Manager’s Portal Tools

Staff Changes Tab

Version 9.0
10/29/09
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<td>View Standard Hours Change Status</td>
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<tr>
<td>View Leave of Absence Status</td>
<td>54</td>
</tr>
<tr>
<td>Information &amp; Resources</td>
<td>56</td>
</tr>
</tbody>
</table>
Access PeopleSoft

There are two options for accessing the main PeopleSoft site:

- Click on InSite from your computer, and then select “BUZZ” in the top toolbar.
- You may also access PeopleSoft from any computer with internet access by typing mybenefits.sw.org in the browser address box.
Enter your User ID and Password, then click “Sign In.”

- Note: This User ID and Password is the same as your regular Novell log-in information. If you need assistance with your User ID or Password, contact the Help Desk: 254-724-2501.

[Log In]

User ID: JDOE
Password: •••••

[Sign In]

To set trace flags, click here

Select a Language:
- English
- Español
- Dansk
- Deutsch
- Français
- Français du Canada
- Italiano
- Magyar
- Nederlands
- Norsk
- Polski
- Português
- Suomi
- Svenska
- 日本語
- Русский
- 한국어
- 简体中文
- العربية
Manager’s Portal Tabs

- Manager’s Portal tools are organized into the following tabs:
  - **Home**
    - Staff Information
    - Birthday Alerts
    - Manager Expiring Licenses
    - Information and Resources
    - Anniversary Alerts
    - Announcements
  - **My Self Service**
    - Personal Information
    - Payroll and Compensation
    - Performance Evaluation
    - Benefits
    - Recruiting
    - Expiring Licenses
    - Information and Resources
  - **Recruiting**
    - Position Request Form
    - My Jobs
    - Internal Applicants
    - Job Description Report
    - Scott & White Postings
    - Information & Resources
  - **Staff Changes**
    - Organizational
    - Job/ Salary
    - Terminations
    - Leave of Absence
    - Information and Resources
  - **Reports**
    - Organizational Reports
    - Compensation Reports
    - Information and Resources
  - **Performance, Merit & Incentives**
    - Performance
    - Reports
    - Bonus & Incentive Awards
    - Information and Resources
  - **Information & Resources**
    - Training Schedule
    - Contact Us
Organizational: Initiate Reporting Change

- Click the Staff Changes tab, and then select Initiate Reporting Change.

### Organizational
- **Initiate Reporting Change**: Initiate a reporting change for one or more of your employees.
- **Approve Reporting Change**: Approve or deny a reporting change request.
- **View Reporting Change Status**: Review the status of a reporting change request.
- **Initiate Transfer**: Initiate a request to transfer an employee.
- **Approve Transfer**: Approve or deny an employee transfer request.
- **View Transfer Status**: Review the status of a transfer request.
- **Initiate Department Reorg**: Initiate Department Reorganization for one or more of your employees.
- **Approve Department Reorg**: Approve the department reorganization request.
- **View Department Reorg Status**: View Department Reorg Status.

### Information & Resources
- **Pay Period Dates**
- **Staff Changes Information**
- **More...**
- **View All Articles and Sections**

### Manager's Portal Tools: Staff Changes Tab
Use the calendar icon to select the **effective date** for the reporting change, or key in the date in MM/DD/YYYY format. Reporting changes are **NOT** required to begin on a pay period start date.

Click **Continue**.

### Reporting Change

Initiate a reporting change for one or more of your employees.

#### Instructions

Follow this 3-step process to assign one or more employees to a new supervisor:

1. Enter the date this reporting change will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employees to be assigned to the new supervisor.
3. Enter the name of the new supervisor and submit the change.

#### Enter the Effective Date

Enter the effective date for this reporting change.  

10/06/2009

Click **Continue**.

**Direct Reports** will be the first layer of staff available for reporting changes.

To submit a reporting change for a **direct report**, click the box next to the staff member’s name (or choose Select All or Deselect All), then click **Continue**.

### Reporting Change

Select the employees to be assigned to a new supervisor.

#### Instructions

Select the employees to be assigned to the new supervisor. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click **Continue** to enter the new supervisor.

**View Selected Employees**

**Cancel**

**Select Employees**

**Reports To:** Kathryn Wash

**As Of:** 10/06/2009

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Pay Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Bond</td>
<td>000486845</td>
<td>Active</td>
</tr>
<tr>
<td>Brad Pitt</td>
<td>000486401</td>
<td>Active</td>
</tr>
</tbody>
</table>

**Select All**

**Deselect All**

**Continue**

Direct reports shown here.
Leaders may also initiate reporting changes for **Indirect Reports**.

To submit a reporting change for an indirect report, first click the Organizational Chart icon beside the appropriate direct report staff member's name.

Select the appropriate staff member by clicking in the box, and then click **Continue**.
Enter name of new supervisor in the following format: Firstname Lastname (or type in part of the first name, then use the magnifying glass icon to look up complete name).

Click Submit.

**Reporting Change**

Below is a list of the employees you selected for the reporting change. Click Submit once you have entered the reporting change information.

**Selected Employees**

<table>
<thead>
<tr>
<th>EmpID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>000408645</td>
<td>Bond</td>
<td>James</td>
<td>GR HR Representative</td>
</tr>
</tbody>
</table>

**Reporting Change Details**

Reporting Change Date: 10/06/2009

*Required Field

Submit

Return to Select Employees
Click the Staff Changes tab, and then select Approve Reporting Change.

- Click the transaction number of the reporting change request you wish to review.

### Approve Reporting Change

#### Select a Reporting Change Request

The list below contains reporting change requests requiring your approval. Click on a transaction number to view details.

<table>
<thead>
<tr>
<th>Transaction Number</th>
<th>Reporting Change Date</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>09/29/2009</td>
<td>Administrator is Processing</td>
</tr>
<tr>
<td>6</td>
<td>09/29/2009</td>
<td>Administrator is Processing</td>
</tr>
</tbody>
</table>
Review details of reporting change, then click Approve or Deny. (Entering comments is optional.)
Click the **Staff Changes** tab, then select **View Reporting Change Status**.

Click the transaction number of the reporting change request you wish to view.

### Reporting Change Status

#### Select a Reporting Change Request

The list below contains reporting change requests requiring your approval. Click on a transaction number to view details.

<table>
<thead>
<tr>
<th>Transaction Number</th>
<th>Reporting Change Date</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>09/29/2009</td>
<td>Administrator is Processing</td>
</tr>
<tr>
<td>6</td>
<td>09/29/2009</td>
<td>Administrator is Processing</td>
</tr>
</tbody>
</table>
Review key details of reporting change request.

Reporting Change Status

Reporting Change Details

Selected Employees

<table>
<thead>
<tr>
<th>EmpID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Nancy</td>
<td></td>
</tr>
</tbody>
</table>

Reporting Change Details

Reporting Change Date: 09/29/2009

Supervisor: [Redacted]

Transaction Number: 5

An administrator is currently working on this transaction. You will receive status on each individual employee via e-mail.

Return to Select a Reporting Change Request
Organizational: Initiate Transfer

- Click the **Staff Changes** tab, and then select **Initiate Transfer**.

**Instructions**

Follow this 3-step process to transfer an employee:

1. Enter the date this transfer will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employee to be transferred.
3. Enter the transfer details and submit the change.

**Enter the Effective Date**
Enter the effective date for this transfer: **09/26/2009**

**Click Continue**.
Direct Reports will be the first layer of staff available for transfers.

To submit a transfer for a direct report, click the box next to the staff member’s name (or choose Select All or Deselect All), then click Continue.

Transfer Employee
Select the employee to be transferred.

Instructions
Select the employee to be transferred. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click Continue to enter the transfer details.

Select Employees

<table>
<thead>
<tr>
<th>Reports To:</th>
<th>Kathryn Welt</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>EmplID</th>
<th>Pay Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Bond</td>
<td>000486845</td>
<td>Active</td>
</tr>
<tr>
<td>Brad Pitt</td>
<td>000486401</td>
<td>Active</td>
</tr>
</tbody>
</table>

Find First 1 of 2 Last

Continue
Leaders may also initiate transfers for Indirect Reports.

To submit a transfer for an indirect report, first click the Organizational Chart icon beside the appropriate direct report staff member’s name.

Select the appropriate staff member by clicking the button next to the name, and then click Continue.
Select reason for transfer from drop-down box.
Complete “New Info” details:
- Business Unit
- Department
- Job Title
- Kronos Code
Enter comments if desired.
Click Submit.
Organizational: Approve Transfer

☐ If you are the “approver” for a staff transfer request, you will receive an e-mail notification. You may click on the link in the e-mail to access the transfer approval.

☐ You may also log directly into Manager’s Portal to access the transfer approval. Click the Staff Changes tab, and then select Approve Transfer.

☐ Click the underlined name link of the transfer request you wish to approve.

---

**Approve Transfer**

**Select a Transaction**

The list below contains transfer requests requiring your approval. Click on an employee to view details and to process the approval.

<table>
<thead>
<tr>
<th>Name</th>
<th>Transfer Date</th>
<th>Effective Sequence</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anna Franz</td>
<td>08/31/2009</td>
<td>1</td>
<td>In Approval Process</td>
</tr>
</tbody>
</table>
Review details of transfer, and then click **Approve** or **Deny**. (Entering comments is optional.)
Organizational: View Transfer Status

- Click the Staff Changes tab, and then select View Transfer Status.

- Click the name link of the transfer request you wish to view.
Review key details of transfer request. Note Approval Details in bottom section.

Transfer Status Details

Lynn Proctor

Transfer Information

- Transfer Date: 09/14/2009
- Reason for Transfer: Reorganization
- Workflow Status: Administrator is Processing
- Effective Sequence: 1

<table>
<thead>
<tr>
<th>Current Info</th>
<th>New Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit:</td>
<td>Shared Services</td>
</tr>
<tr>
<td>Department:</td>
<td>IACUC Support</td>
</tr>
<tr>
<td>Location:</td>
<td>Scott &amp; White Hospital</td>
</tr>
<tr>
<td>Job Title:</td>
<td>Sr. HRIS Analyst</td>
</tr>
<tr>
<td>Kronos Code:</td>
<td>81104</td>
</tr>
<tr>
<td>Full/Part Time:</td>
<td>Full-Time</td>
</tr>
<tr>
<td>Standard Hours:</td>
<td>40.00</td>
</tr>
<tr>
<td>Supervisor:</td>
<td>Julene Hollenkamp</td>
</tr>
</tbody>
</table>

Approval Details

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Name</th>
<th>Action Taken</th>
<th>Transaction Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originator</td>
<td>Julene Hollenkamp</td>
<td>Submitted</td>
<td>09/29/2009</td>
<td></td>
</tr>
</tbody>
</table>
**Organizational: Initiate Department Reorg**

- **Click the Staff Changes tab, and then select Initiate Department Reorg.**

### Organizational
- **Initiate Reporting Change**: Initiate a reporting change for one or more of your employees.
- **Approve Reporting Change**: Approve or deny a reporting change request.
- **View Reporting Change Status**: View the status of a reporting change request.
- **Initiate Transfer**: Initiate a request to transfer an employee.
- **Approve Transfer**: Approve or deny an employee transfer request.
- **View Transfer Status**: View the status of a transfer request.
- **Initiate Department Reorg**: Initiate a Department Reorganization for one or more of your employees.
- **Approve Department Reorg**: Approve the department reorganization request.
- **View Department Reorg Status**: View Department Reorg Status.

### Information & Resources
- **Information & Resources**: Provides options such as ECO Period Dates, Staff Changes Information, and more.

### Job/Salary
- **Initiate Promotion**: Initiate a request to promote an employee.
- **Approve Promotion**: Approve or deny a request to promote an employee.
- **View Promotion Status**: View the status of an employee promotion request.
- **Initiate Standard Hours Change**: Change standard hours for an employee.
- **Approve Standard Hours Change**: Approve standard hours change request.
- **View Standard Hours Change Status**: View standard hours change status.

### Terminations
- **Initiate Termination**: Initiate a request to terminate an employee.

### Leave of Absence
- **Initiate Leave of Absence**: Initiate a Leave of Absence request for an employee.
- **View Leave of Absence Status**: View Leave of Absence status.
Use the calendar icon to select the effective date of the department reorganization, or key in the date in MM/DD/YYYY format. Note: Department Reorganization dates are REQUIRED to begin on a pay period start date.

Click Continue.

**Department Reorganization**

Select the employees to be moved to a different department (cost center)

**Instructions**

Follow this 3-step process to transfer a group of employees:

1. Initiate the Request to move one or more employees to a different department (cost center).
2. Select the employees to be moved by this Department Reorganization.
3. Enter the Department Reorganization details and submit the change.

**Enter the Effective Date**

Enter the effective date for this change. [09/28/2009]

Combat:

Direct Reports will be the first layer of staff available for department reorganization.

To initiate a department reorganization for direct reports, click the box next to the staff member’s name (or choose Select All or Deselect All), then click Continue.
Leaders may also initiate department reorganizations for Indirect Reports.

To submit a department reorganization for an indirect report, first click the Organizational Chart icon beside the appropriate direct report staff member’s name.

Select the appropriate staff member by clicking the box next to the staff member’s name (or choose Select All or Deselect All), then click Continue.
- Verify that staff information listed in the “Current Information” section is correct.
- Complete “Department Reorg” details. Enter details or click magnifying glass for a list of values.
  - Business Unit
  - New Department
- Click Submit.

### Department Reorganization

Below is the list of employees you selected to be moved to a different department (Cost Center). You may need to change the Business Unit to get a list of (additional) valid departments. Click submit once you have entered the department (Cost Center) change information.

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Department Department Descr</th>
<th>Business Unit</th>
<th>Job Title</th>
<th>Supervisor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 000466040</td>
<td>Roberts</td>
<td>Julia</td>
<td>EVS Memorial</td>
<td>Shared Services</td>
<td>EVS Associate - PRN</td>
<td>James Bond</td>
</tr>
</tbody>
</table>

**Date Change Will Take Effect:** 09/28/2009

*Business Unit:* [Shared Services]

*New Department:* [Operations & Service Excellence]
Organizational: Approve Department Reorg

- If you are the “approver” for a department reorganization request, you will receive an e-mail notification. You may click on the link in the e-mail to access the department reorganization approval.
- You may also log directly into Manager’s Portal to access the department reorganization approval. Click the Staff Changes tab, and then select Approve Department Reorg.

[Image of Manager’s Portal]

- Click the transaction number of the department reorganization request you wish to approve.

Department Reorganization

Below is the list of employees selected to be moved to a different department (Cost Center). Click Approve or Deny to accept or reject the request for department (Cost Center) change.

<table>
<thead>
<tr>
<th>Transaction Number</th>
<th>Display Name</th>
<th>As of Date</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Anna Franz</td>
<td>14-SEP-09</td>
<td>Submitted</td>
</tr>
<tr>
<td>6</td>
<td>Krista Birnmeier</td>
<td>14-SEP-09</td>
<td>Submitted</td>
</tr>
<tr>
<td>7</td>
<td>Jennifer Smith</td>
<td>14-SEP-09</td>
<td>Submitted</td>
</tr>
<tr>
<td>8</td>
<td>Brad Pitt</td>
<td>14-SEP-09</td>
<td>Submitted</td>
</tr>
<tr>
<td>10</td>
<td>Leon Cantu</td>
<td>14-SEP-09</td>
<td>Submitted</td>
</tr>
<tr>
<td>23</td>
<td>Kathryn Welch</td>
<td>14-SEP-09</td>
<td>Submitted</td>
</tr>
</tbody>
</table>
Review details of department reorganization, and then click **Approve** or **Deny**. (Entering comments is optional.)

### Department Reorganization

Below is the list of employees selected to be moved to a different department (Cost Center). Click Approve or Deny to accept or reject the request for department (Cost Center) change.

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Department</th>
<th>Department Descr</th>
<th>Business Unit</th>
<th>Job Title</th>
<th>Supervisor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Franz</td>
<td>Anna</td>
<td>80420</td>
<td>Human Resources</td>
<td>Shared Services</td>
<td>Sr. HRIS Analyst</td>
<td>Julene Hollenkamp</td>
</tr>
</tbody>
</table>

**Date Change Will Take Effect:** 09/14/2009

- **Business Unit:** Shared Services
- **New Department:** Insurance Management Team

**Comment:**

[Approve] [Deny]
Organizational: View Department Reorg Status

☐ Click the Staff Changes tab, and then select View Department Reorg Status.

☐ Click the staff name of the department reorganization request you wish to review.
Review key details of department reorganization request.

### Department Reorganization

Below is the list of employees selected to be moved to a different department (Cost Center).

<table>
<thead>
<tr>
<th>EmpID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Department</th>
<th>Department Descr</th>
<th>Business Unit</th>
<th>Job Title</th>
<th>Supervisor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>000488938</td>
<td>Joep</td>
<td>Johnny</td>
<td>S8420</td>
<td>Human Resources</td>
<td>Shared Services</td>
<td>HR Representative</td>
<td>Julian</td>
</tr>
</tbody>
</table>

- **Date Change Will Take Effect:** 1/1/2009
- **Business Unit:** Shared Services
- **New Department:** Medical Records Reimbursement

[Return to Select Employees]
Click the **Staff Changes** tab, and then select **Initiate Promotion**.

- Use the calendar icon to select the **effective date** for the promotion, or key in the date in MM/DD/YYYY format. **Note:** Effective dates for promotions are **REQUIRED** to begin on a pay period start date.
- Click **Continue**.

### Promote Employee

Initiate a request to promote an employee.

**Enter the Effective Date**

Enter the effective date for this promotion.  

[09/28/2009]
**Direct Reports** will be the first layer of staff available for promotions.

To submit a promotion for a direct report, click the button next to the staff member’s name, and then click **Continue**.

---

**Promote Employee**
Select the employee to be promoted.

---

**Instructions**
Select the employee to be promoted. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click **Continue** to enter the promotion details.

---

**Select Employees**

<table>
<thead>
<tr>
<th>Reports To:</th>
<th>Kathryn Welles</th>
</tr>
</thead>
</table>

---

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Pay Status</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>James Bond</td>
<td>000486845</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Brad Pitt</td>
<td>000486401</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

Direct reports shown here.

**Continue**
Leaders may also initiate promotions for Indirect Reports.

To initiate a promotion for an indirect report, first click the Organizational Chart icon beside the appropriate direct report staff member’s name.

Promote Employee
Select the employee to be promoted.

Instructions
Select the employee to be promoted. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click Continue to enter the promotion details.

Cancel

Select Employees
Reports To: Kathryn Welch

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Pay Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Bond</td>
<td>000435845</td>
<td>Active</td>
</tr>
<tr>
<td>Brad Pitt</td>
<td>000435401</td>
<td></td>
</tr>
</tbody>
</table>

Continue

Select the appropriate staff member by clicking the button, and then click Continue.

Promote Employee
Select the employee to be promoted.

Instructions
Select the employee to be promoted. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click Continue to enter the promotion details.

Cancel

Select Employees
Reports To: James Bond

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Pay Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julia Roberts</td>
<td>000488040</td>
<td>Active</td>
</tr>
</tbody>
</table>

Continue
Select reason for promotion from drop-down box.

Complete “New Info” details:
- Business Unit
- Department
- Job Title
- Kronos Code
- Hourly Rate

Enter comments if desired.

Click Submit.
Job/Salary: Approve Promotion

- When a promotion has been initiated that requires your approval, you will receive an e-mail in your S&W GroupWise box. The e-mail will contain a link that will take you to the Approve Promotion transaction in Manager’s Portal.

You may also approve promotions by logging into Manager’s Portal, clicking the Staff Changes tab, and then selecting Approve Promotion.

### Staff Changes

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate Reporting Change</td>
<td>Initiates a reporting change for one or more of your employees.</td>
</tr>
<tr>
<td>Approve Reporting Change</td>
<td>Approve or deny a reporting change request.</td>
</tr>
<tr>
<td>View Reporting Change Status</td>
<td>View the status of a reporting change request.</td>
</tr>
<tr>
<td>Initiate Transfer</td>
<td>Initiates a request to transfer an employee.</td>
</tr>
<tr>
<td>Approve Transfer</td>
<td>Approve or deny an employee transfer request.</td>
</tr>
<tr>
<td>View Transfer Status</td>
<td>View the status of a transfer request.</td>
</tr>
<tr>
<td>Initiate Department Reorg</td>
<td>Initiates a Department Reorganization for one or more of your employees.</td>
</tr>
<tr>
<td>Approve Department Reorg</td>
<td>Approve the department reorganization request.</td>
</tr>
<tr>
<td>View Department Reorg Status</td>
<td>View the Department Reorg Status.</td>
</tr>
</tbody>
</table>

### Information & Resources

- Pay Levels
- Pay Levels Information
- Staff Changes Information
- Leave of Absence
- Leave of Absence Information
- View Leave of Absence Status
- View Leave of Absence Status
- Change Standard Hours
- Change Standard Hours Information
- View Standard Hours Change Status
- View Standard Hours Change Status
- View Promotion Status
- View Promotion Status
- View Promotion Status
Click the **underlined link** (staff member’s name) for the promotion request you wish to approve/deny.

**Approve Promotion**

**Select a Transaction**

The list below contains promotion requests requiring your approval. Click on an employee to view details and to process the approval.

<table>
<thead>
<tr>
<th>Name</th>
<th>Promotion Date</th>
<th>Effective Sequence</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nolan Ryan</td>
<td>10/1/2009</td>
<td>1</td>
<td>In Approval Process</td>
</tr>
</tbody>
</table>

Review promotion details. Enter comments if desired. Click **Approve** or **Deny**.

---

**Approve Promotion**

**Promotion Details**

Nolan Ryan

This transaction requires an action on your part. Enter your comments (optional) in the area provided, then click the Approve or Deny button to process this request.

**Promotion Details**

- **Promotion Date**: 10/1/2009
- **Reason for Promotion**: Normal Career Progression
- **Workflow Status**: In Approval Process
- **Effective Sequence**: 1

**Current Info**

- **Business Unit**: Shared Services
- **Department**: Human Resources
- **Location**: Scott & White Hospital
- **Job Title**: HR Representative
- **Kronos Code**: Hourly
- **Full-Time**: Full-Time
- **Standard Hours**: 40:00

**New Info**

- **Business Unit**: Shared Services
- **Department**: Human Resources
- **Location**: Scott & White Hospital
- **Job Title**: HR Analyst
- **Kronos Code**: Salaried

**Current Hourly Rate**: 15.000000

**New Hourly Rate**: 20.000000

**Approval Details**

- **Originator**: Cindy Crawford
- **Manager**: Marilyn Monroe

**Comment**

- **Approver Name**: Marilyn Monroe
- **Comment**: Enter comments if desired. ABC, XYZ.

[Approve] [Deny]

Return to Select a Transaction
Job/Salary: View Promotion Status

- Click the Staff Changes tab, and then select View Promotion Status.

Promotion Status
Select a Transaction

The list below contains promotion requests. Click on an employee to view details.

<table>
<thead>
<tr>
<th>Name</th>
<th>Transfer Date</th>
<th>Effective Sequence</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shannon Agol</td>
<td>09/14/2009</td>
<td>1</td>
<td>Data Saved</td>
</tr>
<tr>
<td>Yvonne Lang</td>
<td>09/14/2009</td>
<td>1</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>Lynn Proctor</td>
<td>09/14/2009</td>
<td>2</td>
<td>Data Saved</td>
</tr>
<tr>
<td>Kathryn Welch</td>
<td>09/14/2009</td>
<td>1</td>
<td>Denied</td>
</tr>
<tr>
<td>Kathryn Welch</td>
<td>09/14/2009</td>
<td>2</td>
<td>Data Saved</td>
</tr>
<tr>
<td>Kathryn Welch</td>
<td>09/14/2009</td>
<td>3</td>
<td>Administrator is Processing</td>
</tr>
<tr>
<td>Keith Minnis</td>
<td>12/07/2009</td>
<td>1</td>
<td>Data Saved</td>
</tr>
<tr>
<td>Keith Minnis</td>
<td>02/15/2010</td>
<td>1</td>
<td>In Approval Process</td>
</tr>
</tbody>
</table>

- Click the staff name of the promotion request you wish to view.
Review key details of promotion request.

Promotion Status Details
Kathryn Welch

Promotion Date: 05/1/2009
Reason for Promotion: Salary Grade Advancement
Workflow Status: Data Saved
Effective Sequence: 1

<table>
<thead>
<tr>
<th>Current Info</th>
<th>New Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit:</td>
<td>Shared Services</td>
</tr>
<tr>
<td>Department:</td>
<td>Service Center - Shuffles 84315 Construction</td>
</tr>
<tr>
<td>Location:</td>
<td>Scott &amp; White Hospital 001 Scott &amp; White Hospital</td>
</tr>
<tr>
<td>Job Title:</td>
<td>SWIP Assistant, Membership 0316 SWIP Assistant, Membership</td>
</tr>
<tr>
<td>Names Code:</td>
<td>Selected EMS, Hourly</td>
</tr>
<tr>
<td>Full/Part Time:</td>
<td>Full-Time</td>
</tr>
<tr>
<td>Standard Hours:</td>
<td>40.00</td>
</tr>
<tr>
<td>Supervisor:</td>
<td>Julianne Helenkamp</td>
</tr>
</tbody>
</table>

Current Hourly Rate: $12.00

/**/ Approval Details

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Action Taken</th>
<th>Transaction Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origination</td>
<td>Julianne Helenkamp</td>
<td>Submitted</td>
<td>09/08/2009</td>
<td>TARGET</td>
</tr>
<tr>
<td>Manager</td>
<td>Stuart Stepp Jr.</td>
<td>Approved</td>
<td>09/08/2009</td>
<td></td>
</tr>
<tr>
<td>Compensation Administrator</td>
<td>Yvonne Laning</td>
<td>Approved</td>
<td>09/08/2009</td>
<td></td>
</tr>
</tbody>
</table>

[Return to Select a Transaction]
Job/Salary: Initiate Standard Hours Change

Click the Staff Changes tab, and then select Initiate Standard Hours Change.

Use the calendar icon to select the effective date for the standard hours change, or key in the date in MM/DD/YYYY format. **Note:** Effective dates for standard hours changes are REQUIRED to begin on a pay period start date.

Click Continue.

---

**Standard Hours Change**

Initiate a request to change an employee's standard hours per week.

**Instructions**

Follow this 3-step process to change an employee's standard hours per week value:

1. Enter the date the standard hours per week change will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employee to be changed.
3. Select the new value and submit the change.

**Enter the Effective Date**

Enter the effective date for this change.

09/28/2009

**Continue**
Direct Reports will be the first layer of staff available for standard hours changes. To submit a standard hours change for a direct report, click the button next to the staff member’s name, and then click Continue.

### Standard Hours Change
Select the employee that needs to have the standard hours value changed.

**Instructions**
Select the employee to be changed. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click Continue to select the new status.

**Select Employees**

<table>
<thead>
<tr>
<th>Reports To: Stuart Sequin Jr</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>Leah Birge</td>
</tr>
<tr>
<td>Julene Hollenkatt</td>
</tr>
<tr>
<td>Yvonne Laing</td>
</tr>
<tr>
<td>Keith Minnis</td>
</tr>
<tr>
<td>Rhonda Schumpert</td>
</tr>
<tr>
<td>Peggy Shafer</td>
</tr>
<tr>
<td>Kathleen Winters</td>
</tr>
</tbody>
</table>

Direct reports shown here.

[Continue]
Leaders may also initiate standard hours changes for **Indirect Reports**.

To initiate a standard hours change for an **indirect report**, first click the Organizational Chart icon beside the appropriate direct report staff member’s name.

**Standard Hours Change**
Select the employee that needs to have the standard hours value changed.

**Instructions**
Select the employee to be changed. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click **Continue** to select the new status.

**Select Employees**
**Reports To:** Stuart Sequin Jr

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Status</th>
<th>Full/Part</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leah Birge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Julene Hollenkamp</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yvonne Loing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keith Minnis</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rhonda Schumpert</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peggy Shafield</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kathleen Winters</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click **Continue**

Select the appropriate staff member by clicking the button, and then click **Continue**.

**Select Employees**
**Reports To:** Kathleen Winters

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Pay Status</th>
<th>Full/Part</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linda Roe</td>
<td></td>
<td>Active</td>
<td>Full-Time</td>
</tr>
</tbody>
</table>

Click **Continue**

**Note:** Indirect reports are shown by clicking on the org chart icon.
Review current status details:
- Empl ID
- Status
- Hours Per Week
- Annual Salary
- Hourly Salary

Enter new standard hours per week value. Note that “status” will update according to the number of standard hours per week entered.

Click Submit.

Standard Hours Change

Linda Roe

Click Submit once you have entered the new standard hours change information.

Current Status

Contact the Human Resources Department if any of this information is incorrect.

<table>
<thead>
<tr>
<th>EmplID:</th>
<th></th>
<th>Annual Salary:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Status:</td>
<td></td>
<td>Hours Per Week:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Annual Salary:</td>
<td></td>
</tr>
<tr>
<td>Full-Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours Per Week:</td>
<td>40.00</td>
<td>Currency:</td>
<td>US Dollar</td>
</tr>
</tbody>
</table>

New Status

*Date Change Will Take Effect: 09/28/2009

| Hours Per Week: | 30.00 |
| Status:         |       |

Submit
Job/Salary: Approve Standard Hours Change

Click the Staff Changes tab, and then select Approve Standard Hours Change.

- Click the transaction number of the standard hours change you wish to review.

### Approve Standard Hours Change

#### Select a Standard Hours Change

The list below contains standard hours change requests requiring your approval. Click on a transaction number to view details.

<table>
<thead>
<tr>
<th>Transaction Number</th>
<th>Action Date</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>30</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>31</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>32</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>33</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>34</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>37</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>40</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
</tbody>
</table>
Review details of standard hours change, and then click **Approve** or **Deny**. (Entering comments is optional.)

**Standard Hours Change**

Virginia [Redacted]

This transaction requires an action on your part. Enter your comments in the area provided, then click the Approve or Deny button to process this request.

**Current Status**

Contact the Human Resources Department if any of this information is incorrect.

<table>
<thead>
<tr>
<th>EmpID:</th>
<th>[Redacted]</th>
<th>Annual Salary:</th>
<th>[Redacted]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status:</td>
<td>PRN</td>
<td>Hourly Salary:</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>Hours Per Week:</td>
<td>1.00</td>
<td>Currency:</td>
<td>US Dollar</td>
</tr>
</tbody>
</table>

**New Status**

| Date Change Will Take Effect: | 09/14/2009 |
| Hours Per Week:                | 21.00      |
| Status:                        | Part-Time  |

**Approval Details**

<table>
<thead>
<tr>
<th>Name</th>
<th>Action Taken</th>
<th>Action Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stuart Sequin Jr</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comment**

- **Approver Name:** Stuart Sequin Jr
- **Comment:**

  Submit comments here.

- **Approve**
- **Deny**
Click the Staff Changes tab, and then select View Standard Hours Change Status.

- Click the Staff Changes tab, and then select View Standard Hours Change Status.

Standard Hours Change Status

Select a Standard Hours Change

The list below contains standard hours change requests requiring your approval. Click on a transaction number to view details.

<table>
<thead>
<tr>
<th>Transaction Number</th>
<th>Action Date</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>30</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>31</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>32</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>33</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>34</td>
<td>09/14/2009</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>35</td>
<td>09/14/2009</td>
<td>Approved</td>
</tr>
</tbody>
</table>

Click the transaction number of the standard hours change request you wish to view.
□ Review key details of request for standard hours change. Note approval details in bottom section.

Standard Hours Change

Virginia

An approver is working on this transaction.

Current Status

Contact the Human Resources Department if any of this information is incorrect.

EmpID: ******  Annual Salary: ******
Status: PRN  Hourly Salary: ******
Hours Per Week: 1.00  Currency: US Dollar

New Status

Date Change Will Take Effect: 09/14/2009
Hours Per Week: 23.00
Status: Part-Time

Approval Details

<table>
<thead>
<tr>
<th>Name</th>
<th>Action Taken</th>
<th>Action Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keith Minnis</td>
<td>Submitted</td>
<td>09/19/2009</td>
<td></td>
</tr>
<tr>
<td>Stuart Sequn Jr</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Terminations: Initiate Termination

- Click the **Staff Changes** tab, and then select **Initiate Termination**.

Use the calendar icon to select the **effective date** for the termination, or key in the date in **MM/DD/YYYY** format. **Important:** The effective date for the termination is the FIRST day that the staff member is no longer working at Scott & White, not the last day that the staff member is employed.

- Click **Continue**.
Direct Reports will be the first layer of staff available for a leader to terminate.

To terminate a direct report, click the button next to the staff member’s name, and then click Continue.

Direct reports shown here.
Leaders may also terminate Indirect Reports.

To terminate an indirect report, first click the box next to the direct report’s name. Next, click the organizational chart icon.

Select the appropriate staff member by clicking the button, and then click Continue.
Select reason for termination from drop-down box. 
Enter comments (optional). 
Click Submit.

**Terminate Employee**

Carrie Howard

The Termination Date is the first day the employee is no longer employed at the company. Click Submit once you have entered the termination information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmplID</td>
<td>___________________________</td>
</tr>
<tr>
<td>Job Title</td>
<td>Manager, Human Resources</td>
</tr>
<tr>
<td>Termination Date</td>
<td>10/23/2009</td>
</tr>
<tr>
<td>Reason for Termination</td>
<td>Career Growth Opportunity</td>
</tr>
<tr>
<td>Comments for Termination</td>
<td>Great employee. Hate to see her go!</td>
</tr>
</tbody>
</table>

* Required Field

[Submit]

[Return to Select Employees]
Initiate Leave of Absence

☐ Click the Staff Changes tab, and then select Initiate Leave of Absence.

☐ Use the calendar icon to select the effective date for the leave of absence, or key in the date in MM/DD/YYYY format.

☐ Click Continue.

Manage Leave of Absence

Initiate this request to place an employee on a LOA or PLA or RFL.

Instructions

DO NOT initiate a request if this is an intermittent leave of absence. Complete a paper status form and submit to Human Resources.

Follow this 3-step process to manage an employee leave:

1. Enter the date the LOA/RFL will take effect. This date is the FIRST day the employee is not at work or returns to work. You will be able to view documents for only those employees that report to you as of this date.
2. Select the employee to be updated.
3. Select the employees to plan on or return from a leave.

Enter the Effective Date

Enter the effective date for this change

10/31/2009

Continue

Important: The effective date for a Leave of Absence must be the FIRST day the employee is no longer coming to work. The effective date for a Return from Leave is the FIRST day the employee is back to work.
Direct Reports will be the first layer of staff available for a leader to place on leave of absence.

To initiate a leave of absence for a direct report, click the button next to the staff member's name, and then click Continue.

Manage Leave of Absence
Select the employee to be placed on or returned from a Leave of Absence

In-structions
Select the employee to be placed on LOA/PLA or REL. You will be able to process only those employees that report to you as of the data entered on the first page. Employees in an "Active" pay status may be placed on a leave. Employees in a "Leave" or "Leave with Pay" pay status may be returned from leave. Select the appropriate employee and click "Continue" to enter the leave reason

Select Employees
Reports To: Kathryn Welch  As Of: 10/31/2009

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Pay Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Bond</td>
<td>000466845</td>
<td>Active</td>
</tr>
<tr>
<td>Brad Pitt</td>
<td>000466401</td>
<td>Active</td>
</tr>
</tbody>
</table>

Direct reports shown here.
Leaders may also initiate leaves of absence for Indirect Reports.

To initiate a leave of absence for an indirect report, first click the organizational chart icon next to the appropriate direct report staff member’s name.

Manage Leave of Absence
Select the employee to be placed on or returned from a Leave of Absence

Instructions
Select the employee to be placed on LOA/FLA or RFL. You will be able to process only those employees that report to you as of the date entered on the first page. Employees in an "Active" pay status may be placed on leave. Employees in a "Leave" or "Leave with Pay" pay status may be returned from leave. Select the appropriate employee and click "Continue" to enter the leave reason.

Select Employees
Reports To: Kathryn Welch
Name
- James Bond 000486845
- Brad Pitt 000486401 Active

Access indirect reports by clicking on the org chart icon.

Select the appropriate staff member by clicking the button, and then click Continue.

Select Employees
Reports To: James Bond
Name
- Julia Roberts 000486040 Active

Continue
Select Action from drop-down box.
Select Reason from drop-down box.
Use the calendar icon to select the expected return date for the leave of absence, or key in the date in MM/DD/YYYY format.
Review staff member’s current information (especially EIB and PTO balances).
Click Submit.

**Manage Leave of Absence**

John Roberts

Refer to the “Leave Guidelines” link to determine the Action and Action Reason to select.
Please enter the “Expected Return Date”.

**Note:** The Action of Leave of Absence (LOA) will not allow the employee to be paid during the time they are on leave.

**Reminder:** Submit leave documentation (i.e., medical certification, military orders) to Human Resources.
Click on submit once you have entered the leave information.

**Leave Details**

<table>
<thead>
<tr>
<th>Action Date:</th>
<th>Leave Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/31/2009</td>
<td>Leave of Absence</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action:</th>
<th>Leave of Absence</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Reason for LOA:</th>
<th>Family Medical Leave Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Return Date:</td>
<td>12/25/2009</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comment:</th>
<th>FMLA leave received from physician</th>
</tr>
</thead>
</table>

**Current Info**

<table>
<thead>
<tr>
<th>Business Unit:</th>
<th>Shared Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>EVS Memorial</td>
</tr>
<tr>
<td>Location:</td>
<td>Scott &amp; White Hospitals</td>
</tr>
<tr>
<td>Job Title:</td>
<td>EVS Associate - PRN</td>
</tr>
<tr>
<td>Full/Part Time:</td>
<td>PRN</td>
</tr>
<tr>
<td>Standard Hours:</td>
<td>1</td>
</tr>
<tr>
<td>Supervisor:</td>
<td>James Brad</td>
</tr>
</tbody>
</table>

**Pay Status:** Active

| EIB Balance: | 0 |
| PTO Balance: | 0 |

*Required Field

Click **Submit**.

Return to Select Employees.
View Leave of Absence Status

Click the Staff Changes tab, and then select Initiate Leave of Absence.

□ Click the blue underlined staff name whose Leave status you wish to view.
View Leave of Absence status details.

- Date of action: 10/20/2009
- EmplID: [redacted]
- Action: Paid LOA
- Reason for LOA/RFL: Maternity/Paternity
- Expected Return Date: 12/01/2009

Current Info:
- Business Unit: Scott & White Hospital
- Department: [redacted]
- Location: Scott & White Hospital
- Job Title: [redacted]
- Full Part Time: Full-Time
- Standard Hours: 40.00
- Supervisor: [redacted]
- Pay Status: Active
- EIB Balance: 435.22
- PTO Balance: 37.76

Approval Details:
- Originator: [redacted]
  - Workflow Action: Submitted
  - Transaction Date: 10/17/2009
  - Comment: paid loa
- SW_BENIFIT_ADMIN: [redacted]
  - Workflow Action: Approved
  - Transaction Date: 10/17/2009
  - Comment: Lisa's comments

Comment:
- Approver Name: BenefitAdmin
- Comment: Lisa's comments
The Information and Resources link on the Staff Changes tab provides step-by-step information and tips for using tools on this tab.