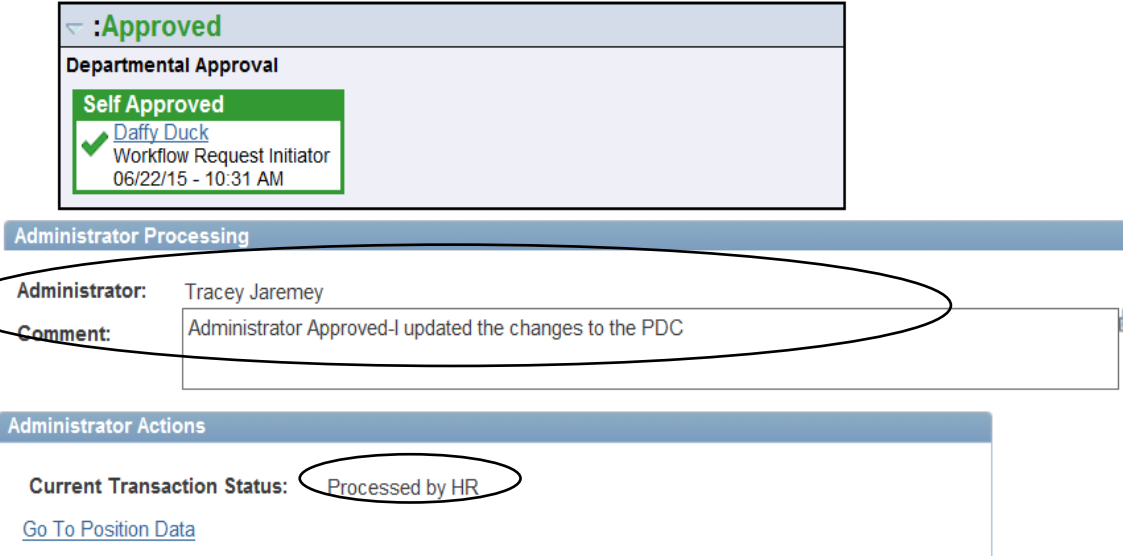
☐ Budgeted Position

Head Count: 99

FTE: 0.000000

57

5	If routing to COH Payroll Worklist click ⌄ to select **COH Payroll Worklist** User 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: [⌄] COH Benefits Worklist User COH Payroll Worklist User *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. **Position Change Approval Chain** ▽ :Approved **Departmental Approval** **Self Approved** ✓ Daffy Duck Workflow Request Initiator 06/22/15 - 10:31 AM
7	**Administrator Processing** will display your name. Enter your Initials to time stamp transaction and comments as required *(For New Positions, enter the Position Number in the comments section)*. *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.* **Cancel**-will update the Current Status to Cancelled by HR and generate an email to **only** the Initiator. Both actions will remove the transaction from the HR Worklist (*currently we are not using*). **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. [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. *Note: this warning will **only** 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]
10	Click [OK] you will be taken back to the completed transaction

Position Data Change Request
Save Confirmation

✔ The Save was successful.

[OK]

11	The transaction is now complete and saved. Note the Current Transaction Status has updated to Processed by HR. **Position Change Approval Chain** :Approved Departmental Approval Self Approved ✔ Daffy Duck Workflow Request Initiator 06/22/15 - 10:31 AM Administrator Processing Administrator: Tracey Jaremey Comment: Administrator Approved-I updated the changes to the PDC Administrator Actions 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.

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

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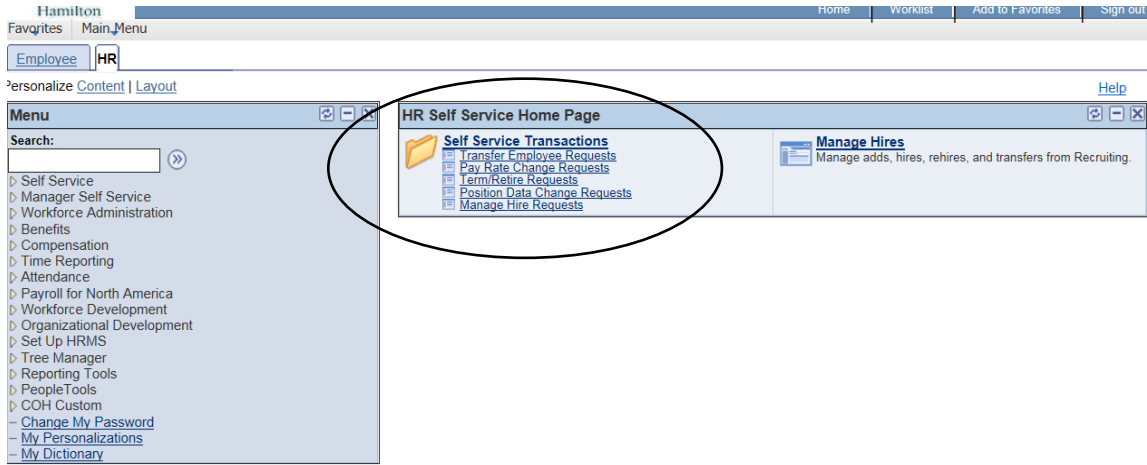
Purpose:
The Self Service Transaction Page is for HR Records staff to process (approve/cancel) or view a Term/Retire Request initiated through Manager Self Service. Once HR Records saves the transaction, it can be routed to COH Payroll Worklist with instructions for further processing if required.

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

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

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

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

Pay 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 (up to 300): 300

Empl ID:	begins with ∨	
Empl Record:	= ∨	
*Effective Date:	= ∨	📅
Effective Sequence:	= ∨	
Name:	begins with ∨	
Last Name:	begins with ∨	
Department:	begins with ∨	🔍
Pay Group:	begins with ∨	🔍
Self Service Status Indicator:	= ∨	Awaiting HR Processing ∨

Search   Clear   Basic Search 🔲 Save Search Criteria

| 3 | Click [Search] to view all pending Term/Retire Request transactions. Click on any of the Headers to change the sort. Click on any of the Headers to change the sort. You may wish to click on the **Department Description** to sort by your portfolio.

Click the transaction link you wish to process.

Self Service Status Indicator: = ∨ Awaiting HR Processing ∨

Search   Clear   Basic Search 🔲 Save Search Criteria

Search Results

View All   First ◀ 1-28 of 28 ▶ La

Empl ID	Empl Record	*Effective Date	Effective Sequence	Name	Department	Department Description	Pay Group	Std Hours From	Std Hours To	Self Service Status Indicator
015155	0	06/04/2015	3	Charbonneau,Therese Marie	792630	P&ED-T&C-HRM-HeratigeFacCap	WAL	.01	.01	HR Process
064796	0	05/27/2015	1	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation	SAL	35	35	HR Process
011641	0	05/26/2015	1	Burgess,Philip George	350049	CorpServ-IT-BusinessApplicatn	SAL	35	35	HR Process
115840	0	05/26/2015	1	Marunchak,Kyra	320540	CityMgr-HR-LR-LabourRelation	SAL	35	35	HR Process
111888	0	05/26/2015	1	Spohn,Brandi	350044	CorpServ-IT-Infastructure&Opr	SAL	35	35	HR Process
066323	0	05/25/2015	1	Oliphant,Rebecca Ann	720004	P&ED-T&C-Director'sOffice-Admn	SAL	35	35	HR Process
103740	0	05/25/2015	1	Kenyeres,Cathy	336226	CorpServ-FS-AcctPayRecFA-APSup	SAL	35	35	HR Process
052750	1	05/25/2015	1	Duck,Donald	720150	P&ED-T&C-HRM-FieldcoteMus	SAL	35	35	HR Process

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4	The Termination/Retirement Request page will display, review the information ensure the information is correct. Note the Requesters Comments/Instructions.

Termination/Retirement Information

Separation Type:	TER
Termination Date:	08/15/2015
Reason for Leaving:	RET Resignation-Return to School
Eligible for Rehire:	Yes
Last Day Paid:	08/10/2015 Last Day Paid is Last Day the Employee worked or had a paid absence
Workflow Status:	Awaiting HR Processing
Effective Sequence:	1
Requester ID:	Sally Supervisor

Requester Comments/Instructions

Comment:	Wonderful employee will be missed

Current Job Information

Position Nbr:	00007384	File/Admin Clk
Department:	720150	P&ED-T&C-HRM-FieldcoteMus
Location:	BLD040	Fieldcote Museum
Union Code:	C1	
Reg/Temp:	Regular	
Full/Part Time:	Full-Time	
Standard Hours:	35.00	
Reports To:	00007369	

Current Compensation Information

Pay Group:	SAL
Salary Plan:	CUPE Local 5167 Inside

5	Term/Retire 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 is: 1 level of approval, with a minimum of a Manager. Click View/Hide Comments to view approver's added comments.

Term/Retire Approval Chain

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.
7	Once Job Data has been updated, return to the **Transaction Status Request** window.
8	**Administrator Processing** will display your name. Enter your 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 Processing **Administrator:** Tracey Jaremey **Comment:**
9	If routing to COH Payroll Worklist click ⌄ to select **COH Payroll Worklist** 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** COH Benefits Worklist User COH Payroll Worklist User ***Route to:** ⌄ ***Instructions:**
10	**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 FAII with DeptID access that the transaction is complete. **Cancel**-will update the Current Status to Cancelled by HR and generate an email to **only** the Initiator. Both actions will remove the transaction from the HR Worklist (*currently we are not using*).

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.

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.* **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 Hamilton 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.
	Note: the Current Transaction Status has updated to Processed by HR.
	Term/Retire Approval Chain
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 processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's.
	End of procedure.

View Status:

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

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 9th to Nov 22nd, 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 Request Employee Increase to initiate merit increase for each employee.

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

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

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

FA Query: N_HR_MERIT_ALERT_NOTIFICATIONS

	Empl Record	Dept ID	Employee Name	Salary Admin Plan	Grade	New Step	New Hourly Rate	Merit Increase Date	Hours Flag	eMail Sent Dt	Rept.to.PosnNbr	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	I	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	CM	TO	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
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 Date Based	Thru Date Date Based	Hours 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

Tables Created for this process:
1. N_PY_ANINCR – This table will be refreshed after the Anniversary Notice process is run every other Thursday.
2. 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 each Transaction Type request
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 pay.
5	Click on the transaction to view the Approval Chain, contact the department to determine the required action, note below are possible situations and their solutions: • Duplicate Transaction – Contact department to deny the 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
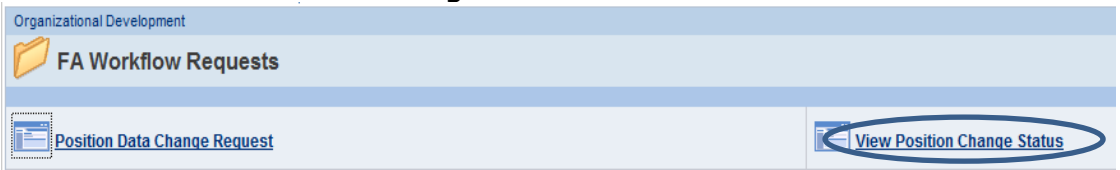
COMPENSATION POSITION DATA CHANGE STATUS PAGE:

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
3	Select the Transaction you wish to review by clicking on the Position Title. **Show Transactions**: 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.

4	**Self Service Status Indicator:** **Awaiting HR Processing** – Transaction has been routed to HR and waiting to be processed. **Cancelled by HR** – Transaction has been routed to HR and HR has cancelled. **Denied** – Transaction was not routed to HR as an approver has denied which terminates the remainder of the approval chain.(n/a for PDC) **Errors Encountered** – System generated **In Approval Process** – Transaction is pending in the approval process and will be routed to HR once all approvals are complete.(n/a for PDC) **Processed by HR** – Transaction has been processed by HR.	
5	The Position Data Change Status page will be displayed with workflow status, comments visible and who it was processed by in HR Records.	

Position Details

Note: Request # is only used for tracking new position requests. Once the transaction has been approved and processed it will be assigned a position #.

Select Position Request Type

○ New Position   ◉ Update Position   ○ Inactivate Position

Select Position to Update

Position Number:	00007384	File/Admin Clk
Effective Date:	06/29/2015	
Status:	Active	
Workflow Status:	Processed by HR	
Sequence:	1	
Requester ID:	Lombardo Borrelli	

Position Request Details

Position Title:

Job Code:

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

Location Code:

Reports To:

Union Code:

Standard Hours:

Reg/Temp:

Full/Part:

Salary Plan:

Salary Grade:

Budget Information

☑ Budgeted Position

Head Count:	99
FTE:	1.000000

▶ Current Position Info

Requester Comments/Instructions

Comment: Update grade to B and place both employees step 2. Please advise when complete.

Administrator Comments

Comments: Diane Gulas-DGULAS-Administrator Approved-changes have been made and forwarded to Finance Payroll for processing.

End of Procedure

COMPENSATION POSITION DATA CHANGE REQUESTS:
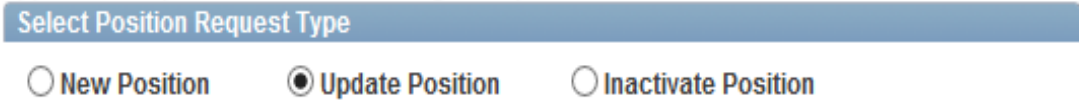
Purpose:
Use the Position Data Change Request to process a change to an employee's classification/pay grade as a result of the Job Evaluation (JE) process.

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:

Step	Action
1	Navigation: Organizational Development>Maintain Positions/Budgets>FA Workflow Requests>Position Data Change Request
2	Select Position Request Type = Update Select Position Request Type ○ New Position ● Update Position ○ Inactivate Position
3	Enter the **Position Number.** Use the Look Up icon 🔍 to search for a position number. Enter the **Effective Date** for the change. Status will default to **Active.** Select Position to Update Position Number: 🔍 *Effective Date: 06/11/2015 Status: Active

4	Enter changes to any of the fields under **Position Request Details**.

Position Request Details

If no updates to any of these fields, you will still need to enter one unchanged value to prevent the error message when saving.

Message

At least one field in Position Request Details area must be supplied. (26010,12)

When Update Position has been selected, at least ONE of the fields in the Position Request Details must be supplied before request is accepted.

OK

Department: 720150

Location Code:

Reports To:

Standard Hours:

Reg/Temp:

Full/Part:

Budget Information

☑ Budgeted Position

Head Count: 99

FTE: 1.000(

The position's current attributes and incumbents are listed on the page.

Current Position Info

Description:	File/Admin Clk
Job Code:	636	File/Admin Clk
Department:	720150	P&ED-T&C-HRM-FieldcoteMus
Location Code:	BLD040	Fieldcote Museum
Reports To:	00007369	Fieldcote Site Supv
Union Code:	CUPE Local 5167 Inside
Standard Hours:	35.00
Reg/Temp:	Regular
Full/Part Time:	Full-Time
Salary Plan:	C1
Salary Grade:	C

Budget Information

☑ Budgeted Position

Head Count: 99
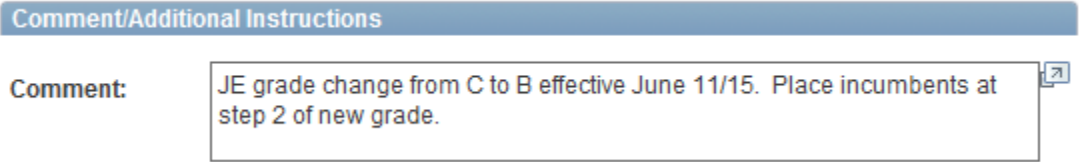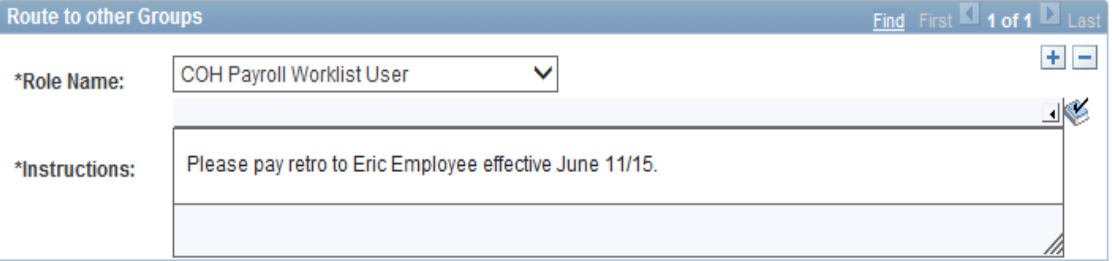
FTE: 1.000000

Current Incumbents

Empl ID	Empl Record	Name	Full/Part	Stnd Hrs/Wk	Empl Status	Override	Effective Date
117227	0	Elmer Fudd	Part-Time	0.01	Active	N	11/17/2014

5	As Departments are not allowed to update Position Title, Grade or Job Code, HR Compensation will need to enter these updates in the Comments section. Enter any Comments/Instructions for HR

	Records also in the Comments. Your comments will be visible by HR Records, FAII with DeptID access and Finance Payroll if routed by HR Records.
	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 **Submit** . As there are no approvals, this transaction will be routed directly to HR Records for review and processing.
7	HR Records also has the ability to route this transaction with any Comments/Instructions to Finance Payroll for review and processing. **Route to other Groups** Find First 1 of 1 Last *Role Name: COH Payroll Worklist User *Instructions: Please pay retro to Eric Employee effective June 11/15.
8	Workflow will generate an email at various stages: -to the initiator once HR Records has reviewed the transaction and either processed it or cancelled it; -to all FAII with DeptID access to the position once HR Records has processed the transaction. If HR Records cancels the transaction, no email is generated to FAII's. *Note: HR Compensation as the Initiator and with DeptID access will receive both of these emails.*
	End of procedure.

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

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

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:
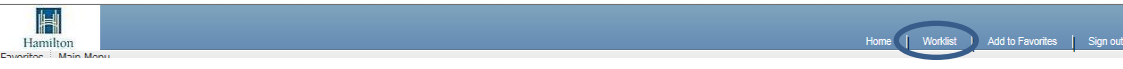
Purpose:
Use the Worklist to process transactions routed by HR Records.

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 Hamilton Home Worklist Add to Favorites Sign out Favorites Main Menu
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.

Favorites | Main Menu

Worklist for LAVERY: Lisa Avery

Job Requisition
Manage Hire Request
Pay Rate Change
Position Data Change
Terminate/Retire
Transfer Employee

Worklist Filter: [▼] Refresh

Worklist | Customize | Find |

Link	Transaction Name	*Effective Date	Transaction For	Dept ID	Department	Position #/ Request ID	ID	Rcd#	Pay Group	Stand Hours From
View Transaction	Position Data Change	05/25/2015	test	709103	P&ED-T&C-AE&G-Events	90000002		0		
View Transaction	Pay Rate Change	05/16/2015	Hampson,Lynn Michelle	632010	CES-Lodge-WL-ResidentSocServ		119745	1	WAL	35
View Transaction	Pay Rate Change	01/01/2015	Moffatt,Lori Jean	632005	CES-Lodge-WL-Admin		057607	0	SAL	35
View Transaction	Pay Rate Change	05/27/2015	D'Ambrosio,Anna	320525	CityMgr-HR-COD-Compensation		020003	0	SAL	35
View Transaction	Pay Rate Change	05/01/2015	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation		064796	0	SAL	35
View Transaction	Pay Rate Change	05/30/2015	Filice,Anna Maria	320525	CityMgr-HR-COD-Compensation		119615	0	SAL	35
View Transaction	Pay Rate Change	04/15/2015	Woodcox,Victoria Jane	636005	CES-Lodge-ML-Admin		096125	0	SAL	35
View Transaction	Terminate/Retire	05/03/2015	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation		064796	0	SAL	35
View Transaction	Manage Hire Request	05/28/2015	Test,Hudson	465010	P&ED-PrkngByLw-MLE-SchoolCross		NEW			
View Transaction	Manage Hire Request	06/01/2015	Krnetic,Adriana	332015	CorpServ-F&ARevGen-Fin&Admin		NEW			
View Transaction	Manage Hire Request	06/01/2015	Chegou,Abe (Abderahim)	332015	CorpServ-F&ARevGen-Fin&Admin		121742			
View Transaction	Manage Hire Request	05/15/2015	McDaniel,Mallory	634005	CES-Lodge-ML-DayProgAdmin		114289			
View Transaction	Manage Hire Request	06/01/2015	Test,Janice	750068	Library-Central-NonFiction		NEW			
View Transaction	Manage Hire Request	04/15/2015	McDaniel,Luke	465010	P&ED-PrkngByLw-MLE-SchoolCross		NEW			
View Transaction	Position Data Change	06/01/2015	Recreationist -WLPT	632010	CES-Lodge-WL-ResidentSocServ	00007962		0		20
View Transaction	Transfer Employee	06/08/2015	Mouse,Minnie	720140	P&ED-T&C-HRM-GriffinHouse		111447	0	WAL	
View Transaction	Position Data Change	06/01/2015	New Position	632011	CES-Lodge-WL-VolunteerCoord	90000005		0		
View Transaction	Pay Rate Change	04/01/2013	Borrelli,Lombardo	320525	CityMgr-HR-COD-Compensation		008475	0	SAL	35
View Transaction	Position Data Change	06/01/2015	Return to Work Specialist	510019	PW-CityMgr-HR-HSW-ReturntoWork	00002989		0		35
View Transaction	Transfer Employee	09/15/2015	Sinha,Yolanda	492026	PW-Env-PrksCem-CemClear		003957	0	WAL	40
View Transaction	Transfer Employee	09/15/2015	Tanner,Krista Lynn	632010	CES-Lodge-WL-ResidentSocServ		122429	0	WAL	
View Transaction	Terminate/Retire	01/31/2015	Bryan,Susan	336226	CorpServ-FS-AcctPayRecFA-APSup		116324	0	SAL	35

Department/DeptID columns help identify portfolio. Click on a column heading to sort by that column.

Worklist | Customize | F

Link	Transaction Name	*Effective Date	Transaction For	Dept ID	Department	Position #/ Request ID	ID	Rcd#	Pay Gro
View Transaction	Position Data Change	05/25/2015	test	709103	P&ED-T&C-AE&G-Events	90000002		0	
View Transaction	Pay Rate Change	05/16/2015	Hampson,Lynn Michelle	632010	CES-Lodge-WL-ResidentSocServ		119745	1	WAL
View Transaction	Pay Rate Change	01/01/2015	Moffatt,Lori Jean	632005	CES-Lodge-WL-Admin		057607	0	SAL
View Transaction	Pay Rate Change	05/27/2015	D'Ambrosio,Anna	320525	CityMgr-HR-COD-Compensation		020003	0	SAL
View Transaction	Pay Rate Change	05/01/2015	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation		064796	0	SAL
View Transaction	Pay Rate Change	05/30/2015	Filice,Anna Maria	320525	CityMgr-HR-COD-Compensation		119615	0	SAL
View Transaction	Pay Rate Change	04/15/2015	Woodcox,Victoria Jane	636005	CES-Lodge-ML-Admin		096125	0	SAL
View Transaction	Terminate/Retire	05/03/2015	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation		064796	0	SAL
View Transaction	Manage Hire Request	05/28/2015	Test,Hudson	465010	P&ED-PrkngByLw-MLE-SchoolCross		NEW		
View Transaction	Manage Hire Request	06/01/2015	Krnetic,Adriana	332015	CorpServ-F&ARevGen-Fin&Admin		NEW		
			Chegou,Abe						

4	Worklist Column Definitions: **Link** – Retrieve/View routed Transaction **Transaction Name** – Pay Rate Change, Position Data Change, Terminate/Retire, Transfer, Manage Hire Request (New/Rehire/Smart HR Template Hire) **Effective Date** – Transaction effective date **Transaction For** – Employee Name, unless it is a Position Data it will display the Position Title **DeptID** – New DeptID (or current if not Transfer) **Department** – New Department Description (or current if not Transfer) **Position #/Request ID** – Request ID is a unique identifier system auto assigns for transactions processed via Manage Hire or Smart HR Template Base

		ID – Employee ID **Rcd #** - Employee Record Number **Paygroup** – Employee's current paygroup **Standard Hours From** – Employee Standard Hours From **Standard Hours To** – Employee Standard Hours To **Transaction Date** – Date Originally submitted | ansaction Name	*Effective Date	Transaction For	Dept ID	Department	Position #/ Request ID	ID	Rcd#	Pay Group	Standard Hours From	Standard Hours To	Transaction Date
---	---	---	---	---	---	---	---	---	---	---	---
												  Note: Rcd # for Manage Hire Requests will always default to "0" but may not be correct. HR Records will provide the correct Rcd # in the Instructions when routing to COH Payroll Worklist user.
5	Click on the applicable View Transaction link to retrieve the transaction 	Link	Transaction Name	*Effective Date	Transaction For	Dept ID	Department	Position #/ Request ID	ID	Rcd#	Pay Group	Standard Hours From
---	---	---	---	---	---	---	---	---	---	---
View Transaction	Position Data Change	05/25/2015	test	709103	P&ED-T&C-AE&G-Events	90000002		0		
View Transaction	Pay Rate Change	05/16/2015	Hampson,Lynn Michelle	632010	CES-Lodge-WL-ResidentSocServ		119745	1	WAL	35.00
View Transaction	Pay Rate Change	01/01/2015	Moffatt,Lori Jean	632005	CES-Lodge-WL-Admin		057607	0	SAL	35.00
View Transaction	Pay Rate Change	05/27/2015	D'Ambrosio,Anna	320525	CityMgr-HR-COD-Compensation		020003	0	SAL	35.00
View Transaction	Pay Rate Change	05/01/2015	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation		064796	0	SAL	35.00
View Transaction	Pay Rate Change	05/30/2015	Filice,Anna Maria	320525	CityMgr-HR-COD-Compensation		119615	0	SAL	35.00
View Transaction	Pay Rate Change	04/15/2015	Woodcox,Victoria Jane	636005	CES-Lodge-ML-Admin		096125	0	SAL	35.00
View Transaction	Terminate/Retire	05/03/2015	Burtch,Karen Rita	320525	CityMgr-HR-COD-Compensation		064796	0	SAL	35.00	
6	The Transaction Request form will display. **Route To other Groups: COH Payroll Worklist User** is where you will review the instructions from instructions from HR Payroll. **Transfer Information** 		Current Info		New Info	
---	---	---	---	---
Position:	00007384	File/Admin Clk	00007383	Historical Int-Griffin
Department:	720150	P&ED-T&C-HRM-FieldcoteMus	720140	P&ED-T&C-HRM-GriffinHouse
Location Code:	BLD040	Fieldcote Museum	BLD041	Griffin House
Job Code:	636	File/Admin Clk	6452	Historical Interpreter
Reg/Temp:	Regular	**Empl Class:**	Regular	
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:	C		E	
Step:	1	**Hourly Rate:**	---	
Union:	C1	CUPE Local 5167 Inside		
Reports To:	00007369	Fieldcote Site Supv	00007369	Fieldcote Site Supv	 **Route to other Groups** Find First ◀ 1 of 1 ▶ Last **Route to:** COH Payroll Worklist User HR Records and Finance Payroll to decide on a proper format for instructions **Instructions:** **Update Notes:**

7	Enter your processing **Notes**. All comments will be saved on the form and are visible to Finance Payroll and HR Records. Once you click **Save Notes**, the transaction will be removed from the Worklist. Route to other Groups Find First 1 of 1 Role Name: COH Payroll Worklist User Instructions: ply pay diff of two rates for 100 hours Notes: Finance Payroll enters their processing notes here. Save Notes
8	Click on **Worklist** at the top right corner, to refresh your Worklist with new items routed to you by HR Records.
	End of procedure.

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

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.)
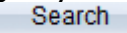
Important:
- WFA will be notified by email to create this delegation by the Manager's Department. WFA to save these emails in a folder set up by year on the H:\ drive. The subject line standard is **Last Name, First Name** of the Manager we are delegating on behalf of.
- Direction to the WFA should come 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 EmplID: begins with ∨ 000509 🔍 Empl Record: = ∨ Name: begins with ∨ Last Name: begins with ∨ 🔍 ☐ Case Sensitive Search Clear Basic Search 🗗 Save Search Criteria
4	Enter the following fields to create the delegation: *(Note: you need to know the Emplid of the Proxy to enter on this page)* **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* **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 **Transaction Name:** Use the Lookup icon 🔍 to select transaction. If delegating multiple transactions click ± to insert a new row. **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 their behalf) 🔲 New Wi **Add Delegation Request** **Martin White** Employee **Emplid:** 000509 **Empl Record:** 0 Add Delegation Request <table><tr><th>From Date</th><th>To Date</th><th>Trans Type</th><th>Transaction Name</th><th></th><th>Proxy</th><th>Name</th><th>Notify Delegator</th><th></th></tr><tr><td>07/02/2015</td><td></td><td>Initiate</td><td>N_HR_RATE</td><td>🔍</td><td>002699 🔍</td><td>Diana Aquila</td><td>☐</td><td>+ −</td></tr><tr><td>07/02/2015</td><td></td><td>Initiate</td><td>N_HR_TERM</td><td>🔍</td><td>002699 🔍</td><td>Diana Aquila</td><td>☐</td><td>+ −</td></tr><tr><td>07/02/2015</td><td></td><td>Initiate</td><td>N_HR_TRANSFER</td><td>🔍</td><td>002699 🔍</td><td>Diana Aquila</td><td>☐</td><td>+ −</td></tr><tr><td>07/02/2015</td><td></td><td>Initiate</td><td>N_HR_JOBREQ</td><td>🔍</td><td>002699 🔍</td><td>Diana Aquila</td><td>☐</td><td>+ −</td></tr></table>
5	Click 🖫 Save .

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 non-management 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 🔍 to search from a list of delegators with existing requests or leave blank to retrieve all requests based on Proxy. **Proxy:** Leave blank to retrieve all requests based on Delegator. **Transaction:** Enter the transaction you wish to retrieve or leave blank to retrieve all requests based on criteria entered.

	From Date: Enter a date to view specific requests or leave blank to retrieve all requests based on criteria entered. **To Date:** Enter a date to view specific requests or leave blank to retrieve all requests based on criteria entered. **Request Status:** Enter the status of the request you want to retrieve or leave blank to retrieve all requests based on criteria entered. **Delegation Status:** Enter the delegation status of the request you want to retrieve or leave blank to retrieve all requests based on criteria entered.
4	Click **Search** .
5	Search Results will appear. Click on Request Details to see Request Status or click on ▦▸ to view both pages on one page.

6	To Revoke a delegation, select the transactions ☑ and click Revoke .

7	The **Revoke Delegation Request** page will appear. Click Yes - Continue or No - Cancel .

8	If Yes - Continue was selected Click OK on the confirmation page.

9	If No - Cancel was selected you will be returned to the **Administer Delegation** page.
10	If revoked, any pending transactions for approval are now moved back to Manager/delegator. An Email is generated to the Proxy advising that the delegation was revoked. *Refer to MSS Emails Generated via Workflow, Ref #10.*
	End of Procedure

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 **Maintain Delegated Authorities** 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 **Search by:** Run Control ID begins with ⬚ ☐ Case Sensitive Search | Advanced Search
3	On the **Maintain Delegation Authority** page click Process Request . *Note: the **As of Date** defaults to the date you are running*

Maintain Delegation Authority

User ID:	VSIKORASA
Run Control ID:	Testing
As Of Date:	07/02/2015

Report List   Process Monitor   Process Request

Save   Return to Search   Notify   Add   Update/Display

| 4 | On the **Process Scheduler 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
Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	HCDL_BATCH	HCDL_BATCH	Application Engine	Web	TXT	Distribution
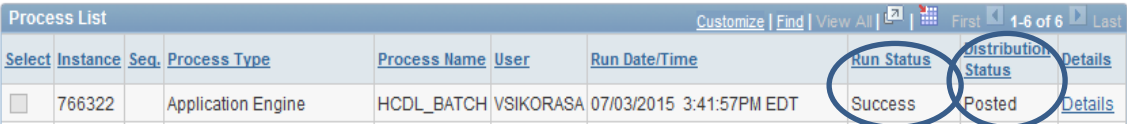
OK   Cancel |

| 5 | You will be taken back to the Maintain Delegation Authority page. Click **Process Monitor** link.

Maintain Delegation Authority

User ID:	VSIKORASA
Run Control ID:	Testing
As Of Date:	07/03/2015

Report List   Process Monitor   Process Request
Process Instance:766322

Save   Return to Search   Notify   Add   Update/Display |

6	Process is complete when **Run Status**=Success and **Distribution Status**=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**	**Distribution Status**	**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 **Reassign Pending Transactions Report** to identify pending transactions sitting with the approver (refer to document Pending Transactions report)

2	Enter the **Approver ID** and **Header Status** of Pending to retrieve the pending transactions you need to action and click Search .

Monitor Approvals

▼ Search Criteria

Approval Process:		Definition ID:	
Header Status:	Pending	Last Modified:	
Approver:	E009457		Debbie Director
Approver Status:			
Originator:			
Requester:			

Search

3	The report identified 5 Pay Rate Changes pending with Debbie Director that need to be actioned. Working from the report, find and select the transactions that need to be reassigned.

▼ Approval Process: Request Employee Rate Increase

Empl ID:		Empl Record:	
Termination Date:		Effective Sequence:	

Filter   Toggle Header and Line

		Modified	Status	Empl ID	Empl Record	Termination Date	Effective Sequence
1	☐	Never	Pending	102172	0	2015-01-05	1
2	☑	2015-06-05	Pending	117227	0	2015-05-25	1
3	☑	2015-06-05	Pending	108936	0	2015-06-01	1
4	☐	Never	Pending	111447	0	2015-06-04	1
5	☑	2015-06-05	Pending	072795	1	2015-06-04	1
6	☑	2015-06-05	Pending	015155	0	2015-06-04	1
7	☑	2015-06-05	Pending	015155	0	2015-06-04	2

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: E009457 ☐ Allow Auto Approval 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) OK You will see the transaction has now been reassigned. **Pay Rate Change Approval Chain** ▽ :Pending ◉View/Hide Comments **Departmental Approval** **Self Approved** ✓ Mike Manager Workflow Request Initiator 06/01/15 - 03:30 PM → **Self Approved** ✓ Mike Manager Approval Step #1 06/01/15 - 03:30 PM → **Pending** ◷ Gary GM for Debbie Director Approval Step #2 ▷ Comments *Note: WFA must send an email to the reassigned approver advising that there is a transaction awaiting his approval.*
5	**To Deny** – select the transaction, enter the following mandatory fields Approver's Oper ID and comments. Click **Deny Selected**.
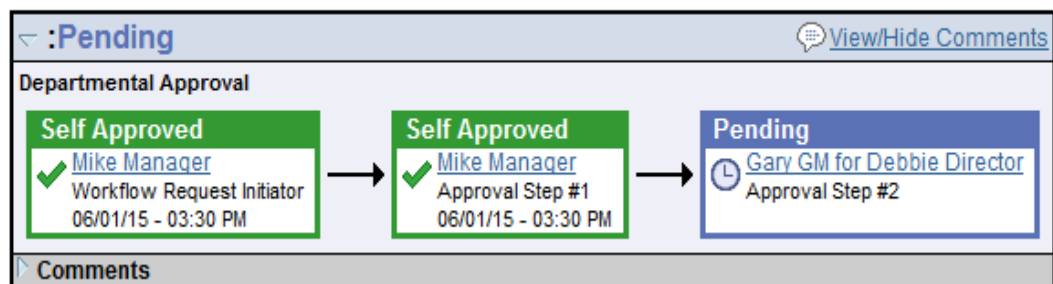
Administrative Actions

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: E121398 🔍 ☐ Allow Auto Approval

Reassign To: 🔍 ☐ Allow Self-Approval

Comment: As per Gary GM WFA is denying this transaction. It will be resubmitted.

[Reassign Selected] [Approve Selected] [Deny Selected]

A message will appear advising that the Denial was successful.

Message ☒

Denial Successful (18081,5527)

[OK]
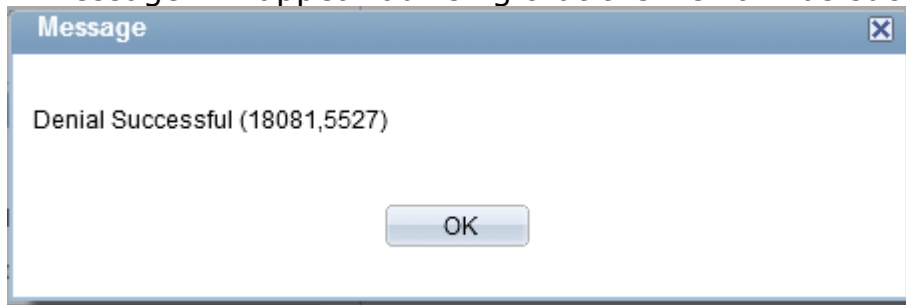
You will see the transaction has now been denied by WFA. The comments also appear on Mike Manager's Pay Rate Change Status page but not on Gary GM's or Debbie Director's as not linked to them.

Pay Rate Change Approval Chain

▽ :Denied   💬 View/Hide Comments

Departmental Approval

Self Approved	Self Approved	Admin Denied
✔ Mike Manager	✔ Mike Manager	🚫 Gary GM for Debbie Director
Workflow Request Initiator	Approval Step #1	Approval Step #2
06/04/15 - 03:23 PM	06/04/15 - 03:23 PM	07/06/15 - 01:51 PM

▽ Comments

E121398 at 07/06/15 - 01:51 PM
As per Gary GM WFA is denying this transaction. It will be resubmitted.

System at 06/05/15 - 12:07 PM
Reassigned from E009457 to E121398 (18081,2022)

Note: An email is generated to the Initiator advising that the WFA denied the transaction.

End of procedure
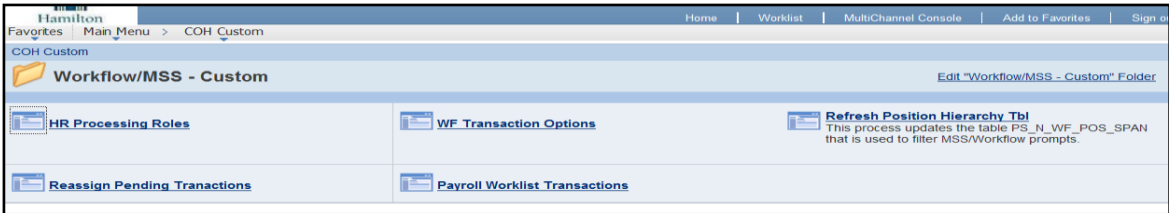
WFA REASSIGN PENDING TRANSACTIONS REPORT:

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
2	Enter User ID or click the Lookup Icon 🔍 to search from a list of Users. **Step Instance Status** will default with Pending but you can change as required. *Note: Process Scheduler Request the Type and Format is: Web CSV*

3	.CSV file will display a listing of pending transaction by Transaction Type and Emplid order

End of Procedure

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:

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

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 **JobReport.htm** contained in the email to open it.

3 Click on the process name **N_WFPND2** link to open.

Instance	Process Name	Description	Process Type	Run Status	Run Control ID	Type	Output Format	Server Name	Begin Date/Time	End Date/Time
747770	N_WFPND2	Inact oprids/Pending WF trans	SQR Process	Success	RON	Web	Comma delimited (*.csv)	PSNT	2015-09-21-16.06.27.820000	2015-09-21-16.06.42.350000

Parameter:

E:\psoft-hr\HR9DMO\BIN\SERVER\WINX86\PSSQR.EXE -CT MICROSFT -CS -CD HR9DMO -CA ACCESSID -CAP ACCESSPSWD -RP N_WFPND2 -I 747770 -R RON -CO RTHORNBE -OT 6 -OP "E:\HR_LOGS\HR9DMO_batch_logs\SQR_N_WFPND2_747770" -OF 3 -LG ENG

Distribution List:

Type	Name
User	RTHORNBE

Application Messages:

Process request completed successfully. (65,35)

Published message with ID 46fc290f-609c-11e5-9642-f1305802f43e to create entry in folder GENERAL. (65,435)

Successfully posted generated files to the report repository (65,71)

4 Click on the **N_WFPND2.csv** file. The report will list any managers who have terminated and have pending transactions.

COH_RequestRateIncrease transactions found for Oprid: E104353 - Name: Jose 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	P	03/10/2015	03/10/2015	E115789	E104353	N_HR_RATE_DAT			122194	0	Marcus Stroman	03/02/2015
E104353	E104353	P	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_TerminateEmployee transactions found 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	P	03/11/2015	03/11/2015	E115789	E104353	N_HR_TERM_DAT	03/11/2015	112831	0	Ryan Goins	03/09/2015

COH_TransferEmployee transactions found 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	P	03/11/2015	03/11/2015	E115789	E104353	HR_TRANSFER_DAT		112831	0	Ben Revere	03/09/2015

5	WFA will reassign pending transactions to terminated managers "reports to" and will need to email them to advise that they now have pending transactions awaiting their approval. **_Note: when reassigning transactions always check to see if the manager you are reassigning to has core ID or E ID to make sure the correct ID is assigned the pending transactions._** **_Note: if the WFA is unable to reassign the terminated manager's transactions by the next Friday process run, the terminated manager will continue to appear on the weekly report and their userid will not be deleted until the transactions are reassigned and approved._**
6	Once the reassigned "reports to" approves the transactions, the weekly userid delete process will delete the terminated manager's userid when it is run the next Friday. If the reassigned "reports to" does not approve the pending transactions by the next Friday, the userid will not be deleted and will remain on the report until it is approved.
7	Listed below are the technical specs for the processes that are run. Supervisor and above userid is deleted (Friday a.m.) and still has pending workflow transactions that need to be re-assigned. **<ins>Resolution</ins>** A new view: PS_N_WF_INACTOP_VW was created using the sql from the dynamic role query for supervisors and above and modified to pick up oprid's of supervisors and above that are inactive in JOB.

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:

```
SELECT * FROM PS_N_WF_INACTOP_VW
```

	OPRID
1	E088203
2	E113367
3	E116803
4	E000863
5	E115647
6	E062776
7	E015755
8	E069020
9	E027530
10	E005990
11	E121398
12	E107427
13	E062849
14	E028691

New SQR: N_WFPND2 – Log

```
Oprid: E121398   Opr Name: Donald (Jason) Thorne

    Total COH_JobRequisition transactions found:       1
    Total COH_RequestRateIncrease transactions found:  4
    Total COH_TerminateEmployee transactions found:    1
    Total COH_TransferEmployee transactions found:     1


Oprid: E107427   Opr Name: Holly Odoardi

    Total COH_JobRequisition transactions found:       2
    Total COH_RequestRateIncrease transactions found:  1
    Total COH_TerminateEmployee transactions found:    1
    Total COH_TransferEmployee transactions found:     2
```

New SQR: N_WFPND2 – spreadsheet

	A	B	C	D	E	F	G	H	I	J	K	L
1	COH_JobRequisition transactions found for Oprid: E121398 - Name: Donald (Jason) Thorne											
2												
3	Oprid	Orig Oprid	Step Status	Date Created	Date Modified	Originator Id	Requestor Id	Record Name	Xrf Date Modified	Request Id		
4	E121398	E121398	P	5/21/15	5/21/15	E067880	E067880	N_HR_JOBREQ_DAT		95		
5												
6												
7	COH_RequestRateIncrease transactions found for Oprid: E121398 - Name: Donald (Jason) Thorne											
8												
9	Oprid	Orig Oprid	Step Status	Date Created	Date Modified	Originator Id	Requestor Id	Record Name	Xrf Date Modified		Emplid	Empl Rcd
10	E121398	E121398	P	3/30/15	3/30/15	E102241	E102241	N_HR_RATE_DAT			9457	0
11	E121398	E121398	P	5/21/15	5/21/15	E067880	E121398	N_HR_RATE_DAT			22500	0
12	E121398	E121398	P	4/23/15	4/23/15	E017893	E017893	N_HR_RATE_DAT			52750	1
13	E121398	E121398	P	4/23/15	4/23/15	E045070	E045070	N_HR_RATE_DAT			111447	0
14												
15												
16	COH_TerminateEmployee transactions found for Oprid: E121398 - Name: Donald (Jason) Thorne											
17												
18	Oprid	Orig Oprid	Step Status	Date Created	Date Modified	Originator Id	Requestor Id	Record Name	Xrf Date Modified		Emplid	Empl Rcd
19	E121398	E121398	P	3/30/15	3/30/15	E102241	E102241	N_HR_TERM_DAT			9457	0
20												
21												
22	COH_TransferEmployee transactions found for Oprid: E121398 - Name: Donald (Jason) Thorne											
23												
24	Oprid	Orig Oprid	Step Status	Date Created	Date Modified	Originator Id	Requestor Id	Record Name	Xrf Date Modified		Emplid	Empl Rcd
25	E121398	E121398	P	5/21/15	5/21/15	E067880	E121398	HR_TRANSFER_DAT			42198	0
26												
27												
28	COH_JobRequisition transactions found for Oprid: E107427 - Name: Holly Odoardi											
29												
30	Oprid	Orig Oprid	Step Status	Date Created	Date Modified	Originator Id	Requestor Id	Record Name	Xrf Date Modified		Emplid	Empl Rcd
31	E107427	E107427	P	3/12/15	3/12/15	LHEPWORT	LHEPWORT	N_HR_JOBREQ_DAT		43		
	E107427	E107427	P	3/15/15	3/15/15	LHEPWORT	LHEPWORT	N_HR_JOBREQ_DAT		107		

New record: PS_N_WF_INACTV_OPR – Oprid's with Pending Transactions

```
SELECT * FROM PS_N_WF_INACTV_OPR
```

HR9DMO

	OPRID
1	E107427
2	E121398

Delete User App. Engine pgm: N_DEL_USER – Log

```
* Oprid [E107427] deleted from HINT response file - PSUSERATTR - Pending Workflow Transactions (0,0)

* Oprid [E107427] User Profile Locked Out - Pending Workflow Transactions (0,0)

* Oprid [E121398] deleted from HINT response file - PSUSERATTR - Pending Workflow Transactions (0,0)

* Oprid [E121398] User Profile Locked Out - Pending Workflow Transactions (0,0)
```

User Profile – E107427

General | ID | Roles | Workflow | Audit | Links | User ID Queries

User ID: E107427

☑ **Account Locked Out?**

Description: Holly Odoardi

Security Administrator trying to Unlock User Profile – E107427

General | ID | Roles | Workflow | Audit | Links | User ID Queries

User ID: E107427

☐ Account Locked Out?   Failed L

Description: Holly Odoardi

Logon Information

Symbolic ID:

Password:

Confirm Password:

User ID Alias:

Edit Email Addresses

General Attributes

Language Code:

Currency Code:

Message ☒

User has Workflow Pending Transactions (26099,12)

User is inactive in JOB but still has workflow pending transactions that need to be re-assigned then the user's profile will be deleted. This user profile cannot be unlocked. Re-check: Account Locked Out? box, then Save or Return to Search.

OK

IT Help Desk trying to Unlock User Profile – E107427

Unlock Euser + Change Password

Enter any information you have and click Search. Leave fields blank for a lis

Find an Existing Value | Add a New Value

Limit the number of results to (up to 300): 300
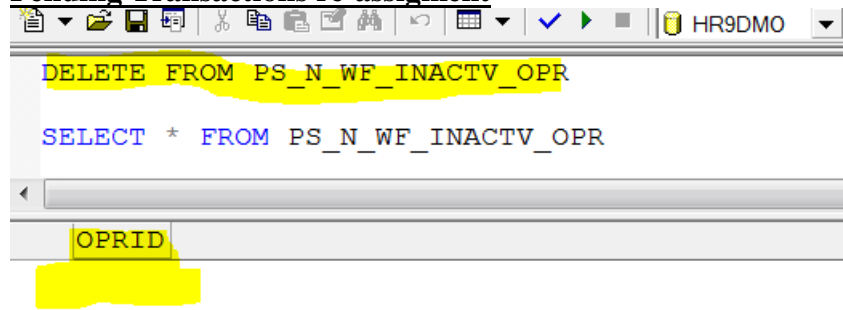
Search by: User ID ▼   begins with   E107427

Search Advanced Search

No matching values were found.

New record: PS_N_WF_INACTV_OPR – Oprid's removed manually similating Pending Transactions re-assigment

```
DELETE FROM PS_N_WF_INACTV_OPR

SELECT * FROM PS_N_WF_INACTV_OPR
```

```
OPRID
```

Delete User App. Engine pgm: N_DEL_USER – Log

```
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)
```

NEW HIRES/TRANSFERS POSTED:

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

Introduction:

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

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing

Steps	Task	Task Details	Assigned To	Processing/Filing
1 *Complete this step for new positions only*	Obtain job description & Compensation data **for new positions**	Work with HR Compensation section to determine position Salary Grade **for new position**	Hiring Manager HR Compensation	HR Compensation creates new Position in PeopleSoft
2	Request approval to fill a vacancy	Create the **Job Opening** in PeopleSoft Manager Self Service	Hiring Manager or Delegate	The Job Opening routes through the approval chain and generates email to the next approver advising that action is required. Once the last approver completes, the approved Job Opening routes to HR Employment Services through the Recruiting Home page.

Steps	Task	Task Details	Assigned To	Processing/Filing
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 Cross references JD and job posting to ensure no significant changes to role Runs process to put posting on S drive and sends email to print and mail	HR Employment Services HR Receptionist	
6	Screen Resumes	Following close of posting, obtain a short list of resumes to be provided to hiring manager	HR Employment Services	Route shortlisted resumes to hiring department

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

Steps	Task	Task Details	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.

Steps	Task	Task Details	Assigned To	Processing/Filing
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

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

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

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

Under normal hiring conditions, HR does not require the Vacancy Management Protocol form. If Departments wish to use this form, it will 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
  - o 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

Process Summary:

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

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

EXTENSION TO TEMPORARY CONTRACTS:

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

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

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1 a)	Identify upcoming	Run Query to determine upcoming contract end dates.	HR Employment Services	Follow up with 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**	**Processing/Filing**
2	Extend an Offer	With an understanding of the departments new timelines for the temporary role, Extension letter is prepared for current incumbent. It is assumed that acceptance of the terms has occurred verbally between employee and manager. Where applicable, benefits language may be included	HR Employment Services	Email to employee with cc to manager, and to HR Records

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

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

POSITION DATA CHANGES:

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

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

- New Position (additional staff/complement to existing classification only)
- Inactivate Position
- Update Position, including:

- Dept ID Changes
- Location Changes
- Reports to Change
- Increase/Decrease Head Count
- Changes to Standard Hours

- FTE
- Budgeted/Unbudgeted
- Regular/Temporary Status
- Part Time/ Full Time Status

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

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Request for Position Data Change	Department representative completes Departmental Position Data Change (PDC) 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.

Process Summary:

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

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

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

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

PAY RATE CHANGES
Step Progression or Merit:

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

Introduction:

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

- Step progression
- Merit Performance Based

Process Summary:

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

2	Recommendation to increase Wage	If the Supervisor determines the employee is eligible, initiate the **Pay Rate Change – Step Progression or Merit Performance Based** transaction in PeopleSoft Manager Self Service	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
		In the case of Non-union, a completed Performance Review is required.		Performance Review is completed in PAD Tool.
		Where Supervisor determines the employee is not eligible due to performance, a completed PAD is required.		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	

NOTE:
- HR Records to follow up on outstanding merits which have not been processed.
- Fire Department does not receive merit alert emails – they track their own eligibility date based on CBA rules.
- Departmental approval for Step Progression increases for employees in ATU 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)

Process Summary:

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

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

NOTE:

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

Add/Remove Additional Duties Pay:

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

Introduction:
This document describes the typical process used to process Additional Duty Pay

Process Summary:

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

NOTE:

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- 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.

Process Summary:

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

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

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

Return to Previous Position:

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

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

Process Summary:

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

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

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

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

Seasonal Transfers:

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

Introduction:

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

Process Summary:

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

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

Short Term Coverage:

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

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

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

Process Summary:

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

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

NOTE:

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

Temporary Internal Secondment/ Minor Reorganizations:

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

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

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

Process Summary:

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

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

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

Confirm To Permanent:

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

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

Process Summary:

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

HR Employment Services files email in Employee file |

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

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

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

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

- Sick coverage
- Filling vacancy pending outcome of a posting

Process Summary:

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

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

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

Training Complete – Fire Only:

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

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

Process Summary:

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

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

Probation Complete – ATU Only:

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

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

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Supervisor identifies position employee is transferring to	Conversation between Supervisor and employee(s) to confirm position change and effective date.	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)

Process Summary:

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

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

UNPAID LEAVE OF ABSENCE >30 DAYS

PeopleSoft Automated Workflow/Manager Self Service Component   Yes ☐   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

Process Summary:

Steps	Task	Task Details	Assigned To	Processing/Filing
1	Request for leave of Absence	An employee will request a leave of absence by completing the **Leave of Absence Request form** where advance notice is possible. Form is located on eNet under Policies & Procedures>Human Resources Policies & Procedures>Employee Orientation & Information>Forms. If the employee is unable to complete the form due to sudden illness for example, then the department completes on their behalf, approvals obtained and the form is	Employee	Sends form to Supervisor for approval

Steps	Task	Task Details	Assigned To	Processing/Filing
		forwarded to HR Records for processing.		
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.

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

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

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

Notes:

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

TERMINATIONS

Voluntary Terminations:

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

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

- Resignations
- Retirements

- Death of a current employee
- End of Temporary Assignment

Process Summary:

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

Steps	Task	Task Details	Assigned To	Processing/Filing
2	Notify Human Resources of Termination	Initiate Termination transaction in PeopleSoft Manager Self Service	Supervisor or Delegate	Workflow routes through approval chain and generates email to next approver advising that action is required. Once last approver completes the transaction routes to HR Records Worklist
3	HR Processing	Process Termination in Job Data including in comments of final vacation calculations/payouts	HR Records	HR Records routes to Finance Payroll Worklist.

4	Process Benefit change	Process termination of benefits in accordance with last day worked	HR Benefits	Staff Movement report
5	Process Pay adjustments	Calculate and process pay adjustments according to comments on transaction and Issue ROE for departing employee	Finance Payroll	
6	Communicate Termination	An announcement is issued to notify staff of employee's departure and to redirect inquiries as appropriate	Supervisor	

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

Involuntary Terminations:

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

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

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

Process Summary:

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

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

NOTE:
- **If new terms are negotiated following the original termination letter is issued. Return to Step 3**
    - o HR Labour Relations (or HR Admin Coordinator in cases of salary continuance) to communicate changes via summary email with backup attached (i.e. minutes of settlement or revised letter) to both HR Records and HR Benefits

- HR Admin Coordinator/ HR Records repeat step 4 & 5 & Finance Payroll to make adjustments as necessary