Manager Self Service in Bear Trax: Time & Absence Approvals, HR Transactions, & More

For All Managers of Direct Reports
Terminology

- **Manager Self Service**—Transactions that managers of direct reports can initiate at any time without assistance from others.

- **Trainstop**—An ordered work flow you must follow to complete certain transactions.

- **Transfer**—An action to change an employee’s status and update relevant employment information.
Key Concepts

- **MSS includes automatic workflow and electronic approvals.**
  
  Employees & Managers can see where a process is in the workflow at any time.

- **Manager Self Service transactions include:**
  
  - **Employee Time Approvals for non-exempt employees**
  
  - **Absence Management**
    - Manage Absence Records
  
  - **Personal and Employment**
    - Transfer & Change Location
Key Concepts

- In addition to time and absence approvals, Managers can complete HR transactions (transfers, salary change, etc) within their department.

- Bear Trax replaces the Change of Status form. Managers can complete the following actions as a Transfer:
  - Position Change
  - Salary & Grade Changes
  - Location Change
  - Work Schedule
  - Working Hours
HR Transactions

Instructions for Managers
Bear Trax for HR Transactions in your department

Bear Trax replaces the Change of Status form.

- Use Bear Trax to initiate an HR transaction (transfer, change manager, change location) within your department.

- In-Department HR Transactions include:
  - Position Change
  - Salary & Grade Change
  - Manager Change
  - Working Hours & Work Schedule
  - Location Change
The Transfer Process

The Transfer process consists of a series of steps set up as Trainstops.

- The Transfer process starts with *a series of conversations* between Manager, Employee and HR *outside of Bear Trax*.
  - All activities (except change in work schedules and location) initiated by a manager go to the manager’s immediate supervisor for approval.
    - The request continues up the supervisory hierarchy to Vice President.
    - Following VP approval the request goes to Budget and then HR for approval.
    - Payroll staff are notified.

- Work schedules and location changes are auto approved. All other transactions follow a workflow that requires HR and/or Payroll approval.
Managers can add an assignee (ie: Administrative Assistant) to the Transfer workflow for assistance completing the process.

- Follow these steps to add an assignee to the workflow:
  - Initiate the Transfer of the Employee.
    - Select the employee and enter basic details.
    - Skip through the Transfer steps by clicking Next on each page.
    - Select Add an assignee and identify that person.
    - Insert an assignee to the workflow above the initiator and add a comment providing direction for the assignee.
Time & Absence Approvals

Instructions for Managers
Absence Management Fast Facts for Managers

- **All Absences must be documented in Bear Trax.**
  - It is the employee’s responsibility to submit absence requests in Bear Trax.
  - It is managers responsibility to ensure employees have submitted absence requests.

- **Absences automatically populate within the employee’s Time Card.**

- **Managers can view team member's current absence balances.**
  - Absences cannot be submitted without sufficient balance.

- **Never modify an employee’s absence request. Reject it with comments for employee modification.**

- **Managers can submit an absence event on their employees’ behalf in special cases.**
Employee time cards will appear in manager’s Notifications where action must be taken.

- Manager actions include Accept or Reject with comments.
  - If time card requires edits, select Reject and add Comments.
  - *It is the employee’s responsibility to ensure time reported is accurate.*
  - *It is the manager’s responsibility to confirm employee time reported is accurate.*

**Remember!** Managers cannot create, edit or submit timecards on their employees’ behalf.

If an employee is unable to submit their time worked, the Manager *must* notify Payroll to ensure employee is paid.
Time Management Best Practice

- If you reject an employee’s time card, you **must** enter a comment when sending it back for revision.

- Make sure that the employee resubmits the time card and that you approve the time card by the **Monday at 9:00 AM** deadline.
  - For employees that do not regularly check email, please *reach out to make them aware* that adjustments need to be made.
Employees with multiple assignments will indicate time worked for each position and submit time card bi-weekly.

- Must be completed by Friday at 1:00 PM.
- The time card is routed first to the Primary Line Manager (the manager of the employee’s primary assignment).

Primary Line Manager follows regular approval process and Approves, adding a comment indicating the position for which time is being approved.

- Must be completed by Friday at 3:00 PM.
- The system automatically routes the time card to the Secondary Line Manager.

Secondary Line Manager receives notification of time card. Secondary Line Manager follows regular approval process and Approves, adding a comment indicating the position for which time is being approved.

- Must be completed by Monday at 9:00 AM.
- The system automatically submits time card to Payroll.

*Note! In the event of a 3rd or 4th time card assignment, the Secondary Line Manager must “Add Ad Hoc Approval” for each pay approval.

- Subsequent Manager data can be obtained from HR or Payroll.
Fast Facts for Managers: Reassigning Approvals

If managers will be away and unable to respond to employee requests, managers must **temporarily reassign approvals to another appropriate employee.**

- Reassignment typically goes to the *next level administrator* or to the individual acting on a managers behalf *with signature authority.*

**Tasks can be reassigned in two ways:**

- **Reassignment of all time/absence submissions during a temporary timeframe.**
  - To reassign all submissions: Notification Icon > HCM > Select Name > Select Preferences > Enable Vacation Period > Reassign > Select designee

- **Reassignment of items one by one.**
  - To reassign items one by one: Open time card > Dropdown menu > Actions > Reassign > Select designee

**Note!** Reassign removes you completely from the approval workflow. You will have no visibility on approval status and will lose all access to notifications for all submittals by your direct reports during the reassignment period! All Bear Trax submissions will be seen by the designee.
Team Time Reports are available from the Tool Menu.

Navigator > Tools > Reports and Analytics > Catalog Icon

- **Detailed Time Card Manager Report**
  
  *Lists direct reports who have made time card entries*
  
  - Best Practice! *Run the Detail Time Card Manager Report mid-pay to view employee entries.*

- **Missing Time Card Report**
  
  *Lists direct reports who have not submitted time cards*
  
  - Best Practice! See Payroll calendar on SSU website for pay period dates.
  - Report is based on pay period dates, not the paydate.
Thank you for reviewing this process overview!

Please contact your Bear Trax Department Coordinator or your manager for more information.