EUT Course 110 –
Manager Self Service

PeopleSoft Version 9.2

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Manager Self Service

Section 1 - Time and Leave Management

Manager Timesheet Entry

Section 1, Lesson 1 - Manager Timesheet Entry Exercise

Procedure

In this lesson you will learn how to enter time on behalf of your direct report. You will learn the following:
1. Enter Annual Leave
2. Enter Sick Leave Taken
3. Enter Time Worked on a Holiday with a Labor Account Code
4. Certify Time on Behalf of Direct Report

The timesheet lookup page will default to the first of the current month and all months will display 31 days regardless of the amount of days in the month.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Time and Leave Management** link.
3.	Click the **Manager Timesheet** link.
4.	Click the **Employee DEX** link.
5.	Note: When there is an exception on a timesheet, a banner moving across the top of the screen saying "You have an exception" will be displayed. At that time, the employee and manager will be locked out of the timesheet until it is resolved.
6.	The employee is taking annual leave. Click the **Look up Time Reporting Code (Alt+5)** button.
7.	Click the **ANLVT** link.

Step	Action
8.	Did you know that CAPPS uses decimals, not minutes for time reporting? For example: 15 minutes = .25 hours 30 minutes = .50 hours 45 minutes = .75 hours For example: if you work 7 1/2 hours, you would enter 7.50 hours on your timesheet, not 7:30. Enter the desired information into the **Thu 4/2 0.00** field. Enter "**8.00**".
9.	Whenever multiple Time Reporting Codes are required you must enter each on a separate line. Click the **Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015** button.
10.	The employee is taking sick leave. Click the **Look up Time Reporting Code (Alt+5)** button.
11.	Click the scrollbar.
12.	Click the **SICKT** link.
13.	Enter the desired information into the **Tue 4/7 0.00** field. Enter "**4.00**".
14.	The employee worked 8 hours on April 21 and the hours need to be charged to a Labor Account Code. Because 4/21 is a holiday and they are scheduled to work, we need to use the TRC REGHW. Click the **Look up Time Reporting Code (Alt+5)** button.
15.	Click on the scrollbar.
16.	Click the **REGHW** link.

Step	Action
17.	Enter the desired information into the **Tue 4/21 0.00** field. Enter "**8.00**".
18.	Click on the scrollbar.
19.	The Labor Account Code is used for allocating hours for special purposes.
20.	Click the **Look up Labor Account Code (Alt+5)** button.
21.	Choose the applicable Labor Account Code for the activity. In this example use 608_ABT_OPERAT. Click the **608_ABT_OPERAT** link.
22.	Click the scrollbar.
23.	Click the **E-Sign & Approve** button.
24.	April 21 is a skeleton crew holiday. Click the **OK** button.
25.	Click the **OK** button.
26.	Now we will certify time for an employee. Click the **Time and Leave Management** button.
27.	Click the **View/Edit Time Certification** menu.
28.	The use of Time Certification will be determined by agency. Click the **Employee JMN** link.
29.	The employee has not certified their time for the January time period. Click the **Period** link.

Step	Action
30.	**Note:** Employees can also certify their hours on the Timesheet. Click the **E-Sign & Certify** button.
31.	Click the **OK** button.
32.	The manager has certified the employee's time for the January time period. After the time has been certified by the manager, the **Certified By:** field displays the manager's name. The **Date/Time Stamp:** field displays when the certification was done. If the employee had certified the time, the employee's name would have displayed.
33.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

View Time

Section 1, Lesson 2 - View Time Exercise

Procedure

This lesson shows how the Manager is able to view an employee's Leave Balances and Expirations.

Step	Action
1.	Click the **Time and Leave Management** link.
2.	Choose the employee whose leave you want to view. Click the **View Leave Balance/Expirations** link.
3.	Click the **Employee PFF** link.
4.	The Leave Time Balance Summary displays all Comp Time plans, the balances and all time expiring. Click the **Show next row (Alt+.)** button.
5.	The employee has an available balance of 27.00 hours of Annual Leave. Click the **Show next row (Alt+.)** button.
6.	This page displays **FLSA Overtime** for an employee. Click the **Show next row (Alt+.)** button.
7.	This page displays **Compensatory Time** for an employee. Click the **Show next row (Alt+.)** button.
8.	Click the **Show next row (Alt+.)** button.

Step	Action
9.	Click the **Show next row (Alt+.)** button.
10.	Click the **Show next row (Alt+.)** button.
11.	Click the **Show next row (Alt+.)** button.
12.	The employee has 8 hours of Holiday Comp Time. The manager can check to see when this time will expire. Click the **Show Time Expiring in** list.
13.	There are 4 expiration choices: Next 30 days Next 90 days One Year Show All Click the **Show All** list item.
14.	The employee has 8 hours of Holiday Comp Time expiring on August 27, 2015.
15.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Maintain Shift Pay Rate

Section 1, Lesson 3 - Maintain Shift Pay Rate Exercise

Procedure

In order to receive regular shift pay, an agency must be authorized to pay shift and an employee must be set up with the correct shift configuration in Job and Time & Labor.

On the Maintain Shift Pay Rate page, the manager can only change the shift rate.

Step	Action
1.	Click the **Time and Leave Management** link.
2.	Click the **Maintain Shift Pay Rate** link.
3.	Click the **Test Staffer** link.
4.	The page displays the **Current Status** of the shift and the **Proposed Status** when the percent is changed.
5.	Enter the desired information into the **Regular Evening Shift(%)** field. Enter "**1.5**".
6.	The new percent was entered in the shift rate field. Tab out to populate the dollar amount of the change. Press **[Tab]**.
7.	The dollar amount was changed from $23.50 to $35.25. Click the **E-Sign & Approve** button.
8.	Click the **OK** button.
9.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Leave Without Pay

Section 1, Lesson 4 - Leave Without Pay Exercise

Procedure

In this lesson, an employee will take one week of Leave Without Pay in April.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Time and Leave Management** link.
3.	Click the **Manager Timesheet** link.
4.	Click the **Employee PFF** link.
5.	Click the **Look up Time Reporting Code (Alt+5)** button.
6.	The employee is taking Leave Without Pay - Employee. Click the **LWPEO** link.
7.	Enter the desired information into the **Mon 4/6 0.00** field. Enter "**8.00**".
8.	Enter the desired information into the **Tue 4/7 0.00** field. Enter "**8.00**".
9.	Enter the desired information into the **Wed 4/8 0.00** field. Enter "**8.00**".
10.	Enter the desired information into the **Thu 4/9 0.00** field. Enter "**8.00**".

Step	Action
11.	The employee will take 40 hours of Leave Without Pay, beginning April 6 to April 10. Enter the desired information into the **Fri 4/10** field. Enter "**8.00**".
12.	Click the scrollbar.
13.	By clicking the **E-Sign & Approve** button the manager will approve the employee's Leave Without Pay. Click the **E-Sign & Approve** button.
14.	Click the **OK** button.
15.	**Note:** Longevity is not paid if the employee is on Leave Without Pay for the entire first scheduled day of the month. In this lesson the employee worked the first scheduled day of the month, so the Longevity pay was not affected. When LWOP is entered and approved on the Timesheet, the next available earnings will be docked. If LWOP is removed from the Timesheet the next available earnings will be credited. If LWOP is at least one calendar month, the employee's service date is decreased by that amount of time. In this scenario there will be no effect on the employee's service date.
16.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Employee Schedules

Section 1, Lesson 5 - Employee Schedules Exercise

Procedure

This lesson demonstrates how a manager can:
1. Assign a new schedule for a future date.
2. Override the schedule for the current week.

Step	Action
1.	Click the **Time and Leave Management** link.
2.	Click the **View/Edit Time and Leave Setup** link.
3.	Click the **Employee STS** link.
4.	The Schedule ID Breakdown shows the alpha characters used in place of 2-digit numbers. This chart helps you understand how to interpret a Schedule ID and Description. Press **[Enter]**.
5.	Note the explanation for new hires.
6.	<u>1. Assign a new schedule for a future date.</u> The employee's schedule is changing and will be entered by the manager. Click the **Add a new Schedule (Alt+7)** button.
7.	All schedules start on a Sunday, but the employee's FLSA workweek will correctly interpret their Saturday or Sunday workweek for comptime/overtime calculations. Click the **Choose a date (Alt+5)** button.
8.	Click the dropdown button to activate the menu.

Step	Action
9.	Click the **April** list item.
10.	Click the **5** link.
11.	Click the lookup icon.
12.	In this example, the schedule reads zero hours on Sunday, 7 on Monday, 9.5 on Tuesday, 7 on Wednesday, 9.5 on Thursday, 7 on Friday, and zero on Saturday. Click the **40 HRS XX-07-95-07-95-07-XX** link.
13.	Click the **E-Sign & Approve** button.
14.	Click the **OK** button.
15.	Click the **Time and Leave Management** menu.
16.	<u>2. Override the schedule for the current week.</u> Click the **Override Scheduled Workday** menu.
17.	The manager wants the employee to work on Saturday and take off Monday. This schedule is only for the current week and will be changed on the **Override Scheduled Workday** page. Click the **Look up Saturday 03/21/2015 (Alt+5)** button.
18.	Click the **8** link.
19.	Delete Monday's hours. Press **[Delete]**.
20.	Enter the desired information into the **Monday 03/16/2015** field. Enter "**0.00**".

Step	Action
21.	Notice the employee's hours for the week now total 40 instead of 48. Click the **E-Sign & Approve** button.
22.	Click the **OK** button.
23.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Manager Approvals

Section 1, Lesson 6 - Manager Approvals Exercise

Procedure

Hours that are entered and submitted by employees need approval from their manager.

The manager can approve the hours on the **Manager Summary Approval** page or the Timesheet.

Hours entered by the manager on an employee's Timesheet are approved when the manager clicks on the **E-Sign and Approve** button.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Time and Leave Management** link.
3.	Click the **Manager Summary Approval Page** link.
4.	Note: Your agency may use this page for approvals or as a view only page. The view only access will have the Approve and Deny boxes grayed out and they will need to drill down to the Timesheet in order to approve the time using the employee name link.
5.	The manager has one employee with hours that need approval. In addition to accessing the **Manager Summary Approval** page to find employees who need hours approved, a reminder process was created to notify managers that they have hours to approve (hours in **NA** status). Ten days after the create date, if the hours are still in an **NA** status, an email is auto-generated and sent to the manager. After 17 days, if the hours are still in an **NA** status, an email is auto-generated and sent to the next level manager.
6.	If the Manager Summary Approval page is not view only, the manager can approve/deny hours for an individual employee for the entire month.

Step	Action
7.	On the **Manager Timesheet**, the manager can deny hours by row. There could be multiple days with hours on a row in a Needs Approval status, but once **Deny** is clicked then it denies everything on that row. When the manager clicks the **E-Sign & Approve** button it will automatically approve all hours in NA status for the month you are currently viewing.
8.	The manager has chosen to approve the hours and clicks the approve button. Click the **Approve** option.
9.	Note: It is a best practice to view your employee's Timesheet prior to approving the time. Click the **E-Sign & Approve** button.
10.	Click the **OK** button.
11.	The employee's hours have been approved and no longer display on the **Manager Summary Approval** page.
12.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Section 2 - Reporting

Reporting

Section 2, Lesson 1 - Reporting Exercise

Procedure

CAPPS provides many reports that managers can run to gather information on their direct reports.

In this lesson the Employee Monthly Time and Leave Report will be run.

Step	Action
1.	Click the **Manager Self-Service** link.
2.	Click the **Reporting** link.
3.	Click the **Run Reports** link.
4.	There are multiple reports you can select on the **Reports** page. Click the **Employee Monthly Time & Leave Report** link.
5.	This report can be run for all of your direct reports or for specific employees. Click the **Select All** button to process all employees.
6.	Enter the last day of the month for the report you are running. Enter the desired information into the **As Of Date** field. Enter "**02/28/2015**".
7.	In the **Report Request Parameters** section you are given the option of showing the Labor Account Codes (LAC) which display on the second page of the report. You also have the option to click on **Show Attestment**. This prints on the third page so that agencies who require their employees to sign a hard copy have a space for their signature.
8.	Click the **Process Report** button.

Step	Action
9.	Click the **OK** button.
10.	Click the **View Reports** button.
11.	Click the **View Report** link.
12.	The report displays: beginning and ending balances for most types of leave, leave accrued/earned, leave expiring within the next 3 months, current annual leave balances, projected accruals, carry over maximum and hours converting to sick leave for each of your direct reports.
13.	Click the **Reporting** link.
14.	Click the **Run Reports** link.
15.	Now, we will run a second report from the **Reports** page. Click the **Time Reporting Codes by Date Report** link.
16.	Enter the desired information into the **Start Date** field. Enter "**01/01/2015**".
17.	Enter the desired information into the **End Date** field. Enter "**01/31/2015**".
18.	Look up the Time Reporting Code you want to show on the report. Enter the desired information into the **TRC** field. Enter "**re**".
19.	Click the **Look up TRC (Alt+5)** button.
20.	Click on the **REGHR** code in the list.
21.	Click the **Include** option.

Step	Action
22.	Click the **Process Report** button.
23.	Click the **OK** button.
24.	Click the **View Reports** button.
25.	Notice the **Run Status** is **Queued.** Click the **Refresh** button.
26.	Notice the **Run Status** is now **Success.** Click the **View Report** link.
27.	The total REGHR hours for the employee are shown by date.
28.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Section 3 - View Employee Personal Data

View Employee Personal Data

Section 3, Lesson 1 - View Personal Data Exercise

The Managers can view personal information on their direct reports by accessing the View Employee Personal Info page in MSS.

Procedure

The Employee Personal Data lesson reviews the pages that provide personal information for a manager's direct and indirect reports.

Step	Action
1.	Click the **View Employee Personal Info** link.
2.	Click the **Select** button for Employee ABC.
3.	The **Employee Information** page not only gives a manager information about his employee, but also contains links to other pages where changes can be made to the employee record, such as Change Location and Reporting Change.
4.	Click the **Home and Mailing Addresses** link.
5.	In CAPPS, only the **Home Address** is being used.
6.	Click the **Return to Employee Information** link.
7.	Click the **Phone Numbers** link.
8.	The employee phone numbers are displayed. The employee can designate a particular phone number as **Preferred.** Click the **Return to Employee Information** link.
9.	Click the **Birthday** link.

Step	Action
10.	The employee's birth month and day is displayed without the year. Click the **Return to Employee Information** link.
11.	Click the **Email Addresses** link.
12.	The employee can enter both business and personal email addresses, with the **Preferred** address checked. Click the **Return to Employee Information** link.
13.	Click the **Emergency Contacts** link.
14.	The employee enters the person or persons they wish to use as **Emergency Contacts**. They can choose one as a **Primary Contact** by checking the **Primary Contact** box next to that person's name. Click the **Return to Employee Information** link.
15.	Total Compensation, Change Location and Reporting Change will be addressed in other lessons.
16.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Section 4 - Maintain Employee's Work Information

Maintain Employee's Work Information

Section 4, Lesson 1 - Maintain Employee's Work Information - Exercise

Procedure

In this exercise you will learn the following:
1. Change an Employee's Work Location
2. Change an Employee's Reports To Manager
3. Review or Enter Agency Property

Step	Action
1.	1. Change an Employee's Work Location The employee's work location has been moved to a different building.
2.	Click the **Change Work Location** link.
3.	Enter the date the employee starts work at the new location. Click the **Choose a date (Alt+5)** button.
4.	Click the button to the right of the **Month** field.
5.	Click the **April** list item.
6.	Click the **1** link.
7.	Choose the employee who is changing location. Click the **Employee MMM** link.
8.	Click the **Look up *New Location (Alt+5)** button.
9.	Click the **00002** link.

Step	Action
10.	**Mail Drop ID** is not a required field. If there is a **Mail Drop ID** associated with the new location, it will show up in the lookup box. Click the **Look up Mail Drop ID (Alt+5)** button.
11.	This location does not have a **Mail Drop ID** associated with it. Click the **Cancel** button.
12.	Click the **Submit** button.
13.	Click the **OK** button.
14.	Once the manager submits the location change request, the location change is updated on job and position data.
15.	Now that you have entered a change for your direct report, you also want to change the work location for one of your indirect reports. Click on the org chart to drill down to your indirect reports. Click the **Org Chart** link.
16.	The new page shows a list of your indirect reports who report to Employee FHG. The employee you want to change is Employee RRR. Click the **Employee RRR** link.
17.	The link takes you to the first page of the **Change Work Location/Mail Drop** process again. These pages are the same ones you used to process your direct report. The process is the same except for your choice of indirect report over direct report.
18.	Click the **Maintain Employee's Work Info** button.
19.	2. Change an Employee's Reports To Manager

Step	Action
20.	Click the **Change Reports To Manager** menu.
21.	Managers submit a reporting change request when there is a change in reporting structure. The manager's supervisor reviews, approves or denies the request.
22.	Enter the date the employee reports to the new manager/supervisor. Click the **Choose a date (Alt+5)** button.
23.	Click the button to the right of the field.
24.	Click the **April** list item.
25.	Click the **1** link.
26.	Choose the employee with the new manager/supervisor. Click the **Employee FHG** link.
27.	Choose the new manager/supervisor's position number. Click the **Position** link.
28.	Click the **Submit** button.
29.	Click the **OK** button.
30.	The page displays the date the change will take effect, the new supervisor's name and position number. Also listed are the direct reports.
31.	Click the **Manager Self-Service** button.
32.	3. Review or Enter Agency Property This feature may not be available to all agencies.

Step	Action
33.	Click the **Track Agency Property** menu.
34.	Choose the employee who just received a new laptop. Click the **Employee DRR** link.
35.	Enter the type of property received. Click the **Look up Property (Alt+5)** button.
36.	Click the **LAPTOP** link.
37.	Enter the date the laptop was issued to the employee. Click the **Choose a date (Alt+5)** button.
38.	Click the **13** link.
39.	Enter the desired information into the **Serial Number** field. Enter "**TX5432680114**".
40.	Click the **Save** button.
41.	Click the **OK** button.
42.	The system now has a record of the laptop and the date it was issued to the employee. When the employee terminates or receives a new laptop, this laptop should be returned and the date entered in the **Date Returned** field above.
43.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Section 5 - Compensation Management

Award Merit Increase

Section 5 Lesson 1 - Award Merit Increase - Exercise

Procedure

Managers can give their direct and indirect reports one-time merit awards and also regular merit awards.

This lesson explains how to process the award and then check on the status.

1. Award a One Time Merit
2. Request Regular Merit Increase
3. One Time Merit Status
4. View Merit Increase Status

Step	Action
1.	Click the **Compensation Management** link.
2.	1. Award One Time Merit Click the **Award One Time Merit** link.
3.	Enter the date that the one time merit will be effective. Enter the desired information into the **Transaction Effective Date** field. Enter "**04/01/2015**".
4.	Enter the dollar amount for the merit award. Enter the desired information into the **Amount** field. Enter "**1000.00**".
5.	Note: When a dollar amount is entered in the amount field, the system automatically calculates the percent.

Step	Action
6.	Enter an explanation for why the direct report is receiving the one time merit award. Enter "**Employee's work was outstanding in the fourth quarter of 2014.**" into the **Justification** field.
7.	Click the **Submit** button.
8.	The award request was successfully submitted. The originating manager and the approving manager are displayed on the submission.
9.	Click the **OK** button.
10.	2. Request Regular Merit Increase Click the **Compensation Management** menu.
11.	The manager requests a regular merit increase. Click the **Request Regular Merit Increase** menu.
12.	Enter the date for the merit increase to be effective. Enter the desired information into the **Transaction Effective Date** field. Enter "**04/01/2015**".
13.	Choose the employee who will receive the merit increase. Click the **Employee DEX** link.
14.	A warning message displays to ensure that any changes made to the employee's pay be in compliance with agency policy. Click the **OK** button.

Step	Action
15.	To change the employee's current salary amount, click on the **Edit** button and enter in the new information.
16.	Enter the desired information into the **Merit Percent** field. Enter "**2.0**".
17.	Enter the desired information into the **Justification** field. Enter "**Employee's performance was excellent last year.**"
18.	When a percent of the employee's current salary is entered, the system automatically calculates the new amount. Notice the **Merit Amount** has been calculated as well as the **New Compensation Rate**. Click the **Return to Select Salary Component** link.
19.	The **Salary Change Summary** box lists the current salary, the change amount, the change percent and the new salary, all by year and month.
20.	Click the **E-Sign & Submit** button.
21.	The request was successfully submitted and will be sent to the manager who initiated the request and the approving manager.
22.	Click the **OK** button.
23.	3. One Time Merit Status Look at the One Time Merit status to find the status of the first request. Click the **One Time Merit Status** link.
24.	The One-Time Merit Increase is still in a **Submitted** status. It is waiting for the proper person to approve it. If it is approved the Status will say **Approved.**
25.	Click the **Compensation Management** menu.

Step	Action
26.	4. View Merit Increase Status Check on the second request, the Regular Merit Award. Click the **View Merit Increase Status** menu.
27.	The Regular Merit Increase has been **Approved** and is ready to be paid.
28.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Leave of Absence

Section 5, Lesson 2 - Leave of Absence Exercise

Procedure

Managers have the ability to place their direct and indirect reports on a Leave of Absence, Change the Reason Code for an employee already on Leave of Absence and then Return an employee from Leave of Absence.

1. Change Leave of Absence Reason
2. Return from Leave of Absence
3. Request Leave of Absence

Step	Action
1.	1. Change Leave of Absence Reason Click the **Manager Self-Service** link.
2.	Click the **Compensation Management** link.
3.	Click the **Change Leave of Absence Reason** link.
4.	Choose an employee who is already on a leave of absence. Click the **Employee CQZ** link.
5.	The employee has had a change in the reason for their Leave of Absence, starting on March 8.
6.	Enter the date the absence change begins. Click the **Choose a date (Alt+5)** button.
7.	Click the **8** link.

Step	Action
8.	Choose the new absence reason. Click the **Look up Description (Alt+5)** button.
9.	Click the **Y43** link.
10.	Since the Leave of Absence reason has changed to Parental, managers must contact their FMLA Administrator to update the employee's FMLA Plan.
11.	Click the **Submit** button.
12.	Click the **OK** button.
13.	The employee's reason code has been successfully changed. Click the **Compensation Management** menu.
14.	2. Return from Leave of Absence The employee has notified their manager that they will be returning from Leave of Absence on April 1.
15.	Click the **Return From Leave of Absence** menu.
16.	Enter the employee's return date. Click the **Choose a date (Alt+5)** button.
17.	Click the button to the right of the field.
18.	Click the **April** list item.
19.	Click the **1** link.
20.	Choose the employee who is returning from leave. Click the **Employee CQZ** link.

Step	Action
21.	Click the **Choose a date (Alt+5)** button.
22.	Click the button to the right of the field.
23.	Click the **April** list item.
24.	Click the **1** link.
25.	Since the employee is on a Parental Leave of Absence and is returning to work it is necessary to notify your FMLA Administrator to update the employee's FMLA Plan.
26.	Click the **Submit** button.
27.	Click the **OK** button.
28.	The manager was informed that one of his direct reports will be going on a Leave of Absence.
29.	3. Request Leave of Absence Click the **Compensation Management** link.
30.	Click the **Request Leave of Absence** link.
31.	Click the **Choose a date (Alt+5)** button.
32.	Click the **16** link.
33.	Click the **Employee BRIT** link.
34.	The employee is going on leave beginning March 16, 2015. This is a regular Leave of Absence with no impact on the employee's FMLA. Click the **Choose a date (Alt+5)** button.

Step	Action
35.	Click the **16** link.
36.	Click the **Look up Description (Alt+5)** button.
37.	Click the **043** link.
38.	Click the **Submit** button.
39.	The employee has successfully been placed on a Leave of Absence.
40.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

View Employee Compensation

Section 5, Lesson 3 - View Employee Compensation Exercise

Procedure

Occasionally managers may need to see their employee's compensation history.

This lesson looks at the pages that provide this data.

1. View Compensation History
2. View Total Compensation

Step	Action
1.	1. View Compensation History Click the **Manager Self-Service** link.
2.	Click the **Compensation Management** link.
3.	Click the **View Compensation History** link.
4.	Choose the employee to review. Click the **Employee AAA** link.
5.	The **Salary History** box displays Job Title, Company, Empl Status, Department, Action, Reason, Annual Salary and Compensation per Frequency for the manager's direct reports. For more detailed information go to the Total Compensation page.
6.	2. View Total Compensation Click the **Compensation Management** menu.
7.	Click the **Total Compensation** menu.

Step	Action
8.	Choose the employee to review. Click the **Employee AAA** link.
9.	The **Total Compensation** page contains monthly compensation for a specific date.
10.	Click on the **Scroll** bar.
11.	**Historical Base Salary** and **Benefit Replacement Pay (BRP)** are displayed. Other types of pay, such as Longevity, will be available after implementation.
12.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Temporary Assignment

Section 5, Lesson 4 - Temporary Assignments Exercise

Procedure

When a manager's direct report accepts a temporary assignment, the manager changes the employee's assignment.

In this lesson, the manager will place the employee on a Temporary Assignment and make adjustments to their compensation.

1. Temporary Assignment
2. Temporary Assignment Status
3. Return from Temporary Assignment

Step	Action
1.	1. Temporary Assignment Click the **Compensation Management** link.
2.	Click the **Temporary Assignment** link.
3.	The employee begins his Temporary Assignment on March 1, 2015. Click the **Choose a date (Alt+5)** button.
4.	Click the **1** link.
5.	Click the **Employee STS** link.
6.	Choose the new position number for the Temporary Assignment. Click the **Look up New Position Number (Alt+5)** button.
7.	Click the **00001740** link.
8.	Click on the scrollbar.

Step	Action
9.	The position number for the Temporary Assignment has been chosen, now we have to adjust the **Compensation.** Click the **Expand section** button.
10.	Click the scrollbar.
11.	Enter the desired percent to change the amount. Enter the desired information into the **Change Percent** field. Enter "**10**".
12.	Click the **Calculate Balance** button.
13.	Enter a reason for why this should be changed. Enter the desired information into the **Justification** field. Enter "**Test**".
14.	The employee's **Compensation** has been adjusted to reflect the Temporary Assignment. Click the **E-Sign & Submit** button.
15.	The employee's assignment has been submitted for approval. Click the **OK** button.
16.	2. Temporary Assignment Status Review the status of the Temporary Assignment request. Click the **Compensation Management** menu.
17.	Click the **Temporary Assignment Status** menu.
18.	The Temporary Assignment is in a **Submitted** status waiting for **Approval.** Click the **Compensation Management** menu.

Step	Action
19.	3. Return from Temporary Assignment Enter the return from Temporary Assignment for April 1, 2015. Click the **Return from Temp Assignment** menu.
20.	Click the **Choose a date (Alt+5)** button.
21.	Click the **1** link.
22.	Choose the employee to return from Temporary Assignment. Click the **Employee STS** link.
23.	The employee's return from Temporary Assignment is now approved. Click the **E-Sign and Approve** link.
24.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Section 6 - Separations and Lump Sum Payments

Voluntary Separation

Section 6, Lesson 1 - Voluntary Separation Exercise

Procedure

Voluntary Separation is the separation filed by the employee when the employee willingly initiates termination of service with the Agency.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Separations & Retirement** link.
3.	Click the **Voluntary Separations** link.
4.	Click the **Employee BRIT** link.
5.	The separation effective date is one day after the last date the employee is paid through. For example, if the employee is paid through April 15, the Separation Effective Date would be April 16. Click the **Choose a date (Alt+5)** button.
6.	Click the button to the right of the field.
7.	Click the **April** list item.
8.	The employee is paid through April 9, so enter April 10 as the Separation Effective Date. Click the **10** link.

Step	Action
9.	Click the date/time field.
10.	Click the button to the right of the field.
11.	Click the **April** list item.
12.	April 8 is the last day physically worked. Click the **8** link.
13.	Click the **Reason for Separation** list.
14.	Click the **Personal Reasons** list item.
15.	Click the **Submit** link.
16.	Terminated employees are paid their Lump Sum Vacation after the employee has been off payroll for 30 days, then processed on the next available payroll. Click the **OK** button.
17.	Click the **OK** button.
18.	An email will be automatically generated if a manager does not enter a separation in a timely manner.

Step	Action
19.	The following is the email that will be sent: You have an employee(s) who has submitted a separation request that has not been processed and may impact the upcoming payroll. A listing of your unprocessed employee separation request(s) is provided below. Please process the separation(s) in Manager Self Service prior to the current payroll period deadline stated in the subject line of this email. If any of the listed separations affect a prior pay period, please approve any leave requests and enter the separation effective date immediately. If the separation effective date is over 30 days in the past, please contact your agency's HR administrator. If you have been in contact with your employee and have agreed not to go forward with the separation entry, then no action related to that separation request is necessary. If you need assistance, please contact Employee AAA at first.last@agy.texas.gov.
20.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Involuntary Separations

Section 6, Lesson 2 - Involuntary Separations Exercise

Procedure

Involuntary Separation occurs when the department may choose to separate its employees through reduction in force or termination for conduct reasons.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Separations & Retirement** link.
3.	Click the **Involuntary Separation** link.
4.	Click the **Employee LLOO** link.
5.	Click the **Choose a date (Alt+5)** button.
6.	The employee will be paid through April 17 therefore the **Separation Effective Date** is April 18. Click the **18** link.
7.	Click the **Choose a date (Alt+5)** button.
8.	The last day the employee physically worked is April 10. Click the **10** link.
9.	Click the **Reason for Separation** list.
10.	Click the **Reduction in Force** list item.

Step	Action
11.	Click the **Submit** button.
12.	Click the **OK** button.
13.	Click the **OK** button.
14.	The super user will monitor terminations and ensure managers are transferring out balances appropriately. Annual Leave and FLSA Overtime will be paid out automatically in CAPPS after the employee has been off payroll for 30 days, then processed on the next available payroll.
15.	An email will be automatically generated if a manager does not enter a separation in a timely manner.
16.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Separation Due to Death

Section 6, Lesson 3 - Separation Due to Death Exercise

Procedure

When the separation cause is death, the employee is terminated and CAPPS will automatically calculate any payments due.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Separations & Retirement** link.
3.	Click the **Separation Due to Death** link.
4.	Click the **Employee DEX** link.
5.	Click the **Choose a date (Alt+5)** button.
6.	Click the button to the right of the field.
7.	Click the **March** list item.
8.	Click the **28** link.
9.	Click the **Choose a date (Alt+5)** button.
10.	Click the button to the right of the field.
11.	Click the **March** list item.
12.	Click the **20** link.

Step	Action
13.	Click the **Submit** button.
14.	In the case of Separation Due to Death, the Lump Sum payment is automatically processed for payment after 14 days, then it will pay on the next available payroll. Click the **OK** button.
15.	Click the **OK** button.
16.	An email will be automatically generated if a manager does not enter a separation in a timely manner.
17.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Employee Retirement

Section 6, Lesson 4 - Employee Retirement Exercise

Procedure

The manager receives a retirement request from an employee.

The manager reviews and completes the retirement request via MSS.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Separations & Retirement** link.
3.	Click the **Employee Retirement** link.
4.	Click the **Employee JMN** link.
5.	Click the **Choose a date (Alt+5)** button.
6.	Click the button to the right of the field.
7.	Click the **May** list item.
8.	Click the **1** link.
9.	Click the **Choose a date (Alt+5)** button.
10.	Click the **30** link.
11.	Click the **Submit** button.

Step	Action
12.	Click the **OK** button.
13.	Click the **OK** button.
14.	An email will be automatically generated if a manager does not enter a separation in a timely manner.
15.	**End of Procedure.**

Section 7 - Designate Workflow Alternate

Designate Workflow Alternate

Section 7, Lesson 1 - Designate Workflow Alternate Exercise

Procedure

In this lesson we will see how Workflow Alternate allows a manager to route report actions for direct reports to their manager for a specific period of time.

Step	Action
1.	Click the **Manager Self-Service** link.
2.	Click the **Designate Workflow Alternate** link.
3.	When a manager enters the Designate Workflow Alternate assignment page, the Reassign Work To field defaults with their manager's employee ID and name. Click the **Choose a date (Alt+5)** button.
4.	Enter the date you want the alternate to go into effect. Click the button to the right of the field.
5.	Click the **April** list item.
6.	Click the **5** link.
7.	Enter the alternate's last date to receive your workflow items. Click the **Choose a date (Alt+5)** button.
8.	Click the button to the right of the field.

Step	Action
9.	Click the **April** list item.
10.	Click the **11** link.
11.	We have reassigned the manager's workflow to the delegate for the designated time period. Click the **Save** button.
12.	Click the **OK** button.
13.	Congratulations! You have successfully completed the lesson. **End of Procedure.**