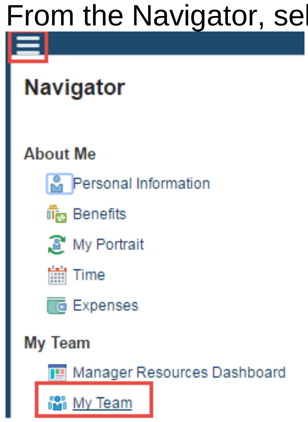
Manager (MSS): HR Transactions for Direct Reports

For Managers of Direct Reports

Intro

Purpose: Initiate an HR transaction for direct reports within your department and update relevant employment information.

How to Access: From the Navigator, select My Team.



Click the orange action arrow of the employee being transferred.

From dropdown menu select Personal & Employment > Transfer.

Helpful Hints: Be sure to keep in mind that…

- This process includes a workflow involving both the Manager & HR
- Much of the information necessary to complete the Transfer process in Bear Trax will be gathered in advance outside of BearTrax via email and conversations with HR.

Procedure: The Transfer process includes a series of “trainstops” or ordered steps you must follow to transfer an employee and update relevant employment information:

Overview & Table of Contents

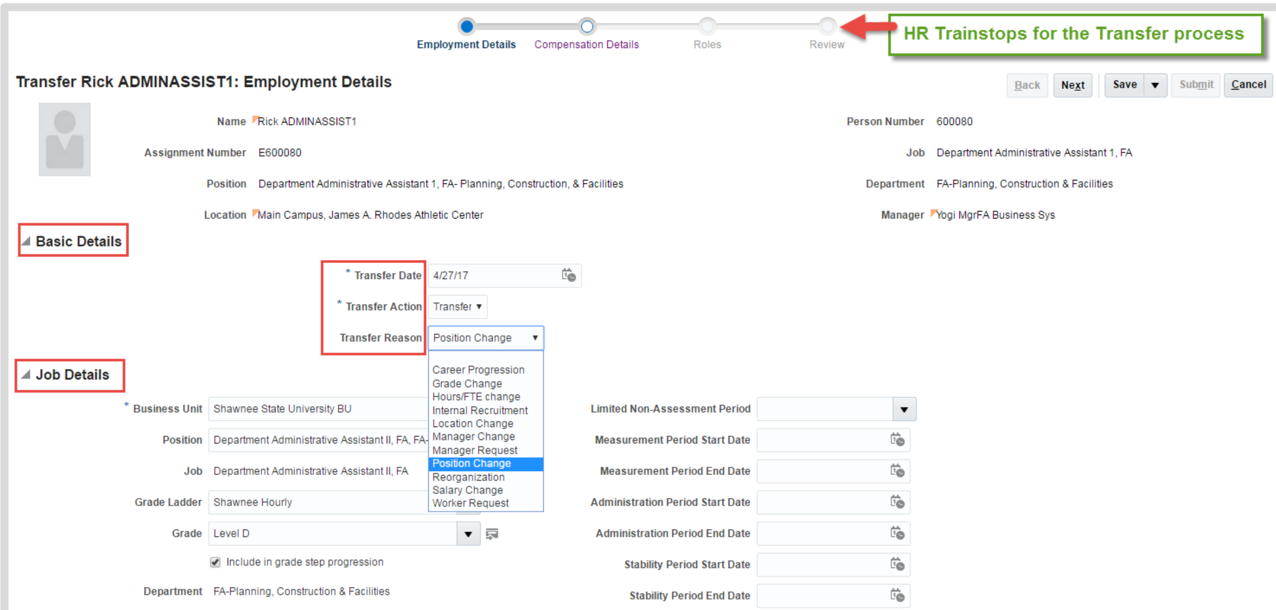
Managers use the Bear Trax Transfer function to initiate HR transactions occurring within their department. In-department transactions include position change, salary and grade change, manager change, working hours and work schedule, and location change. For transfers outside of your department contact Human Resources for assistance.

BearTrax definition of Transfer is the change of an employee's status and/or relevant employment information. This replaces the Change of Status form.

Use the table below to quickly navigate to the Transfer Instructions that you want:

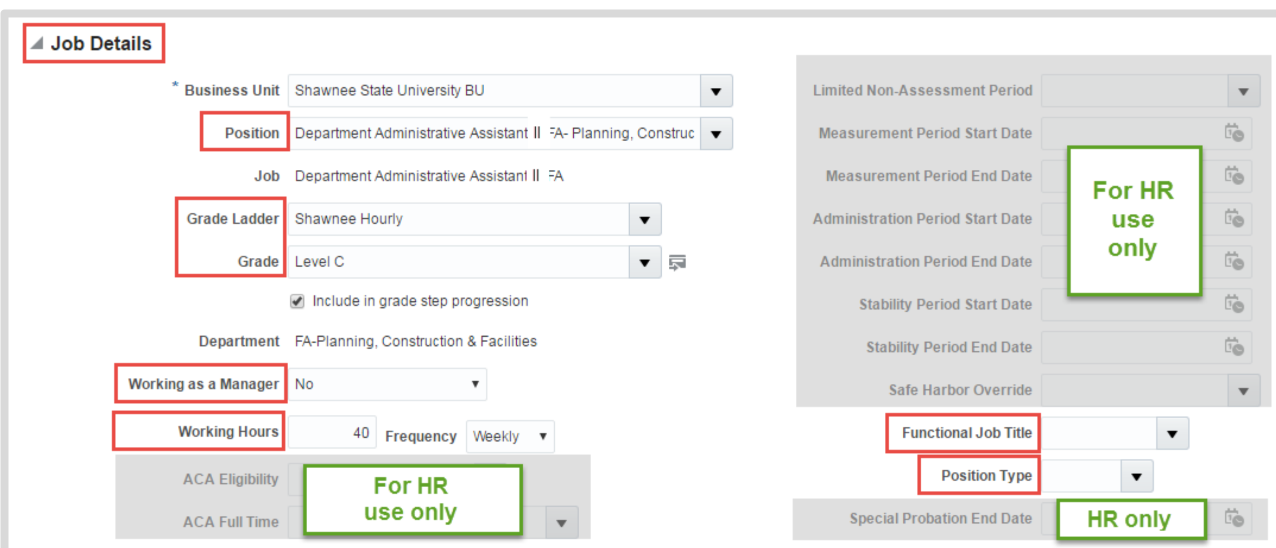
Part One: Complete Employment Details

Part One A: Basic Details



1. Enter **Basic Details** including date, Action and Reason.

2. Enter Job Details

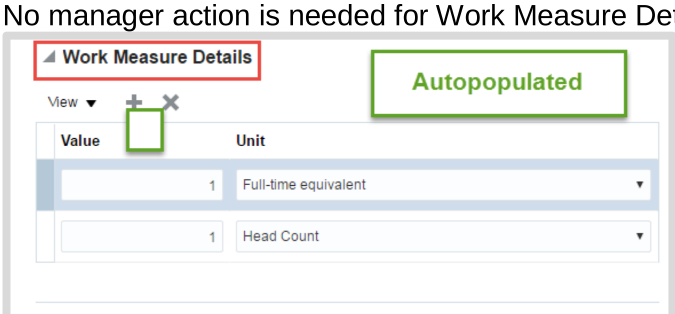


Use the reference chart below to enter Job Details, keeping in mind that some information will be provided to you outside of the system through HR email communications:

Field Name	Optional/Required	Info Source	Instructions/Description
Left Column			
Business Unit	N/A	Autopopulated	N/A
Position	Required	Established by HR	Search and select new job title. Use Advanced option, with Contains as the criteria.
Job	N/A	Autopopulated	This is the generic name for the position.
Grade Ladder	Optional (required for faculty, CWA & student employees)	Established by HR	Only applies to faculty and select hourly employees.
Grade	Optional	Established by HR	Select appropriate grade that pertains to the position.
Include grade step progression	N/A	Autopopulated	N/A
Department	N/A	Autopopulated	N/A
Working as Manager	Optional	Established by HR	Select Yes or No
Working Hours	N/A	Autopopulated	This is an hours estimate based on the position.
ACA Eligibility	N/A—HR USE ONLY	N/A	N/A
ACA Full Time	N/A—HR USE ONLY	N/A	N/A
Right Column			
Functional Job Title	Optional (required for generic jobs and positions such as Student & Intermittent employees)	Established by HR	Adds clarification to generic jobs or positions. Search and select the functional job title.
Position Type	Optional (required for acting and interim positions)	Established by HR	Select Interim or Acting as appropriate for positions.
Special Probation End Date	N/A—HR USE ONLY	Established by HR	CWA requirement when changing positions.

Work Measure Details

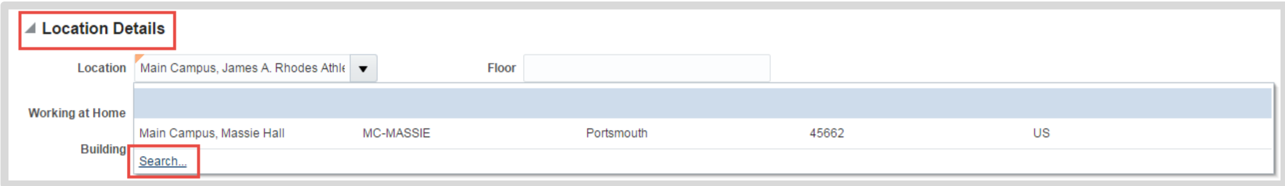
No manager action is needed for Work Measure Details; this section auto populates.



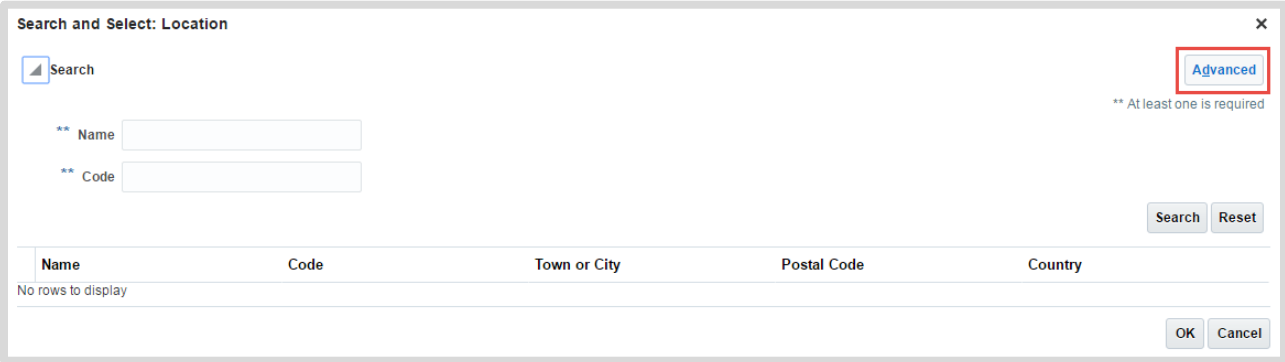
Part One B: Location Details

Follow these steps to search for and enter a Location:

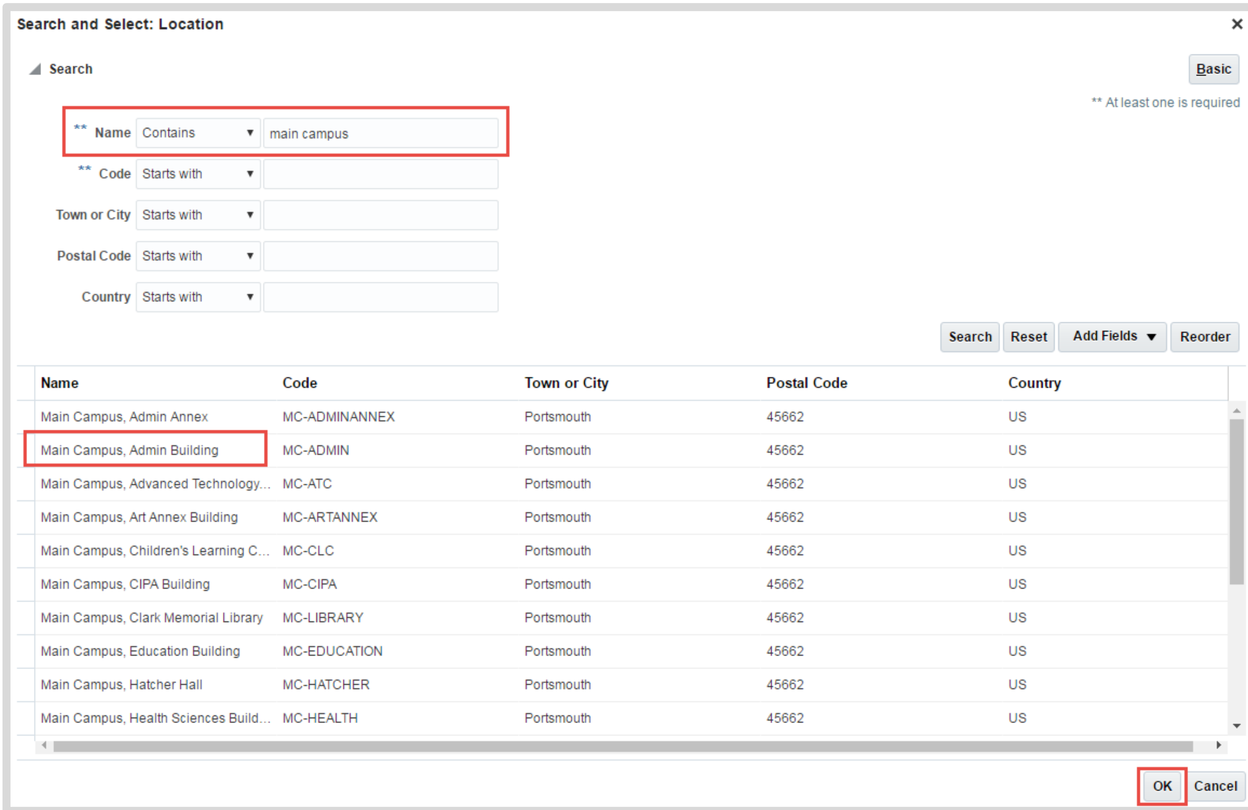
1. Click the dropdown arrow by Location Details and select Search.



2. Click Advanced.



3. Select Contains for search criteria and enter Main Campus. Note! Locations always start with “Main Campus” except offsite EOC locations.



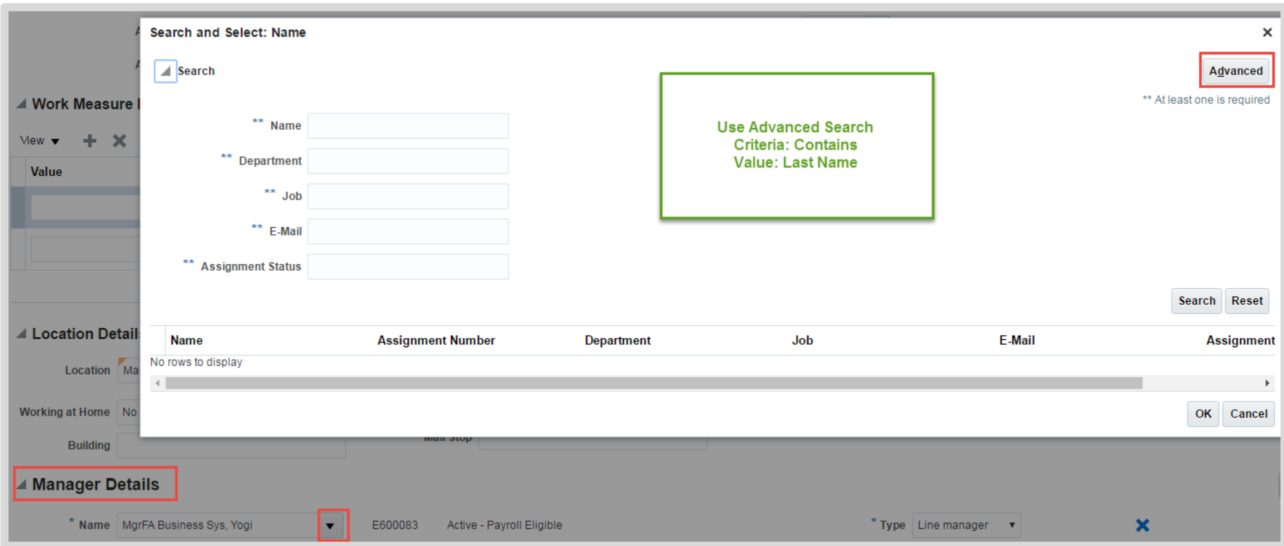
4. Click on the desired location.

5. Click OK.

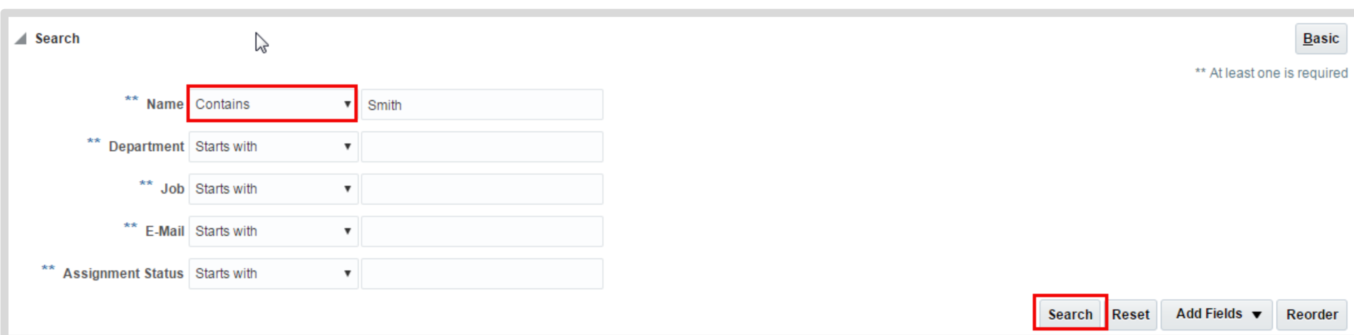
Part One C: Manager Details

Manager name auto populates based on current manager. Follow the instructions below to edit Manager Details:

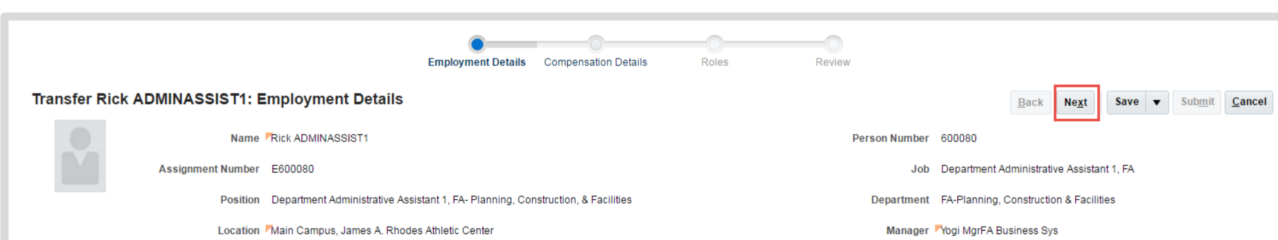
1. Use the Advanced search to change employee's manager, if applicable.



2. Select Contains for search criteria and enter manager's Last Name. Select new manager.

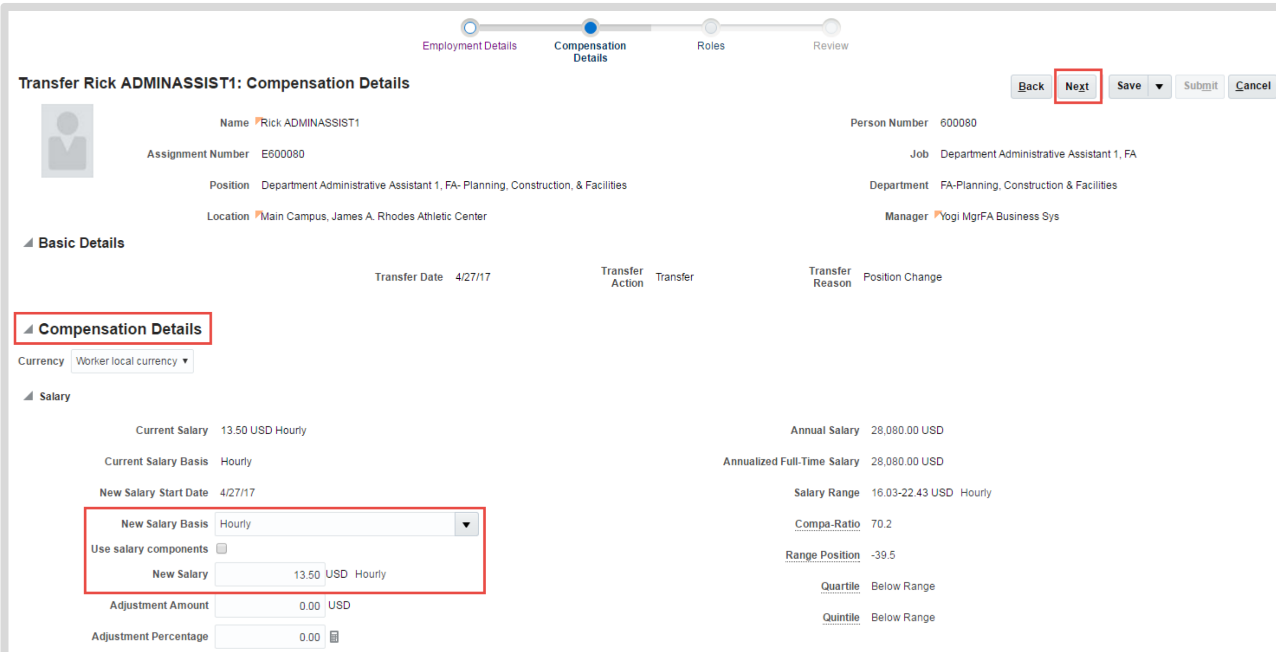


3. Scroll to the top of the page and click Next to advance to the Compensation trainstop.



Part Two: Compensation Details

Follow the instructions below to enter Compensation Details including the new Salary Basis and New Salary. Note: The old salary basis will not show.



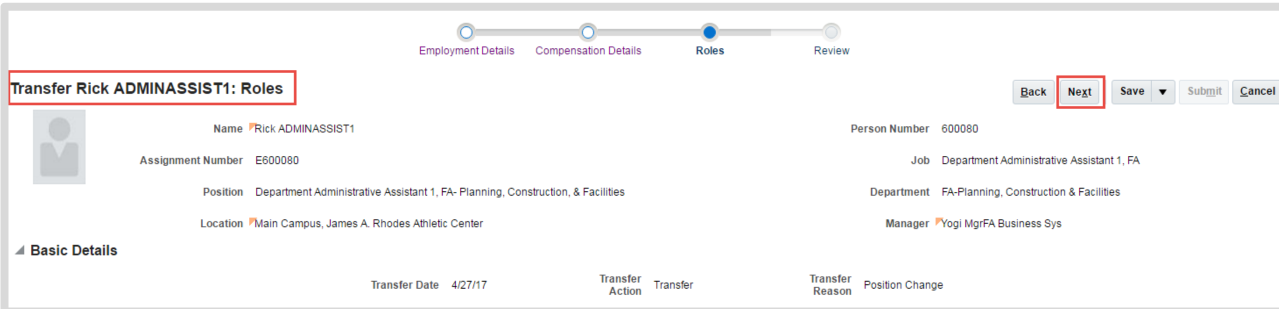
1. Enter the New Salary Basis.
2. Enter the New Salary.
3. Scroll to the top of the page and click Next to advance to the Compensation trainstop.

Use the reference chart below to enter Compensation Details, keeping in mind that some information will be provided to you outside of the system through HR email communications:

Field Name	Optional/Required	Info Source	Instructions
Current Salary	N/A	Autopopulated	N/A
New Salary Start Date	N/A	Autopopulated	N/A—the effective date
New Salary Basis	Required	Established by HR	Select appropriate option. Identifies if position is *Hourly* or the number of pays for Salary (typically *Biweekly 26*)
Use Salary Components	Optional	Established by HR	Only applicable to Mentors and some individuals that work 2nd and 3rd shift. Consult with HR.
New Salary	Required	Established by HR	Enter new salary amount
Adjustment Amount	N/A	Autopopulated	N/A
Adjustment Percentage	N/A	Autopopulated	N/A

Part Three: Roles

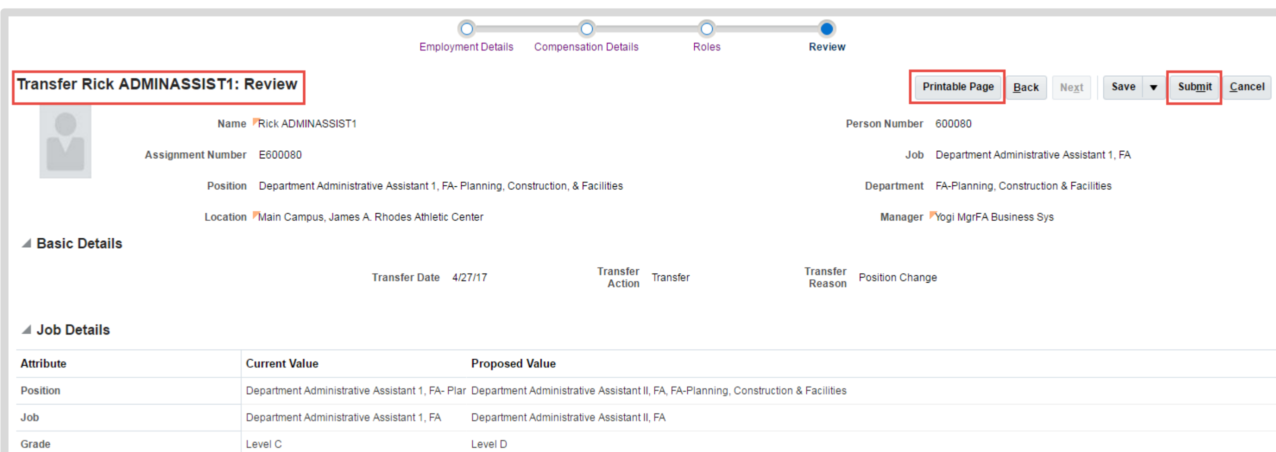
Click Next to skip this section. No action is necessary on the part of the Manager.



Part Four: Review Page

Before submitting, follow these instructions to review your work.

1. Review Transfer information on the Review Page for accuracy. From here you can also print.



2. Compare Compensation Details, before and after.

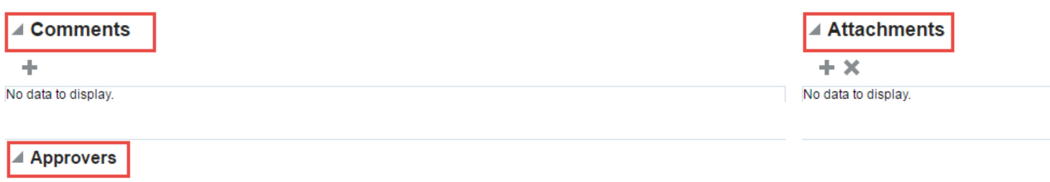
Compensation Details

	Current Value	Proposed Value
Start Date	1/2/16	4/27/17
Action	Hire	Transfer
Action Reason	Hire to fill vacant position	Position Change
Salary Amount	13.50 USD Hourly	13.50 USD Hourly
Salary Basis	Hourly	Hourly
Adjustment Amount		0.00 USD
Adjustment Percentage		0.00
Annual Salary	28,080.00 USD	28,080.00 USD
Annualized Full-Time Salary	28,080.00 USD	28,080.00 USD
Salary Range	14.57 - 20.39 USD Hourly	16.03 - 22.43 USD Hourly
Compa-Ratio	77.23	70.20
Salary Range Position	-18.38	-39.53
Quartile	Below Range	Below Range
Quintile	Below Range	Below Range

3. Scroll down to add relevant comments in Comments section.

4. Add Attachments if necessary.

5. View Approvers



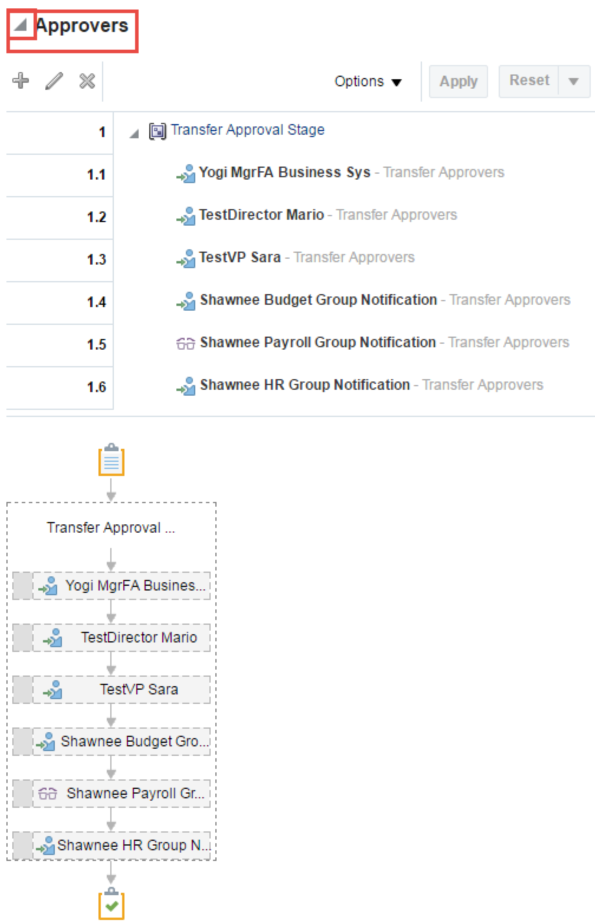
6. Scroll up to click Submit and submit the Transfer.

7. You can Save your work on the Transfer process to initiate at a later date.

Part Five: View Approvers and Add Assignees to the Workflow

Follow these instructions to view the Approvers workflow at the bottom of the Review Page and insert an assignee into the workflow:

1. View Approvers workflow at the bottom of the Review Page. You may need to click the arrow to open the information box.



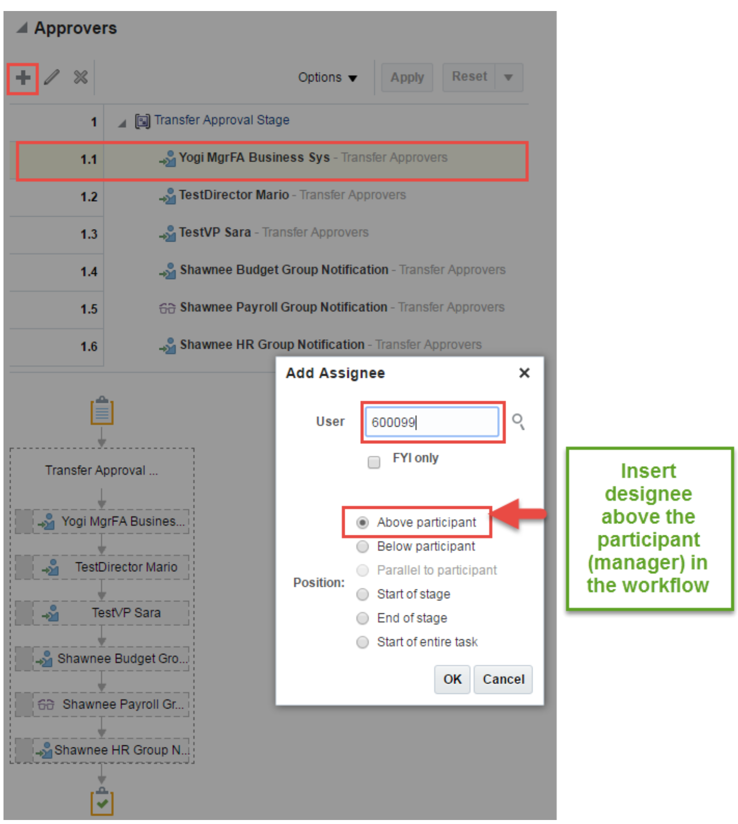
Part Six: Add Assignees to the Workflow

Managers can initiate the Transfer process and then delegate the completion of the task to an assignee. By clicking Next on each page, managers can quickly navigate to the Review page to add an assignee. At minimum, managers must identify the employee being transferred and provide assignee with adequate information to complete the task.

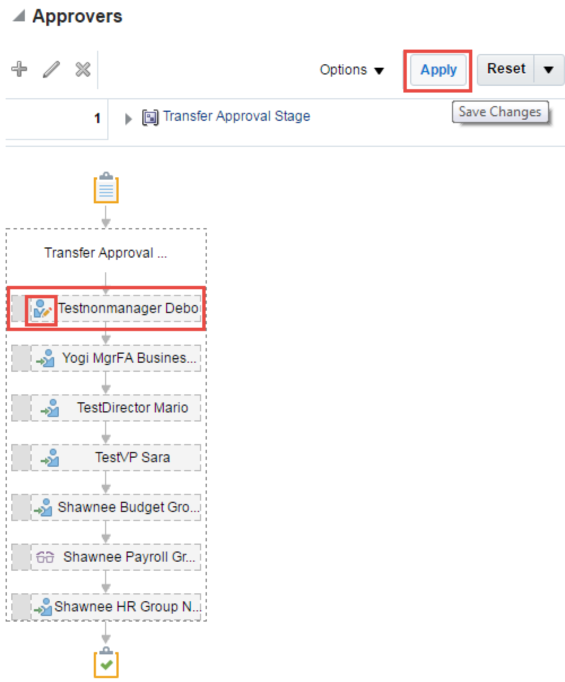
Follow these steps to add Assignees and/or Additional Approvers:

1. Open the Approvers section by clicking on 

2. Highlight yourself in the workflow by clicking to the left of your name.
3. Click the + to open the Add Assignee box.
4. Enter the User ID or search for the person.
5. Select Above participant. (This will insert the assignee above you in the workflow). Add comments that will serve as instructions for your assignee.
6. Click OK.



7. View the new assignee in the workflow. Click Apply to save changes.



Part Seven: Notes on the Review / Approval Process

Upon Manager's submission of the Transfer a workflow process is initiated. Below are some additional workflow guidelines and actions available to Approving Managers in the workflow.

If there is only one approval in the line, the approving manager will receive options to "Approve", "Reject", or select other Actions from the drop down. Listed below are additional actions the approving manager can take:

- "Reject" - Sends task back to previous assignee for reprocessing to request additional information. (Be sure to add appropriate comments to indicate reason for rejection.)
    - Previous assignee can review and "Edit Transfer" (midway through screen)
- "Reassign" – Sends to a different manager for review.
- "Request Information" – Sends notification to any previous assignee or the initiator (or search another user in the system) to request additional information/documentation.
    - Return Options – Route directly back to me opens direct line between the two points; Require subsequent participants to retake action.
    - Does not require additional approvals; individual should add comment/response/document and go to "Actions" and "Submit Information" or "Reassign."
- "Edit Transfer" – any approver has the option to edit, but other reviewers in the workflow will not receive notification of the changes.
- "Claim" - in a group notification, several individuals may receive the notification but one has to claim to act on approval; once claimed, it will revert back through notifications with "Approve" and "Reject" buttons.

Listed below are specific actions relevant to departments and/or roles:

- VP – "Approve" or "Reject" or select alternative Action.
- Budget Group – "Claim", then "Approve" or "Reject" or select alternative Action.
- HR Group – "Claim", then "Approve or "Reject" or select alternative Action.

Closing Notes

This Job Aid overviews the Transfer process for transfers occurring internally within your department. Seek assistance from Human Resources if initiating a Transfer outside of your department.