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This manual supports ADP Self Service October 2010 Release and ADP Enterprise HR Version V4D (4.2005.2), V4.04 and higher, V5.0 and higher, as well as ADP HR Anytime Version 5.01 and higher. Published October 2010.

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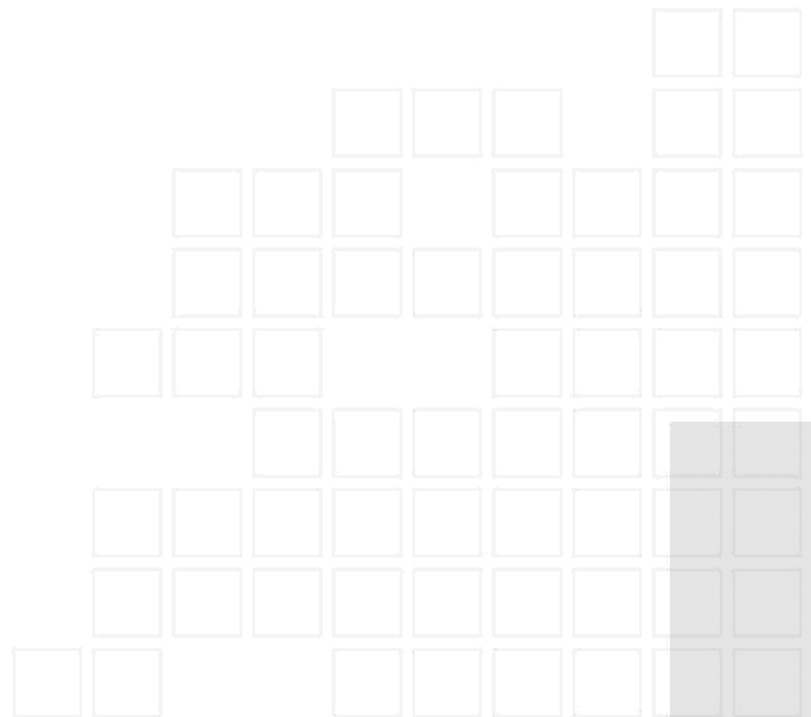
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Introduction

Use the *ADP Self Service Manager's Guide* to complete manager tasks within the ADP Self Service application. Manager tasks include compensation and performance reviews, hiring and rehiring employees, changing employee job status, transferring employees, changing employee job and salary information, and changing employees employment status, as well as designating a proxy to complete tasks when you are unavailable. Manager tasks also include viewing approval history, task lists, and running reports.

 As you work through the tasks in this chapter, you may have questions about fields. To display a description of fields and related tasks in Self Service, click the  (Help icon) provided in the right-hand corner of the Self Service web page.

Audience for This Guide

This guide is written for managers using ADP Self Service, whose HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime. Information in this guide applies to both systems of record unless otherwise specified.

To take full advantage of this guide, we recommend that you have a basic understanding of how to use your HR/payroll system of record and Self Service. This guide is not intended to be a tutorial.

In addition, you should be comfortable with using a graphical user interface as well as a web-enabled application.

What's in This Book

This guide, the *ADP Self Service Manager's Guide*, covers the following topics:

Chapter 1, "Introducing Manager Self Service," provides an overview of Manager Self Service, including how to access Self Service and manager tasks available within Self Service.

Chapter 2, "Managing Approval Tasks and Notifications," provides detailed instructions on using the Manager's Message Center to process approval tasks which have been sent to them, as well as view notifications concerning tasks in which they have been involved. This chapter also details setting up a proxy to complete assignments for managers who are unavailable to process tasks in a timely manner.

Chapter 3, "Managing Approval History," provides detailed instructions on using Approval History to view details on any tasks in which a manager was involved, either as an originator and/or an approver.

Chapter 4, "Managing Compensation," provides detailed instructions on managing direct reports compensation, including viewing compensation summary information, viewing the budget pool, viewing employee compensation history, and initiating a bonus or merit compensation proposed increase.

Chapter 5, "Managing Performance Reviews," provides detailed instructions on viewing performance summary information, viewing employee performance history, initiating a performance review, as well as how to create custom performance view templates.

Chapter 6, "Managing Work Events," provides detailed instructions on performing work events such as: hiring and rehiring; transferring a direct report to a new manager, department or location; changing an employee's job status; promoting, demoting, performing a lateral move, and changing an employee's salary; placing an employee on leave or returning an employee from leave; terminating an employee.

Chapter 7, "Managing Employee Career and Training Information," provides information on managing employee career and training information, including updating employee career information and enrolling employees in training activities.

Chapter 8, "Running Manager Reports," provides detailed instructions on running pre-defined reports for direct reports employment and compensation information.

An index is also provided.

What's New

The following changes have been made to this guide since the last publication date:


- Made changes to [Chapter 6, “Managing Work Events”](#) as follows:
 - A new confirmation message was added for salary changes to employee’s whose current salary already exceeds the established maximum salary amount. For more information, see [“Changing an Employee’s Salary”](#) on page 6-96.
 - Employment actions for **Suspend** and **Return from Suspend** have been added to the Employment page as part of the Comprehensive Employee Change tabbed view when creating a comprehensive change event for an employee. For more information, see [“Changing an Employee's Employment Information”](#) on page 6-147. These actions have also been added to Change Employee Status. For more information, see [“Placing an Employee on Suspension”](#) on page 6-120 and [“Placing an Employee on Suspension”](#) on page 6-120.
 - The search field filters for the Direct Reports page provided in a previous release for those whose HR/payroll system of record is ADP Enterprise HR 5.03 have been made available for those whose HR/payroll system of record is ADP Enterprise HR 5.01. For more information, see [“Using Search Fields to Filter Results”](#) on page 6-3.

Related Documentation

This guide covers the information necessary for using the Manager tasks within ADP Self Service. You may need to refer to related documentation for other areas of the product. You can access the documentation in the following location:

- On the web at adp4me.adp.com, select **Product Documentation**

Documentation Conventions

 The fields shown and described for all the Self Service pages are the default settings supplied by ADP. Your company Self Service administrator can configure non-required fields to not display, as well as change the field order and field label text.

In addition, not all tasks may be available. Your Self Service administrator may enable or disable tasks, depending on your company's policies.

Table 1 describes the documentation conventions used in this guide.

Table 1. Documentation Conventions










Documentation Convention	Description
bold	In procedures, user interface items that you select, click, or enter information for are shown in bold. For instance, tab names, buttons, and field names.
command	Indicates that you should type the command on your computer.
	Signifies important additional information.
	Signifies very important additional information
	Identifies helpful—but not necessary—information.
	Signifies that a failure to follow the recommended procedure could result in a loss of data or could result in the product not performing properly.
	Used to indicate either of the following: <ul style="list-style-type: none"> You can find additional information in the online Help You can find additional information on interface shortcuts and tips in the user's guide.
Company Definitions ~ Organization Definitions	At the beginning of a procedure, shows the path or navigation to a process or task.
People ~ Personnel Actions ~ Change Employee's Job/Position ~ Change Job Position	Within text, shows the path or navigation to a process, task, or tab.

Table 1. Documentation Conventions (cont.)

Documentation Convention	Description
 What's next	Indicates that you have reached the end of one step in a multiple-step process. Instructions are given after this convention to help you find the next step in the process and other related information.
 End of procedure	Indicates that you have reached the end of a procedure. If additional information is available, it is noted after this convention.
 More info For a description of the fields on this tab, press F1.	Indicates where you can find a complete description of every field on a tab. This convention is placed either to the left or, less often, to the right of a screen illustration.
 Tasks MULTI-STEP PROCESS First step in process Second step in process <input checked="" type="checkbox"/> Third step in process	Lists each step in a multi-step process, and indicates which step the current section is documenting. In this example, the third step is currently being documented. Note that this step is highlighted in bold and is preceded by a check mark. If you are viewing an online manual, click the highlighted text to jump to the desired section.

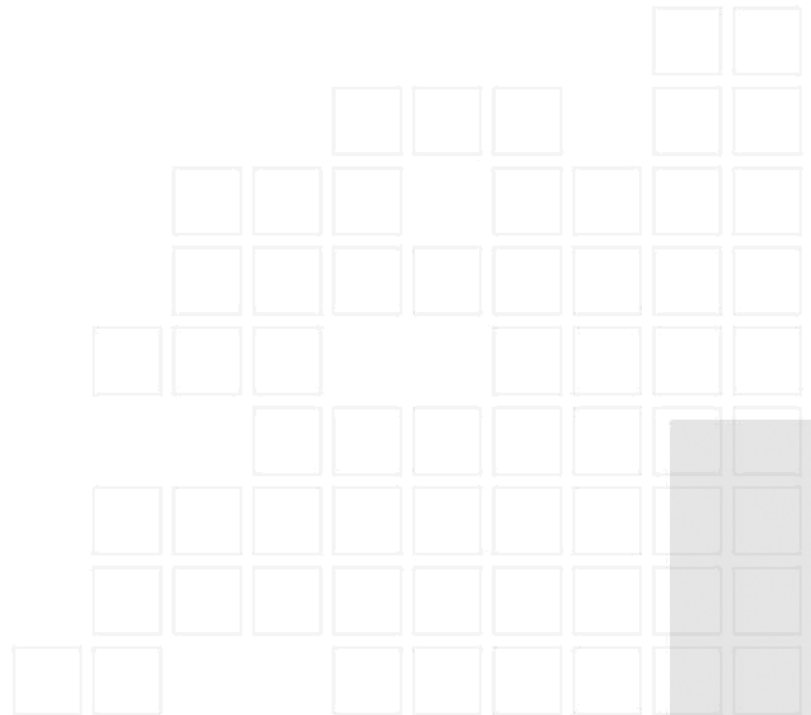
Providing Comments

We welcome your comments and suggestions about all the documentation delivered with your HR/payroll system of record. That way, we can continue to improve the manuals and online Help. You can provide comments in one of the following ways:

- Select **Help ~ Online Manuals** from your HR/payroll system of record application and then click the link to submit your suggestions.
- Give us feedback by visiting the web at adp4me.adp.com ~ **Product Documentation**.


Introducing Manager Self Service


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Introduction


The ADP Self Service solution is purchased separately from your HR/payroll system of record, and is based on portal technology allowing your employees, managers, practitioners, and administrators to perform tasks over the Internet.


 The term “employee” in this guide can refer to a regular employee/associate, temporary employee/associate, or a consultant or contractor, depending on your company’s organization.

 This solution is for clients using one of the following HR/payroll systems of record as a hosting/outsourcing service solution for payroll processing:

- ADP Enterprise HR with Autolink Version 4.2005.2(D), 4.04 or higher, and 5.0 or higher
- ADP Enterprise HR with Enterprise Payroll (EPayroll) Version 4.2005.2(D), 4.04 or higher, and 5.0 or higher
- ADP HR Anytime Version 5.01 or higher

Some features are not available, depending on which version and HR/payroll system of record you are using. Differences are noted throughout this guide.

Self Service is comprised of easy-to-use web pages that the user accesses with the user name and password selected during the initial registration process (see “[Registering for Self Service](#)” on page 1-15). Across the top of the Self Service web pages are tabs that categorize the information and tasks available in Self Service. Online Help is provided for the Self Service pages. Simply click the  (Help icon) provided in the right-hand corner of the web page to access the Help.

 The Help reflects the default settings of the Self Service Web pages. If your administrator has changed the default settings, the Help files may vary from the actual fields displayed in your Self Service pages.

Self Service accommodates several distinct users, as follows:

- Employees — employees can access the employee-level tasks
- Managers — managers access the manager-level tasks according to how they are set up in the Reports To Hierarchy feature of the HR/payroll system of record (see the *Hiring, Staffing, and Job Maintenance Guide* for information on using the Reports To Hierarchy feature.)
- Practitioners — these are ADP Enterprise HR or HR Anytime users who will access Enterprise HR or HR Anytime through Self Service
- Administrators — can define the approval and notification routing (workflow) through Self Service, as well as configure the Self Service pages for company-specific needs

This guide details the information and tasks available to managers.

About the Self Service Manager Tasks

Within your HR/payroll system of record, managers are set up using the Reports-To feature. The way managers are set up determines the tasks that they can view and perform within Self Service. For instance, managers may manage people and handle compensation and performance reviews. Or, managers could solely be compensation managers that need access to just the compensation details provided in Self Service. For information on the Reports-To feature, see the *Hiring, Staffing, and Job Maintenance Guide*.

Figure 1-1 illustrates the Manager Home Welcome portlets. The tabs that display across the top of the Self Service header area, depends on the role selected. If the user has more than one role, they can select a role from the role selector. Each role is associated with tasks specific for that role. The tasks detailed in this guide are those accessed when the **Manager** role is selected.

📄 If a user is assigned both an **Employee** and **Manager** role, the **Manager** role will be selected by default. If a user is also assigned a **Practitioner** role, the **Practitioner** role will always be the default. In this case, to access the Manager tasks, you would select **Manager** from the Role Selector.

⚠ Self Service Session Time Out Warning dialog box displays after 18 minutes of inactivity. The dialog box gives you the option of re-entering or logging out of Self Service.

Role Selector →

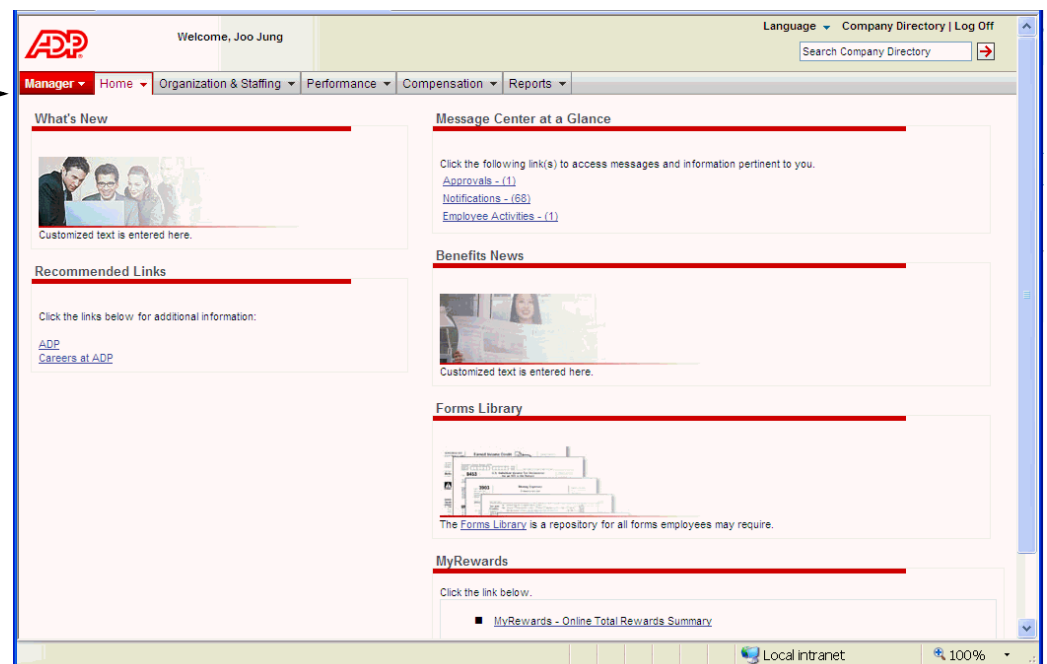




Figure 1-1. Manager Home Welcome Portlets




The content in the Home Welcome portlets will be the same for all roles, unless your Portal administrator has added customized instructional content and assigned the content to specific groups (roles).

The components of the Self Service Welcome Home portlets are as follows:

- What's New
- Message Center at a Glance – This includes links to your Message Center Approvals, Notifications and Employee Activities (see [Chapter 2, “Managing Approval Tasks and Notifications”](#) for more information).
- Recommended Links
- Benefit News
- Forms Library

 Your company administrator can configure the Self Service web pages to display certain fields, rearrange fields, change the label text for the field, as well as change fonts and color schemes. Online Help is provided for Self Service pages. Simply click the  (Help icon) provided in the right-hand corner of the web page to access the online help. The help and this guide reflect the default settings of the Self Service web pages. If your administrator has changed the default settings, the online help and this guide may vary from the actual fields displayed in your Self Service pages.


 You can view employee-level and manager-level tasks in either English or Spanish. The **Language** link in the header area allows you to select either English or Espanol. English is selected by default. Text on the employee-level and manager-level tabs, as well as the instructional text and labels on these web pages, will display the selected language. The data displayed in the fields, however, will be in English, since the fields are populated with data from your system of record.



Your security profile is managed by your administrator through Security Access. Your administrator must enable the **Language** option for your security group in order for you to view this option.


Across the top of the Self Service header area, are tabs that categorize the information and tasks available for managers. Hover your mouse over the tabs to see and select the manager tasks. The following tabs and tasks may be available, depending on user setup details:

Tabs and tasks available for managers include the following:

- **Home** – This tab allows access to the following tasks:
 - **Welcome** – Access the Welcome portlets.
 - **Company Directory** – Access an employee directory search to find information for an employee within your organization.
 - **Message Center** – Outstanding approval tasks that have been sent for approval are displayed on the Approvals page, and any notifications received through the Self Service approval and notification routing are displayed on the Notifications page. Once an approver has processed an approval task, it is removed from the Approvals page. In addition, if Event Configuration has been enabled for your company, users can access and complete activities, such as new hire, data verification, or company policy events.

- **Approval History** – Displays the approval processes and approval details which the manager has participated in, either as an originator or an approver. In addition, a user can recall an event, if they are the originator of the event and the event status is **In Progress**.
- **Forms Library** – Access company forms.
- **Policies and Guidelines** – Access company policies and procedures. The Company Policies portlet lists the policies your company has made available, based on the user's security access. A red asterisk (*) indicates that it is a policy which the user needs to acknowledge. A green check mark shows that the user has already acknowledged the policy. This portlet displays a maximum of 10 policies at a time. If there are additional policies, a **More** link displays. Clicking **More** accesses the Policy Acknowledgement List page. You can also access the Policy Acknowledgement List page by clicking the **Read and acknowledge all policies** link.
- **FAQs** – Access FAQs posted by your administrator.
- **Organization & Staffing** – This tab allows access to the following tasks:
 - **Direct Reports** – Displays a manager's direct reports, as well as the direct reports of each of the managers reporting to them. The Direct Reports page provides the manager with quick access to initiate a number of employee events. These same employee events are also accessible through other manager tasks. The Direct Reports page, however, provides a single point through which a manager can do a number of employee-related events.
 - **Managing Work Events** – The Managing Work Events page allows the manager to perform job actions, such as hires and rehires, transfers, job status changes, job and salary changes, and employment status changes.
 -  The work events (hire, rehire, transfer, job status changes, job and salary changes, and employment status changes) feature is available for all supported versions of ADP Enterprise HR with Autolink and ADP HR Anytime. However, the work events feature is not available for ADP Enterprise HR with EPayroll Version 4D (4.2005.2) or 5.0. At this time, EPayroll Versions 4.04, 4.05, and 5.01 and higher support the work events feature. The Comprehensive Employment Change is only available for ADP Enterprise HR and ADP HR Anytime Versions 5.03.
 - For new hires and rehires, once the job action has been approved within the Self Service application, the employee information entered in Self Service populates the Hire/Rehire Data tab in your HR/payroll system of record. The HR Practitioner must then complete the hire/rehire process within your HR/payroll system of record. See the *Hiring, Staffing, and Job Maintenance Guide* for additional information.
 - **Employee Career Profile** – Managers can add and update career profile information for their employees. Career profile information includes education, languages, skills, and license/certification information.
 - **Enroll Employee in Training** – Managers can check prerequisites and enroll their employees in training.

- **Employee Training Summary** – Managers can view summary information for training activities for which their employees are enrolled, wait listed, or have completed. A manager can also cancel a scheduled training activity.
- **Proxy Assignment** – Displays the paths established for event proxy workflow. Workflow is the approval and notification routing of events, such as performance reviews, compensation proposals, work events, and employee events. Proxy assignment allows a manager to delegate alternative approval personnel in the event the manager is out of the office, or unable to process approvals for an extended period of time.
- **Performance** – This tab allows access to the following tasks:
 - **Performance Planning** – View and print performance summary information and performance review forms for direct reports, as well as the direct reports of managers who report into them. Conduct the performance review, including submitting the completed review to the next approving manager.
 - **Performance History** – View and print employee performance history.
 - **Performance Review Template** – The Performance Review Template is used to create custom templates. Only modifiable templates can be used as a base to create customized templates. Managers can also modify any custom templates they have created.
-  Once the performance review has completed the approval process in Self Service, the employee's performance review information is updated in your HR/payroll system of record.
- **Compensation** – This tab allows access to the following tasks:
 - **Compensation Planning** – View and print compensation planning information for direct reports, as well as the direct reports of managers who report into them, as well as view and print consolidated budget information. Complete the Compensation Worksheets to process the compensation review, including submitting the completed review to the next approving manager.
 - **Compensation History** – View and print employee compensation history.
-  Once the proposed compensation increase has completed the approval process in Self Service, the employee's compensation information is updated in the HR/payroll system of record.
- **Reports** – This tab allows access to the following tasks:
 - **Manager Reports** – Allows manager's to access a variety of reports that contain their team's employment and compensation information. Managers only have access to information for their direct reports. The information available in each report is pre-defined. These reports include the effective-dated information for employees with the statuses of Active, Leave, Paid Leave, and Suspended. The team reports include all the direct reports for a manager. The employee history reports contain information about a single direct report. These history reports include all data of an employee based on tenure.

 The number of reports available may vary. Your company administrator can configure reports to not display, as well as change the report label text.


Using the Manager Direct Reports Page

The Direct Reports page is accessed through the **Organization & Staffing** tab and displays your direct reports, as well as the direct reports of each of the managers reporting to you. The Direct Reports page provides the manager with quick access to initiate a number of employee events. These same employee events are also accessible through other manager tasks. The Direct Reports page, however, provides a single point through which you can do a number of employee-related events.

Through the underline **Name** link on the Direct Reports page, you can do any of the following:

- View and print employee profiles
- Perform job actions, such as transfers, job and salary changes, employee and employment status changes
- Compensation reviews
- Performance reviews
- Employee career maintenance
- Employee training maintenance

Which employee events are available to you depends on how your administrator has configured your security access in Self Service. You can perform these employee events on your direct reports, as well as your indirect reports if your administrator has enabled the indirect report update option. If this option has not been enabled, you can initiate these employee events only for your direct reports.

 Managers can update indirect and direct reports from either the Direct Reports page or through the Compensation Planning and Performance Planning pages. For job actions, managers can update indirect and direct reports through the Direct Reports page. However, they can only update direct reports if they access job actions from the Managing Work Events page, regardless of whether or not the indirect report update option is selected.

Using the Manager Direct Reports page includes the following tasks:

- [Viewing Your Direct and Indirect Reports](#)
- [Initiating Employee Events](#)

Viewing Your Direct and Indirect Reports

Tasks

Using the Manager Direct Reports Page

Viewing Your Direct and Indirect Reports

Initiating Employee Events

To view your direct and indirect reports, do the following:

1. Access your Self Service URL at <https://portal.adp.com> and log in to the Portal.
2. Make sure that the **Manager** role is selected.
3. From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays.

Employees reporting directly to you are displayed in the employee list area. Any of your direct reports who also have employees reporting to them will have the (Direct Reports icon) displayed next to their name.

You can sort the columns in the employee list area in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

More info

For a description of the fields on this page or for related tasks, click the

(Help icon) provided in the right-hand corner of the Self Service page

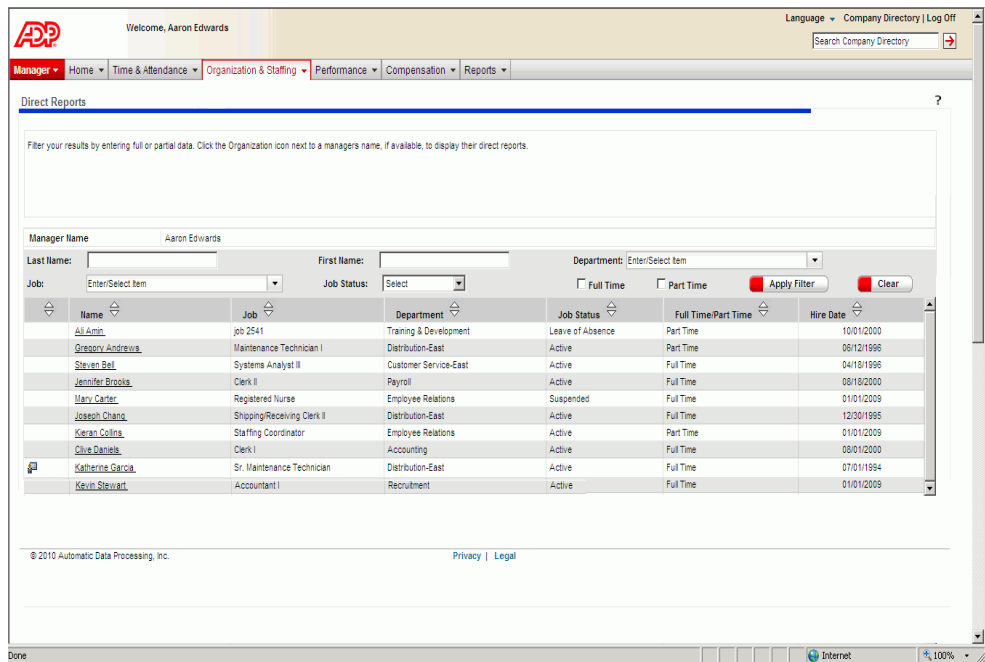





Figure 1-2. Manager Direct Reports Page

The search fields at the top of the Direct Reports page are only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Version 5.03. Search fields allow you to enter criteria to filter your employee list.

The initial display of direct reports is limited by the HR/payroll system of record to 999. However, you can use the search fields to display direct reports beyond this initial display. For example, the page initially displays 999 direct reports but the direct report you want to use is John Stewart in department 123 but he isn't listed. In the **Last Name** search field, enter Stewart and click **Apply Filter**. John Stewart should display in the filtered listing.

4. Click  next to your direct report's name (if available) to drill down and view their direct reports.

 As you click  to drill down to the next level of direct reports, the **Navigation Trail** field lists the starting manager name first, then subsequent managers in the order in which they were accessed.

5. To navigate back, click the appropriate underlined name in the **Navigation Trail** field.



What's next

You have finished viewing your direct and indirect reports. Next you will initiate an employee event.

Initiating Employee Events

Tasks



Using the Manager Direct Reports Page

Viewing Your Direct and Indirect Reports

Initiating Employee Events

Which employee events are available to you depends on how your administrator has configured your security access in Self Service. You can perform these employee events on your direct reports, as well as your indirect reports if your administrator has enabled the indirect report update option. If this option has not been enabled, you can initiate these employee events only for your direct reports.




To drill down to view and select your indirect reports, click  next to your direct report's name to view their direct reports. As you click  to drill down to the next level of direct reports, the **Navigation Trail** field lists the starting manager name first, then subsequent managers in the order in which they were accessed. To navigate back, click the appropriate underlined name in the **Navigation Trail** field.

To initiate an Employee Event, do the following:

1. On the Direct Reports page, locate the employee for whom you want to initiate an employee event and click their **Name**. The Employee Event selection menu displays.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page

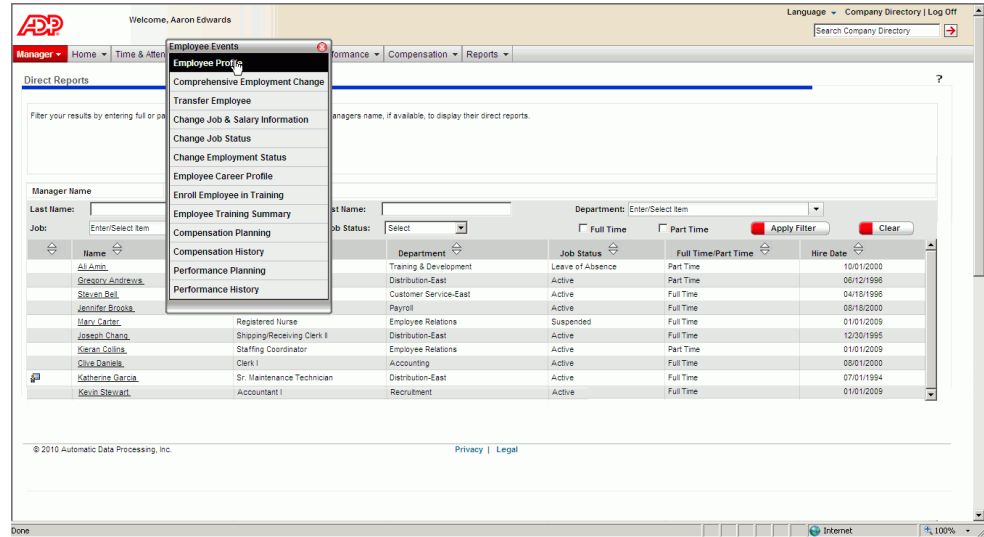


Figure 1-3. Employee Event Selection Menu

2. Choose from the following:
 - **Employee Profile** – Select this to access the selected employee's profile information.
 - **Comprehensive Employment Change** – Select this to update employment information for an employee in a single, inclusive task that encompasses job, employment, compensation, and payroll (if appropriate) information. The feature is only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Versions 5.03. For details, see [“Using the Comprehensive Employment Change”](#) on page 6-141.
 - **Transfer Employee** – Select this to transfer the employee to another manager, department, or location. For details on transferring an employee, see [“Transferring Employees”](#) on page 6-44.
 - **Change Job & Salary Information** – Select this to promote, demote, make a lateral move, or change salary information for the selected employee. For details on changing an employee’s job and salary, see [“Changing an Employee’s Job and Salary Information”](#) on page 6-71.
 - **Change Job Status** – Select this to change the employee's job status. For details on changing an employee’s job status, see [“Changing an Employee’s Job Status”](#) on page 6-64.
 - **Change Employment Status** – Select this to terminate, place an employee on leave, or return an employee from leave. For details on changing an employee’s status, see [“Changing an Employee’s Employment Status”](#) on page 6-104.

- **Employee Career Profile** – Select this to update career information (such as education, languages, skills and certifications) for the selected employee. For details on changing an employee’s career profile, see [“Managing Employee Career Profiles”](#) on page 7-3.
- **Enroll Employee in Training** – Select this to enroll the selected employee in available training. For details on enrolling employees in training, see [“Enrolling Employees in Training”](#) on page 7-17.
- **Employee Training Summary** – Select this to view training information for the selected employee. For details on viewing an employee’s training summary, see [“Accessing Employee Training Summary Information”](#) on page 7-24.
- **Compensation Planning** – Select this to perform a compensation review for the selected employee. For details on compensation reviews, see [“Completing Compensation Reviews”](#) on page 4-3.
- **Compensation History** – Select this to view compensation history for the selected employee. For details on viewing an employee’s compensation history, see [“Viewing and Printing Employee Compensation History”](#) on page 4-22.
- **Performance Planning** – Select this to perform a performance review for the selected employee. For details on performance reviews, see [“Completing Performance Reviews”](#) on page 5-3.
- **Performance History** – Select this to view performance history for the selected employee. For details on viewing an employee’s performance history, see [“Viewing and Printing Employee Performance History”](#) on page 5-16.

Once you have selected the employee event, the corresponding event page displays. After completing the task, you will be returned to the Direct Reports page, where you can choose to initiate another employee event.





End of procedure

You have completed initiating an employee event.

Using the Online Help


Because the delivered Self Service solution is easy to use and self explanatory, the application has online Help as its primary means of employees, managers, practitioners, and administrators that are using Self Service. Since users may be using the application from home or remote offices, the online Help insures that the information is always available to the users.

Online Help is provided for ADP Self Service pages. Simply click the  (Help icon) provided in the upper right-hand corner of the web page to access the Help. The Help reflects the default settings of the Self Service web pages.

-  Your company administrator can configure the Self Service web pages to display certain fields, rearrange fields, change the label text for the field, as well as change fonts and color schemes. If your administrator has changed the default settings, the Help files may vary from the actual fields displayed in your Self Service pages.

Within the online Help, users may find the following information:

- Descriptions of the application pages, including its purpose and related field descriptions.
- A contents in the left pane specific to the ADP Self Service page that provides links to field descriptions, related tasks or guide.

Figure 1-4 shows a Help page for the Performance Planning process for managers as an example. This Help page is accessed by clicking the  (Help icon).

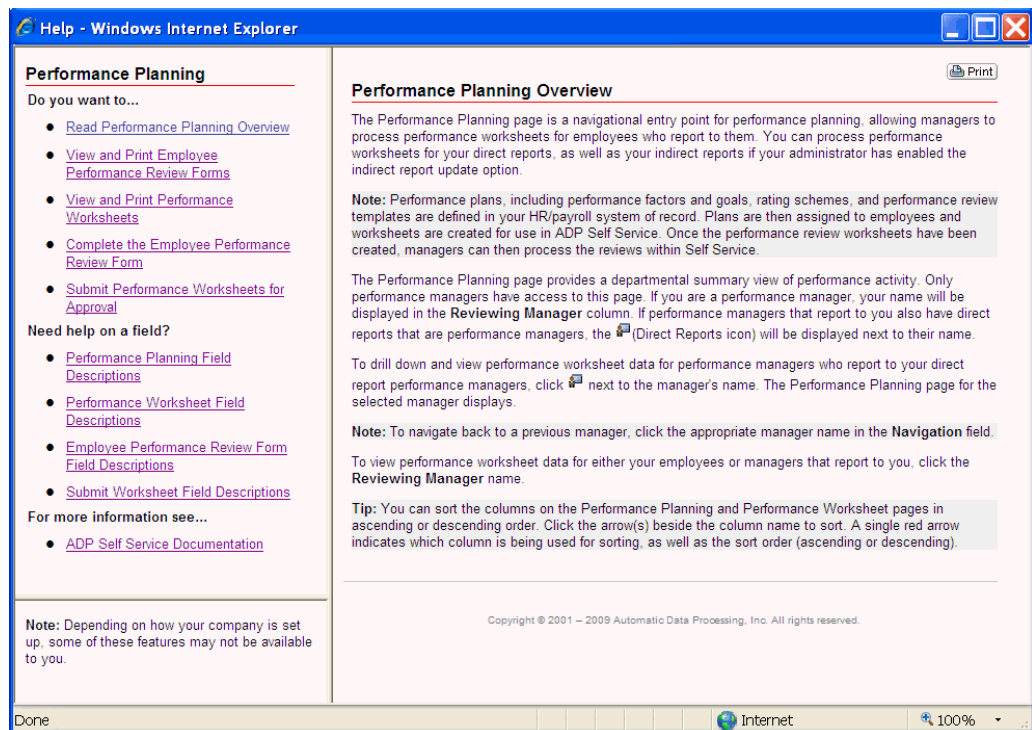


Figure 1-4. ADP Self Service Help - Example of Performance Planning Process

Additionally, managers can click the [ADP Self Service Documentation](#) link in the left pane to access this manual (in PDF format) from the ADP website (adp4me.adp.com).

- ⓘ In order for a user to access the ADP Self Service guides on adp4me, the user must be assigned the ADP4ME User role in Netsecure. This role is issued a digital certificate, necessary for accessing the adp4me web site.

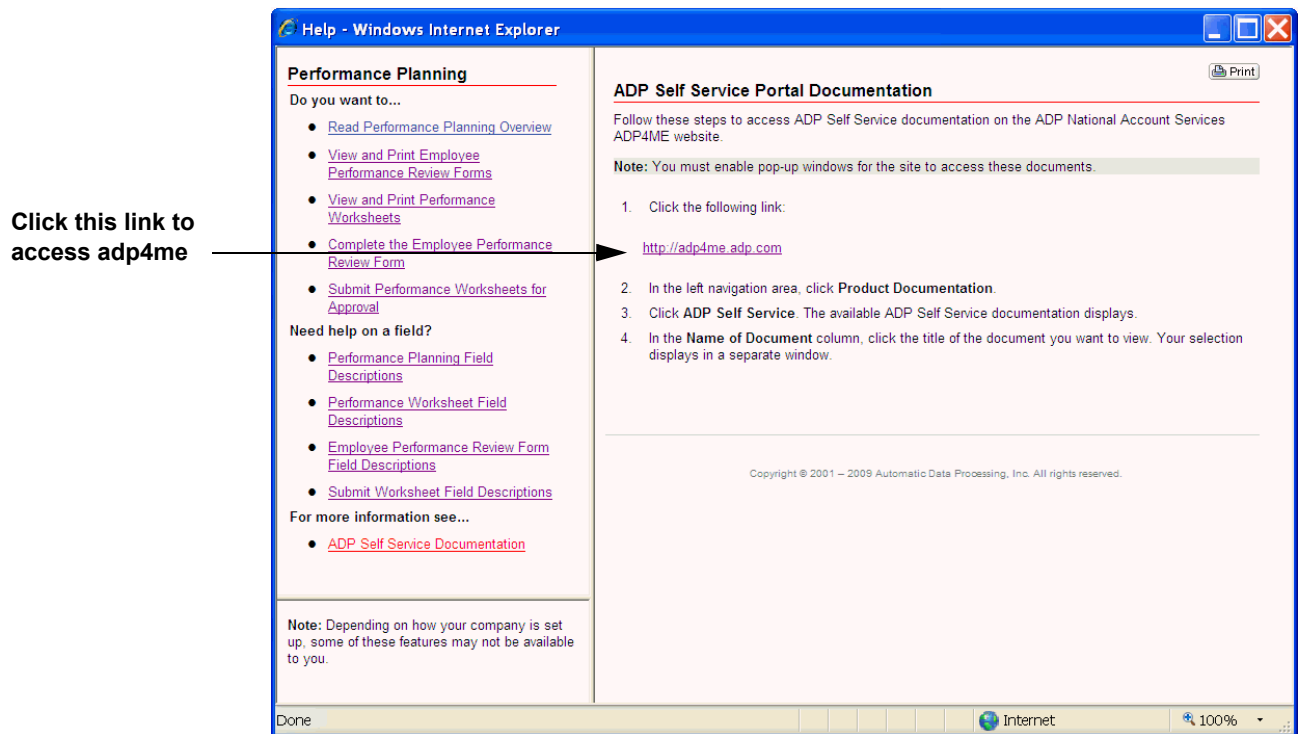


Figure 1-5. ADP Self Service Help - Accessing the ADP Self Service Manager's Guide

Touring Self Service

Employee and Manager tours are provided. The tours include an overview of the elements of the Self Service application user interface design and new navigation to the tasks. Also included are tours of sample tasks for both the employee and the manager roles.

To access the tours, do the following:

1. Access adp4me.adp.com
2. In the left navigation area, click **Product Documentation**.
3. Click **ADP Self Service**. The available ADP Self Service documentation displays.
4. In the **Name of Document** column, click the title of the document you want to view. Your selection displays in a separate window.

Figure 1-6 illustrates the opening page for the Self Service User-Interface Tour for Managers and Employees.



Figure 1-6. Self Service User Interface Tour for Managers and Employees

Registering for Self Service

To begin using Self Service, you must first register for each of the services you wish to access. Your Human Resources Department will mail you a Self Service User ID Notice that includes all the information required for you to complete your Self Service Registration.

To register for Self Service if you are a standard user (rather than a practitioner or administrator), do the following:

1. Access the URL for Self Service, at <https://portal.adp.com>. The Self Service Portal Login page displays.

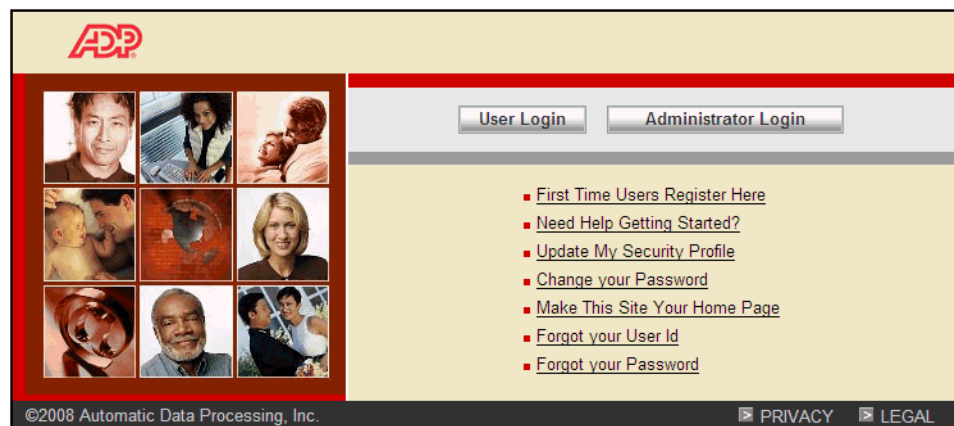


Figure 1-7. Self Service Portal Login Page

2. Click the **First Time Users Register Here** link on the Self Service login page. The Registration Welcome page displays.

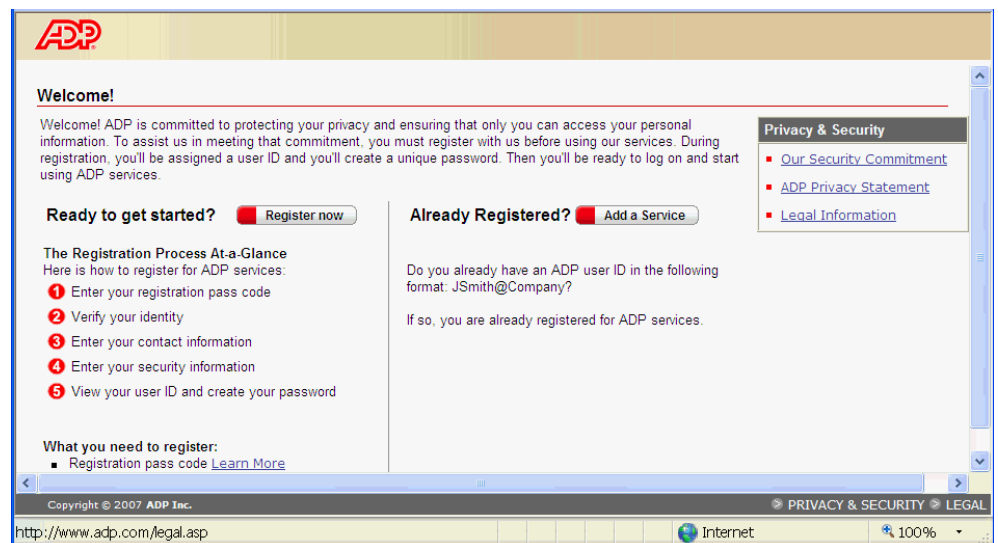

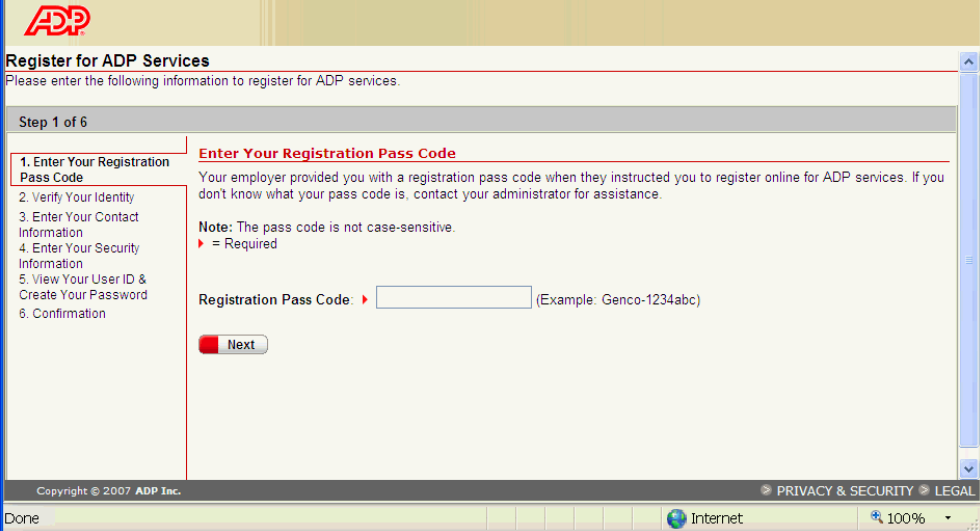


Figure 1-8. Registration Welcome Page

3. Click **Register Now**. The Register for ADP Services page displays.

 If you have already registered for an ADP internet product, such as iPay Statements, select the **Add a Service** link. For more information, see “[Managing Your Self Service Account](#)” on page 1-22.



ADP

Register for ADP Services

Please enter the following information to register for ADP services.

Step 1 of 6

1. Enter Your Registration Pass Code
2. Verify Your Identity
3. Enter Your Contact Information
4. Enter Your Security Information
5. View Your User ID & Create Your Password
6. Confirmation

Enter Your Registration Pass Code

Your employer provided you with a registration pass code when they instructed you to register online for ADP services. If you don't know what your pass code is, contact your administrator for assistance.

Note: The pass code is not case-sensitive.
▶ = Required


Registration Pass Code: (Example: Genco-1234abc)

Copyright © 2007 ADP Inc. [PRIVACY & SECURITY](#) [LEGAL](#)

Done Internet 100%

Figure 1-9. Register for ADP Services Page

4. Enter your **Registration Pass Code** and click **Next**. The Verify Your Identity page displays.

 Your Self Service Registration Pass Code was provided to you by your Human Resources Department.

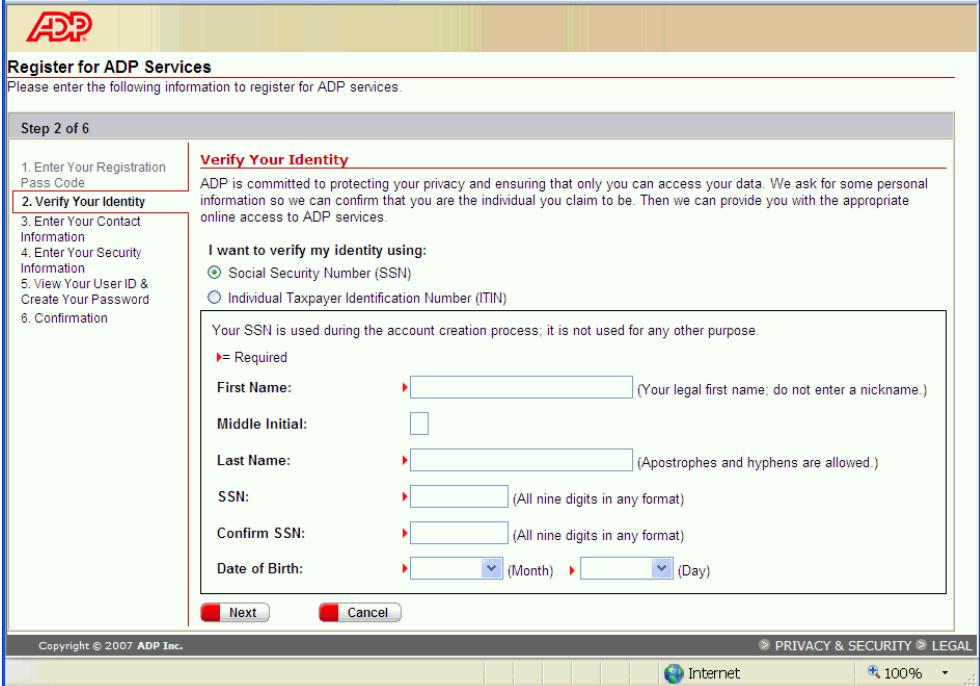




Figure 1-10. Verify Your Identity Page

 Required fields are indicated by a red arrow.


What identity verification fields are displayed on the page depends on how your company has been set up. In addition to your first and last name, the following may be required for identity verification:

- Full or last four digits of your Social Security Number (SSN)
- Full or last four digits of your Individual Taxpayer Identification Number (ITIN)
- Employee ID
- Personal Identification Number (PIN)

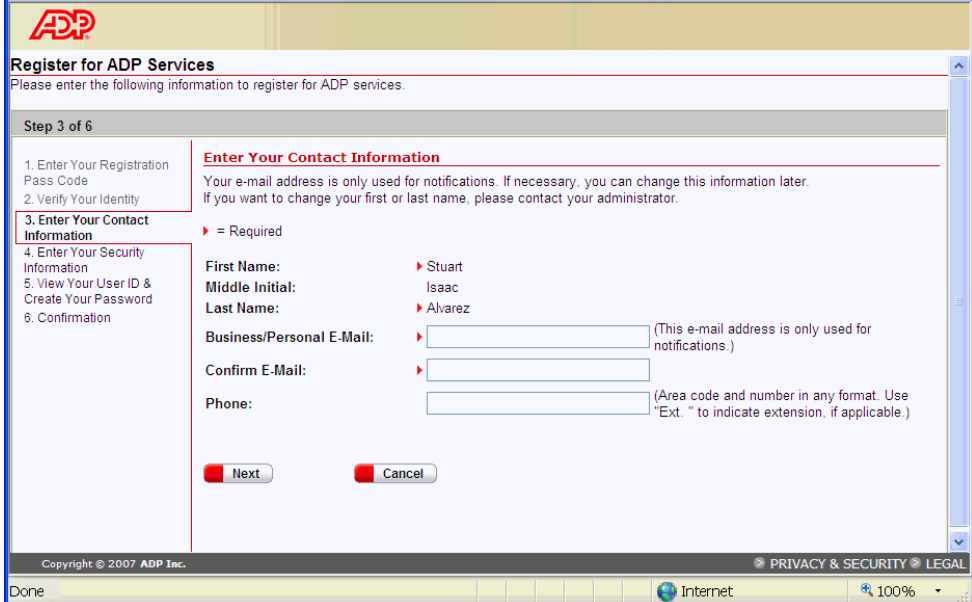
 PINs are generated in your HR/payroll system of record. If PINs are required, notices are mailed to users with the information necessary for them to complete the registration process.

In addition, you may be required to enter birth date and zip code information.

The example shown in [Figure 1-10](#), allows the user to select to verify with either their SSN or ITIN, using the full number of digits. In addition, it requires the user to enter their birth date information.

 Some products require you to use product-specific data to register, rather than the identity verification options. Examples are Benefit Enrollment/HWSE, and Enterprise eTIME.

5. If available, select the option you want to use from the **I want to verify my identity using** area. In our example, we have selected **Social Security Number (SSN)**.
6. Enter your **First Name** and **Last Name**.
7. In the **SSN** field, enter your Social Security Number. In our example, all digits are required.
8. Re-enter your Social Security Number in the **Confirm SSN** field.
9. If required, enter your birth date information in the **Date of Birth** area. Depending on your company setup, you may need to enter your full date of birth or just the birth month and day.
10. If required, enter your home zip/postal code information.
11. When you are finished entering information, click **Next**. The Enter Your Contact Information page displays.



ADP

Register for ADP Services
Please enter the following information to register for ADP services.

Step 3 of 6

1. Enter Your Registration Pass Code
2. Verify Your Identity
3. Enter Your Contact Information
4. Enter Your Security Information
5. View Your User ID & Create Your Password
6. Confirmation

Enter Your Contact Information
Your e-mail address is only used for notifications. If necessary, you can change this information later. If you want to change your first or last name, please contact your administrator.

▶ = Required

First Name: ▶ Stuart
Middle Initial: ▶ Isaac
Last Name: ▶ Alvarez

Business/Personal E-Mail: ▶ (This e-mail address is only used for notifications.)
Confirm E-Mail: ▶

Phone: (Area code and number in any format. Use "Ext. " to indicate extension, if applicable.)

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Done Internet 100%

Figure 1-11. Enter Your Contact Information Page

12. Complete the fields on the contact information page and click **Next**. The Enter Your Security Information page displays.

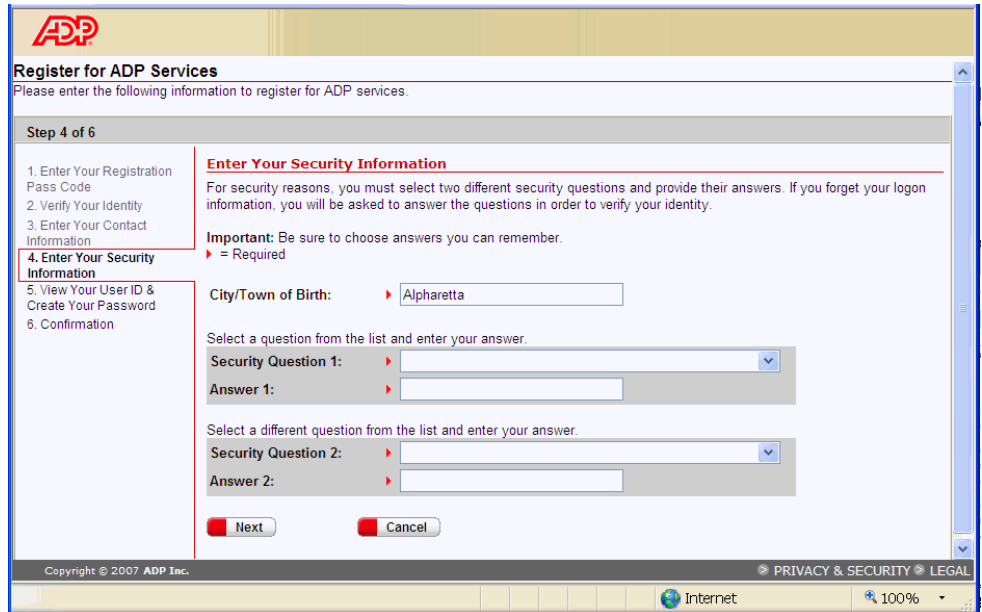



Figure 1-12. Enter Your Security Information Page

13. Complete the fields on the security information page and click **Next**. The View Your User ID & Create Your Password page displays. Your user ID is displayed.

 The security questions and answers are used if you forget your logon credentials. Be sure to choose information that you can readily remember.

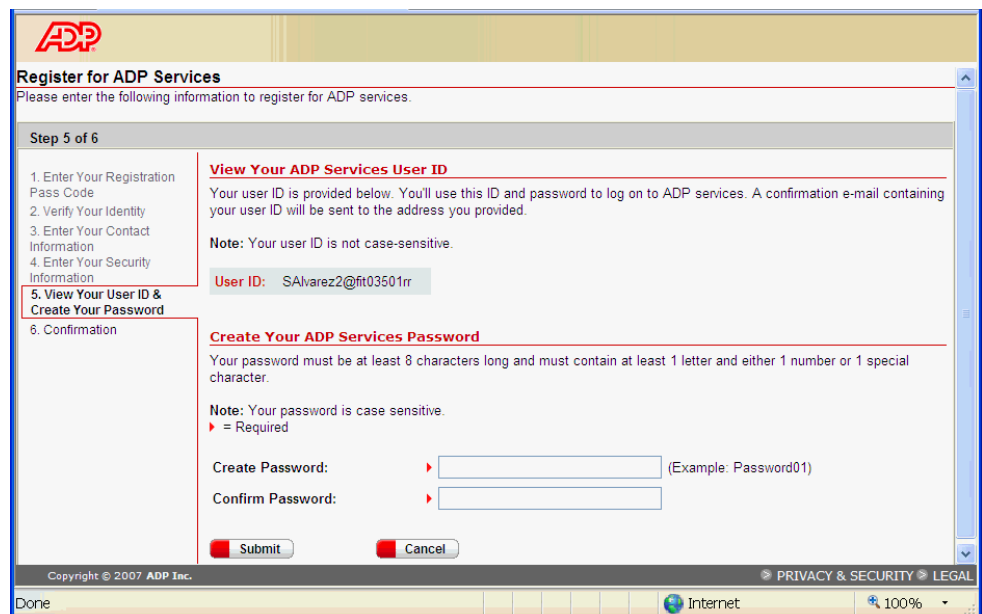



Figure 1-13. View Your User ID & Create Your Password Page

14. Enter your password in the **Create Password** field.

 Your password must be a minimum of 8 characters and contain at least one alpha and either one numeric or special character. Your password is case-sensitive.

15. Re-enter your password in the **Confirm Password** field and click **Submit**. The Confirmation page displays.

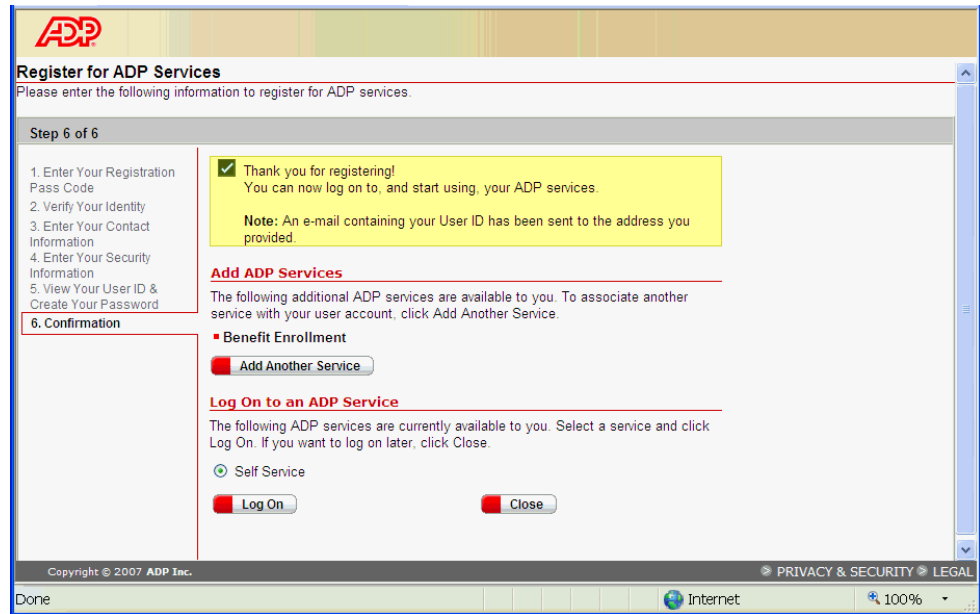



Figure 1-14. Self Service Registration Confirmation

 To register for another available product, click **Add Another Service**. You can also subscribe to additional services at a later time. See [“Managing Your Self Service Account”](#) on page 1-22.

16. Select the service you want to use and click **Log On**. Refer to [“Logging In to Self Service”](#) on page 1-21 for additional information.



End of procedure

You have finished registering for Self Service as a standard user (rather than a practitioner or administrator). For information on registering for Self Service as a practitioner or administrator, see the *ADP Self Service Administrator's Guide*.

For information on logging in to Self Service, see the following section.

Logging In to Self Service

Before you can log in to Self Service, you must register for the products you want to access through the Self Service Portal. Refer to “[Registering for Self Service](#)” on page 1-15 for more information.

To log in to Self Service as a standard user, do the following:

1. Access the URL for Self Service, <https://portal.adp.com>. The Self-Service Portal Login page displays.

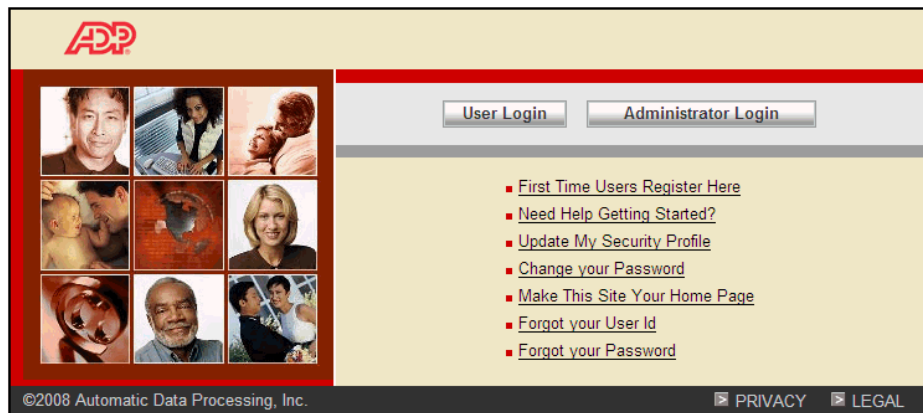


Figure 1-15. Self Service Portal Login Page

2. Click the **User Login**. The Enter Network Password dialog box displays.

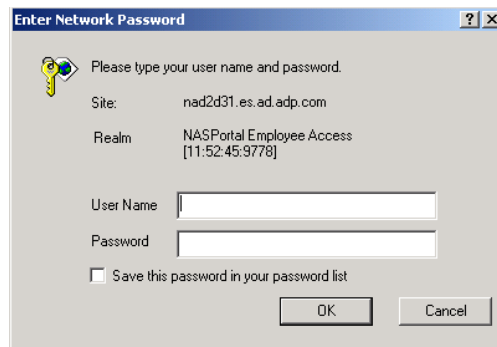



Figure 1-16. Enter Network Password Dialog Box

3. Enter your **User Name** and **Password** and click **OK**. Self Service launches.

 Your **User Name** is the user ID you received when you completed your registration. Your **Password** is the password you created during the registration process.

You can access the services for which you registered. The tasks you can access within Self Service depend on the tasks your company has enabled for you in Self Service.



End of procedure

You have just logged in to Self Service as a standard user.

Managing Your Self Service Account

Once you have your user ID, you can manage your account information, including changing your profile, changing your password, subscribing to additional available services, as well as unsubscribing to services.

To manage your account information, do the following:

1. Access Netsecure at <https://netsecure.adp.com>, as shown in Figure 1-17.

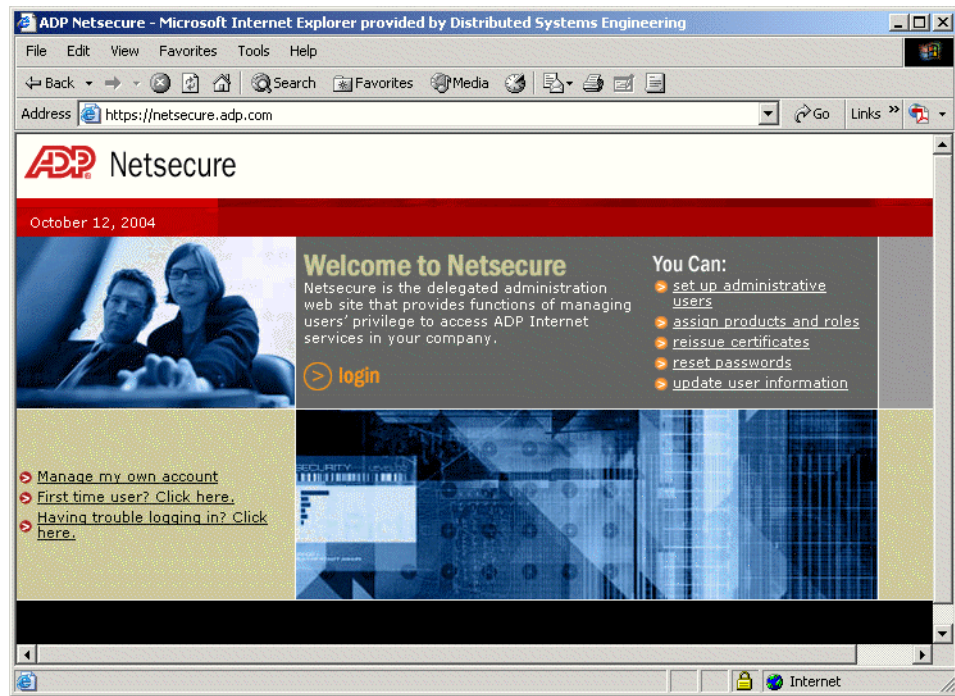


Figure 1-17. Netsecure Welcome Page

2. Click **Manage my own account**. The Enter Network Password dialog box displays.



Figure 1-18. Enter Network Password Dialog Box

3. Enter your **User Name** and **Password** and click **OK**. The Manage My Profile page displays.

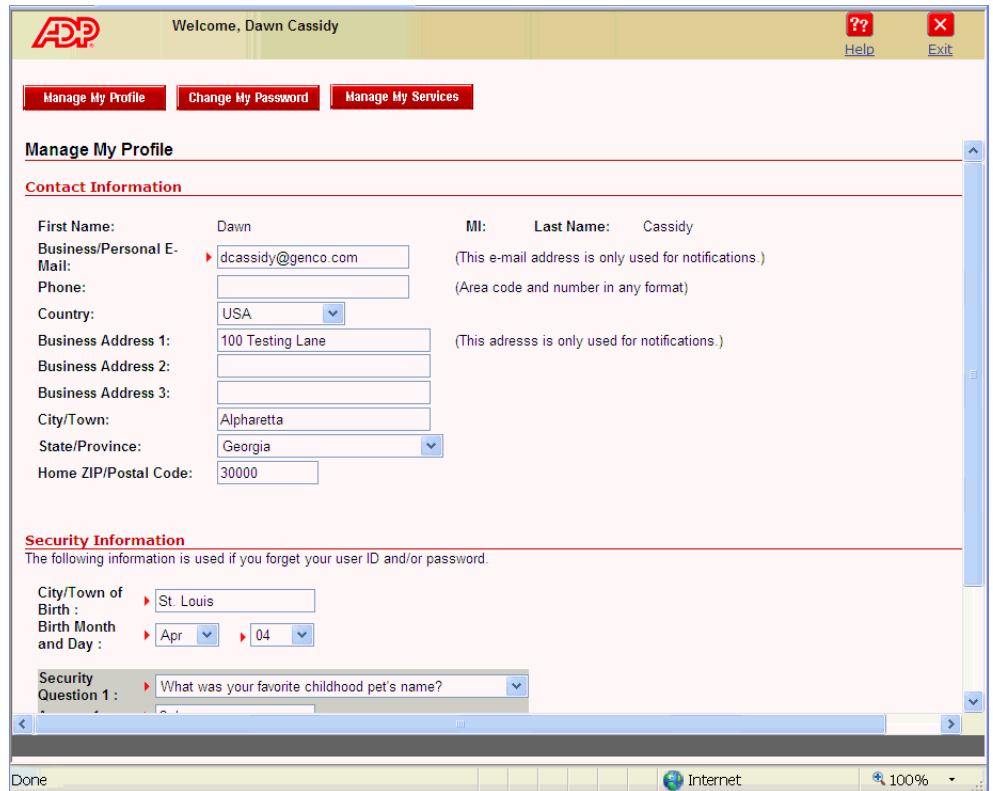


Figure 1-19. Manage My Profile Page

4. Make changes to your account as needed.
 - The **Manage My Profile** page allows you to update your contact and security information. The **Change My Password** page allows you to change your password. The **Manage My Services** page allows you to add or delete services.
 - You can also manage your account through the **First Time Users Register Here** link on the Self Service logon page. From the Registration Welcome page, select the **Add a Service** button.
5. Click **Save** or **Submit**, as appropriate.

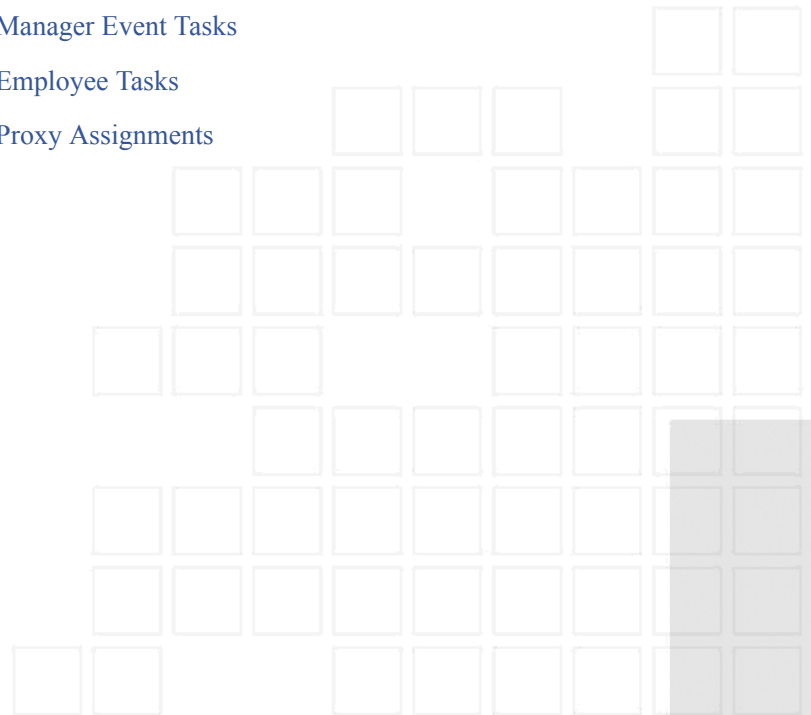


End of procedure


You have finished managing your Self Service user account.

Managing Approval Tasks and Notifications


<u>PAGE</u>	<u>TOPIC</u>
2-2	Introduction
2-3	Viewing Approvals and Notifications
2-10	Managing Merit Compensation Approval Tasks
2-14	Managing Bonus Compensation Approval Tasks
2-18	Managing Performance Review Approval Tasks
2-22	Processing Job Action Approval Tasks
2-24	Managing Manager Event Tasks
2-26	Managing Employee Tasks
2-28	Managing Proxy Assignments



Introduction

 The Approvals, Notifications, and Employee Activities pages can be accessed from any of the following ways: from the **Home** tab, you can select **Welcome**, then click the **Approvals**, **Notifications**, or the **Employee Activities** link in the Message Center at a Glance portlet; or you can select **Message Center** from the **Home** tab.

The Message Center includes an **Approvals**, a **Notifications**, and an **Employee Activities** tab.


 The **Employee Activities** tab is available only if Event Configuration (**Configuration ~ Set Up Employee Activities**) has been enabled for your company. In addition, whether or not the **Approvals**, **Notifications**, and **Employee Activities** tabs are available depends on your Portal role and your security access setting.

When you click the tab, the corresponding page (either approvals, notifications, or employee activities) is displayed. You can sort columns on the Approvals, Notifications, and Employee Activities pages in ascending/descending order by clicking the up/down arrows in the column headings. A red single arrow indicates which column is being used as the sort.

For Employees, any rejections you have received through the Self Service approval and notification routing are displayed on the Notifications page. The Approvals page does not apply to employees. Approvals are viewed through Approval History. The Employee Activities page displays any activities you need to complete. Activities can include new hire, data verification, and company policy events.

For Managers and Practitioners, outstanding approval tasks that have been sent to you for approval are displayed on the Approvals page, and any notifications received through the Self Service approval and notification routing are displayed on the Notifications page. Once you have processed an approval task, it is removed from the Approvals page.

This chapter details how to process bonus and merit compensation, performance review, work event, and employee event tasks that have been sent to you for approval. This chapter also details setting up a proxy to complete your approval tasks for you in the event you are unavailable to process them in a timely manner.

 An Activity Wizard is provided for completing employee activities. For more information, see the Self Service online help.

Viewing Approvals and Notifications

Viewing Approvals and Notifications includes the following tasks:

- [Viewing Approval Tasks](#)
- [Viewing Notifications](#)
- [Using Search Criteria to Filter Results](#)

Viewing Approval Tasks

The Message Center Approvals page displays tasks that have been sent to you for approval. The page initially displays with all pending approvals displayed. You can use the search fields to filter your results. Once you have processed an approval task, it is removed from the Approvals page.

To view your approval details, do the following:

1. From the **Home** tab, select **Message Center**.
2. Click the **Approvals** tab (if not already selected.) The list of approval tasks displays. Use the search criteria to filter your results, if needed. See “[Using Search Criteria to Filter Results](#)” on page 2-8 for more information.



The Approvals page can also be accessed from the **Approvals** link on the Message Center at a Glance portlet.

You can sort columns on the Approvals page in ascending/descending order by clicking the up/down arrows in the column headings. A red single arrow indicates which column is being used as the sort.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

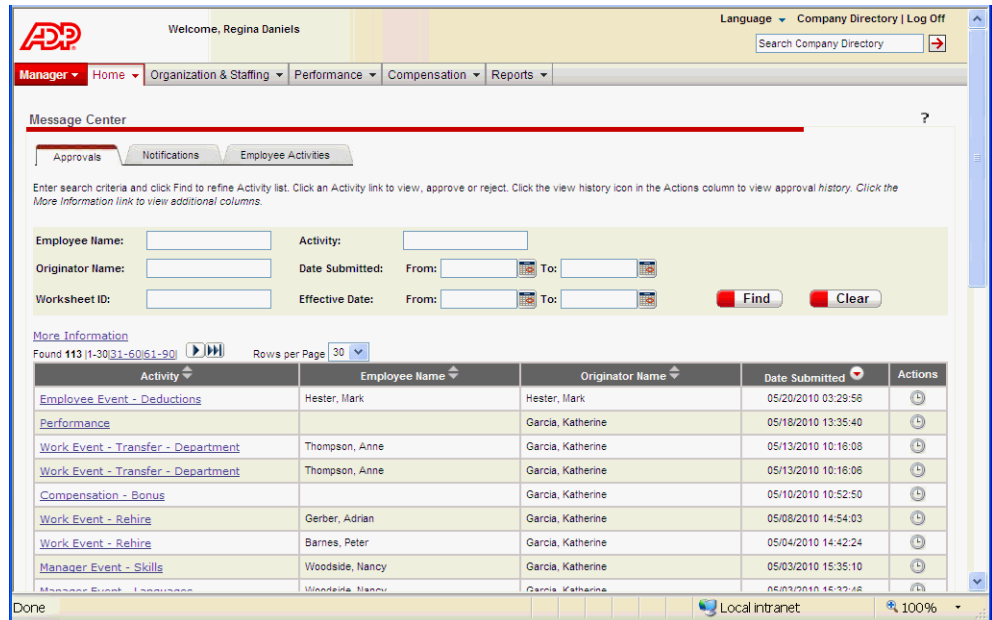




Figure 2-1. Message Center Approvals Page

The Approvals page provides summary information for approval tasks which you need to complete. You can view the following information:

- **Activity** – Displays the name of the activity. Click on this link to access the corresponding approval worksheet.
- **Employee Name** – This field displays the employee name for whom the event is for. This field is not used for performance or compensation events.
- **Worksheet ID** – This field is valid for performance or compensation events only, and displays the corresponding worksheet ID.
 - This column is not displayed unless **Worksheet ID** or **Effective Date** was used as a search criteria. Click the **More Information** link to display this column.
- **Originator Name** – Displays the name of the individual who originated the action.
- **Date Submitted** – Displays the date the event was submitted.
- **Effective Date** – Displays the effective date of the event. This field is only applicable to Work Events.
 - This column is not displayed unless **Worksheet ID** or **Effective Date** was used as a search criteria. Click the **More Information** link to display this column.
- **Action** – Click the View History icon (🕒) to view approval history detail for the corresponding activity (event).

3. Click on the appropriate underlined activity. Depending on the type of task you have selected, the corresponding approval worksheet displays. Click **Cancel** to return to the Approvals page.

 You will only have access to the Approval Worksheets if you are an approver.

4. To view approval history detail for a particular task, click the View History icon () in the Actions column. The View Approval History Detail page displays. Click **Back** to return to the Approvals page.



What's next


You have finished viewing approvals. Next you will view notifications.


Viewing Notifications

The Notifications page displays notifications for any rejections you have received through the Self Service approval and notification routing. The page initially displays with all available notifications displayed. You can use the search criteria to filter your results.

To view your notification details, do the following:


1. From the Message Center, click the **Notifications** tab. The list of notifications displays. Use the search criteria to filter your results, if needed. See “Using Search Criteria to Filter Results” on page 2-8 for more information.

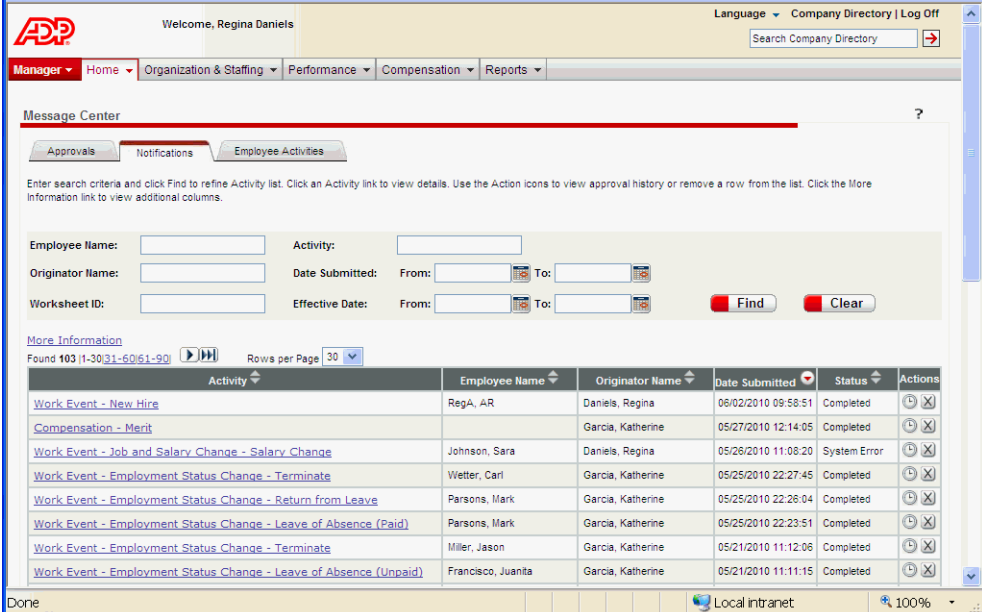
 The Notifications page can also be accessed from the **Notifications** link on the Message Center at a Glance portlet.

 You can sort columns on the Notifications page in ascending/descending order by clicking the up/down arrows in the column headings. A red single arrow indicates which column is being used as the sort.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



Message Center

Approvals | **Notifications** | Employee Activities

Enter search criteria and click Find to refine Activity list. Click an Activity link to view details. Use the Action icons to view approval history or remove a row from the list. Click the More Information link to view additional columns.

Employee Name: Activity:

Originator Name: Date Submitted: From: To:

Worksheet ID: Effective Date: From: To:

More Information






Found 103 (1-30|31-60|61-90) Rows per Page 30

Activity	Employee Name	Originator Name	Date Submitted	Status	Actions
Work Event - New Hire	RegA, AR	Daniels, Regina	06/02/2010 09:58:51	Completed	
Compensation - Merit		Garcia, Katherine	05/27/2010 12:14:05	Completed	
Work Event - Job and Salary Change - Salary Change	Johnson, Sara	Daniels, Regina	05/26/2010 11:08:20	System Error	
Work Event - Employment Status Change - Terminate	Wetter, Carl	Garcia, Katherine	05/25/2010 22:27:45	Completed	
Work Event - Employment Status Change - Return from Leave	Parsons, Mark	Garcia, Katherine	05/25/2010 22:28:04	Completed	
Work Event - Employment Status Change - Leave of Absence (Paid)	Parsons, Mark	Garcia, Katherine	05/25/2010 22:23:51	Completed	
Work Event - Employment Status Change - Terminate	Miller, Jason	Garcia, Katherine	05/21/2010 11:12:06	Completed	
Work Event - Employment Status Change - Leave of Absence (Unpaid)	Francisco, Juanita	Garcia, Katherine	05/21/2010 11:11:15	Completed	


Figure 2-2. Message Center Notifications Page



The Notifications page provides summary information for notifications received through the Self Service notification routing. You can view the following information:

- **Activity** – Displays the name of the activity. Click on this link to access the corresponding approval worksheet.
- **Employee Name** – This field displays the employee name for whom the event is for. This field is not used for performance or compensation events.

- **Worksheet ID** – This field is valid for performance or compensation events only, and displays the corresponding worksheet ID.
 -  This column is not displayed unless **Worksheet ID** or **Effective Date** was used as a search criteria. Click the **More Information** link to display this column.
- **Originator Name** – Displays the name of the individual who originated the action.
- **Date Submitted** – Displays the date the event was submitted.
- **Effective Date** – Displays the effective date of the event. This field is only applicable to Work Events.
 -  This column is not displayed unless **Worksheet ID** or **Effective Date** was used as a search criteria. Click the **More Information** link to display this column.
- **Status** – Displays the status of the activity.
- **Action** – Click the View History icon () to view approval history detail for the corresponding activity (event). Click the Delete icon () to delete the selected notification.
 -  When you delete a notification, it is deleted from your Notifications only. The notification will remain in the Notifications list of other participants in the event.

2. To view details for a notification, click on the appropriate underlined activity. Depending on the type of event you have selected, the corresponding event detail page displays. Click **Cancel** to return to the Notifications page.

 (For Managers and Practitioners only) For compensation, performance, and work events tasks that have been rejected, if you are the originating manager or practitioner, you can access the specific pages through the Notifications page and make corrections to the information. This allows the originating manager or practitioner to make corrections through the Notifications page and resubmit the action rather than re-enter all new information through the compensation, performance, or work events pages.


3. To delete a notification, click the corresponding Delete icon () in the **Actions** column.
4. To view approval history detail for a particular task, click the View History icon () in the **Actions** column. The View Approval History Detail page displays. Click **Back** to return to the Notifications page.

What's next

You have finished viewing notifications. Next you will review how to use the search fields to filter your results.


Using Search Criteria to Filter Results

Use the search criteria fields on the Approvals and Notifications pages to filter your Approvals or Notifications results. The default view for both the Approvals and Notifications pages is to show all existing approvals and/or notifications.

 The Approvals page does not apply to employees. For employees, Approvals are viewed through Approval History.

To use the search fields to enter/select criteria, do the following:

1. In the **Employee Name** field, enter the beginning part of the employee's last name. (If you want to enter their entire name, use the format: Last Name, First Name) All alphanumeric and special characters are valid. The search is a "last name begins with" query and is not case sensitive.
2. In the **Originator Name** field, enter the beginning part of the originator's last name. (If you want to enter their entire name, use the format: Last Name, First Name) All alphanumeric and special characters are valid. The search is a "last name begins with" query and is not case sensitive.
3. In the **Worksheet ID** field, enter the worksheet ID. All alphanumeric and special characters are valid. The search is a "contains" query and is not case sensitive. When you include this field in the search criteria, the **Worksheet ID** and **Effective Date** columns display in your results. Otherwise, to view the **Worksheet ID** and/or **Effective Date** fields, you need to click the **More Information** link on the Approvals or Notifications pages.

 The **Worksheet ID** field is only applicable to Performance and Compensation events.

4. In the **Activity** field, enter the name of the activity you want to filter on. The search is a "contains" query and is not case sensitive.
5. In the **Date Submitted** field, select the date submitted **From** and **To** dates. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar. If no date is selected, the results will include all records.
6. In the **Effective Date** field, select the effective date **From** and **To** dates. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar. If no date is selected, the results will include all records. When you include this field in the search criteria, the **Worksheet ID** and **Effective Date** columns display in your results. Otherwise, to view the **Worksheet ID** and/or **Effective Date** fields, you need to click the **More Information** link on the Approvals or Notifications pages.
7. Click **Find**. The results matching your search criteria display. You can sort columns in ascending/descending order by clicking the up/down arrows in the column headings. A red single arrow indicates which column is being used as the sort. Use the **Rows per Page** field to specify how many rows of data you want displayed per page. Default is 10. Step through the pages either by clicking the arrows keys, or selecting a page number range.

 If you change any of your search criteria, you must click **Find** again.

**End of procedure**

You have finished viewing approvals and notifications.

For information on processing merit compensation tasks that have been sent to you for approval, see [“Managing Merit Compensation Approval Tasks”](#) on page 2-10.

For information on processing bonus compensation tasks that have been sent to you for approval, see [“Managing Bonus Compensation Approval Tasks”](#) on page 2-14.

For information on processing performance review tasks that have been sent to you for approval, see [“Managing Performance Review Approval Tasks”](#) on page 2-18.


For information on processing job actions, such as employee events, hiring, rehiring, changing job status, transfers, changing job and salary information, and changing employment status, that have been sent to you for approval, see [“Processing Job Action Approval Tasks”](#) on page 2-22.

For information on setting up a proxy to complete approval tasks for you in the event you are unavailable to process them in a timely manner, see [“Managing Proxy Assignments”](#) on page 2-28.

Managing Merit Compensation Approval Tasks

The Merit Compensation Approval Worksheet lists the merit compensation details for a compensation manager's direct reports, and allows you to approve or reject the compensation proposal. You will only have access to the Merit Compensation Approval Worksheet if you are an approver. Click the underlined employee's name to see the Employee Compensation History for that employee.

Only outstanding approval tasks are displayed. Once an approval task has been processed, it is removed from the Approvals page.

 For detailed information on initiating compensation proposals, see [Chapter 4, “Managing Compensation.”](#)

Managing merit compensation approvals includes the following tasks:

- [Viewing and Printing Merit Compensation Approval Worksheets](#)
- [Processing Merit Compensation Approval Tasks](#)

Viewing and Printing Merit Compensation Approval Worksheets

Once an approval task has been processed, it is removed from the Approvals page. You may want to print the approval worksheets before you complete the approval.

To view and print your merit compensation approval worksheets, do the following:

1. From the Message Center, select the **Approvals** tab (if not already selected). The list of approval tasks displays, as shown in [Figure 2-1](#).



The Approvals page can also be accessed from the **Approvals** link on the Message Center at a Glance portlet.




Tasks

Managing Merit Compensation Approval Tasks

Viewing and Printing Merit Compensation Approval Worksheets

Processing Merit Compensation Approval Tasks

- Click the underlined Merit Compensation activity for which you want to view and print details. The Merit Compensation Approval Worksheet displays.

More info
 For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

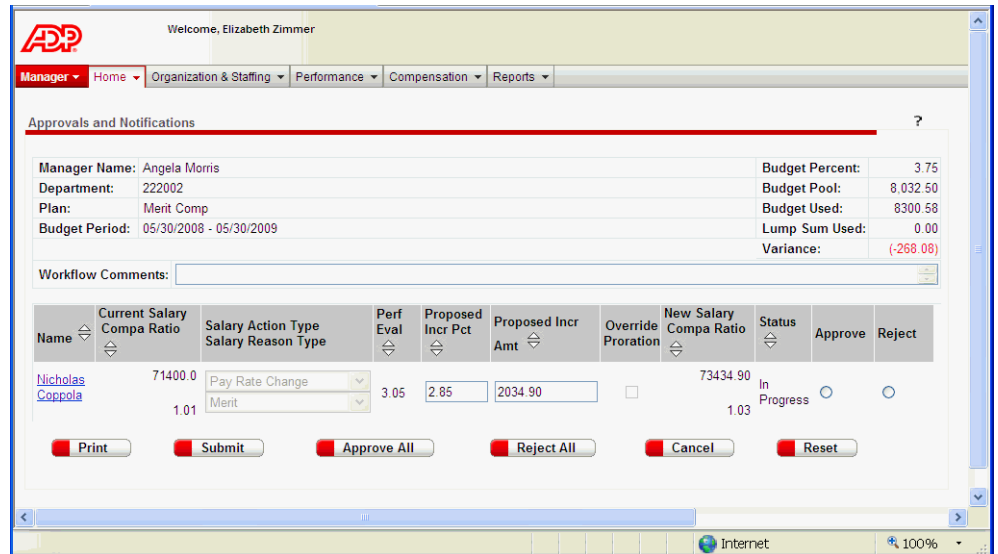





Figure 2-3. Merit Compensation Approval Worksheet

The Merit Compensation Approval Worksheet page provides the following information:

- **Manager Name** – Displays the originating manager's name.
- **Department** – Displays the originating manager's department ID.
- **Plan** – Displays the plan type. Compensation plans are defined in your HR/payroll system of record.
- **Budget Period** – Displays the budget period.
- **Budget Percent** – Displays the budget percent.
- **Budget Pool** – Displays the budget pool.
- **Budget Used** – Displays the budget used. This is the sum of all increase amounts, not including any lump sums.
- **Lump Sum Used** – Displays the sum of all lump sum amounts.
- **Variance** – Displays the budget variance.
 Negative numbers are displayed as red text with parentheses around the number.
- **Workflow Comments** – Displays approval and notification routing comments, if any, that were entered on the Merit Compensation Approval Worksheet and/or the Submit Worksheet.
- **Name** – Displays the employee's name. Click to access the Employee Compensation History page.
- **Current Salary/Compa Ratio** – Displays the employee's current salary and compa ratio.

- **Salary Action Type/Salary Action Reason** – Displays the salary action type (Pay Rate Change or Lump Sum) and the reason for the salary action.
 - **Perf Eval** – Displays the performance evaluation rating, if available.
 - **Proposed Incr Pct** – Displays the proposed increase percent.
 -  If you hover the mouse over the **Proposed Incr Pct** or **Proposed Incr Amt** fields, additional information for the employee is displayed. Information includes the employee name, department, merit matrix range, effective date, prorate applied at x.x%, the salary range min, mid, and max, and standard hours.
 - **Proposed Incr Amt** – Displays the proposed increase amount.
 - **Override Proration** – Indicates if proration override was selected. If selected, prorate calculations are not performed on the proposed increase percent or amount.
 -  The **Override Prorate** option may not be available. Your Human Resources Department determines whether or not managers have the ability to use the override prorate.
 - **New Salary/Compa Ratio** – Displays the new salary and compa ratio. This is automatically calculated if no lump sum is being applied.
 - **Status** – Displays the status of the proposed increase. Values are New, In Process, Rejected, and Complete.
3. Click **Print** to print the information on the Merit Compensation Approval Worksheet.
 4. Click **Cancel** to return to the Approvals page.



What's next

You have completed viewing and printing merit compensation tasks sent to you for approval. Next you will review how to process a merit compensation approval task.

Processing Merit Compensation Approval Tasks

Tasks

Managing Merit Compensation Approval Tasks

Viewing and Printing
Merit Compensation
Approval
Worksheets

Processing Merit Compensation Approval Tasks

More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

To process merit compensation tasks that have been sent to you for approval, do the following:

1. From the **Approvals** page, click the underlined Merit Compensation activity you want to process. The Merit Compensation Approval Worksheet displays.

Figure 2-4. Merit Compensation Approval Worksheet

2. Enter any comments into the **Workflow Comments** field. Workflow is the approval and notification routing for an event. Comments will be viewable by all approvers, as well as through Approval History.
 - To view employee compensation history, click the underlined employee's **Name**. The Employee Compensation History page displays. Click **Cancel** to return to the Merit Compensation Approval Worksheet. You can also access Employee Compensation History through the Manager tab's Compensation History task.
3. To approve a task, select the corresponding **Approve** option for the task.
 - You can also approve all the compensation reviews listed in your Merit Compensation Approval Worksheet by selecting **Approve All**.
4. To reject a task, select the corresponding **Reject** option for the task.
 - You can also reject all the merit compensation reviews listed in your Merit Compensation Approval Worksheet by selecting **Reject All**.
5. Click **Submit**. You are returned to the refreshed Approvals page, which displays a message indicating who this task has been sent to. The processed approval task is removed from the Approvals page.




End of procedure

You have completed viewing, printing, and processing merit compensation tasks sent to you for approval.

Managing Bonus Compensation Approval Tasks

The Bonus Compensation Approval Worksheet lists the bonus compensation details for a compensation manager's direct reports, and allows you to approve or reject the compensation proposal. You will only have access to the Bonus Compensation Approval Worksheet if you are an approver. Click the underlined employee's name to see the Employee Compensation History for that employee.

Only outstanding approval tasks are displayed. Once an approval task has been processed, it is removed from the Approvals page.

 For detailed information on initiating compensation proposals, see [Chapter 4, "Managing Compensation."](#)

Managing bonus compensation approvals includes the following tasks:

- [Viewing and Printing Bonus Compensation Approval Worksheets](#)
- [Processing Bonus Compensation Approval Tasks](#)

Viewing and Printing Bonus Compensation Approval Worksheets



Once an approval task has been processed, it is removed from the Approvals page. You may want to print the approval worksheets before you complete the approval.

To view and print your bonus compensation approval worksheets, do the following:

1. From the Message Center, select the **Approvals** tab (if not already selected). The list of approval tasks displays, as shown in [Figure 2-1](#).



The Approvals page can also be accessed from the **Approvals** link on the Message Center at a Glance portlet.

2. Click the underlined Bonus Compensation activity for which you want to view and print details. The Bonus Compensation Approval Worksheet displays.



For a description of the fields on this page or for related tasks, click the



(Help icon) provided in the right-hand corner of the Self Service page

Name	Salary Amount	Salary Comp.	Salary Grade Min.	Salary Grade Max.	Salary Grade Max.	Part. Evt.	Bonus Percent	Bonus Amount	Override Prorate	Status	Approve	Reject
William Crocker	77,000.00	3.18	18,900.00	24,200.00	29,600.00	0.00	2.89	2,075.00	<input type="checkbox"/>	In Progress	<input type="radio"/>	<input type="radio"/>
Margaret Bauer	29.50	1.89	11.68	15.58	19.42	0.00	0.00	2.75	<input type="checkbox"/>	In Progress	<input type="radio"/>	<input type="radio"/>

Figure 2-5. Bonus Compensation Approval Worksheet

The Bonus Compensation Approval Worksheet page provides the following information:

- **Manager Name** – Displays the originating manager's name.
- **Department** – Displays the originating manager's department ID.
- **Bonus Plan** – Displays the plan type. Compensation plans are defined in your HR/payroll system of record.
- **Budget Period** – Displays the budget period.
- **Budget Percent** – Displays the budget percent. If there is no budget, this field will be blank.
- **Budget Pool** – Displays the budget pool. If there is no budget, this field will be blank.
- **Budget Used** – Displays the budget used. This is the sum of all increase amounts, not including any lump sums.

- **Comments** – Displays approval and notification routing comments, if any, that were entered on the Bonus Compensation Approval Worksheet and/or the Submit Worksheet.
 - **Name** – Displays the employee's name. Click to access the Employee Compensation History page.
 - **Salary Amount** – Displays the employee's current salary.
 - **Salary Comp** – Displays the employee's current salary compa ratio.
 - **Salary Grade Min/Mid/Max** – Displays the employee's salary grade minimum/mid-point/maximum.
 - **Perf Eval** – Displays the performance evaluation rating, if available.
 - **Bonus Percent** – Displays the proposed increase percent.
 -  If you hover the mouse over the **Bonus Percent** and **Bonus Amount** fields, additional information for the employee is displayed. Information includes the employee name, department, effective date, prorate applied at x.x%, and the performance evaluation rating.
 - **Bonus Amount** – Displays the proposed increase amount.
 - **Override Proration** – Indicates if proration override was selected. If selected, prorate calculations are not performed on the proposed increase percent or amount.
 -  The **Override Prorate** option may not be available. Your Human Resources Department determines whether or not managers have the ability to use the override prorate.
 - **Status** – Displays the status of the proposed increase. Values are New, In Process, Rejected, and Complete.
3. Click **Print** to print the information on the Bonus Compensation Approval Worksheet.
 4. Click **Cancel** to return to the Approvals page.

 **What's next**

You have completed viewing and printing bonus compensation tasks sent to you for approval. Next you will review how to process a bonus compensation approval task.

Processing Bonus Compensation Approval Tasks



Managing Bonus Compensation Approval Tasks

Viewing and Printing Bonus Compensation Approval Worksheets

Processing Bonus Compensation Approval Tasks



For a description of the fields on this page or for related tasks, click the

(Help icon) provided in the right-hand corner of the Self Service page

To process bonus compensation tasks that have been sent to you for approval, do the following:

1. From the Approvals page, click the underlined Bonus Compensation activity you want to process. The Bonus Compensation Approval Worksheet displays.

Name	Salary Amount	Salary Comp.	Salary Grade Min	Salary Grade Mid	Salary Grade Max	Perf. Eval.	Bonus Percent	Bonus Amount	Override Prorate	Status	Approve	Reject
<u>William Crocker</u>	77,000.00	3.18	18,900.00	24,200.00	29,600.00	0.00	2.89	2,075.00	<input type="checkbox"/>	In Progress	<input type="radio"/>	<input type="radio"/>
<u>Margaret Bauer</u>	29.58	1.89	11.68	15.58	19.42	0.00	0.00	2.75	<input type="checkbox"/>	In Progress	<input type="radio"/>	<input type="radio"/>

Figure 2-6. Bonus Compensation Approval Worksheet

2. Enter any comments into the **Workflow Comments** field. Workflow is the approval and notification routing for an event. Comments will be viewable by all approvers, as well as through Approval History.

To view employee compensation history, click the underlined **Name**. The Employee Compensation History page displays. Click **Cancel** to return to the Bonus Compensation Approval Worksheet. You can also access Employee Compensation History through the Manager tab Compensation History task in left navigation area.

3. To approve a task, select the corresponding **Approve** option for the task.

You can also approve all the compensation reviews listed in your Bonus Compensation Approval Worksheet by selecting **Approve All**.

4. To reject a task, select the corresponding **Reject** option for the task.

You can also reject all the merit compensation reviews listed in your Bonus Compensation Approval Worksheet by selecting **Reject All**.

5. Click **Submit**. You are returned to the refreshed Approvals page, which displays a message indicating who this task has been sent to. The processed approval task is removed from the Approvals page.




End of procedure

You have completed viewing, printing, and processing bonus compensation tasks sent to you for approval.

Managing Performance Review Approval Tasks

The Performance Approval Worksheet lists the performance review details and allows you to approve or reject the performance review. You will only have access to the Performance Approval Worksheet if you are an approver.

Only outstanding approval tasks are displayed. Once an approval task has been processed, it is removed from the Approvals page.

 For detailed information on initiating performance reviews, see [Chapter 5, "Managing Performance Reviews."](#)

Managing performance review approvals includes the following tasks:

- [Viewing and Printing Performance Approval Worksheets](#)
- [Processing Performance Review Approval Tasks](#)

Viewing and Printing Performance Approval Worksheets




Managing Performance Review Approval Tasks

Viewing and Printing Performance Approval Worksheets

Processing Performance Review Approval Tasks



For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

Once an approval task has been processed, it is removed from the Approvals page. You may want to print the approval worksheets before you complete the approval.

To view and print your performance approval worksheets, do the following:

1. From the Message Center, select the **Approvals** tab (if not already selected). The list of approval tasks displays, as shown in [Figure 2-1](#).



The Approvals page can also be accessed from the **Approvals** link on the Message Center at a Glance portlet.

2. Click the underlined Performance activity for which you want to view and print details. The Performance Approval Worksheet displays.

Employee Name	ReviewDate	HireDate	EmployeeStatus	Job Title	Template	OverallRating	OverallGoal	Status	Approve	Return
<u>Barry Baldwin</u>	06/10/2010	03/22/2010	Active	Tax Accountant	Goal Factor Non Modifiable	Met all training requirements	New	In Progress	<input type="radio"/>	<input type="radio"/>

Figure 2-7. Performance Approval Worksheet

The Performance Approval Worksheet page provides the following information:

- **Reviewing Manager** – Displays the reviewing manager's name.
- **Performance Plan** – Displays the name of the performance plan. Performance plans are defined in your HR/payroll system of record.
- **Review Type** – Displays the type of review
- **Workflow Comments** – Displays approval and notification routing comments, if any, that were entered on the Performance Approval Worksheet and/or the Submit Worksheet.
- **Employee Name** – Displays the employee's name. Click the underlined employee name to view the selected employee's review detail from the View Employee Performance Review Form.
- **Review Date** – Displays the employee's review date.

- **Hire Date** – Displays the employee's hire date
 - **Employee Status** – Displays the employee's status.
 - **Job Title** – Displays the employee's job title.
 - **Template** – Displays the name of the template used for the employee's review.
 - **Overall Rating** – Displays the employee's overall performance rating from the View Employee Performance Review Form, if applicable.
 - **Overall Goal** – Displays the employee's overall goal rating from the View Employee Performance Review Form, if applicable.
 - **Status** – Displays the status of the review. Values are New, In Process, Rejected, and Complete.
3. Click **Print** to print the information on the Performance Approval Worksheet.
 4. Click **Cancel** to return to the Approvals page.



What's next

You have completed viewing and printing performance review tasks sent to you for approval. Next you will review how to process a performance review approval task.

Processing Performance Review Approval Tasks

To process performance reviews that have been sent to you for approval, do the following:

1. From the Approvals page, click the underlined Performance activity you want to process. The Performance Approval Worksheet displays.

Employee Name	Review Date	Hire Date	Employee Status	Job Title	Template	Overall Rating	Overall Goal	Status	Approve	Return
Barry Baldwin	06/10/2010	03/22/2010	Active	Tax Accountant	Goal Factor:ten floorface	Met all training requirements	New	In Progress	<input type="radio"/>	<input type="radio"/>

Figure 2-8. Performance Approval Worksheet




- For a description of the fields on this page or for related tasks, click the (Help icon) provided in the right-hand corner of the Self Service page.

Tasks

Managing Performance Review Approval Tasks

Viewing and Printing Performance Approval Worksheets

Processing Performance Review Approval Tasks

2. Enter any comments into the **Workflow Comments** field. Workflow is the approval and notification routing for an event. Comments will be viewable by all approvers, as well as through Approval History.
 -  To view employee performance review detail, click the underlined **Employee Name**. The View Employee Performance Review Form displays (see [Chapter 5, "Managing Performance Reviews"](#) for additional details). Click the **View Performance History** link to access the Employee Performance History. Click **Cancel** to navigate back to the Performance Approval Worksheet. You can also access Employee Performance History through the Manager tab's Performance History task.
3. To approve a task, select the corresponding **Approve** option for the task.
 -  You can also approve all the performance reviews listed in your Performance Approval Worksheet by selecting **Approve All**.
4. To reject a task, select the corresponding **Reject** option for the task.
 -  You can also reject all the performance reviews listed in your Performance Approval Worksheet by selecting **Reject All**.
5. Click **Submit**. You are returned to the refreshed Approvals page, which displays a message indicating who this task has been sent to. The processed approval task is removed from the Approvals page.



End of procedure

You have completed viewing, printing, and processing performance review tasks sent to you for approval.

Processing Job Action Approval Tasks

You will only have access to the work event approval tasks if you are an approver. Work events include:

- New Hires
- Rehires
- Changing an employee's job status
- Transferring employees
- Changing an employee's job and salary information
- Changing an employee's employment status
- Performing a Comprehensive Employment Change

 For complete details on initiating work events, see [Chapter 6, "Managing Work Events."](#)

Only outstanding approval tasks are displayed. Once an approval task has been processed, it is removed from the Approvals page.

To process job actions that have been sent to you for approval, do the following:

1. From the Message Center select the **Approvals** tab (if not already selected). The list of approval tasks displays.
2. Click on the appropriate underlined job action. The corresponding job action detail page displays.
3. To approve the employee event, select **Approve**.
4. To reject the employee event, select **Reject**.

You are returned to the refreshed Approvals page, which displays a message indicating either to whom this task has been sent, or that the task is completed. The processed approval task is removed from the Approvals page.

Figure 2-9 shows an example of a Transfer page.



More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

Work Event - Transfer - Department (Woodside, Nancy)

Instructions to Approvers
The changes made by a manager are shown below. If any of the information is incorrect, reject the changes and the manager will be notified so that they can make corrections. You can also add comments, which will display in the approval history.

Comments:

Employee Name: Nancy Woodside	Status: Active
Employee ID: 222037	Job: 6602 - QA Inspector II
Hire Date: 05/21/1996	Department: 222003 - Recruitment
Service Date: 05/21/1996	Location: NORCR - Georgia
Employee Type: Hourly	Pay Group: 22D
	Payroll Department Number:

Type of Transfer: Department

Department

Enter the required information and click Submit to complete the action.

Transfer Date: 05/05/2009

Reason for Transfer:

Department: 0700 - Operations - Midwest Region

Location: DAKTO - HSC Midwest

Additional Transfer Information: [Details](#)

Figure 2-9. Transfer Page, as Accessed from the Approvals Page



End of procedure

You have completed processing job actions. For more information on work events, see Chapter 6, “Managing Work Events.”

Managing Manager Event Tasks

You will only have access to the manager event approval tasks if you are an approver. Manager events include the following career and training tasks:

- Education
- Languages
- Skills
- Licence and Certifications
- Enroll Employee in Training

Only outstanding approval tasks are displayed. Once an approval task has been processed, it is removed from the Approvals page.

To process manager events that have been sent to you for approval, do the following:

1. From the Message Center, select the **Approvals** tab (if not already selected). The list of approval tasks displays, as shown in [Figure 2-1](#).



The Approvals page can also be accessed from the **Approvals** link on the Message Center at a Glance portlet.


2. Click the underlined manager event activity you want to process. The corresponding detail page displays.



If there is previous data, the history detail shows the previous data displayed and grayed above the new data.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page

Manager Event - Enroll Employee in Training (Hopkins, Gregory)

Summary of Changes

Instructions to Approvers

The changes made by an employee are shown below. If any of the information is incorrect, reject the changes and the employee will be notified so that they can make corrections. You can also add comments, which will display in the approval history.

Comments:

This page displays sessions available for the training activity selected. Click Check Prerequisites to see if there are any prerequisite requirements. Clicking Enroll box will automatically enroll you in the class or place you on a waiting list. <http://www.adp.com>

Gregory Hopkins

Activity Description: This course is designed to improve team building skills with non-management personnel.

Training Description: Team Building

Location	Start Date and Time	Duration	Availability	Enroll
Norcross Headquarters	10/14/2004 09:00	3.0	Available	<input type="checkbox"/>

Figure 2-10. Manager Event Details Accessed Through the Approvals Page

3. Enter any desired comments in the **Comments** field. Comments will be viewable by all approvers, as well as through Approval History.

4. To approve the event, select **Approve**.
5. To reject the event, select **Reject**. You are returned to the refreshed Approvals page, which displays a message indicating either who this task has been sent to, or that the task is completed. The processed approval task is removed from the Approvals page.



End of procedure

You have finished processing any manager events that have been sent to you for approval.

Managing Employee Tasks

Workflow, which is the approval and notification routing of events, may not be enabled for employee events. If approval has been enabled for an employee event, and you are an approver, you will have access to the employee event approvals.

Only outstanding approval tasks are displayed. Once an approval task has been processed, it is removed from the Approvals page.

To process employee events that have been sent to you for approval, do the following:

1. From the Message Center, select the **Approvals** tab (if not already selected). The list of approval tasks displays, as shown in [Figure 2-1](#).



The Approvals page can also be accessed from the **Approvals** link on the Message Center at a Glance portlet.

2. Click the underlined employee event activity you want to process. The corresponding detail page displays.



If there is previous data, the previous data is displayed and grayed above the new data on the detail page.

More info


For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

Figure 2-11. Employee Event Details Accessed Through the Approvals Page

3. Enter any desired comments in the **Comments** field. Comments will be viewable by all approvers, as well as through Approval History.

4. To approve the employee event, select **Approve**.
5. To reject the employee event, select **Reject**. You are returned to the refreshed Approvals page, which displays a message indicating either who this task has been sent to, or that the task is completed. The processed approval task is removed from the Approvals page.



End of procedure

You have finished processing any employee events that have been sent to you for approval.

Managing Proxy Assignments

The Proxy Assignment page displays the paths established for event proxy workflow. Workflow is the approval and notification routing of events, such as performance reviews, compensation proposals, work events, and employee events. Proxy assignment allows you to delegate alternative approval personnel in the event you are out of the office, or unable to process approvals for an extended period of time.

On any one step of an approval path, only one Manager Proxy is honored. If neither the original assignee nor the proxy assignee responds, the Default Event Proxy defined by the Portal administrator is used. When the proxy assignee approves, the system returns to the original path. This means that if subsequent steps in the path are One (n) Up, the system follows the manager hierarchy of the original assignee, not the hierarchy of the proxy.

If a proxy is not established, the default settings defined by the Portal administrator are used.

Managing proxy assignments includes the following tasks:

- [Viewing Proxy Assignments](#)
- [Defining Proxy Assignments](#)
- [Deleting a Proxy Assignment](#)

Viewing Proxy Assignments

To view your proxy assignment, do the following:

1. From the **Organization & Staffing** tab, select **Proxy Assignment**. The Proxy Assignment page displays.

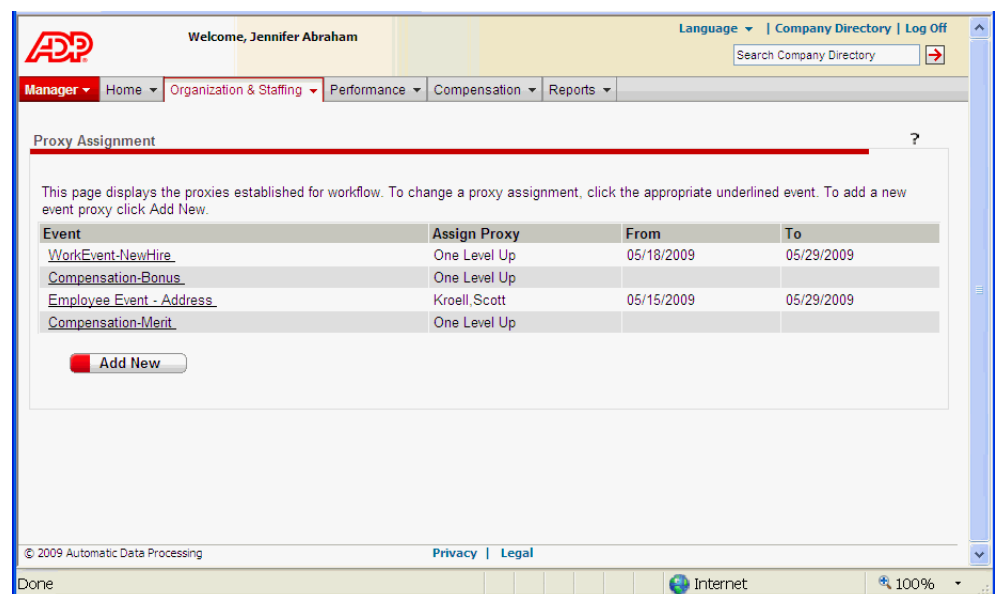


Figure 2-12. Proxy Assignment Page

Tasks

Managing Proxy Assignments

Viewing Proxy Assignments

[Defining Proxy Assignments](#)

[Deleting a Proxy Assignment](#)

More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

The Proxy Assignment page provides the following proxy summary information:

- **Event** – Displays the event name. Click the underlined link to access the Update Proxy Assignment page.
- **Assign Proxy** – Displays the proxy assignment.
- **From** – Displays the beginning of the date range to send tasks to a proxy
- **To** – Displays the end of the date range to send tasks to a proxy.

2. View your proxy setup. You can edit existing event proxies, as well as add new ones.

What's next

You have finished viewing your proxy setup. Next you will review how to add a new proxy or change an existing proxy assignment.

Defining Proxy Assignments

You can add new proxy assignments, as well as change existing proxy assignments. The Add/Updated Proxy Assignment allows you to define proxy processing by event. If a proxy is not established, the default settings defined by the Self Service administrator are used.

To define proxy assignments, do the following:

1. From the **Organization & Staffing** tab, select **Proxy Assignment**. The Proxy Assignment page displays.

Tasks

Managing Proxy Assignments


Viewing Proxy Assignments

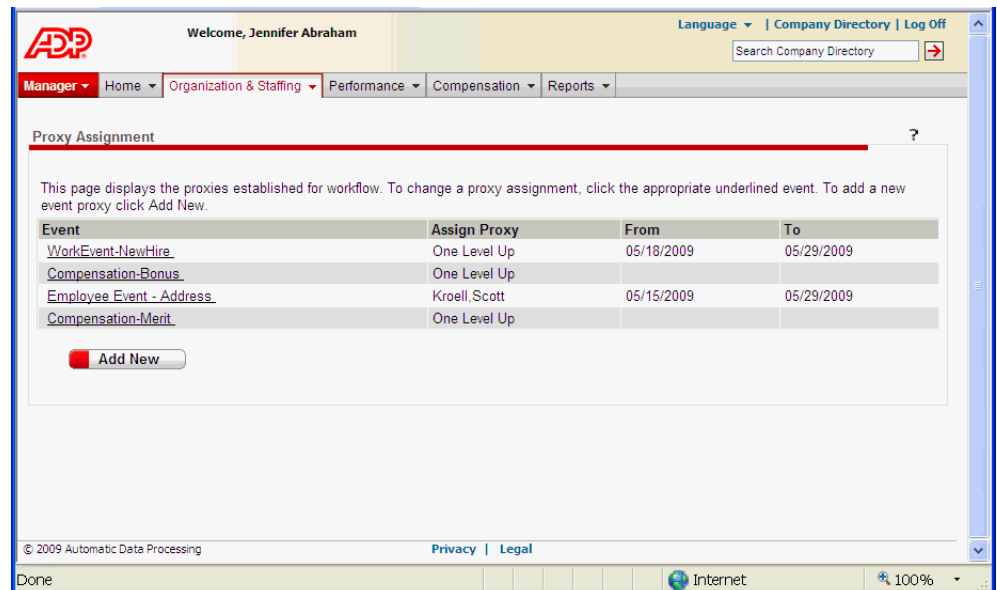
Defining Proxy Assignments

Deleting a Proxy Assignment

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



Welcome, Jennifer Abraham

Language | Company Directory | Log Off

Search Company Directory

Manager | Home | Organization & Staffing | Performance | Compensation | Reports

Proxy Assignment

This page displays the proxies established for workflow. To change a proxy assignment, click the appropriate underlined event. To add a new event proxy click Add New.

Event	Assign Proxy	From	To
<u>WorkEvent-NewHire</u>	One Level Up	05/18/2009	05/29/2009
<u>Compensation-Bonus</u>	One Level Up		
<u>Employee Event - Address</u>	Kroell, Scott	05/15/2009	05/29/2009
<u>Compensation-Merit</u>	One Level Up		

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Done | Internet | 100%

Figure 2-13. Proxy Assignment Page

2. To define your proxy, do one of the following:
 - To add a new proxy, click **Add New**. The Add Proxy Assignment page displays.
 - To change an existing proxy, click the underlined proxy you want to change. The Update Proxy Assignment page displays.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

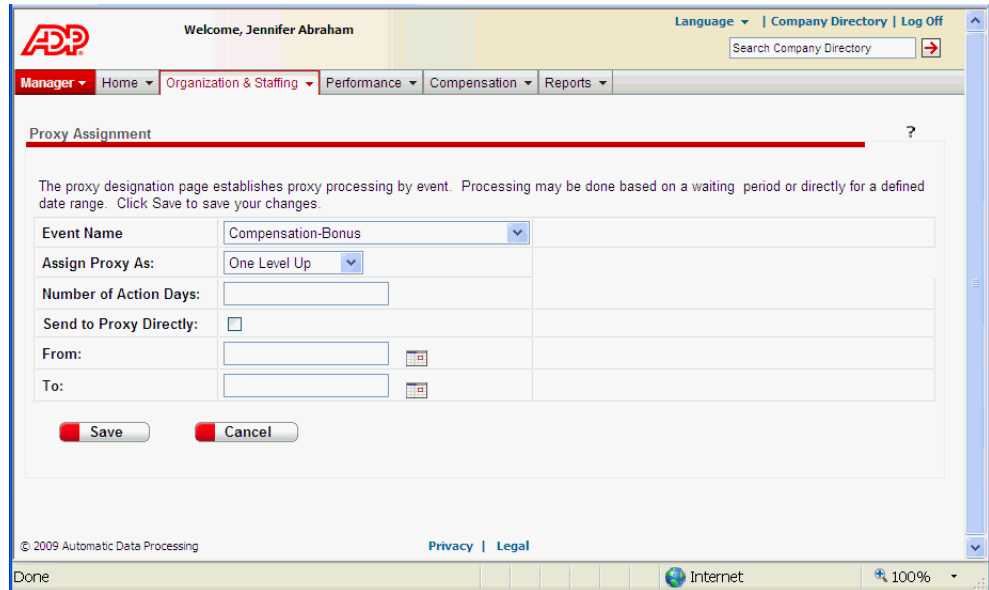


Figure 2-14. Add Proxy Assignment Page

- Only the Update Proxy Assignment page has the **Cancel** and **Delete** buttons. The **Cancel** button allows you to cancel any changes and return to the Proxy Assignment page. The **Delete** button allows you to cancel an existing proxy assignment.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

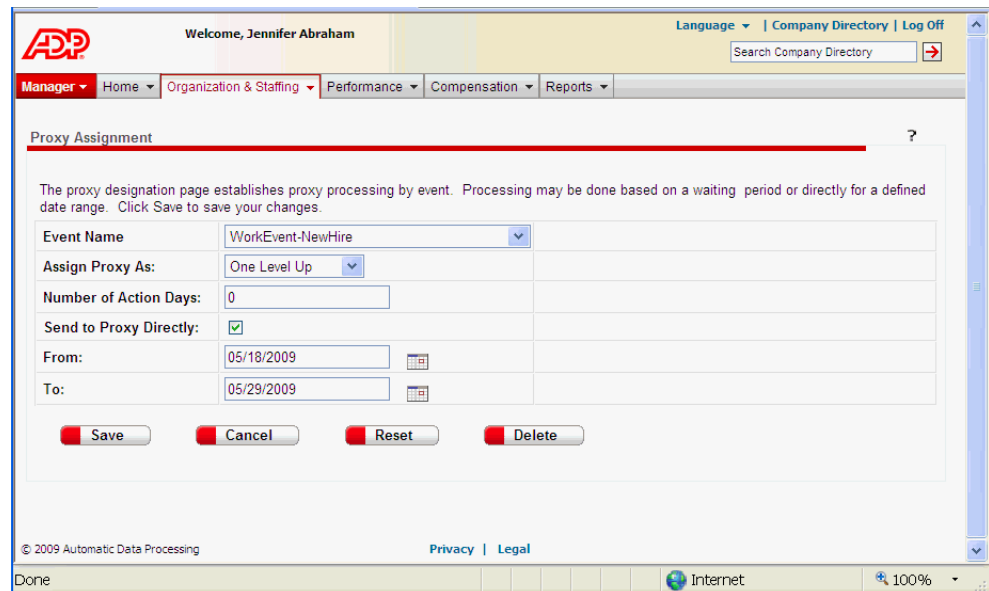






Figure 2-15. Update Proxy Assignment Page

3. From the **Event Name** field, select the event name.

4. From the **Assign Proxy As** field, select the proxy. If nothing is selected here, the default settings defined by the Portal administrator are used. Available options are:
 - **One Level Up**
 - **Workgroup** – If **Workgroup** is selected as the assigned proxy, a work group selection field displays. When this field initially displays, it will show **Select Workgroup**. This field is populated with a list of the defined work groups. Select the work group from the drop-down list.
 - **Specific Manager** – If **Specific Manager** is selected as the assigned proxy, a manager selection field and a search button display. Click **Find** for a list of all managers, or refine your search by entering the last name of a manager and then clicking **Find**. The search results display any proxy managers that met the search criteria. Click the underlined **Manager Name** to select that manager as the proxy. You are returned to the Add Proxy Assignment page.
5. In the **Number of Action Days** field, enter the number of days to wait before a task will be routed to the proxy.
 -  If the **Send to Proxy Directly** option is selected, this wait period is ignored.
 -  The maximum number of days in the proxy assignment is not absolute because the activity monitor, which triggers the proxy assignment, runs once a day at 1:00 a.m. system time. For example, if a user submits an event on Tuesday at 1:00 p.m. and the number of days before an event gets rerouted to the proxy is defined as 2, the event will not be rerouted until 1:00 a.m. on Friday morning.
6. Select **Send to Proxy Directly** if you want the task to be sent directly to the proxy for the stated time period.
 -  If the **Send to Proxy Directly** option is selected, the wait period displayed in the **Number of Action Days** field is ignored. A date range must be entered when the **Send-to-Proxy Directly** option is selected.
7. In the **From** field, enter the beginning of the date range you want to send tasks to a proxy. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
8. In the **To** field, enter the end of the date range you want to send tasks to a proxy. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
9. Click **Save** to save your changes. The new event proxy will be displayed on the Proxy Assignment page.
 -  Click **Cancel** to cancel any changes and return to the Proxy Assignment page.



What's next

You have finished defining a new proxy assignment. Next you will review how to delete an existing proxy.

Deleting a Proxy Assignment

Tasks

Managing Proxy Assignments

Viewing Proxy Assignments

Defining Proxy Assignments

Deleting a Proxy Assignment

More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

To delete an existing proxy assignment, do the following:

1. From the Proxy Assignment page (see [Figure 2-12](#) on page 2-28), click the underlined proxy you want to change. The Update Proxy Assignment page displays.

The screenshot shows the 'Update Proxy Assignment' page in the ADP system. The page title is 'Proxy Assignment'. Below the title, there is a brief description: 'The proxy designation page establishes proxy processing by event. Processing may be done based on a waiting period or directly for a defined date range. Click Save to save your changes.' The form contains the following fields:

- Event Name: WorkEvent-NewHire (dropdown menu)
- Assign Proxy As: One Level Up (dropdown menu)
- Number of Action Days: 0 (text input)
- Send to Proxy Directly:
- From: 05/18/2009 (calendar icon)
- To: 05/29/2009 (calendar icon)

At the bottom of the form, there are four buttons: Save, Cancel, Reset, and Delete. The page footer includes '© 2009 Automatic Data Processing' and 'Privacy | Legal' links. The browser's address bar shows 'Done' and 'Internet' with a 100% zoom level.

Figure 2-16. Update Proxy Assignment Page

2. Click **Delete**. A confirmation dialog displays asking if you are sure you want to delete this event proxy.
3. Click **OK** to confirm the deletion. You are returned to the refreshed Proxy Assignment page.

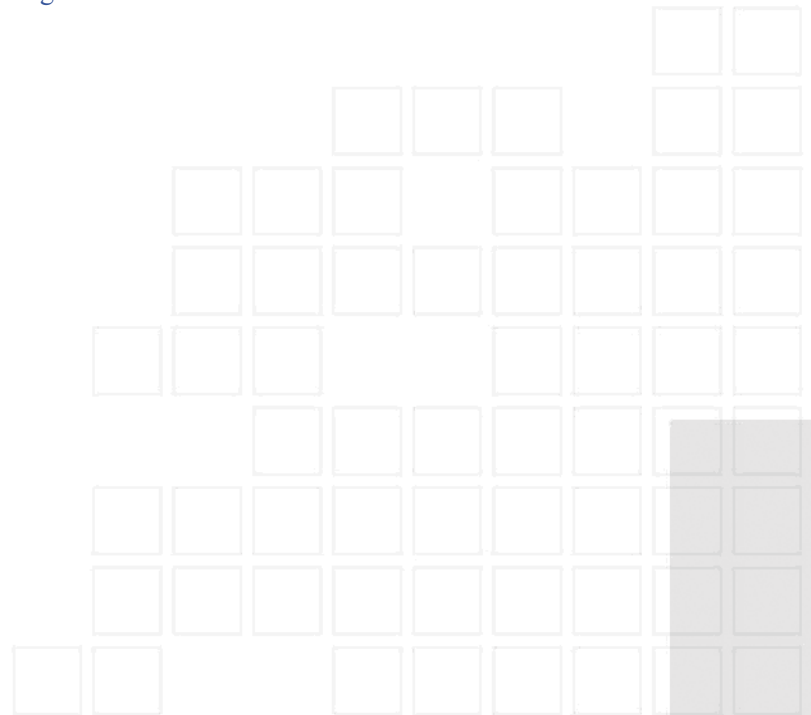


End of procedure

You have completed viewing, adding, changing, and deleting proxy assignments.

Managing Approval History

<u>PAGE</u>	<u>TOPIC</u>
3-2	Introduction
3-3	Managing Approval History
3-11	Viewing Employee Events Detail
3-14	Viewing and Printing Merit Compensation Event Detail
3-17	Viewing and Printing Bonus Compensation Event Detail
3-20	Viewing and Printing Performance Event Detail
3-22	Viewing Job Action Detail
3-24	Viewing Manager Event Detail




Introduction

The Approval History page lists all events in which you have participated. You can view the history of an active workflow path, recall an activity, or remove a completed activity from the list. You can also use the search capability to filter the list based on search criteria. Click **More Information** to display additional columns for **Effective Date** and **Worksheet ID**.

Activity types are:




- Employee Events
- iPay Events
- Merit Compensation
- Bonus Compensation
- Performance
- Work Events (Rehire, Hire, Transfer, Change Job Status, Change Job & Salary Info, Change Employment Status, Comprehensive Employment Change)
- Manager Events (Career and Training tasks)

 For Employee Event changes, if there is previous data, the event detail shows the previous data displayed and grayed above the new data.

You can sort the information displayed in ascending/descending order by clicking the up/down arrows in the column headings. A red single arrow indicates which column is being used as the sort.

Click the underlined **Activity** to view the corresponding event detail. Which activity types are displayed depends on your approval history.

From the **Actions** column, you can do the following:

- Click the View History icon () to view the history of the workflow path steps for the corresponding event.
- Click the Delete icon () for the activity history you want to delete. This removes the activity from the Approval History list.
- Click the Recall icon () to recall an event with an **In Progress** status. The refreshed Approval History page shows a new status of **Recalled**. You can only recall an event if you are the originator and the status of the event is **In Progress**.

Managing Approval History

Managing Approval History includes the following tasks:


- [Using Search Criteria to Filter Results](#)
- [Viewing Approval History](#)
- [Viewing Approval History Detail](#)
- [Deleting an Activity from Approval History](#)
- [Recalling an Event](#)

Using Search Criteria to Filter Results

Use the search criteria fields on the Approval History page to filter your results. The default view is to show all existing approval history.

To use the search fields to enter/select criteria, do the following:

1. In the **Status** field, select a status from the list. The default status is **All**.
2. In the **Employee Name** field, enter the beginning part of the employee's last name. (If you want to enter their entire name, use the format: Last Name, First Name) All alphanumeric and special characters are valid. The search is a "last name begins with" query and is not case sensitive.
3. In the **Originator Name** field, enter the beginning part of the originator's last name. (If you want to enter their entire name, use the format: Last Name, First Name) All alphanumeric and special characters are valid. The search is a "last name begins with" query and is not case sensitive.
4. In the **Worksheet ID** field, enter the worksheet ID. All alphanumeric and special characters are valid. The search is a "contains" query and is not case sensitive. When you include this field in the search criteria, the **Worksheet ID** and **Effective Date** columns display in your results. Otherwise, to view the **Worksheet ID** and/or **Effective Date** fields, you need to click the **More Information** link.

 The **Worksheet ID** field is only applicable to Performance and Compensation events.
5. In the **Activity** field, enter the name of the activity you want to filter on. The search is a "contains" query and is not case sensitive.
6. In the **Date Submitted** field, select the date submitted **From** and **To** dates. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar. If no date is selected, the results will include all records.

7. In the **Effective Date** field, select the effective date **From** and **To** dates. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar. If no date is selected, the results will include all records. When you include this field in the search criteria, the **Worksheet ID** and **Effective Date** columns display in your results. Otherwise, to view the **Worksheet ID** and/or **Effective Date** fields, you need to click the **More Information** link.
8. Click **Find**. The results matching your search criteria display. You can sort columns in ascending/descending order by clicking the up/down arrows in the column headings. A red single arrow indicates which column is being used as the sort. Use the **Rows per Page** field to specify how many rows of data you want displayed per page. Default is 10. Step through the pages either by clicking the arrows keys, or selecting a page number range.



If you change any of your search criteria, you must click **Find** again.



What's next


You have finished reviewing how to filter your approval history results. Next you will review how to view approval history.

Viewing Approval History


The Approval History page lists the approval processes in which you have participated, either as an originator or an approver. The type of tasks displayed depends on your approval history.

To view event details for the approval processes in which you have participated, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays. Use the search criteria to filter your results, if needed. See “Using Search Criteria to Filter Results” on page 3-3.

 You can sort the information displayed in ascending/descending order by clicking the up/down arrows in the column headings. A red single arrow indicates which column is being used as the sort.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

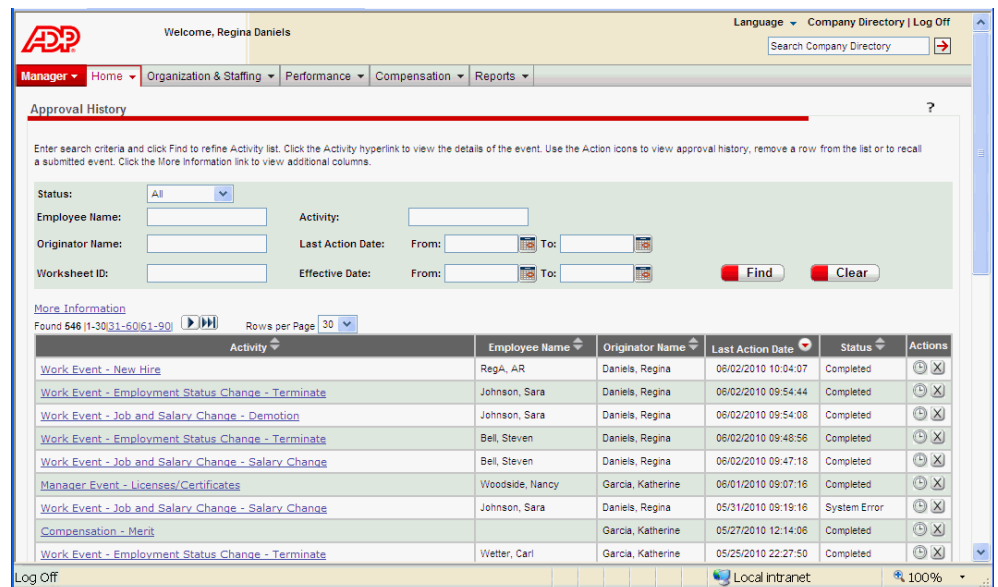


Figure 3-1. Approval History Page

The Approval History page provides you summary information for approval history events. You can view the following:

- **Activity**– Displays the name of the activity. Click on this link to access the corresponding activity detail.
- **Employee Name** – This field displays the employee name for whom the event is for. This field is not used for performance or compensation events.
- **Worksheet ID** – This field is valid for performance or compensation events only, and displays the corresponding worksheet ID.

 This column is not displayed unless **Worksheet ID** or **Effective Date** was used as a search criteria. Click the **More Information** link to display this column.

- **Originator Name** – Displays the name of the individual who originated the action.

- **Date Submitted** – Displays the date the event was submitted.
- **Effective Date** – Displays the effective date of the event. This field is only applicable to Work Events.
 - ☰ This column is not displayed unless **Worksheet ID** or **Effective Date** was used as a search criteria. Click the **More Information** link to display this column.
- **Status** – Displays the status of the activity.
- **Action** – Click the View History icon (🕒) to view approval history detail for the corresponding activity (event). Click the Delete icon (✕) to delete the selected notification. Click the Recall icon (🔙) to recall an event.

☰ You can only delete completed tasks from your approval history page.

You can only recall an event if you are the originator and the status of the event is **In Progress**. If the global email template for recall is configured by the Portal Administrator, then upon a successful recall of an event the system will send an email notification to prior approver(s) and pending approvers. If the prior approver was a member of a work group, then only the specific member of the group who approved the previous step is notified and not the whole work group. If the pending approver is a work group, then every member of the work group will get the notification.

2. Click the appropriate underlined **Activity** to view details for the selected task. The corresponding event detail page displays for the selected task. Figure 3-2 shows an example of an Employee Event detail page.

☰ For Employee Event changes, if there is previous data, the history detail shows the previous data displayed and grayed above the new data.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

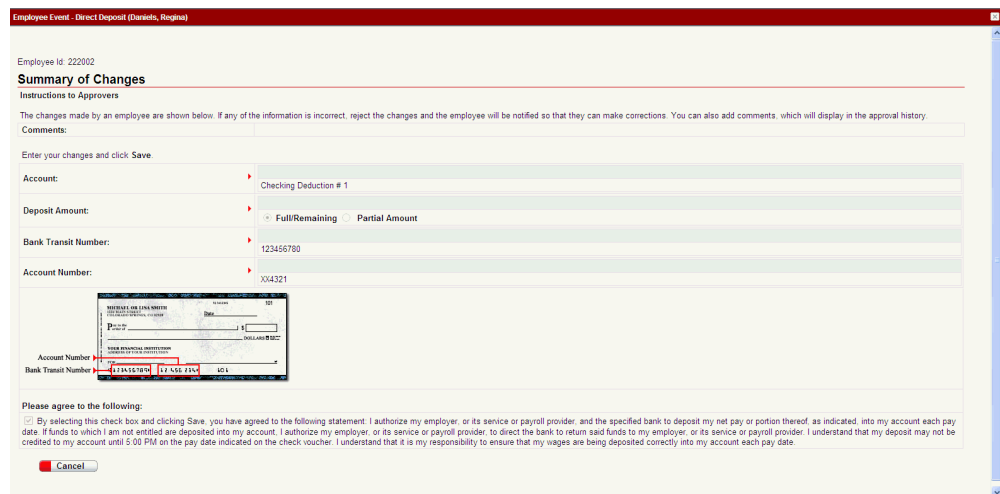


Figure 3-2. Employee Event Detail Page

3. When you are finished viewing the event detail for the selected task, click **Cancel** to return to the Approval History page.


 What's next

You have finished reviewing Approval History. Next you will view the Approval History detail.

Viewing Approval History Detail

The View Approval History Detail page displays the detailed steps of any workflow path and other important information about the event. Summary data appears at the top, followed by the step detail information. This page can be accessed through the Approval History, the Message Center Approvals, the Message Center Notifications, or Manage Approval History pages.

To view approval history detail, do the following:

1. Click the View History icon () in the **Actions** column for the particular event for which you wish to view approval history detail. The View Approval History Detail page displays.

 Details of what is displayed in the **Assigned To** column include the following:

- Names are displayed in Last Name, First Name format.
- System displays if the step was automatically skipped or automatically approved.
- If the assignee is a work group, after approval or rejection, the name of the work group member displays in the Assigned To column.
- If the action was Notified and the assignee is a work group, the work group name displays in the Assigned To column.
- If the assignee is an individual (Up level, Specific User, Transfer to Manager), the individual's name is displayed in the Assigned To column.
- If the action taken is Waiting for Approval and the assignee is a work group, the work group name displays in the Assigned To column.

- When you are finished viewing the approval history detail, click **Back** to return to the Approval History page. Figure 3-3 shows an example of approval history detail for an employee event.



More info

For a description of the fields on this page or for related tasks, click the

(Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP system interface. At the top, there is a navigation bar with 'Manager' and 'Home' selected. Below the navigation bar, the 'Approval History' page is displayed. The page title is 'Approval History' and it includes a search icon. The main content area is titled 'History' and contains a table with the following data:

Activity	Employee Name	Worksheet ID	Originator Name	Date Submitted	Effective Date	Completion Date	Workflow Path Name	Business Rule
Employee Event - Direct Deposit	Daniels, Regina		Daniels, Regina	04/28/2010 10:21:35		04/28/2010 10:23:49	MHester WkgrApp	

Below the main table is a 'Step History' table with the following data:

Assigned to	Action Taken	Date	Comments
System	Completed	04/28/2010 10:23:49	
Hester, Mark	Approved	04/28/2010 10:23:48	
Daniels, Regina	Submitted	04/28/2010 10:21:35	

At the bottom of the page, there is a 'Back' button and a status bar showing 'Local Intranet' and '100%' zoom.

Figure 3-3. View Approval History Detail for an Employee Event

The View Approval History Detail page provides you with the following information:


- **History area:**
 - **Activity** – Displays the name of the activity.
 - **Employee Name** – Displays the employee name for whom the event is for. This field is not used for performance or compensation events.
 - **Worksheet ID** – For performance or compensation events, the worksheet ID will be displayed.
 - **Originator Name** – Displays the originator of the approval process.
 - **Date Submitted** – Displays the date and time the process originated.
 - **Effective Date** – Displays the effective date and time.
 - **Completion Date** – Displays the date the process was completed, if available.
 - **Workflow Path Name** – Displays the name of the workflow routing path assigned to this event by default or by business rule exception.
 - **Business Rule** – Displays the name of the assigned business rule for the workflow, if this business rule is triggered. A trigger occurs when the exception criteria defined for the default workflow path is met. The most recent business rule that is triggered displays.
- **Step History area:**
 - **Assigned To** – Displays who the activity was assigned to.
 - **Action Taken** – Displays the action taken for the activity. Only steps in the workflow path that have been completed are listed.

- **Date** – Displays the date and time the task was originated.
- **Comments** – Displays comments entered by the associated assignee. Comments that have more than 50 characters are followed by 3 ellipses (...). Hover your cursor over the comment to view all text.

 What's next

You have finished viewing approval history detail. Next you will review deleting an activity from Approval History.


Deleting an Activity from Approval History

 You can only delete completed tasks from your approval history page.

To delete a process from your approval history, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

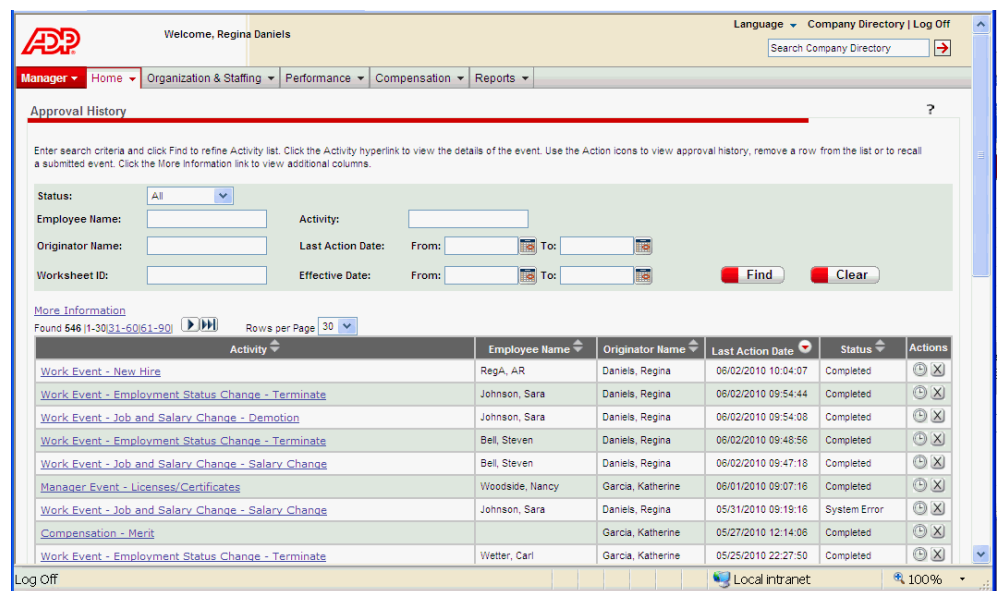




Figure 3-4. Approval History Page

2. From the **Actions** column, click the Delete icon () that corresponds to the completed activity you wish to delete. You will receive a confirmation message asking if you are sure you want to delete this history.


 When you delete a task, the task is deleted from your history only. The event will remain in the histories of other participants in the event

3. Click **OK**. The selected task is deleted and you are returned to the refreshed Approval History page.

 What's next

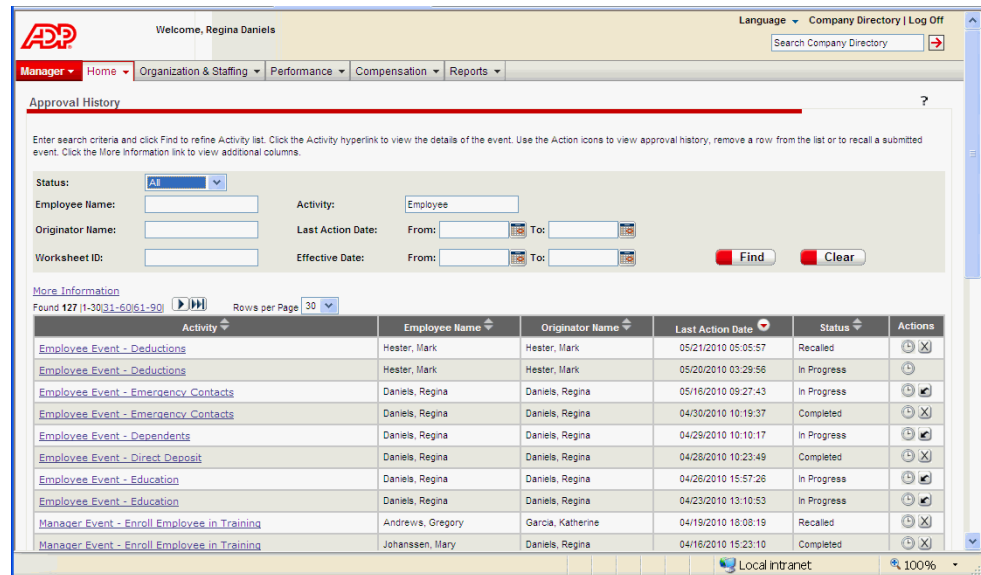
You are finished deleting an activity from Approval History. Next you will review how to recall an activity.

Recalling an Event

 You can only recall an event if you are the originator of the event and the status of the event is **In Progress**.

To recall an event, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays.
























Activity	Employee Name	Originator Name	Last Action Date	Status	Actions
Employee Event - Deductions	Hester, Mark	Hester, Mark	05/21/2010 05:05:57	Recalled	 
Employee Event - Deductions	Hester, Mark	Hester, Mark	05/20/2010 03:29:56	In Progress	
Employee Event - Emergency Contacts	Daniels, Regina	Daniels, Regina	05/16/2010 09:27:43	In Progress	 
Employee Event - Emergency Contacts	Daniels, Regina	Daniels, Regina	04/30/2010 10:19:37	Completed	 
Employee Event - Dependents	Daniels, Regina	Daniels, Regina	04/29/2010 10:10:17	In Progress	 
Employee Event - Direct Deposit	Daniels, Regina	Daniels, Regina	04/28/2010 10:23:49	Completed	 
Employee Event - Education	Daniels, Regina	Daniels, Regina	04/28/2010 15:57:26	In Progress	 
Employee Event - Education	Daniels, Regina	Daniels, Regina	04/23/2010 13:10:53	In Progress	 
Manager Event - Enroll Employee in Training	Andrews, Gregory	Garcia, Katherine	04/19/2010 18:08:19	Recalled	 
Manager Event - Enroll Employee in Training	Johanssen, Mary	Daniels, Regina	04/16/2010 15:23:10	Completed	 

Figure 3-5. Approval History Page


2. Click the Recall icon () in the **Actions** column next to the **In Progress** task you wish to recall. You will receive a confirmation message asking if you are sure you want to recall this pending event.
3. Click **OK**. You are returned to the refreshed Approval History page and the status of the event is changed to **Recalled**.

 If the global email template for recall is configured by the Portal administrator, then upon a successful recall of an event the system will send an email notification to prior approver(s) and pending approvers. If the prior approver was a member of a work group, then only the specific member of the group who approved the previous step is notified and not the whole work group. If the pending approver is a work group, then every member of the work group will get the notification.


 End of procedure

You have finished recalling an **In Progress** event, for which you are the event originator.

 More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

Viewing Employee Events Detail

 Workflow for employee events is delivered turned off, with no paths defined for the event. The Portal administrator must set up the employee events for workflow, if so desired. Workflow can be set up to either require approval, or just provide notification of the event.

The following employee events can be set up so that employees receive rejection notifications in their task list. Note that approvals are tracked through Approval History.

- Addresses
- Dependents
- Emergency Contacts
- Phone Numbers
- Direct Deposit
- Deductions
- Tax Withholding
- Pay Statement Delivery
- Annual Statement Delivery
- Pay Statement E-mail Address
- Annual Statement E-mail Address
- Flexible Spending Direct Deposit
- Flexible Spending E-mail Address
- Languages
- Education
- Skills
- Licenses and Certificates
- Enrolling in Training
- Internal Job Posting

Employees receive notification after the approval process is completed, whether approved or rejected. Notification is received through approval history or through e-mail.

To view event detail on employee events in which you have participated, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

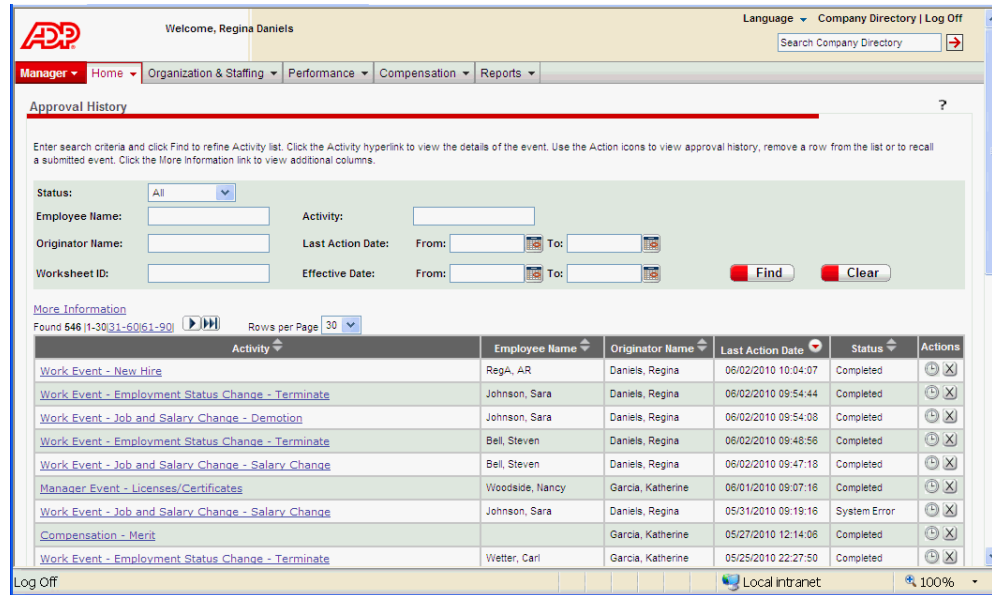


Figure 3-6. Approval History Page

2. To view event detail for an employee event, click the underlined **Activity** for which you want to view event detail. The Detail page displays.

For Employee Event changes, if there is previous data, the history detail shows the previous data displayed and grayed above the new data.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

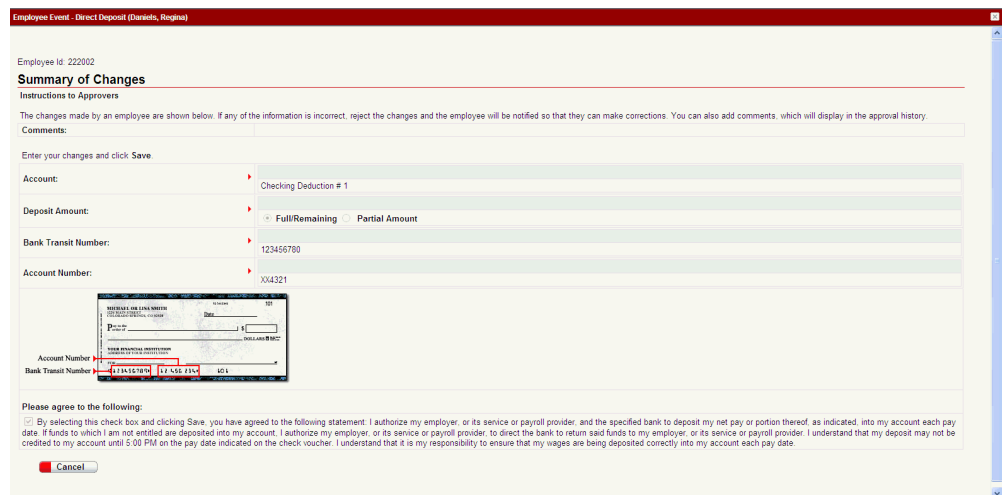



Figure 3-7. Employee Event Detail Page

3. Click **Cancel** to return to the Approval History page.

4. To view approval history detail, which includes information on who the approval task was assigned to and the action taken for a particular task, click the View History icon () in the **Actions** column. The View Approval History Detail page displays, as shown in [Figure 3-3](#) on page 3-8.
5. Click **Cancel** to return to the Approval History page.



End of procedure

You have finished viewing employee event and approval history details.

Viewing and Printing Merit Compensation Event Detail

To view and print event detail on merit compensation approval processes in which you have participated, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays.
2. To view event detail for merit compensation proposals, click the underlined Merit Compensation activity for which you want to view event detail. The Merit Compensation Event Detail page displays.

Name	Current Salary Compa Ratio	Salary Action Type Salary Reason Type	Perf Eval	Proposed Incr Pct	Proposed Incr Amt	Override Proration	New Salary Compa Ratio	Status	Action
<u>Grades</u>	16.1527	Pay Rate Change		8.07	0.98	<input type="checkbox"/>	17.1327	In	
<u>Advances</u>	1.10	Cost-of-Living					1.16	Progress	



More info





For a description of the fields on this page or for related tasks, click the

(Help icon) provided in the right-hand corner of the Self Service page

Figure 3-8. Merit Compensation Event Detail Page

The Merit Compensation Event Detail page provides the following information:

- **Manager Name** – Displays the originating manager's name.
- **Department** – Displays the originating manager's department ID.
- **Plan** – Displays the plan type. Compensation plans are defined in your HR/payroll system of record.
- **Budget Period** – Displays the budget period.
- **Budget Percent** – Displays the budget percent.
- **Budget Pool** – Displays the budget pool.
- **Budget Used** – Displays the budget used. This is the sum of all increase amounts, not including any lump sums.
- **Lump Sum Used** – Displays the sum of all lump sum amounts.

- **Variance** – Displays the budget variance.
 -  Negative numbers are displayed as red text with parentheses around the number.
 - **Workflow Comments** – Displays approval and notification routing comments, if any, that were entered on the Merit Compensation Approval Worksheet and/or the Submit Worksheet.
 - **Name** – Displays the employee's name. Click to access the Employee Compensation History page.
 - **Current Salary/Compa Ratio** – Displays the employee's current salary and compa ratio.
 - **Salary Action Type/Salary Action Reason** – Displays the salary action type (Pay Rate Change or Lump Sum) and the reason for the salary action.
 - **Perf Eval** – Displays the performance evaluation rating, if available.
 - **Proposed Incr Pct** – Displays the proposed increase percent.
 -  If you hover the mouse over the **Proposed Incr Pct** or **Proposed Incr Amt** fields, additional information for the employee is displayed. Information includes the employee name, department, merit matrix range, effective date, prorate applied at x.x%, the salary range min, mid, and max, and standard hours.
 - **Proposed Incr Amt** – Displays the proposed increase amount.
 - **Override Proration** – Indicates if proration override was selected. If selected, prorate calculations are not performed on the proposed increase percent or amount.
 -  The **Override Prorate** option may not be available. Your Human Resources Department determines whether or not managers have the ability to use the override prorate.
 - **New Salary/Compa Ratio** – Displays the new salary and compa ratio. This is automatically calculated if no lump sum is being applied.
 - **Status** – Displays the status of the proposed increase. Values are New, In Process, Rejected, and Complete.
 - **Action** – Displays the action taken on this proposed compensation. Values are Approved, Rejected, and Blank if no approval action has been taken.
3. Click **Print** to print the information on this page.
 -  To view compensation history detail for an employee, click the underlined employee name. The Employee Compensation History displays. Click **Cancel** to return to the Merit Compensation Approval History Detail page.
 4. Click **Cancel** to return to the Approval History page.

- To view approval history detail, which includes information on who the approval task was assigned to and the action taken for a particular task, click the corresponding **View** button in the **View History** column. The View Approval History Detail page displays.



More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager interface. The top navigation bar includes 'Manager', 'Home', 'Organization & Staffing', 'Performance', 'Compensation', and 'Reports'. The main content area is titled 'Approval History' and contains a table with the following data:

Assigned to	Action Taken	Date	Comments
System	Completed	05/27/2010 12:14:06	
Daniels, Regina	Notified	05/27/2010 12:14:06	
Garcia, Katherine	Submitted	05/27/2010 12:14:05	

Below the table is a 'Back' button. The page also includes a 'History' section with details such as Activity (Compensation - Merit), Employee Name, Worksheet ID (MC1), Originator Name (Garcia, Katherine), Date Submitted (05/27/2010 12:14:05), Effective Date, Completion Date (05/27/2010 12:14:06), and Workflow Path Name (1 Up Notification).

Figure 3-9. View Approval History Detail for a Merit Compensation Event

- Click **Cancel** to return to the Approval History page.



End of procedure

You have finished viewing merit compensation event and approval history details.

Viewing and Printing Bonus Compensation Event Detail

The Bonus Compensation Event Detail page displays the bonus compensation details for the compensation manager's direct reports. To view and print event detail on bonus compensation approval processes in which you have participated, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays.
2. To view approval history detail for bonus compensation proposals, click the underlined Bonus Compensation activity for which you want to view event detail. The Bonus Compensation Event Detail page displays.



More info





For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

Figure 3-10. Bonus Compensation Event Detail Page


The Bonus Compensation Event Detail page provides the following information:

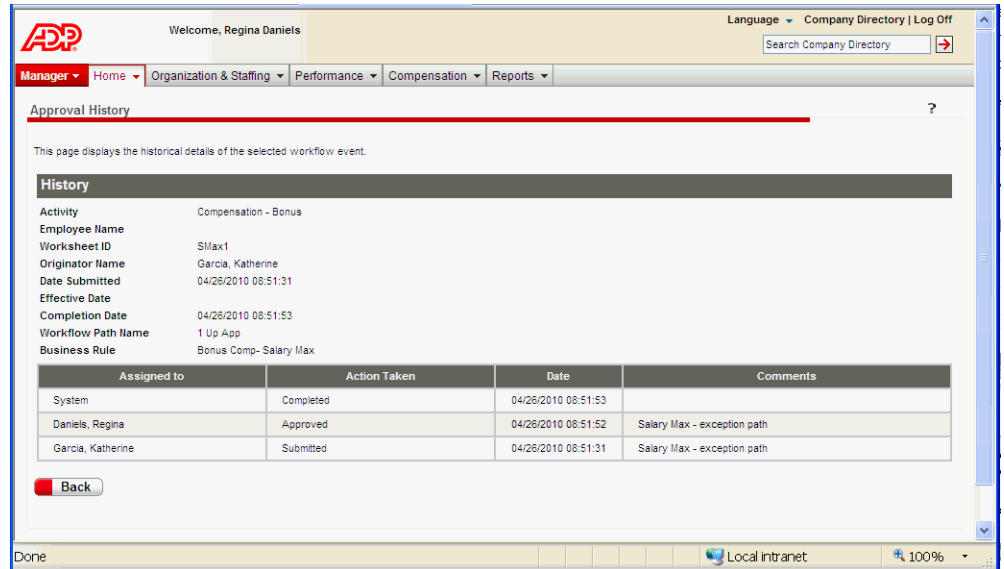
- **Manager Name** – Displays the originating manager's name.
- **Department** – Displays the originating manager's department ID.
- **Bonus Plan** – Displays the plan type. Compensation plans are defined in your HR/payroll system of record.
- **Budget Period** – Displays the budget period.
- **Budget Percent** – Displays the budget percent. If there is no budget, this field will be blank.
- **Budget Pool** – Displays the budget pool. If there is no budget, this field will be blank.
- **Budget Used** – Displays the budget used. This is the sum of all increase amounts, not including any lump sums.

- **Comments** – Displays approval and notification routing comments, if any, that were entered on the Bonus Compensation Approval Worksheet and/or the Submit Worksheet.
 - **Name** – Displays the employee's name. Click to access the Employee Compensation History page.
 - **Salary Amount** – Displays the employee's current salary.
 - **Salary Comp** – Displays the employee's current salary compa ratio.
 - **Salary Grade Min/Mid/Max** – Displays the employee's salary grade minimum/mid-point/maximum.
 - **Perf Eval** – Displays the performance evaluation rating, if available.
 - **Bonus Percent** – Displays the proposed increase percent.
 -  If you hover the mouse over the **Bonus Percent** and **Bonus Amount** fields, additional information for the employee is displayed. Information includes the employee name, department, effective date, prorate applied at x.x%, and the performance evaluation rating.
 - **Bonus Amount** – Displays the proposed increase amount.
 - **Override Proration** – Indicates if proration override was selected. If selected, prorate calculations are not performed on the proposed increase percent or amount.
 -  The **Override Prorate** option may not be available. Your Human Resources Department determines whether or not managers have the ability to use the override prorate.
 - **Status** – Displays the status of the proposed increase. Values are New, In Process, Rejected, and Complete.
 - **Action** – Displays the action taken on this proposed compensation. Values are Approved, Rejected, and Blank if no approval action has been taken.
3. Click **Print** to print the information on this page.
 -  To view compensation history detail for an employee, click the underlined employee name. The Employee Compensation History page displays. Click **Cancel** to return to the Bonus Compensation Approval History Detail page.
 4. Click **Cancel** to return to the Approval History page.

- To view approval history detail, which includes information on who the approval task was assigned to and the action taken for a particular task, click the View History icon (🕒) in the **Actions** column. The View Approval History Detail page displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager interface. The user is Regina Daniels. The page title is 'Approval History'. Below the title, there is a 'History' section with the following details:

- Activity: Compensation - Bonus
- Employee Name: SMax1
- Worksheet ID: SMax1
- Originator Name: Garcia, Katherine
- Date Submitted: 04/26/2010 08:51:31
- Effective Date: 04/26/2010 08:51:53
- Completion Date: 04/26/2010 08:51:53
- Workflow Path Name: 1 Up App
- Business Rule: Bonus Comp- Salary Max

Below the details is a table showing the approval history:

Assigned to	Action Taken	Date	Comments
System	Completed	04/26/2010 08:51:53	
Daniels, Regina	Approved	04/26/2010 08:51:52	Salary Max - exception path
Garcia, Katherine	Submitted	04/26/2010 08:51:31	Salary Max - exception path

At the bottom of the table, there is a 'Back' button.

Figure 3-11. View Approval History Detail for a Bonus Compensation Event

- Click **Cancel** to return to the Approval History page.



End of procedure

You have finished viewing bonus compensation event and approval history details.

Viewing and Printing Performance Event Detail

The Performance Event Detail page displays the performance review details for your direct reports. To view and print event detail on performance approval processes in which you have participated, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays, as shown in [Figure 3-1](#).
2. To view approval history detail for performance reviews, click the underlined Performance activity for which you want to view approval history detail. The Performance Event Detail page displays.

Performance

Reviewing Manager : Katherine Garcia
 Performance Plan: GR1
 Review Type: Goal Review
 Workflow Comments:

Employee Name	Review Date	Hire Date	Employee Status	Job Title	Template	Overall Rating	Overall Goal	Status
<u>Barry Redmon</u>	05/10/2010	03/22/2010	Active	Tax Accountant	Headface Goal Review Regress		Expd Prog	In Progress





More info

For a description of the fields on this page or for related tasks, click the (Help icon) provided in the right-hand corner of the Self Service page


Figure 3-12. Performance Event Detail Page

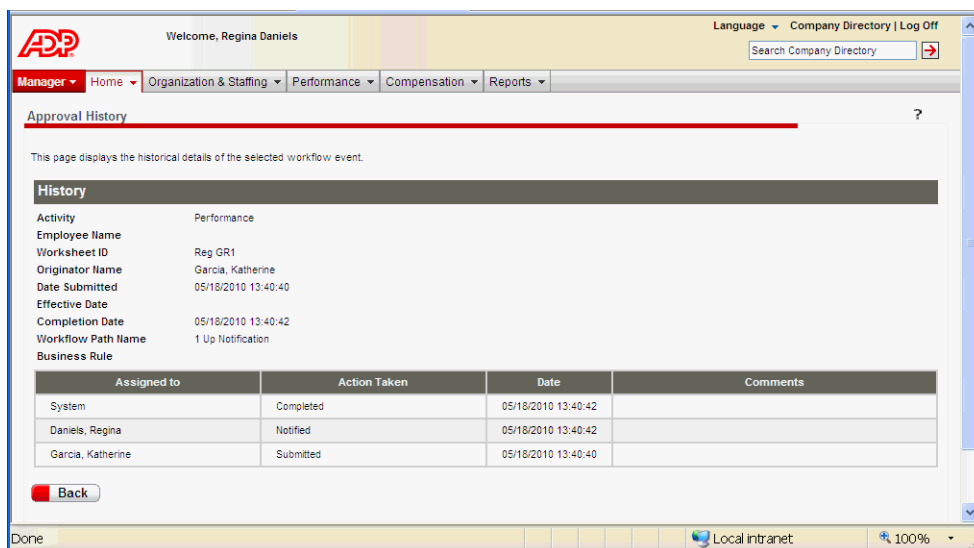
The Performance Event Detail page provides the following information:

- **Reviewing Manager** – Displays the reviewing manager's name.
- **Performance Plan** – Displays the name of the performance plan. Performance plans are defined in your HR/payroll system of record.
- **Review Type** – Displays the type of review.
- **Workflow Comments** – Displays approval and notification routing comments, if any, that were entered on the Performance Approval Worksheet and/or the Submit Worksheet.
- **Employee Name** – Displays the employee's name. Click the underlined employee name to view the selected employee's review detail from the View Employee Performance Review Form.
- **Review Date** – Displays the employee's review date.
- **Hire Date** – Displays the employee's hire date.
- **Employee Status** – Displays the employee's status.

- **Job Title** – Displays the employee's job title.
 - **Template** – Displays the name of the template used for the employee's review.
 - **Overall Rating** – Displays the employee's overall performance rating from the View Employee Performance Review Form, if applicable.
 - **Overall Goal** – Displays the employee's overall goal rating from the View Employee Performance Review Form, if applicable.
 - **Status** – Displays the status of the review. Values are New, In Process, Rejected, and Complete.
3. Click **Print** to print the information on this page.
 -  To view employee performance review detail, click the employee's name. The View Employee Performance Review Form displays. Click the **View Performance History** link to access the Employee Performance History. Click **Cancel** to navigate back to the Performance Approval History Detail page.
 4. Click **Cancel** to return to the Approval History page.
 5. To view approval history detail, which includes information on who the approval task was assigned to and the action taken for a particular task, click the View History icon () in the **Actions** column. The View Approval History Detail page displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



Approval History

This page displays the historical details of the selected workflow event.

History

Activity	Performance
Employee Name	
Worksheet ID	Reg GR1
Originator Name	Garcia, Katherine
Date Submitted	05/18/2010 13:40:40
Effective Date	
Completion Date	05/18/2010 13:40:42
Workflow Path Name	1 Up Notification
Business Rule	

Assigned to	Action Taken	Date	Comments
System	Completed	05/18/2010 13:40:42	
Daniels, Regina	Notified	05/18/2010 13:40:42	
Garcia, Katherine	Submitted	05/18/2010 13:40:40	




Figure 3-13. View Approval History Detail for a Performance Event

6. Click **Cancel** to return to the Approval History page.



End of procedure

You have finished viewing performance event and approval history details.

Viewing Job Action Detail


Job actions include:

- New Hires
- Rehires
- Changing an employee's job status
- Transferring employees
- Changing an employee's job and salary information
- Changing an employee's employment status


 For complete details on initiating work events, see [Chapter 6, "Managing Work Events."](#)

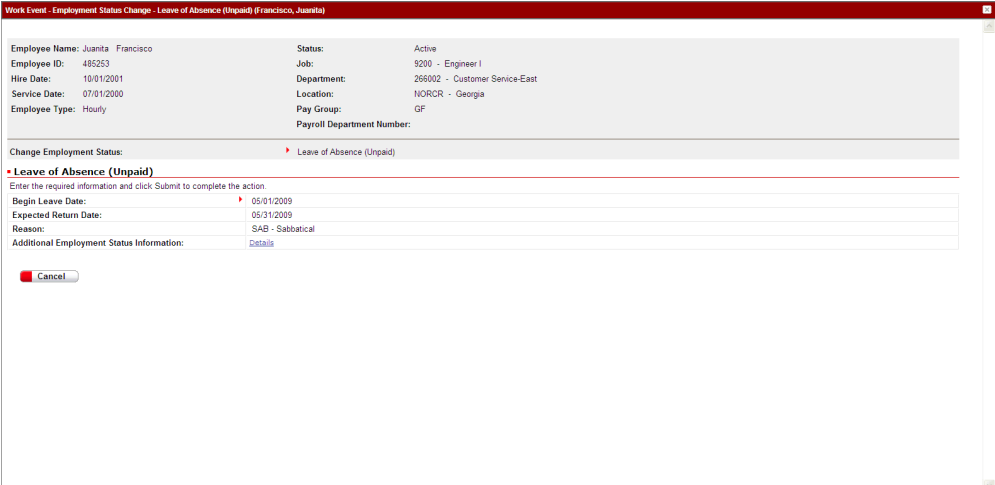
To view event detail for job action approvals in which you have participated, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays.
2. Click the underlined job action activity for which you want to view event detail. The respective page displays.

 When accessed from Managing Work Events, this page is "active." When accessed from the Approval History, the fields on this page are display only.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



Work Event - Employment Status Change - Leave of Absence (Unpaid) (Francisco, Juanita)

Employee Name:	Juanita Francisco	Status:	Active
Employee ID:	485253	Job:	9200 - Engineer I
Hire Date:	10/01/2001	Department:	256502 - Customer Service-East
Service Date:	07/01/2000	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	GF
		Payroll Department Number:	

Change Employment Status: Leave of Absence (Unpaid)

Leave of Absence (Unpaid)

Enter the required information and click Submit to complete the action.


Begin Leave Date:	05/01/2009
Expected Return Date:	05/31/2009
Reason:	SAB - Sabbatical
Additional Employment Status Information:	Details

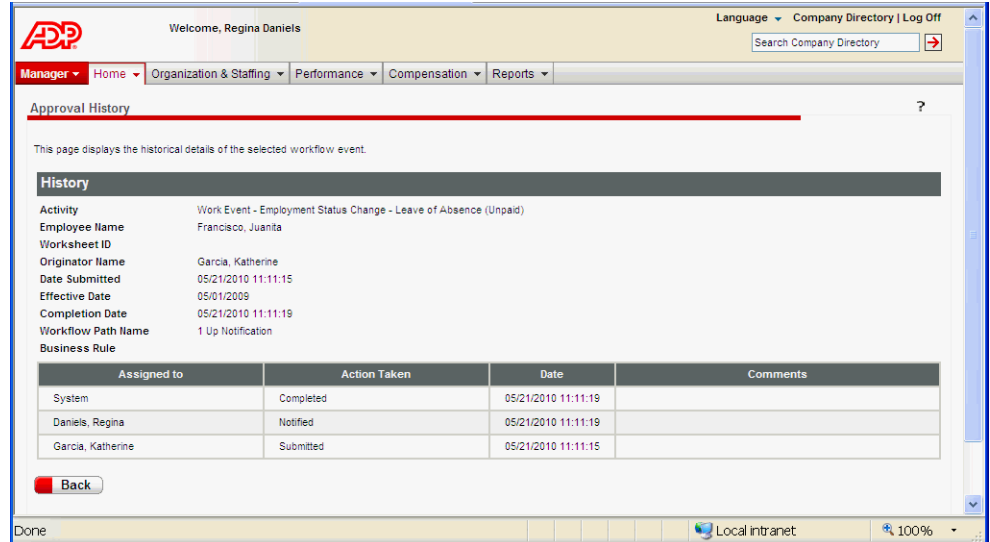
Figure 3-14. Sample Job Action Page

3. Click **Cancel** to return to the Approval History page.

- To view approval history detail, which includes information on who the approval task was assigned to and the action taken for a particular task, click the View History icon (🕒) in the **Actions** column. The View Approval History Detail page displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager's Guide interface. The top navigation bar includes 'Manager', 'Home', 'Organization & Staffing', 'Performance', 'Compensation', and 'Reports'. The main content area is titled 'Approval History' and contains a 'History' section with the following details:

- Activity: Work Event - Employment Status Change - Leave of Absence (Unpaid)
- Employee Name: Francisco, Juanita
- Worksheet ID: [blank]
- Originator Name: Garcia, Katherine
- Date Submitted: 05/21/2010 11:11:15
- Effective Date: 05/01/2009
- Completion Date: 05/21/2010 11:11:19
- Workflow Path Name: 1 Up Notification
- Business Rule: [blank]

Below the details is a table showing the approval history:

Assigned to	Action Taken	Date	Comments
System	Completed	05/21/2010 11:11:19	
Daniels, Regina	Notified	05/21/2010 11:11:19	
Garcia, Katherine	Submitted	05/21/2010 11:11:15	

A 'Back' button is located at the bottom left of the page.

Figure 3-15. Example View Approval History Detail for a Job Action

- Click **Cancel** to return to the Approval History page.




End of procedure

You have finished viewing event and approval history details for job actions.


Viewing Manager Event Detail

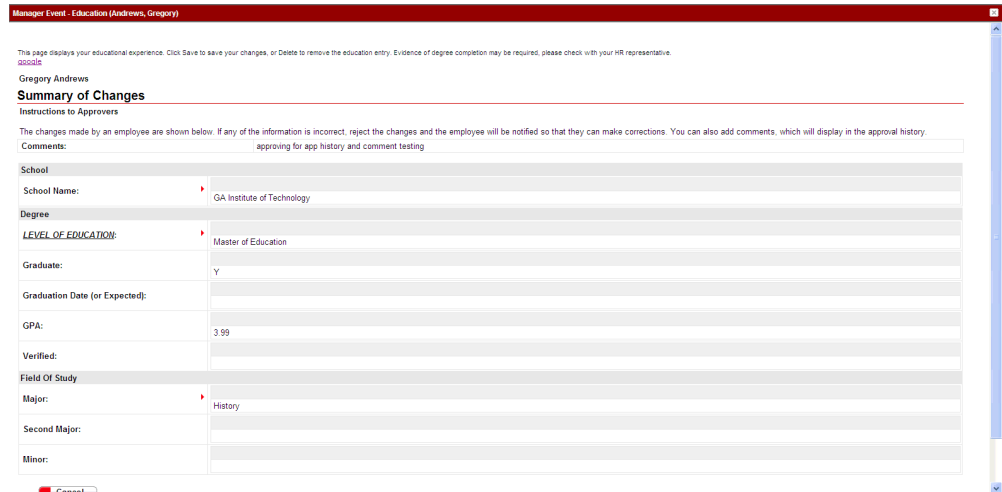
To view and print details for Manager events (updating employee career information or training) approvals in which you have participated, do the following:

1. From the **Home** tab, select **Approval History**. The Approval History page displays.
2. To view event detail, click the underlined activity for which you want to view event detail.

 For Manager Event changes, the history detail shows the previous data displayed and grayed above the new data.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



Manager Event - Education (Andrews, Gregory)

This page displays your educational experience. Click Save to save your changes, or Delete to remove the education entry. Evidence of degree completion may be required, please check with your HR representative.

Gregory Andrews

Summary of Changes

Instructions to Approver

The changes made by an employee are shown below. If any of the information is incorrect, reject the changes and the employee will be notified so that they can make corrections. You can also add comments, which will display in the approval history.


Comments: approving for app history and comment testing

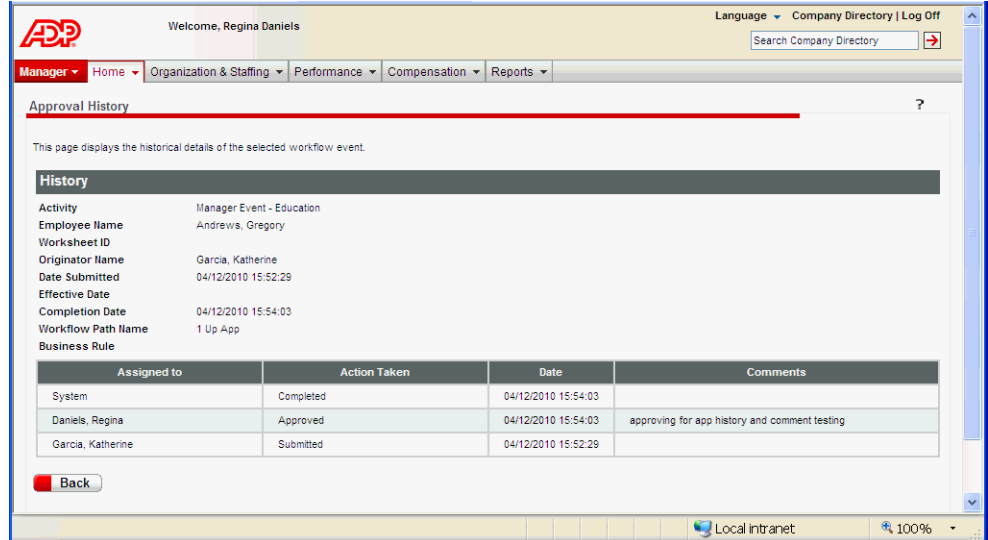
School	
School Name:	GA Institute of Technology
Degree	
LEVEL OF EDUCATION:	Master of Education
Graduate:	Y
Graduation Date (or Expected):	
GPA:	3.99
Verified:	
Field Of Study	
Major:	History
Second Major:	
Minor:	

Figure 3-16. Manager Event - Languages Event Approval History

- To view approval history detail, which includes information on who the approval task was assigned to and the action taken for a particular task, click the View History icon (🕒) in the **Actions** column. The View Approval History Detail page displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager's Guide interface. The top navigation bar includes 'Manager', 'Home', 'Organization & Staffing', 'Performance', 'Compensation', and 'Reports'. The main content area is titled 'Approval History' and contains a table with the following data:

Assigned to	Action Taken	Date	Comments
System	Completed	04/12/2010 15:54:03	
Daniels, Regina	Approved	04/12/2010 15:54:03	approving for app history and comment testing
Garcia, Katherine	Submitted	04/12/2010 15:52:29	

Below the table is a 'Back' button. The page also includes a 'History' section with details such as Activity (Manager Event - Education), Employee Name (Andrews, Gregory), Originator Name (Garcia, Katherine), Date Submitted (04/12/2010 15:52:29), Effective Date, Completion Date (04/12/2010 15:54:03), Workflow Path Name (1 Up App), and Business Rule.

Figure 3-17. View Approval History Detail for a Manager Event

- Click **Cancel** to return to the Approval History page.



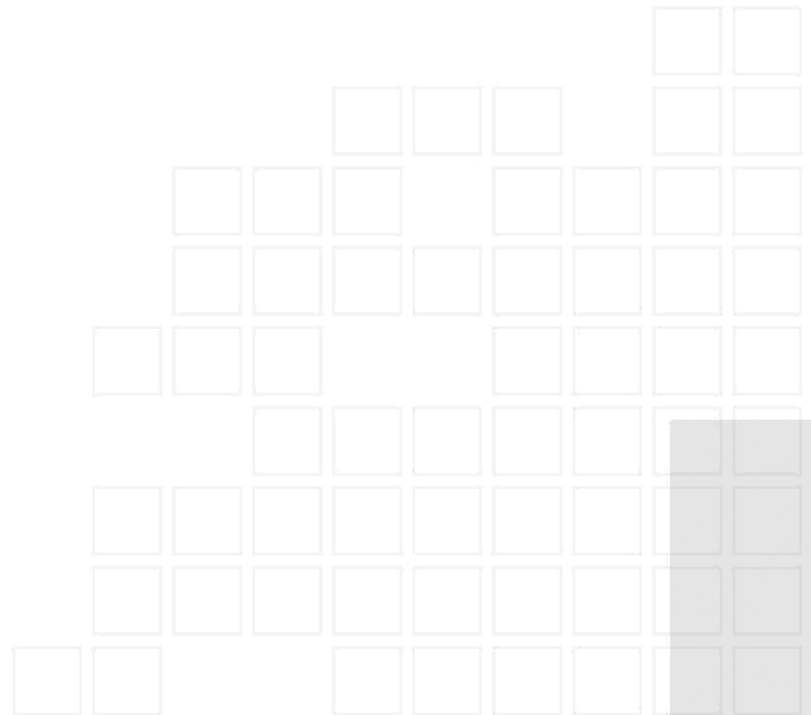
End of procedure

You have finished viewing event and approval history details for manager events, such as updating employee career information (education, language, skills, and license/certifications), enrolling an employee in training, or cancelling an employee's training session. For additional information on the managing employee career and training information, see [Chapter 7, "Managing Employee Career and Training Information."](#)

Chapter 4

Managing Compensation

<u>PAGE</u>	<u>TOPIC</u>
4-2	Introduction
4-3	Completing Compensation Reviews
4-22	Viewing and Printing Employee Compensation History



Introduction

Performance-based pay plans for merit increases and lump sum payments (merit or bonus), are defined in your HR/payroll system of record, as well as budget pool allocation, prorate schedules and merit matrixes. Plans are then assigned to employees and worksheets are created for use in ADP Self Service. Once the compensation worksheets have been created, managers can then process the proposed increases within Self Service to recommend merit or bonus actions.

Managers receive worksheets only for employees for whom they have been designated as compensation managers, through the Reports-To functionality. For more information on Reports-To, see the *Hiring, Staffing, and Job Maintenance Guide*. For more information on creating performance-based pay plans, see the *Planning, Compensation, and Compliance Guide*.

Through Self Service, compensation managers can do the following:

- Use the Compensation Worksheets to process the compensation review, including submitting the completed review to the next approving manager
- View and print compensation planning information for direct reports, as well as the direct reports of managers who report into them
- View and print consolidated budget information
- View and print employee compensation history

Once the proposed compensation increase has completed the approval process in Self Service, the employee's compensation information is updated in the HR/payroll system of record.

Completing Compensation Reviews

The Compensation Planning page is a navigational entry point for compensation planning, allowing managers to process compensation worksheets for employees who report to them. You can process compensation worksheets for your direct reports, as well as your indirect reports if your administrator has enabled the indirect report update option.

Managers can process compensation plans through either the Direct Reports page or through the Compensation Planning page.

The Compensation Worksheets are used to complete and submit bonus and/or merit increases for the compensation manager's direct reports. If you are the originating manager and the proposed increase has not already been submitted, you can enter and modify proposed increases and route for approvals. Submitted rows will be display only. If you are not the originating manager, Compensation Worksheets are display only.

Completing Compensation Reviews includes the following tasks:

- [Completing Merit Compensation Worksheets](#)
- [Completing Bonus Compensation Worksheets](#)
- [Submitting Compensation Worksheets for Approval](#)
- [Viewing and Printing Compensation Planning Summary Information](#)

Completing Merit Compensation Worksheets

- Tasks**
- Completing Compensation Reviews**
 - Completing Merit Compensation Worksheets**
 - Completing Bonus Compensation Worksheets
 - Submitting Compensation Worksheets for Approval
 - Viewing and Printing Compensation Planning Summary Information

The Merit Compensation Worksheet is used to complete and submit merit increases for the compensation manager's direct reports, as well as indirect reports if your administrator has enabled the indirect report update option.

Managers can process compensation plans through either the Direct Reports page or through the Compensation Planning page.

If you are the originating manager and the proposed increase has not already been submitted, you can enter and modify proposed increases and route for approvals. Submitted rows will be display only. If you are not the originating manager this page is display only.

The compensation worksheet allows you to apply the same merit increase amount or percent to all employees, specify the increase amount or percent per individual employee, or apply the same increase to all employees and then adjust individual employees as needed.

To complete the merit compensation worksheet, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Compensation Planning** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

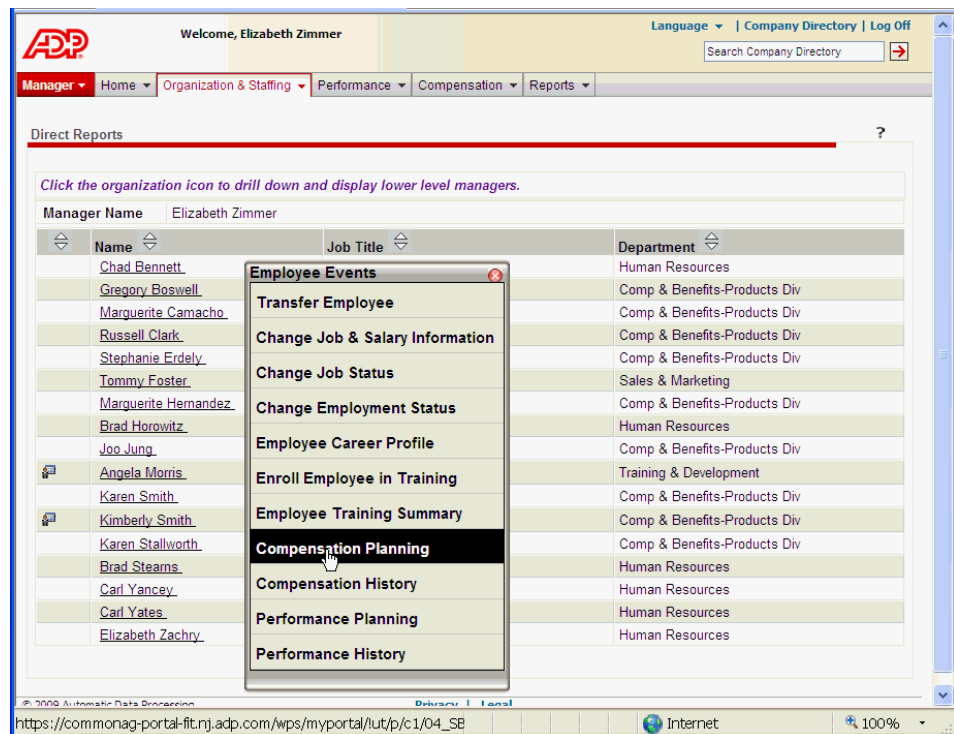





Figure 4-1. Employee Event Selection Menu with Compensation Planning Selected

- From the **Compensation** tab, select **Compensation Planning**.

The Compensation Planning page displays.


If you are a reviewing compensation manager, your compensation plan information is displayed in the top area of the page. The bottom section of the page displays separate information for any of your direct reports who are also compensation managers, if applicable.

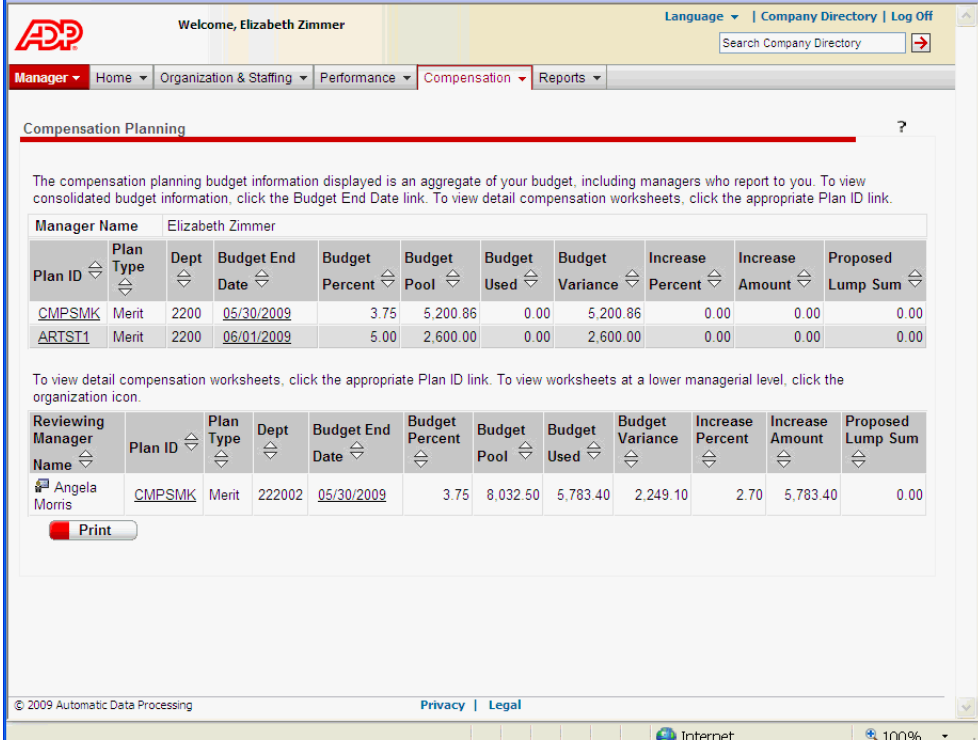
Click  (Direct Reports icon) next to the manager's name in the **Reviewing Manager Name** column to drill down to view each manager's compensation plan details. When you click , the selected manager's compensation information populates the top area of the Compensation Planning page and the selected manager's name is displayed in the **Manager Name** field. You will also see a navigation trail above the **Manager Name** field that lists the starting manager name first, then subsequent managers in the order in which they were accessed. To navigate back, click the appropriate underlined name in the navigation trail and the selected manager's compensation details display in the top area of the page.

 The header bar will display either **Compensation Planning** or **Direct Reports**, indicating from which page you accessed the Compensation Planning page.

You can sort the columns on the Compensation Planning page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



The screenshot shows the ADP Compensation Planning page for user Elizabeth Zimmer. The page title is "Compensation Planning". Below the title, there is a text block explaining that the budget information is an aggregate of the user's budget and their direct reports. It provides instructions on how to view consolidated budget information (clicking the Budget End Date link) and detail compensation worksheets (clicking the appropriate Plan ID link).

The first table displays budget information for the manager Elizabeth Zimmer:

Plan ID	Plan Type	Dept	Budget End Date	Budget Percent	Budget Pool	Budget Used	Budget Variance	Increase Percent	Increase Amount	Proposed Lump Sum
CMPSMK	Merit	2200	05/30/2009	3.75	5,200.86	0.00	5,200.86	0.00	0.00	0.00
ARTST1	Merit	2200	06/01/2009	5.00	2,600.00	0.00	2,600.00	0.00	0.00	0.00

Below this table, there is a text block explaining that clicking the appropriate Plan ID link will view detail compensation worksheets, and clicking the organization icon will view worksheets at a lower managerial level.





The second table displays budget information for the reviewing manager Angela Morris:

Reviewing Manager Name	Plan ID	Plan Type	Dept	Budget End Date	Budget Percent	Budget Pool	Budget Used	Budget Variance	Increase Percent	Increase Amount	Proposed Lump Sum
Angela Morris	CMPSMK	Merit	222002	05/30/2009	3.75	8,032.50	5,783.40	2,249.10	2.70	5,783.40	0.00


At the bottom of the table, there is a "Print" button.

Figure 4-2. Compensation Planning Page


The Compensation Planning page provides the following information:

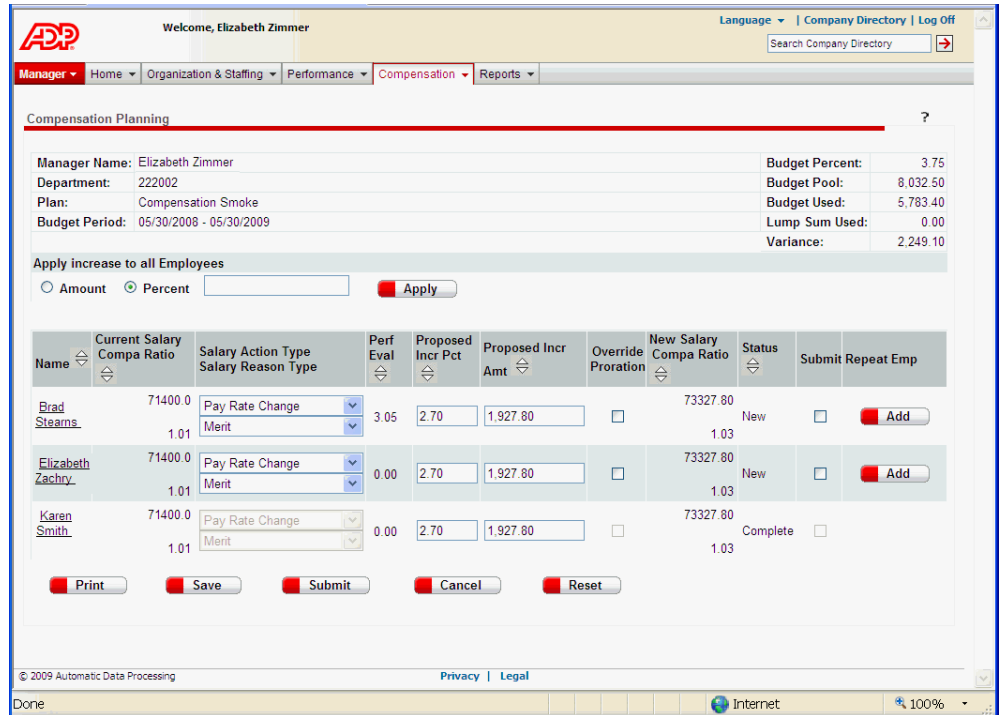
- **Navigation Trail** – Displays the direct reports navigation trail. As you click  to drill down to the next level of direct reports (if applicable), this field lists the starting manager name first, then subsequent managers in the order in which they were accessed.
 - **Manager Name** – Displays the manager name.
 - **Plan ID** – Click this link to access the Merit Compensation Worksheet or Bonus Compensation Worksheet page, depending on the plan type.
 - **Plan Type** – Displays the compensation plan type, either merit or bonus.
 - **Dept** – Displays the manager's department ID.
 - **Budget End Date** – Displays the budget end date. This displays as a hypertext link if budget roll up figures are available. Click this link to access the Consolidated Budget Pool page.
 - **Budget Percent** – Displays the budget percent.
 - **Budget Pool** – Displays the budget pool.
 - **Budget Used** – Displays the budget used.
 - **Budget Variance** – Displays the budget variance.
 -  Negative numbers are displayed as red text with parentheses around the number.
 - **Increase Percent** – Displays the increase percent.
 - **Increase Amount** – Displays the increase amount.
 - **Proposed Lump Sum** – Displays any proposed lump sum.
 - **Reviewing Manager Name** – Displays the reviewing manager name. Click  to drill down and view compensation worksheets for compensation managers that report to you, that also have compensation managers reporting to them.
 -  The **Reviewing Manager Name** field displays only if you have compensation managers that report to you that have active compensation worksheets to be processed.
2. To access merit compensation worksheet data for either your employees or managers that report to you, click the appropriate underlined **Plan ID** with a merit **Plan Type**. Plan types are defined in your HR/payroll system of record. The Merit Compensation Worksheet page displays.

You cannot make changes to any employee's proposed increase with a status of **In Process** or **Complete**.

 You can sort the columns on the Compensation Worksheet page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



ADP Welcome, Elizabeth Zimmer Language | Company Directory | Log Off

Manager: Home | Organization & Staffing | Performance | Compensation | Reports

Compensation Planning ?


Manager Name: Elizabeth Zimmer Budget Percent: 3.75
 Department: 222002 Budget Pool: 8,032.50
 Plan: Compensation Smoke Budget Used: 5,783.40
 Budget Period: 05/30/2008 - 05/30/2009 Lump Sum Used: 0.00
 Variance: 2,249.10

Apply increase to all Employees
 Amount Percent

Name	Current Salary	Compa Ratio	Salary Action Type Salary Reason Type	Perf Eval	Proposed Incr Pct	Proposed Incr Amt	Override Proration	New Salary	Compa Ratio	Status	Submit	Repeat Emp
Brad Stearns	71400.0	1.01	Pay Rate Change Merit	3.05	2.70	1,927.80	<input type="checkbox"/>	73327.80	1.03	New	<input type="checkbox"/>	<input type="button" value="Add"/>
Elizabeth Zachry	71400.0	1.01	Pay Rate Change Merit	0.00	2.70	1,927.80	<input type="checkbox"/>	73327.80	1.03	New	<input type="checkbox"/>	<input type="button" value="Add"/>
Karen Smith	71400.0	1.01	Pay Rate Change Merit	0.00	2.70	1,927.80	<input type="checkbox"/>	73327.80	1.03	Complete	<input type="checkbox"/>	


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Figure 4-3. Merit Compensation Worksheet

 If you hover the mouse over the employee's **Proposed Incr Pct** and **Proposed Incr Amt** fields, additional information for the employee is displayed. Information includes the effective date, department, merit matrix range, prorate applied at x.x%, the salary range min, mid, and max, and the standard hours.


3. If you want to apply the same merit increase amount or percent to all employees listed (will not apply to those with a status of In Progress or Complete), from the **Apply Increase to All Employees** area, select either the **Amount** or **Percent** option, enter the desired value, and click **Apply**.

The employee **Proposed Incr Pct**, **Proposed Incr Amt**, **New Salary/Compa Ratio** are automatically calculated, and the **Budget Percent**, **Budget Pool**, **Budget Used**, and **Variance** fields at the top of the worksheet are also automatically updated, as appropriate.


-  If a prorate percent exists and the **Override Prorate** option is not selected, the proposed increase amount/percent is equal to the proposed increase amount/percent multiplied by the prorate percentage. A warning message is issued informing you that a prorate applies at x%. If a merit matrix exists and the proposed increase is greater than the Salary Grade Maximum, a warning message is issued informing you that the salary exceeds the merit guidelines and has been adjusted. The **Proposed Incr Pct** and **Proposed Incr Amt** fields are adjusted accordingly.



The **Apply Merit Matrix to All Employees** button is enabled if a merit matrix exists. The merit matrix is tied to the employee's performance evaluation and their placement within a salary range. The merit matrix is set up in your HR/payroll system of record. Click this button to set proposed increase to the average merit matrix percent for all employees listed on this page.

4. If you want to specify an increase amount or percent per employee, do the following:
 - a. From the **Salary Action Type** drop down list, select the appropriate action, Pay Rate Change or Lump Sum. If Pay Rate Change is selected, chose the reason from the **Salary Action Reason** drop down list. If Lump Sum is selected, the salary reason defaults to Merit Lump Sum and is disabled.
 - b. In the employee's **Proposed Incr Pct** or **Proposed Incr Amt** field, enter the percent or amount. If you enter the proposed percent, the proposed amount will automatically be calculated and vice versa. The employee's **New Salary/Compa Ratio** fields, and the **Budget Percent**, **Budget Pool**, **Budget Used**, **Lump Sum Used**, and **Variance** fields at the top of the worksheet are also automatically updated, as appropriate.

-  If a prorate percent exists and the **Override Prorate** option is not selected, the proposed increase amount/percent is equal to the proposed increase amount/percent multiplied by the prorate percentage. A warning message is issued informing you that a prorate applies at x%. If a merit matrix exists and the proposed increase is greater than the Salary Grade Maximum, a warning message is issued informing you that the salary exceeds the merit guidelines and has been adjusted. The **Proposed Incr Pct** and **Proposed Incr Amt** fields are adjusted accordingly.

5. Select **Override Prorate** if you do not want to perform prorate calculations on the proposed merit increase.

-  The **Override Prorate** option may not be available. Your Human Resources Department determines whether or not managers have the ability to use the override prorate.

6. To add an additional row for an employee, click **Add**. Another row is added for the employee. Enter information in the fields as needed.
 -  A **Delete** button is available once you have added an additional row to an employee. If you want to delete the added row, click **Delete**.
7. Click **Save** to save your changes.
 -  Click **Print** to print the information on this page. Click **Reset** to reset the fields to their original values. Click **Cancel** to return to the Compensation Planning page.

To submit the completed review for approval, see [“Submitting Compensation Worksheets for Approval”](#) on page 4-14.



What's next

You have completed the merit compensation worksheet.

For information on submitting the completed worksheet for approval, see [“Submitting Compensation Worksheets for Approval”](#) on page 4-14.

For information on viewing and printing compensation planning information, consolidated budget information, and compensation worksheets, see [“Viewing and Printing Compensation Planning Summary Information”](#) on page 4-15.

Completing Bonus Compensation Worksheets

Tasks

Completing Compensation Reviews

Completing Merit Compensation Worksheets

Completing Bonus Compensation Worksheets

Submitting Compensation Worksheets for Approval

Viewing and Printing Compensation Planning Summary Information

The Bonus Compensation Worksheet is used to complete and submit bonus increase for the compensation manager's direct reports, as well as your indirect reports if your administrator has enabled the indirect report update option.

Managers can process compensation plans through either the Direct Reports page or through the Compensation Planning page.

If you are the originating manager and the proposed increase has not already been submitted, you can enter and modify proposed increases and route for approvals. Submitted rows will be display only. If you are not the originating manager this page is display only.

The compensation worksheet allows you to apply the same bonus increase amount or percent to all employees, specify the bonus amount or percent per individual employee, or apply the same bonus to all employees and then adjust individual employees as needed.

To complete the bonus compensation worksheet, do the following:

- Choose one of the following paths:
 - From the **Organization & Planning** tab, select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Compensation Planning** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

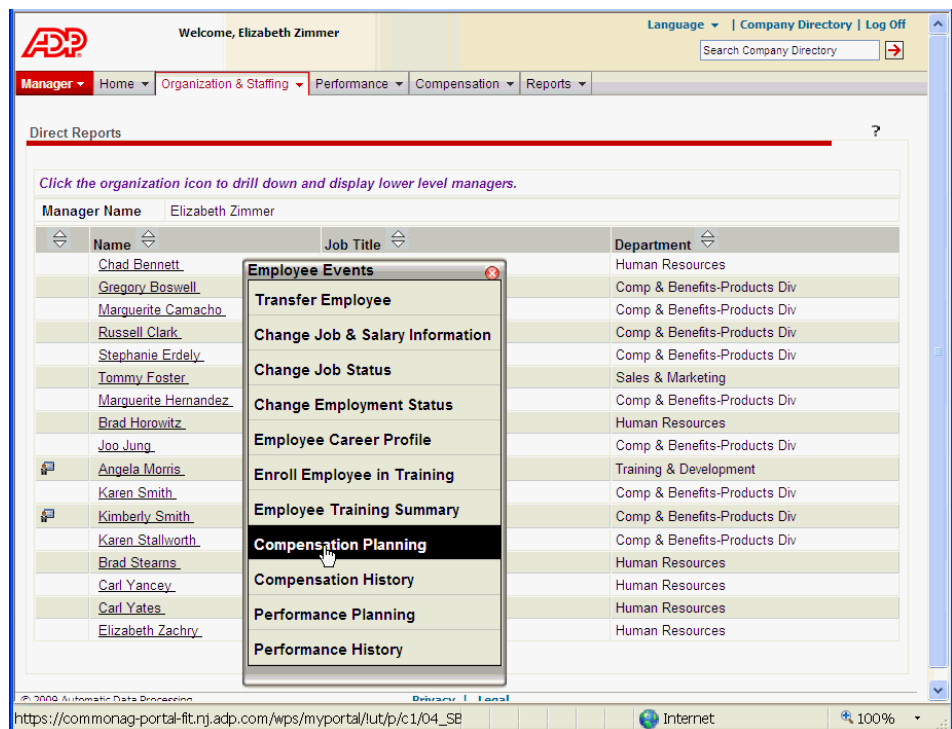





Figure 4-4. Employee Event Selection Menu with Compensation Planning Selected

- From the **Compensation** tab, select **Compensation Planning**.

The Compensation Planning page displays.


If you are a reviewing compensation manager, your compensation plan information is displayed in the top area of the page. The bottom section of the page displays separate information for any of your direct reports who are also compensation managers, if applicable.

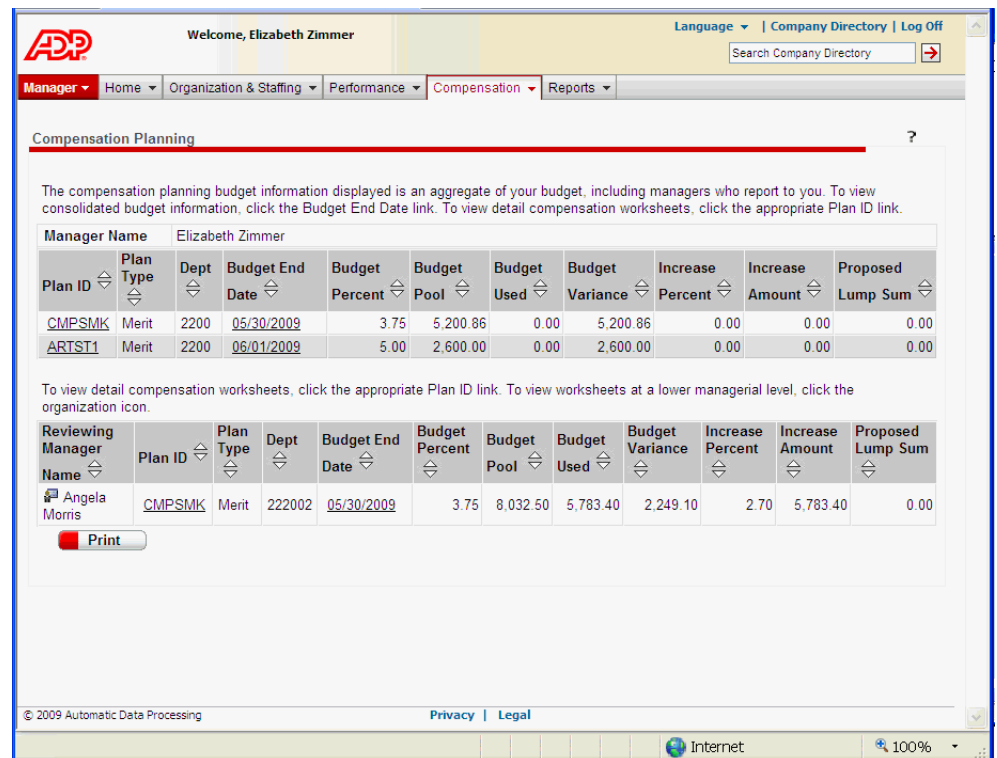
Click  (Direct Reports icon) next to the manager's name in the **Reviewing Manager Name** column to drill down to view each manager's compensation plan details. When you click , the selected manager's compensation information populates the top area of the Compensation Planning page and the selected manager's name is displayed in the **Manager Name** field. You will also see a navigation trail above the **Manager Name** field that lists the starting manager name first, then subsequent managers in the order in which they were accessed. To navigate back, click the appropriate underlined name in the navigation trail and the selected manager's compensation details display in the top area of the page.

 The header bar will display either **Compensation Planning** or **Direct Reports**, indicating from which page you accessed the Compensation Planning page.

You can sort the columns on the Compensation Planning page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).


 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



The screenshot shows the ADP Compensation Planning page for user Elizabeth Zimmer. The page title is "Compensation Planning" and it includes a navigation menu with options like Home, Organization & Staffing, Performance, Compensation, and Reports. Below the header, there is a summary of budget information for the manager and a table of direct reports.

Plan ID	Plan Type	Dept	Budget End Date	Budget Percent	Budget Pool	Budget Used	Budget Variance	Increase Percent	Increase Amount	Proposed Lump Sum
CMPMSK	Merit	2200	05/30/2009	3.75	5,200.86	0.00	5,200.86	0.00	0.00	0.00
ARTST1	Merit	2200	06/01/2009	5.00	2,600.00	0.00	2,600.00	0.00	0.00	0.00

Reviewing Manager Name	Plan ID	Plan Type	Dept	Budget End Date	Budget Percent	Budget Pool	Budget Used	Budget Variance	Increase Percent	Increase Amount	Proposed Lump Sum
 Angela Morris	CMPMSK	Merit	222002	05/30/2009	3.75	8,032.50	5,783.40	2,249.10	2.70	5,783.40	0.00


At the bottom of the screenshot, there is a "Print" button and footer information including "© 2009 Automatic Data Processing" and "Privacy | Legal".

Figure 4-5. Compensation Planning Page


 For a description of the fields on this page, see [page 4-6](#).

- To access the bonus compensation worksheet data for either your employees or managers that report to you, click the appropriate underlined **Plan ID** with a bonus **Plan Type**. Plan types are defined in your HR/payroll system of record. The Bonus Compensation Worksheet page displays.

You cannot make changes to any employee's proposed bonus with a status of **In Process** or **Complete**.

 You can sort the columns on the Compensation Worksheet page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

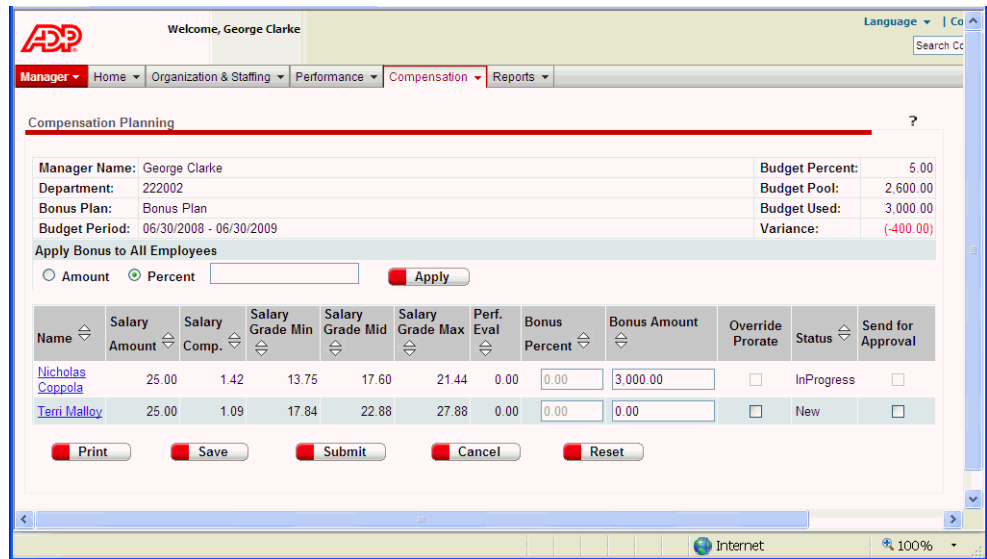






Figure 4-6. Bonus Compensation Worksheet

- If you hover the mouse over the employee's **Bonus Percent** or **Bonus Amount** fields, additional information for the employee is displayed. Information includes the effective date, department, prorate applied at x.x%, and the performance evaluation.
- If you want to apply the same bonus amount or percent to all employees listed (will not apply to those with a status of **In Process** or **Complete**), from the **Apply Increases to all Employees** area, select either the **Amount** or **Percent** option and enter the desired value. Click **Apply**.

The **Bonus Percent** and **Bonus Amount** fields for the affected employees will automatically calculate. The **Budget Percent**, **Budget Pool**, **Budget Used**, and **Variance** fields at the top of the worksheet are also automatically updated, as appropriate.

 If a prorate percent exists and the **Override Prorate** option is not selected, the proposed bonus amount/percent is equal to the proposed bonus amount/percent multiplied by the prorate percentage. A warning message is issued informing you that a prorate applies at x%.

4. If you want to specify a bonus amount or percent per employee, enter the percent or amount in the employee's **Bonus Percent** or **Bonus Amount** field. If you enter the proposed bonus percent, the proposed bonus amount will automatically be calculated and vice versa. The **Budget Percent**, **Budget Pool**, **Budget Used**, and **Variance** fields at the top of the worksheet are also automatically updated, as appropriate.
 -  If a prorate percent exists and the **Override Prorate** option is not selected, the proposed bonus amount/percent is equal to the proposed bonus amount/percent multiplied by the prorate percentage. A warning message is issued informing you that a prorate applies at x%.
5. Select **Override Prorate** if you do not want to perform prorate calculations on the proposed bonus percent or amount.
 -  The **Override Prorate** option may not be available. Your Human Resources Department determines whether or not managers have the ability to use the override prorate.
6. Click **Save** to save your changes.
 -  Click **Print** to print the information on this page. Click **Reset** to reset the fields to their original values. Click **Cancel** to return to the Compensation Planning page.

To submit the completed review for approval, see [“Submitting Compensation Worksheets for Approval”](#) on page 4-14.



What's next

You have completed the bonus compensation worksheet.

For information on submitting the completed worksheet for approval, see [“Submitting Compensation Worksheets for Approval”](#) on page 4-14.

For information on viewing and printing compensation planning information, consolidated budget information, and compensation worksheets, see [“Viewing and Printing Compensation Planning Summary Information”](#) on page 4-15.

Submitting Compensation Worksheets for Approval

Tasks

Completing Compensation Reviews

Completing Merit Compensation Worksheets

Completing Bonus Compensation Worksheets

Submitting Compensation Worksheets for Approval

Viewing and Printing Compensation Planning Summary Information

Once you have completed the Merit Compensation Worksheet and/or the Bonus Compensation Worksheet, you need to submit them for approval. To submit compensation worksheets for approval, do the following:

- From the Compensation Planning page, click the appropriate **Plan ID**. The Merit or Bonus Compensation Worksheet page displays, depending on the plan type.
 - If you want to make additional changes to the worksheet before submitting it for approval, refer to “[Completing Merit Compensation Worksheets](#)” on page 4-4 and/or “[Completing Bonus Compensation Worksheets](#)” on page 4-10.
- Select the **Submit** check box, then click **Submit**. The Submit Worksheet page displays.
 - The **Submit** check box and button are displayed only if you are the originating review manager. The approver can approve or reject the compensation review through the Merit Compensation Approval Worksheet and/or Bonus Compensation Approval Worksheet, depending on the type of compensation plan. See [Chapter 2, “Managing Approval Tasks and Notifications”](#) for more information.

The screenshot shows the ADP web interface for submitting a compensation worksheet. At the top, there's a navigation bar with 'Manager' selected, and other options like 'Home', 'Organization & Staffing', 'Performance', 'Compensation', and 'Reports'. Below the navigation bar, the page title is 'Compensation Planning'. The main content area contains a text box for 'Worksheet Identifier' and a larger text area for 'Workflow Comments'. Below these fields are two buttons: 'Save' and 'Cancel'. The footer of the page includes '© 2009 Automatic Data Processing' and 'Privacy | Legal'.


Figure 4-7. Submit Worksheet Page

- In the **Worksheet Identifier** field, enter a unique worksheet ID for the compensation proposal(s) you are submitting.
 - All reviews submitted together will be presented as a single workflow (approval/notification routing) event, identified by the worksheet ID.


More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

- In the **Workflow Comments** field, enter any comments concerning the workflow (approval and notification routing) of the compensation proposal(s).

 Comments will be viewable by all approvers.

- Click **Save**. You are returned to the Compensation Planning page and a message is displayed informing you who your request has been submitted to.

 Once you click **Save**, you cannot make any more changes to the compensation worksheet you are submitting. Click **Cancel** to cancel any changes and return to the Compensation Planning page.

The Submit Worksheet page can be accessed from the following pages: Merit Compensation Approval Worksheet; Bonus Compensation Approval Worksheet; Performance Approval Worksheet; Merit Compensation Worksheet; Bonus Compensation Worksheet; Performance Worksheet.

 **What's next**

You have finished submitting the compensation worksheet for approval.

Next you will review information on viewing and printing compensation planning information, consolidated budget information, and compensation worksheets.

Viewing and Printing Compensation Planning Summary Information

 **Tasks**

Completing Compensation Reviews

Completing Merit Compensation Worksheets

Completing Bonus Compensation Worksheets

Submitting Compensation Worksheets for Approval


Viewing and Printing Compensation Planning Summary Information

Through the Compensation Planning page, you can view and print compensation planning summary information, as well as compensation worksheets, for your direct reports and the direct reports of the managers that report into you. You can also view and print consolidated budget information.

Managers can view and print compensation worksheets through either the Direct Reports page or through the Compensation Planning page.

Viewing compensation information includes the following tasks:

- [Viewing and Printing Compensation Planning Information](#)
- [Viewing and Printing Consolidated Budget Information](#)
- [Viewing and Printing Compensation Worksheets](#)

 For information on viewing compensation history for specific employees, see [“Viewing and Printing Employee Compensation History”](#) on page 4-22.

Viewing and Printing Compensation Planning Information


If you are a reviewing compensation manager, your compensation plan information is displayed in the top area of the page. The bottom section of the page displays separate information for any of your direct reports who are also compensation managers, if applicable.

Managers can view and print compensation worksheets through either the Direct Report page or through the Compensation Planning page.

To view and print compensation planning information, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Compensation Planning** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

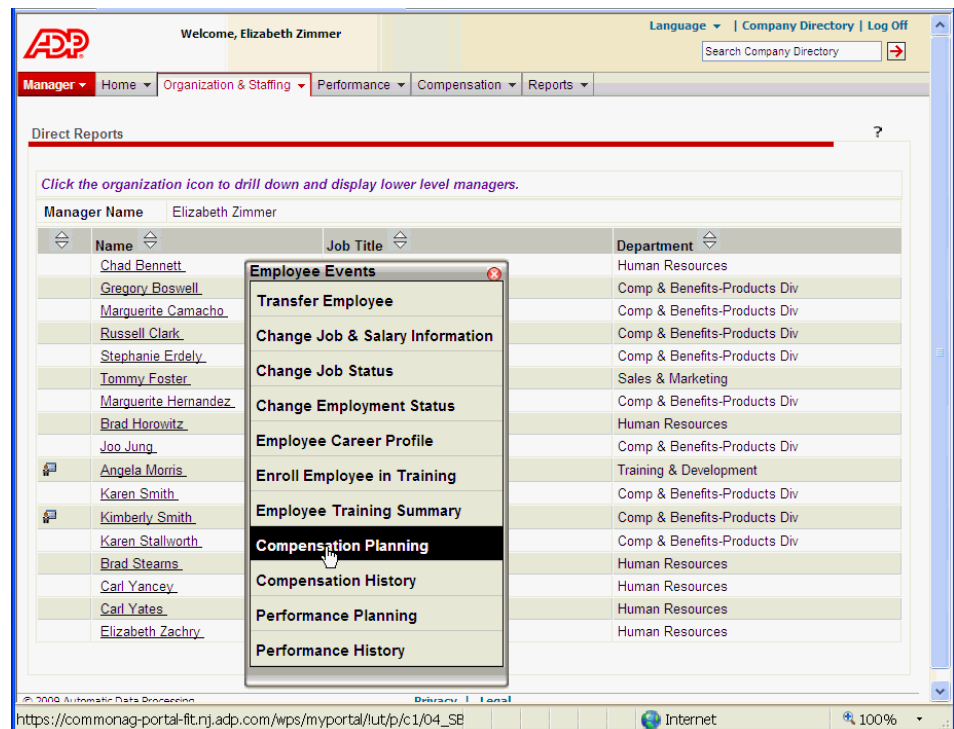



Figure 4-8. Employee Event Selection Menu with Compensation Planning Selected


- From the **Compensation** tab, select **Compensation Planning**.

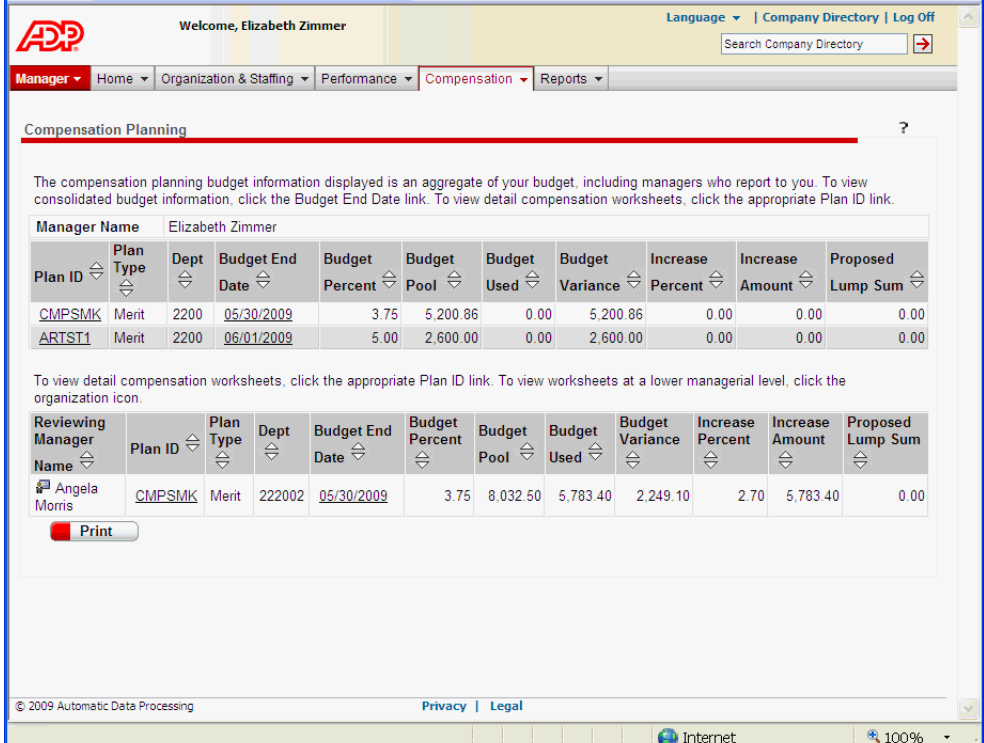
The Compensation Planning page displays.

 The header bar will display either **Compensation Planning** or **Direct Reports**, indicating from which page you accessed the Compensation Planning page.

You can sort the columns on the Compensation Planning page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

 **More info**



For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.




The screenshot shows the ADP Compensation Planning page for Elizabeth Zimmer. The page includes a navigation menu with options like Home, Organization & Staffing, Performance, Compensation, and Reports. Below the menu, there's a section titled "Compensation Planning" with a help icon. A paragraph explains that the budget information is an aggregate of the manager's budget and those of their reports. Two tables are displayed: one for the manager's budget and another for reviewing managers. The first table lists plans like CMPSMK and ARTST1 with columns for Dept, Budget End Date, Budget Percent, Budget Pool, Budget Used, Budget Variance, Increase Percent, Increase Amount, and Proposed Lump Sum. The second table lists reviewing managers like Angela Morris with similar columns. A "Print" button is located below the second table. The footer contains copyright information and links for Privacy and Legal.

Figure 4-9. Compensation Planning Page

 For a description of the fields on this page, see [page 4-6](#).

2. Click  (Direct Reports icon) next to the manager's name in the **Reviewing Manager Name** column to drill down to view each manager's compensation plan details. When you click , the selected manager's compensation information populates the top area of the Compensation Planning page and the selected manager's name is displayed in the **Manager Name** field.

 The **Reviewing Manager Name** field displays only if you have compensation managers that report to you that have active compensation worksheets to be processed.

You will also see a navigation trail above the **Manager Name** field that lists the starting manager name first, then subsequent managers in the order in which they were accessed. To navigate back, click the appropriate underlined name in the navigation trail and the selected manager's compensation details display in the top area of the page.

3. Click **Print** to print the information on this page.

 **What's next**



You have finished viewing compensation planning summary information.

To view and print consolidated budget pool information, see [“Viewing and Printing Consolidated Budget Information”](#) on page 4-19.

To view and print compensation worksheets, see [“Viewing and Printing Compensation Worksheets”](#) on page 4-20.



Viewing and Printing Consolidated Budget Information

The Consolidated Budget Pool displays the total aggregated budget amount of all managers who report to you within the defined manager hierarchy, including your budget allocation. Your personal budget figures are displayed on the Compensation Planning page and within each compensation worksheet (Merit Compensation Worksheet and Bonus Compensation Worksheet).

 If you are a reviewing manager, your compensation information is displayed in the top area of the Planning Compensation page. If compensation managers that report to you also have direct reports that are compensation managers, the  (Direct Reports icon) will be displayed next to their name in the **Reviewing Manager Name** column in the bottom area of the page.

To view and print consolidated budget pool information, do the following:

1. From the Compensation Planning page (see [Figure 4-9](#) on page 4-17), click the underlined **Budget End Date** for the budget pool you wish to view. The Consolidated Budget Pool page displays.

 To drill down and view compensation worksheet data for compensation managers who report to you (if applicable), click  next to the appropriate **Reviewing Manager Name**. The compensation information for the selected subordinate manager displays in the top area of the Compensation Planning page. To navigate back to a previous manager, click the manager's name in the navigation trail above the **Manager Name** field.

 **More info**
 For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

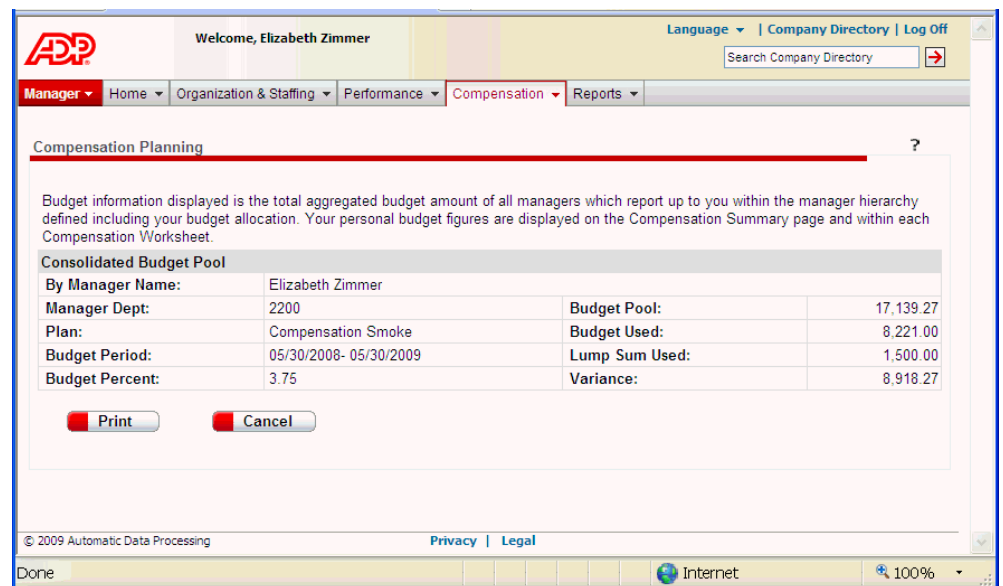



Figure 4-10. Consolidated Budget Pool Page

The Consolidated Budget Pool page provides the following information:

- **By Manager Name** – Displays the manager’s name.
- **Manager Dept** – Displays the manager’s department ID.

- **Plan** – Displays the compensation plan name. Compensation plans are defined in your HR/payroll system of record.
- **Budget Period** – Displays the budget period.
- **Budget Percent** – Displays the budget percent.
- **Budget Pool** – Displays the budget pool.
- **Budget Used** – Displays the budget used.
- **Lump Sum Used** – Displays any lump sum used.
- **Variance** – Displays the budget variance.

 Negative numbers are displayed as red text with parentheses around the number

2. Click **Print** to print the information on this page.
3. Click **Cancel** to return to the Compensation Planning page.




What's next

You have finished viewing and printing consolidated budget pool information.

To view and print compensation planning information, see “[Viewing and Printing Compensation Planning Information](#)” on page 4-16.

To view and print compensation worksheets, see “[Viewing and Printing Compensation Worksheets](#)” on page 4-20.

Viewing and Printing Compensation Worksheets


If compensation managers that report to you also have direct reports that are compensation managers, the  (Direct Reports icon) will be displayed next to their name in the Reviewing Manager Name column.

Managers can view and print compensation worksheets through either the Direct Reports page or through the Compensation Planning page.


To view and print compensation worksheets, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Compensation Planning** from the Employee Event selection menu (see [Figure 4-8](#) on page 4-16).
 - From the **Compensation** tab, select **Compensation Planning**.

The Compensation Planning page displays (see [Figure 4-9](#) on page 4-17).


2. To drill down and view compensation worksheet data for compensation managers who report to your direct report compensation managers, click  next to the appropriate **Reviewing Manager Name**. The compensation information for the selected subordinate manager displays in the top area of the Compensation Planning page.

To navigate back to a previous manager, click the manager's name in the navigation trail above the **Manager Name** field.


 The **Reviewing Manager Name** field displays only if you have compensation managers that report to you that have active compensation worksheets to be processed

3. View compensation worksheet data for either employees or managers that report to you as follows:


- a. To view merit compensation worksheet data, click the appropriate **Plan ID** with a merit **Plan Type**. Plan types are defined in your HR/payroll system of record. The Merit Compensation Worksheet displays, as shown in [Figure 4-3](#).

 For information on entering information on the Merit Compensation Worksheet, see [“Completing Merit Compensation Worksheets”](#) on page 4-4.

- b. To view bonus compensation worksheet data, click the appropriate **Plan ID** with a bonus **Plan Type**. Plan types are defined in your HR/payroll system of record. The Bonus Compensation Worksheet page displays.

 For information on entering information on the Bonus Compensation Worksheet, see [“Completing Bonus Compensation Worksheets”](#) on page 4-10.

4. Click **Print** to print the information on this page.

 To view compensation history detail for an employee, click the underlined employee name. The Employee Compensation History displays (see [“Viewing and Printing Employee Compensation History”](#) on page 4-22 for more information). Click **Cancel** to return to the Merit Compensation Worksheet.


5. Click **Cancel** to return to the Compensation Planning page.



End of procedure

You have finished viewing the compensation planning summary information and compensation worksheet for your direct reports and the direct reports of the managers that report to you, as well as consolidated budget information.

Viewing and Printing Employee Compensation History

The Compensation History page allows you to view the compensation history of your direct reports, as well as the direct reports of each of the managers reporting to you. The  (Direct Reports icon) is displayed next to the name of any of your managers who also have direct reports.


Managers can view and print employee compensation history information through either the Direct Report page or through the Compensation History page.

To view and print employee compensation history, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Compensation History** from the Employee Event selection menu.



More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

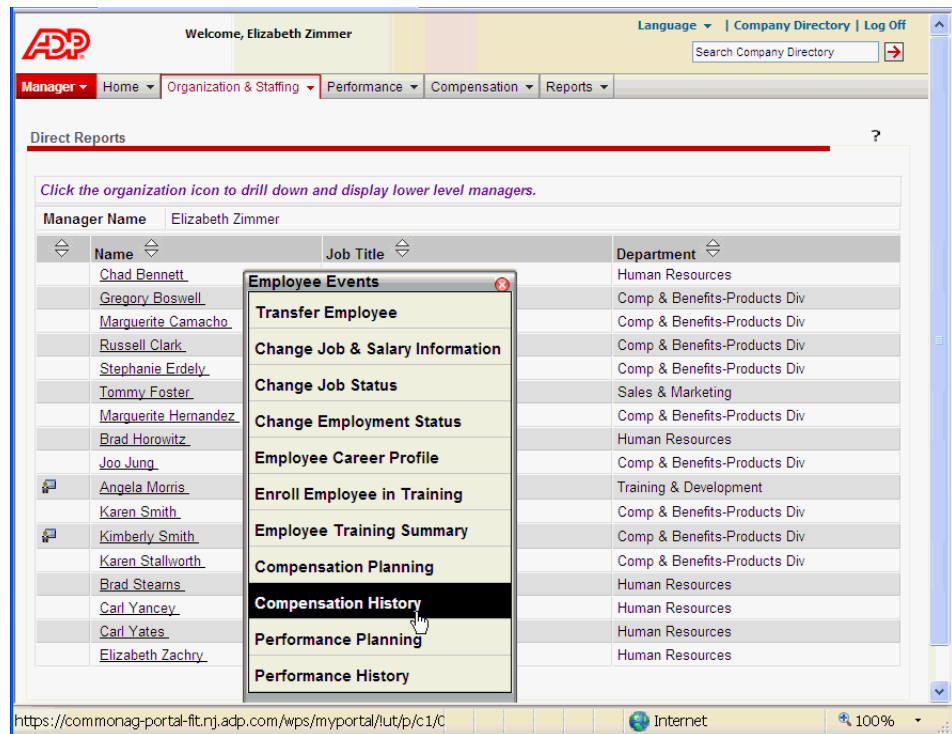





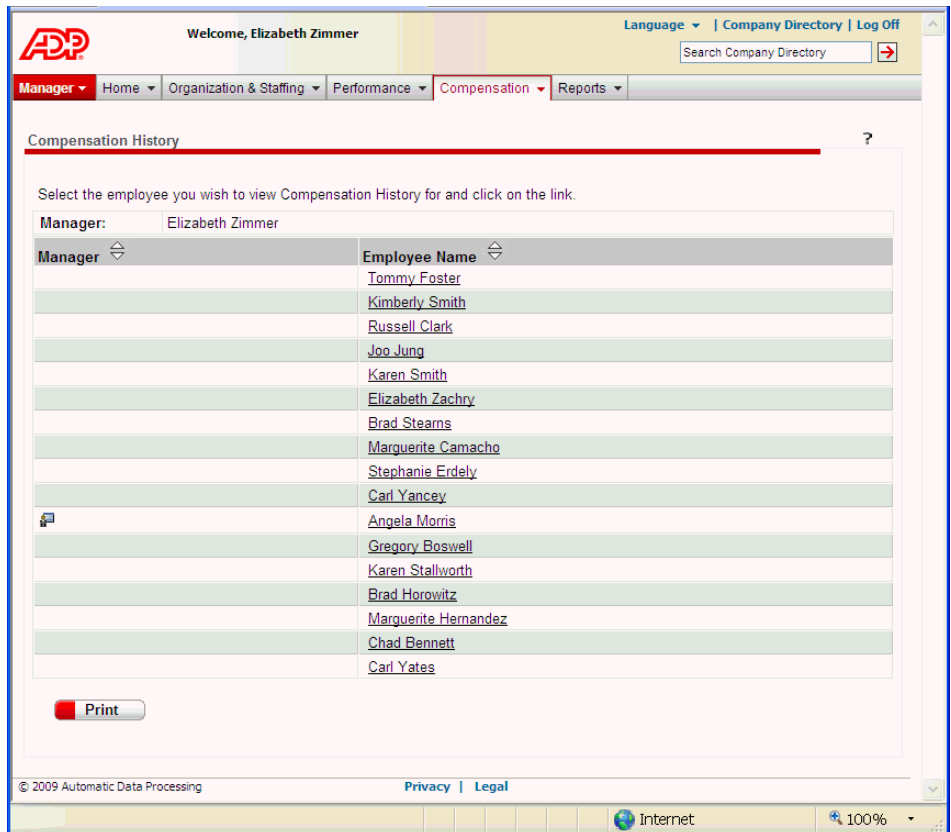
Figure 4-11. Employee Event Selection Menu with Compensation History Selected

- From the **Compensation** tab, select **Compensation History**. The Compensation History page displays. Click  to drill down to view each manager's direct reports. (To navigate back to a previous manager, click the appropriate manager name in the navigation trail above the **Manager** field.) To view compensation history for an employee, click the underlined **Employee Name**.

 You can sort the columns on the Compensation History pages in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



ADP Welcome, Elizabeth Zimmer Language | Company Directory | Log Off


Search Company Directory

Manager Home Organization & Staffing Performance Compensation Reports

Compensation History ?

Select the employee you wish to view Compensation History for and click on the link.

Manager: Elizabeth Zimmer

Manager	Employee Name
	Tommy Foster
	Kimberly Smith
	Russell Clark
	Joo Jung
	Karen Smith
	Elizabeth Zachry
	Brad Stearns
	Marguerite Camacho
	Stephanie Erdely
	Carl Yancey
	Angela Morris
	Gregory Boswell
	Karen Stallworth
	Brad Horowitz
	Marguerite Hernandez
	Chad Bennett
	Carl Yates


Print

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Internet 100%


Figure 4-12. Compensation History Page

The selected employee's compensation history information displays.

 The header bar will display either **Compensation History** or **Direct Reports**, indicating from which page you accessed the Employee Compensation History page.

You can sort the columns on the Compensation History page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



ADP Welcome, John Adams Language | Company Directory | Log Off
Search Company Directory

Manager Home Organization & Staffing Performance Compensation Reports

Compensation History ?


Click Print to print employee's Compensation History and click Cancel to return.

Employee Name	Franklin Ziegler									
Effective Date	Manager Name	Dept	Salary Grade	Rating Nbr	Compensation Frequency	Salary Action	Reason	New Salary	Increase Percent	Increase Amount
05/30/2009	John Adams	2200	N07	0.00	Hourly	Pay Rate Change	MER	27.44	3.50	0.93

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Done Internet 100%

Figure 4-13. Employee Compensation History Page

 You can also access the Employee Compensation History from the employee name link on the following pages: Merit Compensation Approval History Detail; Bonus Compensation Approval History Detail; Merit Compensation Approval Worksheet; Bonus Compensation Approval Worksheet; Merit Compensation Worksheet; and the Bonus Compensation Worksheet.

The Employee Compensation History page provides the following information:

- **Employee Name** – Displays the employee's name.
- **Effective Date** – Displays the effective date of the compensation action.
- **Manager Name** – Displays the employee's manager's name.
- **Dept** – Displays the employee's department ID.
- **Salary Grade** – Displays the employee's salary grade.
- **Rating Nbr** – Displays the employee's overall performance rating code.
- **Compensation Frequency** – Displays the compensation frequency.
- **Salary Action** – Displays the salary action type, either Pay Rate Change or Lump Sum.
- **Reason** – Displays the reason for the salary action.
- **New Salary** – Displays the employee's new salary.

- **Increase Percent** – Displays the increase percent of the employee's salary.
 - **Increase Amount** – Displays the increase amount of the employee's salary.
2. Click **Print** to print the selected employee's compensation history.
 3. Click **Cancel** to return to the page (Compensation History or Manager Home/Direct Reports) from which you accessed this page.

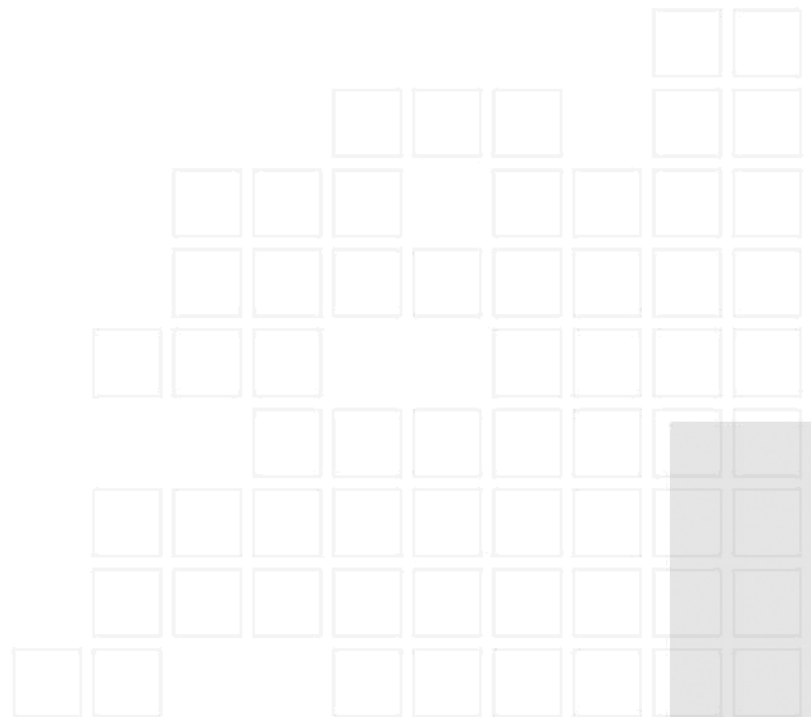


End of procedure

You have finished viewing employee compensation history.

Managing Performance Reviews

<u>PAGE</u>	<u>TOPIC</u>
5-2	Introduction
5-3	Completing Performance Reviews
5-16	Viewing and Printing Employee Performance History
5-19	Viewing and Printing Employee Performance Review Forms
5-23	Creating Performance Review Templates



Introduction

Performance plans, including performance factors and goals, rating schemes, and performance review templates are defined in your HR/payroll system of record. Plans are then assigned to employees and worksheets are created for use in ADP Self Service. Once the performance review worksheets have been created, managers can then process the reviews within Self Service.

Managers may be required to use the standard template, which contains the performance factors, goals, and the rules imposed by the template, or they may be allowed to create their own template via the Create Performance Template menu task in Self Service. Managers receive worksheets only for employees for whom they have been designated as performance managers, through the Reports-To functionality. For more information on Reports-To, see the *Hiring, Staffing, and Job Maintenance Guide*. For more information on creating performance review plans, see the *Performance and Development Guide*.

Through Self Service, performance managers can do the following:


- Build customized performance review templates
- Conduct the performance review, including submitting the completed review to the next approving manager
- View and print performance summary information for direct reports, as well as the direct reports of managers who report into them
- View and print performance review forms for direct reports, as well as the direct reports of managers who report into them
- View and print employee performance history


Once the performance review has completed the approval process in Self Service, the employee's performance review information is updated in your HR/payroll system of record.

Completing Performance Reviews

The Performance Planning page is a navigational entry point for performance planning, allowing managers to process performance worksheets for employees who report to them. You can process performance worksheets for your direct reports, as well as your indirect reports if your administrator has enabled the indirect report update option.

Managers can process compensation plans through either the Direct Reports page or through the Performance Planning page.

 Performance plans, including performance factors and goals, rating schemes, and performance review templates are defined in your HR/payroll system of record. Plans are then assigned to employees and worksheets are created for use in ADP Self Service. Once the performance review worksheets have been created, managers can then process the reviews within Self Service.

The Performance Planning page provides a departmental summary view of performance activity. Only performance managers have access to this page. If you are a performance manager, your name will be displayed in the **Reviewing Manager** column. If performance managers that report to you also have direct reports that are performance managers, the  (Direct Reports icon) will be displayed next to their name.

The Performance Worksheet provides current employee performance information for the selected reviewing manager. If you are the originating manager and the review has not already been submitted, you can modify proposed performance reviews and route for approvals. Submitted rows will be display only. If you are not the originating manager this page is display only.

Completing Performance Reviews includes the following tasks:

- [Completing Performance Review Forms](#)
- [Submitting Performance Worksheets for Approval](#)
- [Viewing and Printing Performance Information](#)

Completing Performance Review Forms

Tasks

Completing Performance Reviews

☑ Completing Performance Review Forms

Submitting Performance Worksheets for Approval

Viewing and Printing Performance Information

The Employee Performance Review Form is used to complete the employee's performance review. You must be the originating review manager in order to access the Employee Performance Review Form. The performance factors, weights, and goals available on the Employee Performance Review Form depend on the template selected from the Performance Worksheet page. Templates can be modified, via the Performance Review Template page.

- 💡 You may be required to use a standard template, in which case that template is selected for you and cannot be changed. However, depending on how you are set up, you may be able to select a performance template. If a template has not yet been assigned, a manager cannot update the performance review for his indirect report. In this case, the direct manager would need to first assign the performance template.

If you are not the originating manager, or if the review has already been submitted, you will access the View Employee Performance Review Form, which is the display-only version of the Employee Performance Review Form.

To complete the Employee Performance Review Form, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Performance Planning** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

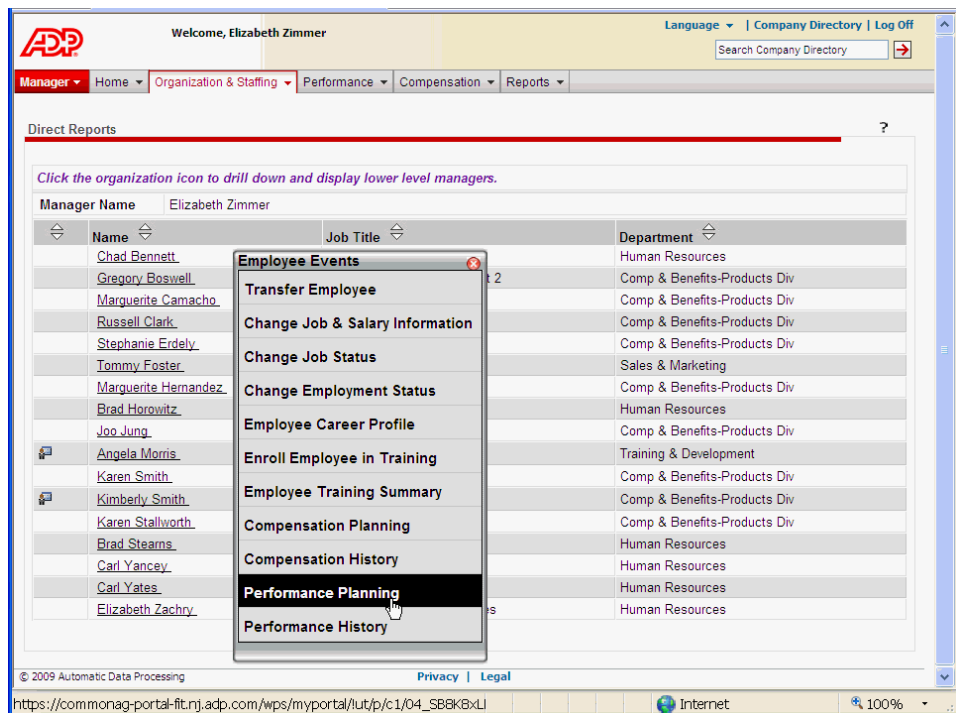



Figure 5-1. Employee Event Selection Menu with Performance Planning Selected

- From the **Performance** tab, select **Performance Planning**.


The Performance Planning page displays.

To drill down and view performance worksheet data for performance managers who report to your direct report performance managers, click  next to the **Subordinate Manager** name to access the corresponding Performance Planning page. To navigate back to a previous manager, click the manager's name in the **Navigation** field.

The header bar will display either **Performance Planning** or **Direct Reports**, indicating from which page you accessed the Performance Planning page.

You can sort the columns on the Performance Planning page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

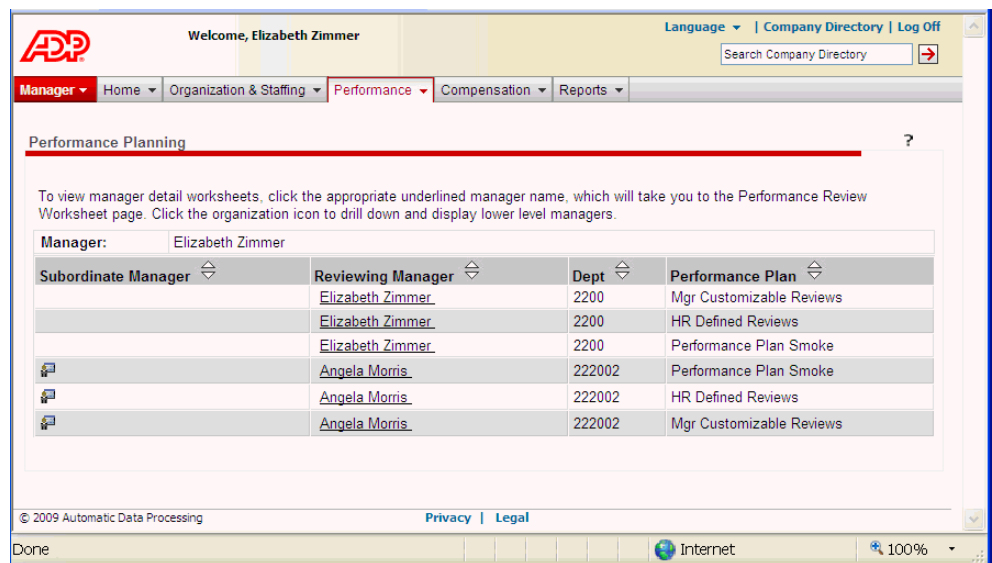


Figure 5-2. Performance Planning Page


- Click your name under the **Reviewing Manager** column. The Performance Worksheet displays.



You can sort the columns on the Performance Worksheet page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).



More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

Employee Name	ReviewDate	HireDate	EmployeeStatus	Job Title	Template	OverallRating	OverallGoal	Status	Submit
Russell Clark	10/01/2004	10/01/1997	Active	Comp./Benefits Analyst II	Templates must be defined prior to entering employee review information. Select Define Template from the drop down list to create a new custom template or select an existing custom template. Select Template			New	<input type="checkbox"/>
Joo Jung	10/01/2004	12/17/1996	Active	Comp./Benefits Analyst I	Templates must be defined prior to entering employee review information. Select Define Template from the drop down list to create a new custom template or select an existing custom template. Select Template			New	<input type="checkbox"/>
Karen Smith	10/01/2004	01/02/1996	Active	Sr. Comp./Benefits Analyst	Templates must be defined prior to entering employee review information. Select Define Template from the drop down list to create a new custom template or select an existing custom template. Select Template			New	<input type="checkbox"/>





Figure 5-3. Performance Worksheet




To view employee performance review detail, click the employee's name. The View Employee Performance Review Form displays. Click the **View Performance History** link to access the Employee Performance History. Click **Cancel** to navigate back to the Performance Worksheet. See [“Viewing and Printing Employee Performance History”](#) on page 5-16.

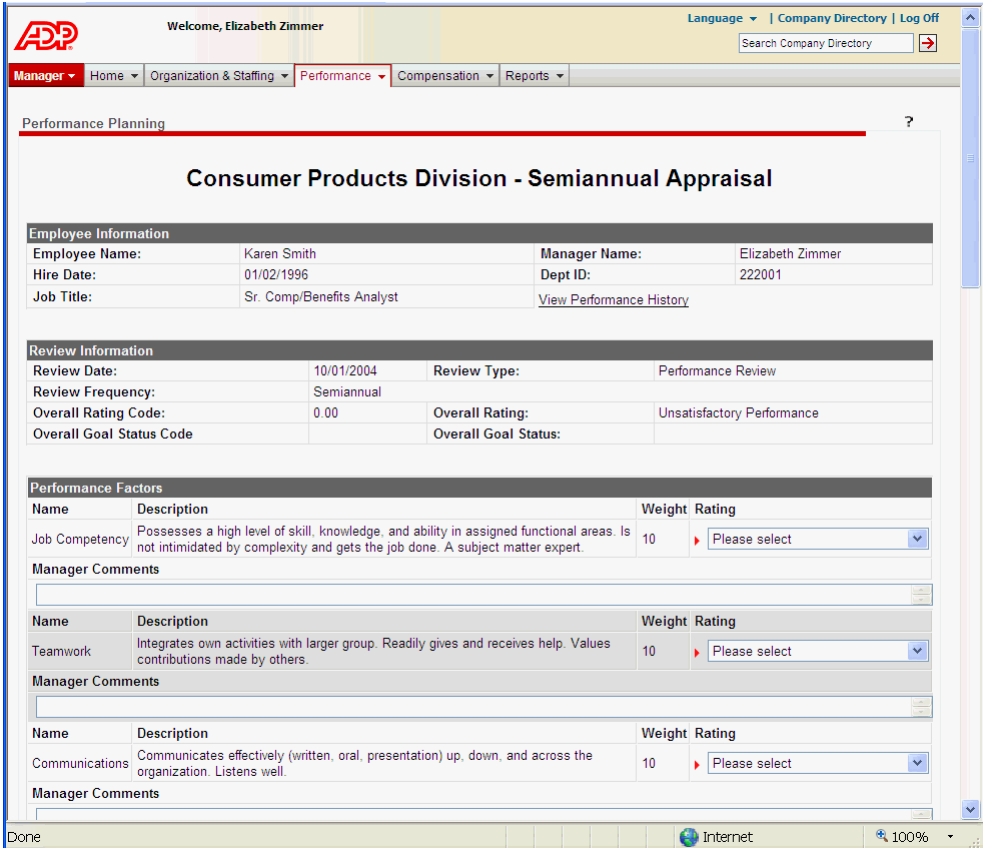
The Performance Worksheet provides the following performance information:

- **Reviewing Manager** – Displays the name of the reviewing manager.
- **Performance Plan** – Displays the type of performance plan.
- **Review Type** – Displays the review type.
- **Employee Name** – Displays the employee's name. Click to view the Employee Performance Review Form.
- **Review Date** – Displays employee's review date.
- **Hire Date** – Displays employee's hire date.
- **Employee Status** – Displays the employee's status.
- **Job Title** – Displays the employee's job title.

- **Template** – Select the template you want to use for the performance review, if available. (If you are not the originating review manager, or if this review has already been submitted, this field is display only.) If you are required to use a standard template, the template name will be displayed in the **Template** field and cannot be changed. See [Step 3](#).
 -  If a template has not yet been assigned, a manager cannot update the performance review for his indirect report. In this case, the direct manager would need to first assign the performance template.
 - **Overall Rating** – Displays the overall performance rating from the Employee Performance Review Form, if applicable. This description is based on the **Overall Rating Code**.
 -  The rating scheme may or may not be in whole numbers. However, the rating description is still based on the lowest matching rating scheme number for that description.
 - **Overall Goal** – Displays the overall goal status from the Employee Performance Review Form, if applicable.
 - **Status** – Displays the status of the review. Values are New, In Process, Rejected, and Complete.
3. From the **Template** drop down list, select the template you want to use for this performance review. If you are required to use a standard template, the template name will be displayed in the **Template** field and cannot be changed. Also, if you are not the originating review manager, or if this review has already been submitted, this field is display only.
-  If there is already existing review information in the Employee Performance Review Form, changing the template will clear employee performance review information.
4. Click the underlined **Employee Name** whose performance review you want to complete. The Employee Performance Review Form page displays.
-  You must be the originating review manager in order to update the Employee Performance Review Form. If you are not the originating manager, or if the review has already been submitted, you will access the View Employee Performance Review Form, which is the display-only version of the Employee Performance Review Form.
- A **Save in Progress** button is provided on the active version of the Employee Performance Review Form. ADP Self Service will timeout after 20 minutes with what is perceived as no activity. Since completing a performance review can take longer than 20 minutes, it is recommended that you periodically save your changes using the **Save in Progress** button. This will let ADP Self Service know you are still active, save your changes to that point, and allow you to will remain in the Employee Performance Review Form. Once you have completed all changes, you can select the **Save** button, which returns you to the Performance Worksheet. You must click **Save** before you can submit the review for processing.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the 'Consumer Products Division - Semiannual Appraisal' form. It includes sections for Employee Information, Review Information, and Performance Factors. The Performance Factors section lists Job Competency, Teamwork, and Communications, each with a weight of 10 and a 'Please select' dropdown for the rating.


Employee Information			
Employee Name:	Karen Smith	Manager Name:	Elizabeth Zimmer
Hire Date:	01/02/1996	Dept ID:	222001
Job Title:	Sr. Comp/Benefits Analyst	View Performance History	

Review Information			
Review Date:	10/01/2004	Review Type:	Performance Review
Review Frequency:	Semiannual		
Overall Rating Code:	0.00	Overall Rating:	Unsatisfactory Performance
Overall Goal Status Code		Overall Goal Status:	


Performance Factors			
Name	Description	Weight	Rating
Job Competency	Possesses a high level of skill, knowledge, and ability in assigned functional areas. Is not intimidated by complexity and gets the job done. A subject matter expert.	10	Please select
Manager Comments			
Teamwork	Integrates own activities with larger group. Readily gives and receives help. Values contributions made by others.	10	Please select
Manager Comments			
Communications	Communicates effectively (written, oral, presentation) up, down, and across the organization. Listens well.	10	Please select
Manager Comments			

Figure 5-4. Employee Performance Review Form


The beginning sections of the Employee Performance Review Form display employee and review summary information.

 The **Overall Rating Code** field is dynamically calculated and updated each time you select a rating in the **Performance Factors** area of the worksheet. The **Overall Goal Status Code** field is populated from the goal information entered in the **Organizational Goals** area of the worksheet.

- In the **Performance Factors** area, select the **Rating** for each performance factor and enter any comments in the corresponding **Manager Comments** field. Comments will be viewable by all approvers, as well as through Approval History. The **Overall Rating Code** is dynamically calculated and updated each time you select a rating.

 The performance factors and weights available (if any) on the Employee Performance Review Form depend on the template selected from the Performance Worksheet. Templates can be modified, via the Performance Review Template page. See [“Creating Performance Review Templates”](#) on page 5-23 for more information.

- In the **Organizational Goals** area, select the **Goal Status** for each goal and enter any comments in the corresponding **Manager Comments** field. Comments will be viewable by all approvers, as well as through Approval History.

 The organizational goals available (if any) on the Employee Performance Review Form depend on the template selected from the Performance Worksheet. Templates can be modified, via the Performance Review Template page. See [“Creating Performance Review Templates”](#) on page 5-23 for more information.

7. Select the **Overall Goal Status Code** that best describes the employee's overall goal status.
8. In the **Manager Comments** area, enter any **Recommendations** and/or **Overall Comments** in the appropriate fields. Comments will be viewable by all approvers, as well as through Approval History.
9. To print the performance review form, click **Print**. The printer-friendly version of the Employee Performance Review Form displays (see [Figure 5-5](#)), and then the print dialog box displays. Choose your printing parameters and click **Print**.

Consumer Products Division - Semiannual Appraisal


Employee Information			
Employee Name:	Karen Smith	Manager Name:	Elizabeth Zimmer
Hire Date:	01/02/1996	Dept ID:	222001
Job Title:	Sr. Comp/Benefits Analyst		

Review Information			
Review Date:	10/01/2004	Review Type:	Performance Review
Review Frequency:	Semiannual		
Overall Rating Code:	4.10	Overall Rating:	Distinctive Performance
Overall Goal Status Code	MET	Overall Goal Status:	Met

Performance Factors			
Name	Description	Weight	Rating
Job Competency	Possesses a high level of skill, knowledge, and ability in assigned functional areas. Is not intimidated by complexity and gets the job done. A subject matter expert.	10	Distinctive Performance
Manager Comments			
Name	Description	Weight	Rating
Teamwork	Integrates own activities with larger group. Readily gives and receives help. Values contributions made by others.	10	Outstanding Performance
Manager Comments			
Name	Description	Weight	Rating
Communications	Communicates effectively (written, oral, presentation) up, down, and across the organization. Listens well.	10	Distinctive Performance
Manager Comments			
Name	Description	Weight	Rating
Ownership	Takes responsibility and holds oneself accountable. Has a sense of urgency. Meets commitments.	10	Distinctive Performance
Manager Comments			

Figure 5-5. Printer-Friendly Version of the Employee Performance Review Form

10. Click **Save** to save your changes. You are returned to the refreshed Performance Worksheet.

 Click **Reset** to reset the fields to their original values. Click **Cancel** to cancel any changes and return to the Performance Worksheet.

 **What's next**

You have completed the Employee Performance Review Form. Next, you will need to submit the performance review for approval.

For information on viewing and printing performance worksheets and performance review forms for your direct reports, as well as the direct reports of the managers who report into you, see “[Viewing and Printing Performance Information](#)” on page 5-11.

Submitting Performance Worksheets for Approval

- Tasks**
- ✓ **Completing Performance Reviews**
 - ✓ **Submitting Performance Worksheets for Approval**
 - **Viewing and Printing Performance Information**

Once you have completed the Employee Performance Review Form, you need to submit it for approval. The Submit Worksheet page allows you to enter a unique identifier for the worksheet you are submitting. You can also add comments that will be viewable by all approvers, as well as through Approval History.

To submit performance worksheets for approval, do the following:

1. From the Performance Planning page (see [Figure 5-2](#) on page 5-5), click your name under the **Reviewing Manager** column. The Performance Worksheet displays, as shown in [Figure 5-3](#).
 - ☰ To view the employee performance worksheet, click the underlined **Employee Name**. The Employee Performance Review Form displays (see [Figure 5-4](#) on page 5-8). If you want to make additional changes to the worksheet before submitting it for approval, refer to [“Completing Performance Review Forms”](#) on page 5-4.
2. Select the **Submit** check box for the review(s) you wish to submit for approval, then click **Submit**. The Submit Worksheet page displays.
 - ☰ The **Submit** check box and button are displayed only if you are the originating review manager. The approver can approve or reject the performance review through the Performance Approval Worksheet. See [Chapter 2, “Managing Approval Tasks and Notifications”](#) for more information.


Figure 5-6. Submit Worksheet Page

3. In the **Worksheet Identifier** field, enter a unique worksheet ID for the review(s) you are submitting.
 - ☰ All reviews submitted together will be presented as a single workflow event, identified by the worksheet ID.
4. In the **Workflow Comments** field, enter any comments concerning the workflow (approval and notification routing) of the review(s).
 - ☰ Comments will be viewable by all approvers, as well as through Approval History.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

5. Click **Save**. You are returned to the Performance Planning page and a message is displayed informing you who your request has been submitted to.

 Once you click **Save**, you cannot make any more changes to the performance worksheet you are submitting. Click **Cancel** to cancel any changes and return to the Performance Worksheet page.

The Submit Worksheet page can be accessed from the following pages: Merit Compensation Approval Worksheet, Bonus Compensation Approval Worksheet, Performance Approval Worksheet, Merit Compensation Worksheet, Bonus Compensation Worksheet, and Performance Worksheet.

What's next

You have finished submitting the performance worksheet for approval.

Next you will review information on viewing and printing performance worksheets and performance review forms for your direct reports, as well as the direct reports of the managers who report into you.

Viewing and Printing Performance Information

Tasks


Completing Performance Reviews

Completing Performance Review Forms


Submitting Performance Worksheets for Approval

Viewing and Printing Performance Information

Through the Performance Planning page, you can view and print Performance Worksheets, as well as Performance Review Forms, for your direct reports and the direct reports of the managers that report into you.


 You can also view completed performance review forms through the Performance History page. For more information, see [“Viewing and Printing Employee Performance Review Forms”](#) on page 5-19.

Viewing performance information includes the following tasks:

- [Viewing and Printing Performance Worksheets](#)
 - [Viewing and Printing Employee Performance Review Forms from Performance Planning](#)
-  For information on viewing compensation history for specific employees, see [“Viewing and Printing Employee Performance History”](#) on page 5-16.

Viewing and Printing Performance Worksheets


The Performance Worksheet provides current employee performance information for the selected reviewing manager. If you are the originating manager and the review has not already been submitted, you can modify proposed performance reviews and route for approvals. Submitted rows will be display only. If you are not the originating manager this page is display only.

If you are a performance manager, your name will be displayed in the **Reviewing Manager** column. If performance managers that report to you also have direct reports that are performance managers, the  (Direct Reports icon) will be displayed next to their name.

To view and print performance worksheets, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Performance Planning** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

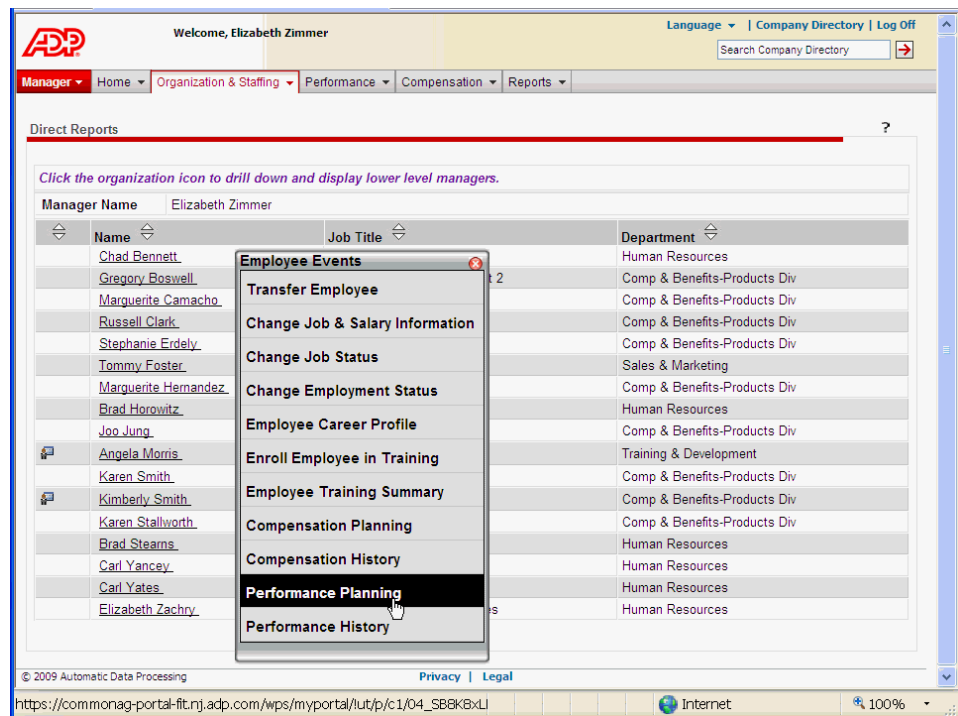



Figure 5-7. Employee Event Selection Menu with Performance Planning Selected

- From the **Performance** tab, select **Performance Planning**.


The Performance Planning page displays.

To drill down and view performance worksheet data for performance managers who report to your direct report performance managers, click  next to the **Subordinate Manager** name to access the corresponding Performance Planning page. To navigate back to a previous manager, click the manager's name in the **Navigation** field.

The header bar will display either **Performance Planning** or **Direct Reports**, indicating from which page you accessed the Performance Planning page.

You can sort the columns on the Performance Planning page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

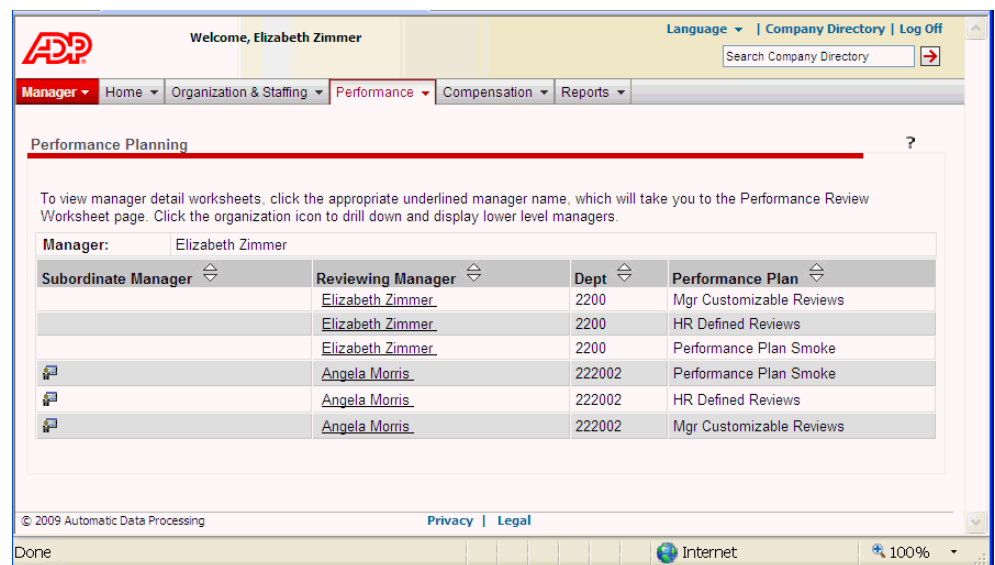


Figure 5-8. Performance Planning Page

2. To view performance worksheet data for either your employees or managers that report to you, click the underlined **Reviewing Manager** name. The Performance Worksheet displays, as shown in Figure 5-3.

To view employee performance review detail, click the employee's name. The View Employee Performance Review Form displays. Click the **View Performance History** link to access the Employee Performance History. Click **Cancel** to navigate back to the Performance Worksheet.

3. Click **Print** to print the information on this page.

4. Click **Cancel** to return to the Performance Planning page.


 **What's next**

You have finished viewing performance worksheets for your direct reports, as well as the direct reports of each of the managers reporting to you. Next you will review how to view and print employee performance review forms.

Viewing and Printing Employee Performance Review Forms from Performance Planning

For performance reviews that the reviewer is doing through Self Service, there are two different views of the Employee Performance Review Forms. One is the "active" view, which is accessible only if you are the originating performance manager. The other is a "display-only" view that is accessed through several different pages. The active view is the Employee Performance Review Form The display-only view is the View Employee Performance Review Form.

For performance reviews imported from a third party application or entered into your HR/payroll system of record, a "display-only" view of summary information displays. Since the review was not completed in Self Service, detailed information is not available.

 If you are the originating manager but the review has already been submitted, you will access the display-only View Employee Performance Review Form.


This procedure details how to view and print Employee Performance Review Forms from Performance Planning. For information on all the paths available to access the Employee Performance Review Forms, see [“Viewing and Printing Employee Performance Review Forms”](#) on page 5-19.

To view and print the Employee Performance Review Forms from Performance Planning, do the following:

1. Select one of these paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**, click the underlined employee **Name**, then select **Performance Planning** from the Employee Event selection menu. The Performance Planning page displays. Click on a reviewing manager, then click on an underlined employee name from the Performance Worksheet.
 - From the **Performance** tab, select **Performance Planning**, click on a reviewing manager, then click on an underlined employee name from the Performance Worksheet.

The Employee Performance Review Form (active or display-only version) displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows a web application interface for ADP. The user is logged in as Elizabeth Zimmer. The page title is "Consumer Products Division - Semiannual Appraisal". The form is divided into several sections:

- Employee Information:**

Employee Name:	Karen Smith	Manager Name:	Elizabeth Zimmer
Hire Date:	01/02/1996	Dept ID:	222001
Job Title:	Sr. Comp/Benefits Analyst	View Performance History	
- Review Information:**

Review Date:	10/01/2004	Review Type:	Performance Review
Review Frequency:	Semiannual	Overall Rating:	Unsatisfactory Performance
Overall Rating Code:	0.00	Overall Goal Status:	
- Performance Factors:**

Name	Description	Weight	Rating
Job Competency	Possesses a high level of skill, knowledge, and ability in assigned functional areas. Is not intimidated by complexity and gets the job done. A subject matter expert.	10	Please select
Teamwork	Integrates own activities with larger group. Readily gives and receives help. Values contributions made by others.	10	Please select
Communications	Communicates effectively (written, oral, presentation) up, down, and across the organization. Listens well.	10	Please select

Figure 5-9. Employee Performance Review Form

2. Click **Print** to print the selected employee's performance review form.
3. Click **Cancel** to return to the page from which you navigated to the employee performance review form.

STOP End of procedure

You have finished viewing and printing performance review worksheets and performance review forms for your direct reports and the direct reports of the managers that report into you.

For information on viewing performance history for specific employees, see “[Viewing and Printing Employee Performance History](#)” on page 5-16.

Viewing and Printing Employee Performance History

The Performance History page allows you to view the performance history and employee performance review forms of your direct reports, as well as the direct reports of each of the managers reporting to you.

Managers can view and print employee performance history information through either the Direct Reports page or through the Performance History page.

To view and print employee performance history, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays, Click the underlined employee **Name**, then select **Performance History** from the Employee Event selection menu.



More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

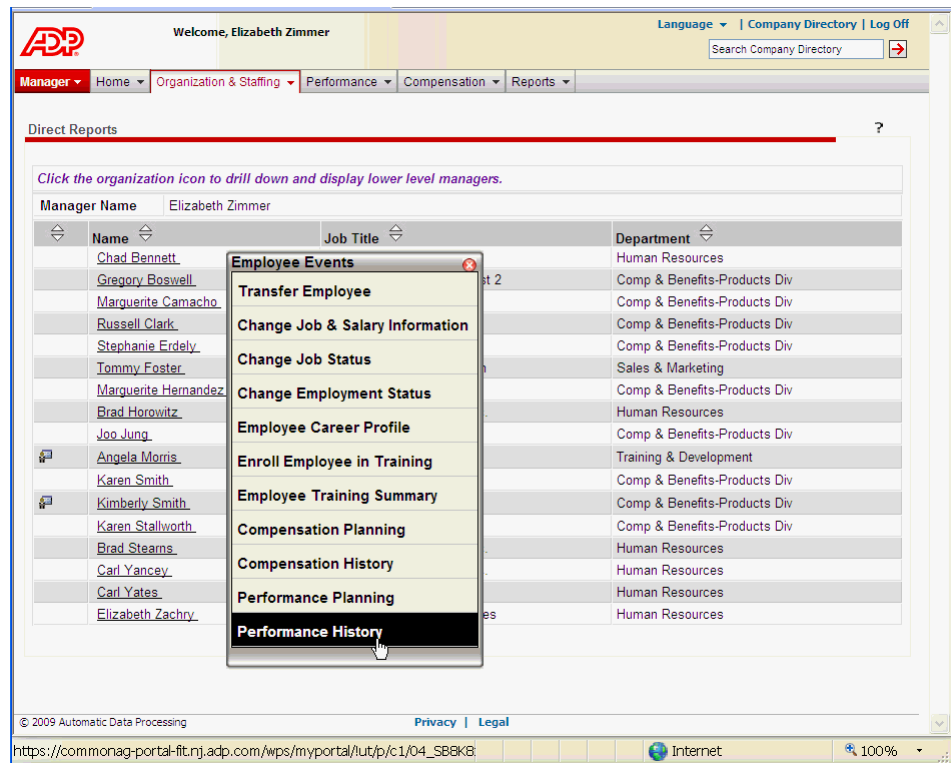





Figure 5-10. Employee Event Selection Menu with Performance History Selected

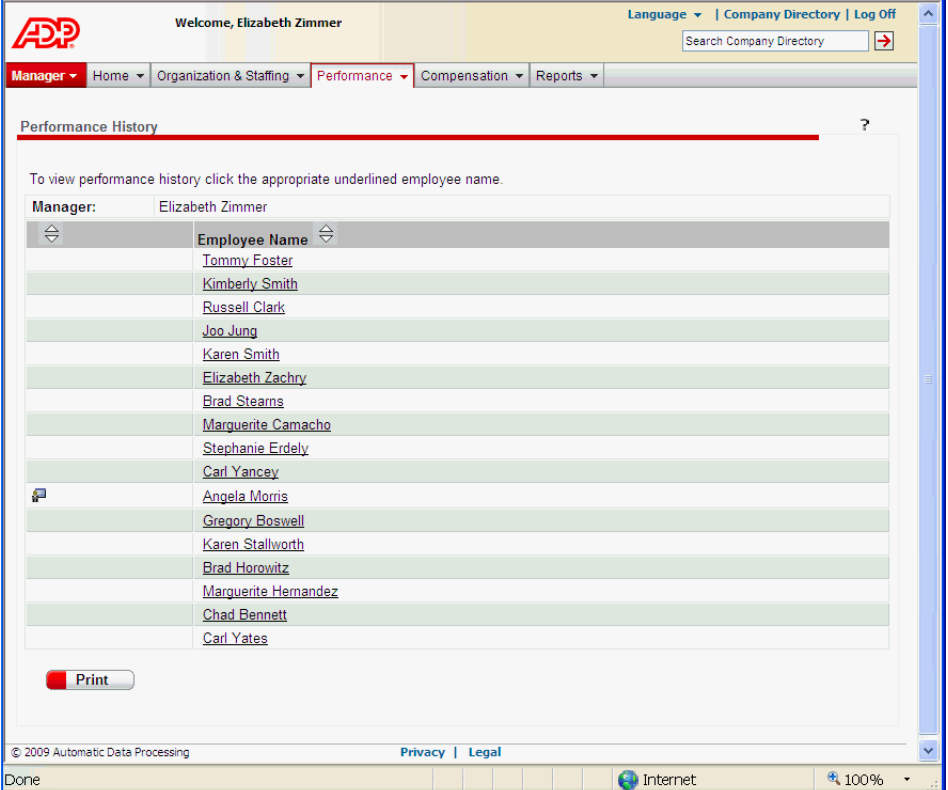
- From the **Performance** tab, select **Performance History**. The Performance History page displays. Click  (Direct Report Icon) to drill down to view each manager's direct reports. (To navigate back to a previous manager, click the appropriate manager name in the navigation trail above the **Manager** field.) To view performance history for an employee, click the underlined **Employee Name**.

 You can sort the columns on the Performance History page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Performance History page for manager Elizabeth Zimmer. The page has a navigation menu with 'Performance' selected. Below the menu, there is a 'Performance History' section with a search bar and a list of employees. The list includes names like Tommy Foster, Kimberly Smith, Russell Clark, Joo Jung, Karen Smith, Elizabeth Zachry, Brad Stearns, Marguerite Camacho, Stephanie Erdely, Carl Yancey, Angela Morris, Gregory Boswell, Karen Stallworth, Brad Horowitz, Marguerite Hernandez, Chad Bennett, and Carl Yates. A 'Print' button is visible at the bottom of the list.

Figure 5-11. Performance History Page


The selected employee's performance history information displays.

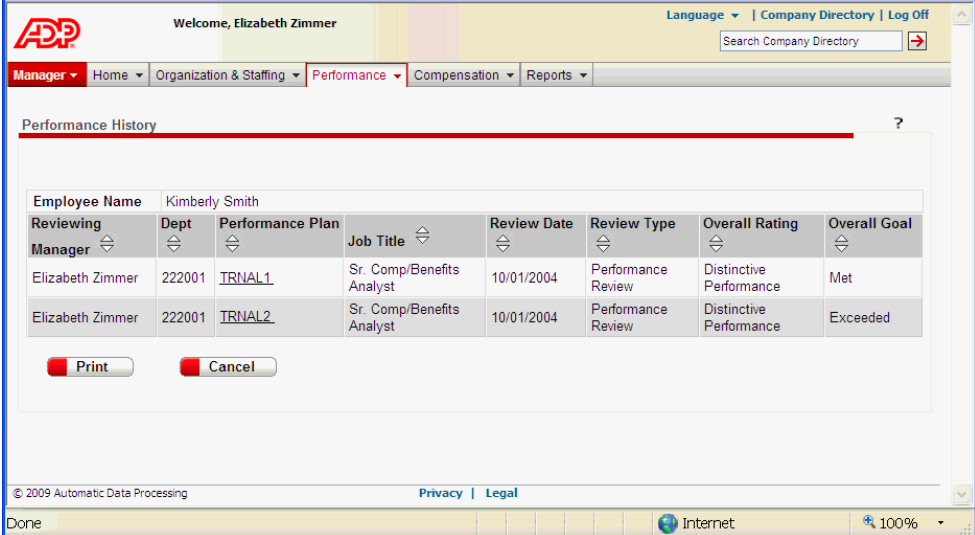
 The header bar will display either **Performance History** or **Direct Reports**, indicating from which page you accessed the Employee Performance History page.

You can also access the Employee Performance History from the **View Performance History** link on both the view-only and active Employee Performance Review Form pages.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



Employee Name	Reviewing Manager	Dept	Performance Plan	Job Title	Review Date	Review Type	Overall Rating	Overall Goal
Kimberly Smith	Elizabeth Zimmer	222001	TRNAL1	Sr. Comp/Benefits Analyst	10/01/2004	Performance Review	Distinctive Performance	Met
Kimberly Smith	Elizabeth Zimmer	222001	TRNAL2	Sr. Comp/Benefits Analyst	10/01/2004	Performance Review	Distinctive Performance	Exceeded

Figure 5-12. Employee Performance History Page

2. Click **Print** to print the selected employee's performance history.
3. To view an employee's Performance Review Form, click the appropriate **Performance Plan**. (For more information, see “[Viewing and Printing Employee Performance Review Forms](#)” on page 5-19.)
4. Click **Cancel** to return to the Performance History page.



End of procedure

You have finished viewing performance history for your direct reports, as well as the direct reports of each of the managers reporting to you.

Viewing and Printing Employee Performance Review Forms

For performance reviews that the reviewer is doing through Self Service, there are two different views of the Employee Performance Review Forms. One is the "active" view, which is accessible only if you are the originating performance manager. The other is a "display-only" view that is accessed through several different paths.

For performance reviews imported from a third party application or entered into your HR/payroll system of record, a "display-only" view of summary information displays. Since the review was not completed in Self Service, detailed information is not available.

To view and print the Employee Performance Review Forms, do the following:

1. Choose one of the following paths:
 - From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays, Click the underlined employee **Name**, then select **Performance History** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

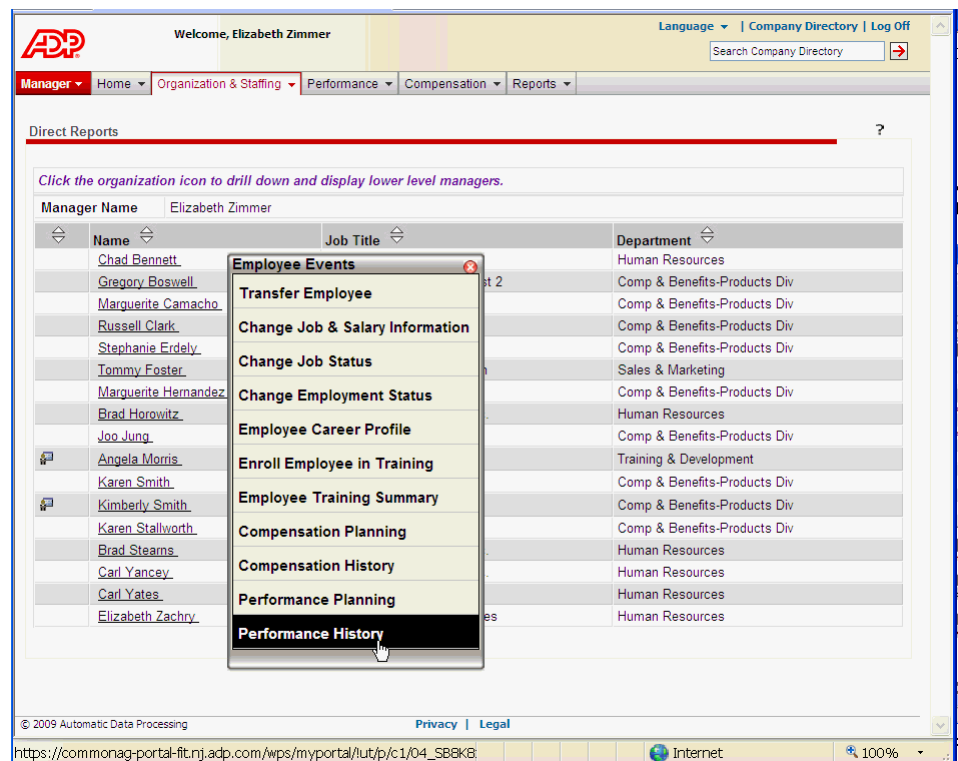





Figure 5-13. Employee Event Selection Menu with Performance History Selected

- From the **Performance** tab, select **Performance History**. The Performance History page displays. Click  (Direct Report Icon) to drill down to view each manager's direct reports. (To navigate back to a previous manager, click the appropriate manager name in the navigation trail above the **Manager** field.) To view performance history for an employee, click the underlined **Employee Name**.

 You can sort the columns on the Performance History page in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

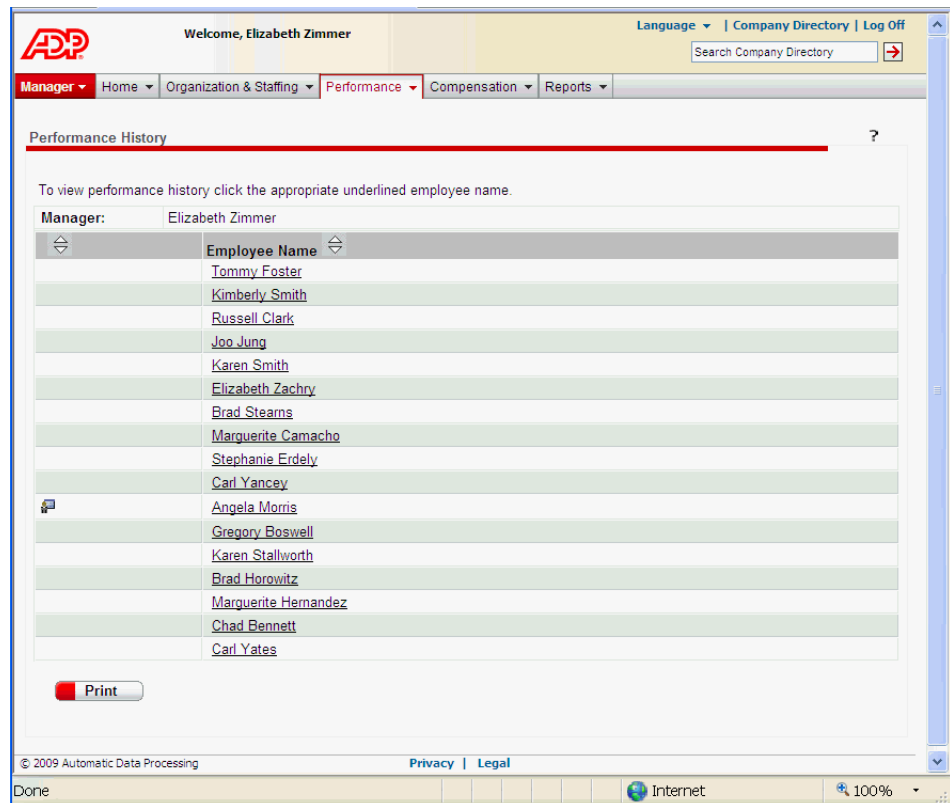


Figure 5-14. Performance History Page

The selected employee's performance history information displays.



The header bar will display either **Performance History** or **Direct Reports**, indicating from which page you accessed the Employee Performance History page.

You can also access the Employee Performance History from the **View Performance History** link on both the view-only and active Employee Performance Review Form pages.



More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

Reviewing Manager	Dept	Performance Plan	Job Title	Review Date	Review Type	Overall Rating	Overall Goal
Elizabeth Zimmer	222001	TRNAL1	Sr. Comp/Benefits Analyst	10/01/2004	Performance Review	Distinctive Performance	Met
Elizabeth Zimmer	222001	TRNAL2	Sr. Comp/Benefits Analyst	10/01/2004	Performance Review	Distinctive Performance	Exceeded

Figure 5-15. Employee Performance History Page

2. Click the **Performance Plan** for which you want to view the Employee Performance Review Form.

You can also access the Employee Performance Review Form from the following additional paths:

- From the **Home** tab, select **Approval History**, click on a performance task description, then click on an employee name from the Performance Approval History Detail page.
- From the **Home** tab, select **Message Center**. From the Approvals page, click on a performance task description, then click on an employee name from the Performance Approval Worksheet.
- From the **Organization & Staffing** tab, select **Direct Reports**, click the employee name, then select **Performance Planning** from the Employee Event selection menu. The Performance Planning page displays. Click on a reviewing manager, then click on an employee name from the Performance Worksheet.
- From the **Organization & Staffing** tab, select **Direct Reports**, click the employee name, then select **Performance History** from the Employee Event selection menu. The Performance History page displays. Click on an employee name. The Employee Performance History page displays. Click the performance plan for which you want to view the Employee Performance Review Form.
- From the **Performance** tab, select **Performance Planning**, click on a reviewing manager, then click on an employee name from the Performance Worksheet.

The Employee Performance Review Form (active or display-only version) displays.

- You can only view Employee Performance Review Forms through Approval History and the Message Center Approvals or Notifications pages, if the approval history has not been purged. However, you can view all previous Employee Performance Review Forms through Direct Reports or Performance History, even though they may have been deleted from approval history.

The screenshot shows the ADP web interface for an employee performance review. The user is identified as Elizabeth Zimmer. The page title is "Consumer Products Division - Semiannual Appraisal".

Employee Information			
Employee Name:	Kimberly Smith	Manager Name:	Elizabeth Zimmer
Hire Date:	10/01/1995	Dept ID:	222001
Job Title:	Sr. Comp/Benefits Analyst	View Performance History	

Review Information			
Review Date:	10/01/2004	Review Type:	Performance Review
Review Frequency:	Semiannual		
Overall Rating Code:	3.00	Overall Rating:	Fully Satisfactory
Overall Goal Status Code	EXP	Overall Goal Status:	Expected Progress

Performance Factors			
Name	Description	Weight	Rating
Job Competency	Possesses a high level of skill, knowledge, and ability in assigned functional areas. Is not intimidated by complexity and gets the job done. A subject matter expert.	10	Fully Satisfactory

Manager Comments			
Name	Description	Weight	Rating
Teamwork	Integrates own activities with larger group. Readily gives and receives help. Values contributions made by others.	10	Distinctive Performance

Figure 5-16. Employee Performance Review Form

- Click **Print** to print the selected employee's performance review form.
- Click **Cancel** to return to the page from which you navigated to the employee performance review form.



End of procedure

You have finished viewing employee performance review forms.

Creating Performance Review Templates

The Performance Review Template is used to create custom templates. Only modifiable templates can be used as a base to create customized templates. You can also modify any custom templates you have created.

- 💡 You can also access the Performance Review Template page from the template link on the Performance Approval Worksheet. The link will only be available if managers are allowed to create their own templates.

To create custom performance review templates, do the following:

1. From the **Organization & Staffing** tab, select **Performance Review Template**. The Performance Review Template selection page displays.



More info

For a description of the fields on this page or for related tasks, click the

🔍 (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Elizabeth Zimmer, and links for Language, Company Directory, and Log Off. Below this is a main navigation menu with tabs for Manager, Home, Organization & Staffing, Performance (selected), Compensation, and Reports. The main content area is titled 'Performance Review Template' and contains a form with the following fields:

- Reviewing Manager: Elizabeth Zimmer
- Plan Type: Please Select Plan Type (dropdown menu)
- Template Type: Please Select Template Type (dropdown menu)


At the bottom of the page, there is a footer with copyright information (© 2009 Automatic Data Processing) and links for Privacy and Legal. The browser's address bar shows 'Internet' and a zoom level of 100%.

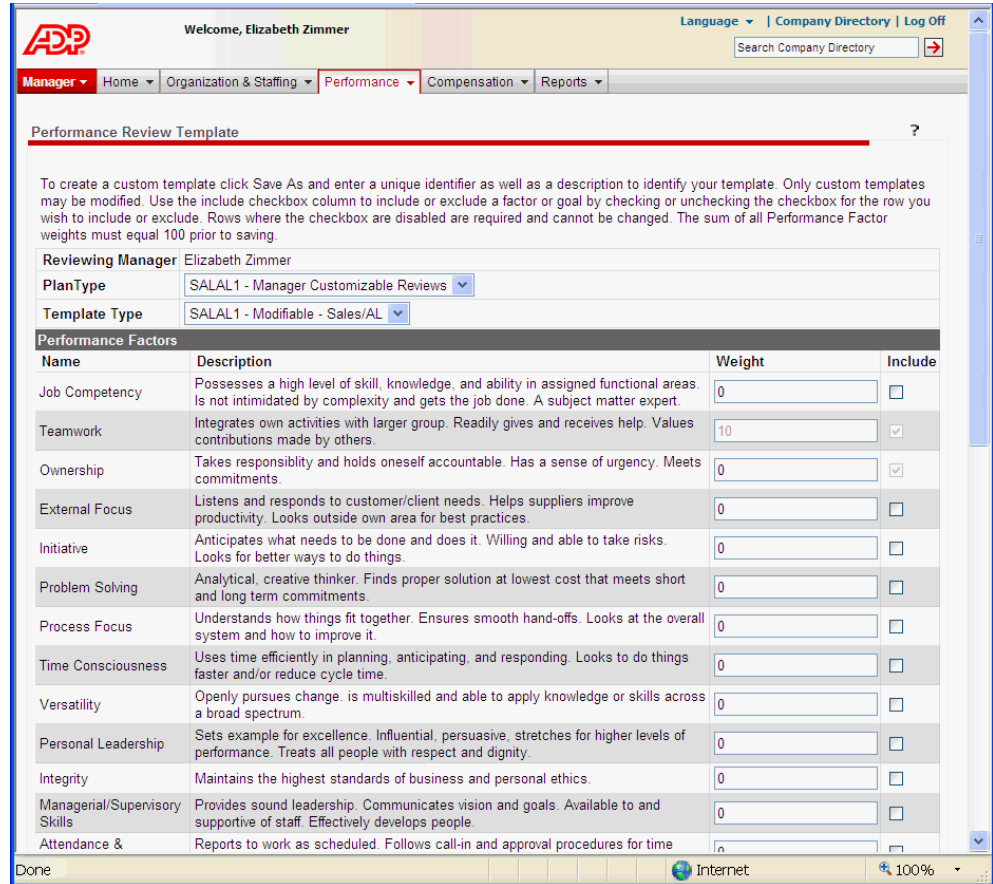
Figure 5-17. Performance Review Template Selection Page

2. Select **Plan Type**.
3. From the **Template Type** drop down list, select the template you want to use as a base to create your custom template.

Once you have selected both the **Plan Type** and **Template Type**, the performance review template displays. The performance factors, weights, and organizational goals available are dependent on the template selected from the **Template Type** field. Standard templates are defined in your HR/payroll system of record.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



Performance Review Template

To create a custom template click Save As and enter a unique identifier as well as a description to identify your template. Only custom templates may be modified. Use the include checkbox column to include or exclude a factor or goal by checking or unchecking the checkbox for the row you wish to include or exclude. Rows where the checkbox are disabled are required and cannot be changed. The sum of all Performance Factor weights must equal 100 prior to saving.

Reviewing Manager Elizabeth Zimmer


Plan Type SALAL1 - Manager Customizable Reviews

Template Type SALAL1 - Modifiable - Sales/AL



Name	Description	Weight	Include
Job Competency	Possesses a high level of skill, knowledge, and ability in assigned functional areas. Is not intimidated by complexity and gets the job done. A subject matter expert.	0	<input type="checkbox"/>
Teamwork	Integrates own activities with larger group. Readily gives and receives help. Values contributions made by others.	10	<input checked="" type="checkbox"/>
Ownership	Takes responsibility and holds oneself accountable. Has a sense of urgency. Meets commitments.	0	<input checked="" type="checkbox"/>
External Focus	Listens and responds to customer/client needs. Helps suppliers improve productivity. Looks outside own area for best practices.	0	<input type="checkbox"/>
Initiative	Anticipates what needs to be done and does it. Willing and able to take risks. Looks for better ways to do things.	0	<input type="checkbox"/>
Problem Solving	Analytical, creative thinker. Finds proper solution at lowest cost that meets short and long term commitments.	0	<input type="checkbox"/>
Process Focus	Understands how things fit together. Ensures smooth hand-offs. Looks at the overall system and how to improve it.	0	<input type="checkbox"/>
Time Consciousness	Uses time efficiently in planning, anticipating, and responding. Looks to do things faster and/or reduce cycle time.	0	<input type="checkbox"/>
Versatility	Openly pursues change. Is multiskilled and able to apply knowledge or skills across a broad spectrum.	0	<input type="checkbox"/>
Personal Leadership	Sets example for excellence. Influential, persuasive, stretches for higher levels of performance. Treats all people with respect and dignity.	0	<input type="checkbox"/>
Integrity	Maintains the highest standards of business and personal ethics.	0	<input type="checkbox"/>
Managerial/Supervisory Skills	Provides sound leadership. Communicates vision and goals. Available to and supportive of staff. Effectively develops people.	0	<input type="checkbox"/>
Attendance &	Reports to work as scheduled. Follows call-in and approval procedures for time	0	<input type="checkbox"/>
Total		100	

Figure 5-18. Performance Review Template Page

- In the **Performance Factors** area, enter the **Weight** of the performance factor and select the **Include** check box if you want to include this performance factor in your custom template.

 If this field's weight has been locked in the template you selected from the **Template Type**, then the **Weight** field is display only. If this is a required performance factor in the template you selected from the **Template Type** field, the **Include** check box is automatically selected and grayed.

The **Total** field displays the total weight of all the performance factors. The sum of all performance factor weights must equal 100 prior to saving your custom template.

5. In the **Organizational Goals** area, select the **Include** check box if you want to include the goal in your custom template.
 -  If this is a required organizational goal in the template you selected from the **Template Type** field, the **Include** check box is automatically selected and grayed.
6. Click **Save As** and enter a unique identifier and description of your template to save your custom template.
 -  Click **Reset** to reset the fields to their original values.



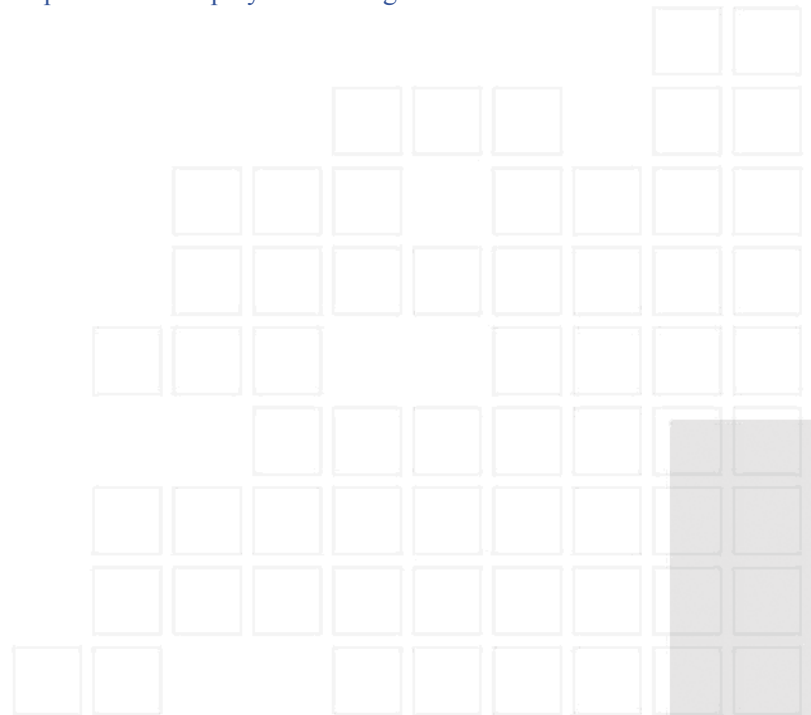
End of procedure

You have finished creating a custom performance review template.


Chapter 6

Managing Work Events

<u>PAGE</u>	<u>TOPIC</u>
6-2	Introduction
6-15	Viewing Employee Profiles
6-21	Initiating the Hiring Process
6-44	Transferring Employees
6-64	Changing an Employee's Job Status
6-71	Changing an Employee's Job and Salary Information
6-104	Changing an Employee's Employment Status
6-141	Using the Comprehensive Employment Change



Introduction




 The work events (hire, rehire, transfer, job status changes, job and salary changes, employment status changes) feature is available for all supported versions of ADP Enterprise HR with Autolink and ADP HR Anytime. The Comprehensive Employment Change is available only for ADP Enterprise with Autolink and ADP HR Anytime Version 5.03.

However, the work events feature is not available for ADP Enterprise HR with EPayroll Version 4.2005.2(D) or 5.0. EPayroll Versions 4.04 and higher and 5.01 and higher support the work events feature.


The Managing Work Events page displays all job actions available to you. You can perform job actions on your direct reports, as well as your indirect reports if your administrator has enabled the indirect report update option.

Managers can make job action changes through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events**. In addition, the Hire and Rehire functionality is available only through the **Managing Work Events** task.

Job actions include the following:

- **Hire New Employee** – allows the manager to initiate the hiring of new employees
 -  Once the hire/rehire has been approved within Self Service, the final processing of the hire/rehire is completed in your HR/payroll system of record. For additional information, see the *Hiring, Staffing, and Job Maintenance Guide*.
- **Rehire Employee** – allows the manager to initiate the rehiring of former employees
 -  Once the hire/rehire has been approved within Self Service, the final processing of the hire/rehire is completed in your HR/payroll system of record. For additional information, see the *Hiring, Staffing, and Job Maintenance Guide*.
- **Transfer Employee(s)** – allows the manager to transfer employees to a new manager, department, or location
 -  A manager can transfer an employee within the departments to which that manager has security access. If the manager does not have security access to the department where the employee is to be transferred, the transfer must be handled by a practitioner through your HR/payroll system of record.
- **Change Job Status** – allows the manager to change an employee's job status, such as full/part time, standard hours, security clearance, and so forth
- **Change Job & Salary Information** – allows the manager to change job and/or salary information when promoting, demoting, initiating a lateral job change, or changing an employee's salary

- **Change Employment Status** – allows the manager to place an employee on leave (paid or unpaid), return an employee from leave, or terminate an employee
- **Comprehensive Employment Change** – allows the manager to update employee information in a single inclusive task that is a composite of job, employment, and compensation information. You can only create the comprehensive employment change for a single employee at a time and it can be the only work event job action selected.


 Your HR/payroll system of record determines if the **Payroll** tab displays and is available as a part of the Comprehensive Employment Change.

Search and Filtering Tips

If your HR/payroll system of record is ADP Enterprise HR or HR Anytime Version 5.03, search fields are provided on the Managing Work Events Summary page that allow you to filter your employee listing.

In addition, there are searchable drop-down fields on the some of the pages that can be used to list values based on criteria you enter in the field.

Using Search Fields to Filter Results

 Depending on your HR/payroll system of record, a maximum of 300 results can be displayed for a number of searchable fields.

If search fields are available at the top of the Managing Work Events Summary page (depends on your HR/payroll system of record), you can filter your employee list. To filter the employee listing, do the following:

1. Enter or select the search criteria as indicated in the following table. You can select more than one criteria.
2. Click **Apply Filter**. The employee listing is limited based on the criteria entered.

Table 6-1. Search Fields

Field	Filtering
Last Name	Enter full or partial data. Filtering is done based on the first character in the last name you enter. Then the second and so forth. For example, entering H will filter out all employees except those whose last name begins with an H: Hester, Hart, Henry, Holt. Entering He will filter out all employees except those whose last name begins with a He: Hester, Henry.
First Name	Enter full or partial data. Filtering is done based on the first character in the first name you enter. Then the second and so forth. For example, entering H will filter out all employees except those whose first name begins with an H: Harold, Hank, Hector, Horace. Entering Ha will filter out all employees except those whose first name begins with a Ha: Harold, Hank.


Table 6-1. Search Fields

Field	Filtering
Department, Job, Job Status	To select a value, click in a field and do one of the following: <ul style="list-style-type: none"> Click the down arrow or press Enter to display all values for the field. Enter full or partial data, then click the down arrow or press Enter to filter your results, based on the entered data. Special characters, such as &, -, and so forth, are supported. Once the field is populated with a valid value, you can click the down arrow to again display all available options, or you can re-filter your results by entering new partial search criteria.
Full Time	Select to filter out all employees except those who are full time.
Part Time	Select to filter out all employees except those who are part time.

Using the Searchable Drop-Down Fields


Some of the Managing Work Event pages include searchable drop-down fields. To populate these fields with values, you can do either of the following:


- Click in the field and press **Enter** or click the down arrow. A list of available values displays. Select the desired value.
- To filter search results, click in the field and enter either full or partial data for the first part of the code or description, then click **Enter** or the down arrow. Values matching the entered data display. Select the desired value. If you get a "no data" message, enter new search criteria and click **Enter** or the down arrow.

 A maximum of 300 results can be displayed in the searchable fields. If there are more than 300 results, you will need to filter your results by re-entering full or partial data. Once the field is populated with a valid value, you can click the down arrow to again display all available options, or you can re-filter your results by entering new partial search criteria.

When entering search criteria, it is recommended you click **Enter** or the down arrow rather than **Tab** or clicking off the field. If you enter full or partial data and you **Tab** or click off the field and only one value matches the entered data, that value populates the field. However, if more than one value matches, you will get a data is invalid message. You will then need to either click the down arrow to view valid values, or enter new search criteria and click **Enter** or the down arrow.

Managing Work Events


 If your HR/payroll system of record is ADP Enterprise HR or HR Anytime Version 5.03, search fields are available at the top of the Work Events Summary page. You can use these search fields to filter the employee listing. For more information, see [“Using Search Fields to Filter Results”](#) on page 6-3. The fields available for filtering depend on your HR/payroll system of record.

 As long as an employee has an approval pending for a change, you cannot make additional changes. If you submit a work event for an employee and the employee has pending approval for a separate event, a message displays, “Employee has previous changes pending approval. Approval is required before you can submit additional changes. Check Approval History for more information.” This is true whether you have submitted a single change for a single employee, a single change for multiple employees, or multiple changes for a single employee.


If you are making changes to multiple employees, you can complete and submit the changes for those employees that do not have pending approvals.

Job actions, such as Transfer, Change Job Status, Change Job & Salary, and Change Employment Status, can be sent as:


- An individual job action for a single employee. For specifics on a job action, see the section pertaining to that job action:
 - [Transferring Employees.](#)
 - [Changing an Employee’s Job Status.](#)
 - [Changing an Employee’s Job and Salary Information.](#)
 - [Changing an Employee’s Employment Status.](#)
- Multiple job actions for a single employee. For specifics, see [“Updating Multiple Job Actions for a Single Employee.”](#)
- Single job action for multiple employees. For specifics, see [“Updating Multiple Employees with a Single Job Action.”](#)


 Hiring and Rehiring can not be included as the job action when creating work events with multiple job actions or multiple employees.

Each work event is submitted independently, processed independently, and listed individually in approval history.

 If you are submitting multiple employees for a single action and any of the selected employees have a pending action, the submission for that employee is canceled. The other submissions continue.

Click **Submit** to display the Start Work Event page, select the **Effective Date**, and if available, enter any comments you need to. Once you click **OK** on the Start Work Events page, you can begin to update the work event with the first job action you have selected.

 You can sort the columns in the employee list area in ascending or descending order. Click the arrow(s) beside the column name to sort. A single red arrow indicates which column is being used for sorting, as well as the sort order (ascending or descending).


 How a few of the fields are populated, as well as the availability of fields on some of the Work Events pages is determined by position management settings in your HR/payroll system of record. The position management indicator sent to Self Service from your HR/payroll system of record is a combination of the **Position Management** setting (**Full**, **Partial**, or **None**) on the Basic Options panel, and the **Update Incumbents** setting on the Position Information panel. For more information on using position management in your HR/payroll system of record, see the *Planning, Compensation, and Compliance Guide*.

Updating Multiple Job Actions for a Single Employee

This method allows you to do multiple job actions for a single employee without having to start over each time. Job actions, such as Transfer, Change Job Status, Change Job & Salary, and Change Employment Status, can be selected to for a single employee through a single task. However, each job action is submitted independently, processed independently, and listed individually in approval history.

To perform multiple job actions for a single employee then submit for approval, do the following:

1. From the Managing Work Events page, select the job actions you want to perform.

 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.


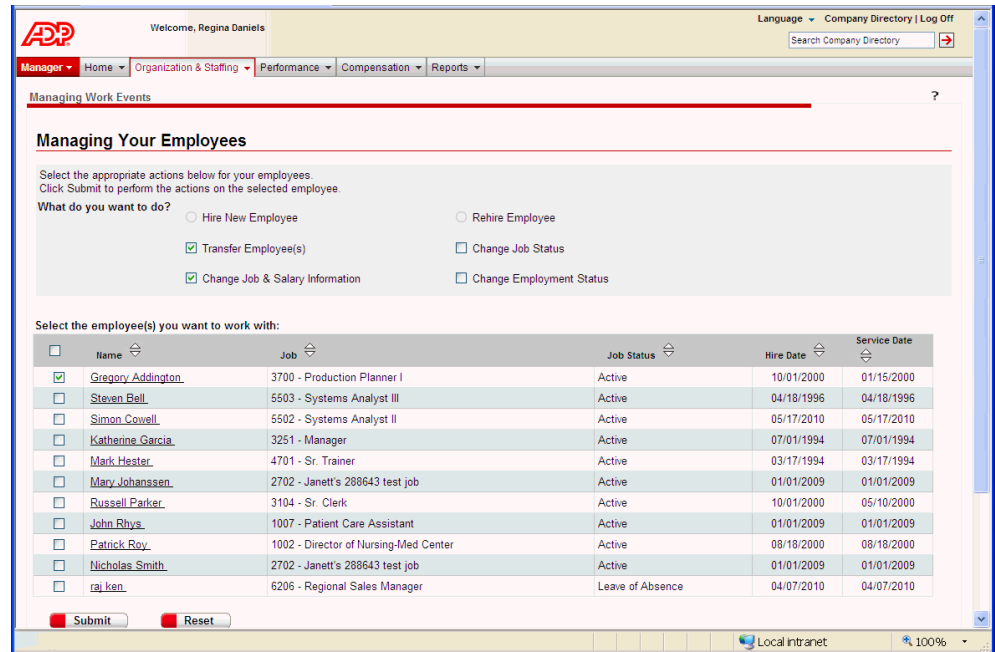
 The Managing Work Events page displays all job actions available to you, as well as your direct reports.

Figure 6-1 shows an example of the Managing Work Events page with multiple job actions selected for a single employee.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.



Welcome, Regina Daniels

Language Company Directory | Log Off

Search Company Directory

Manager Home Organization & Staffing Performance Compensation Reports

Managing Work Events

Managing Your Employees

Select the appropriate actions below for your employees.
Click Submit to perform the actions on the selected employee.

What do you want to do?

Hire New Employee Rehire Employee

Transfer Employee(s) Change Job Status

Change Job & Salary Information Change Employment Status

Select the employee(s) you want to work with:

<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input checked="" type="checkbox"/>	Gregory Addington	3700 - Production Planner I	Active	10/01/2000	01/15/2000
<input type="checkbox"/>	Steven Bell	5503 - Systems Analyst III	Active	04/18/1996	04/18/1996
<input type="checkbox"/>	Simon Cowell	5502 - Systems Analyst II	Active	05/17/2010	05/17/2010
<input type="checkbox"/>	Katherine Garcia	3251 - Manager	Active	07/01/1994	07/01/1994
<input type="checkbox"/>	Mark Hester	4701 - Sr. Trainer	Active	03/17/1994	03/17/1994
<input type="checkbox"/>	Mary Johansen	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Russell Parker	3104 - Sr. Clerk	Active	10/01/2000	05/10/2000
<input type="checkbox"/>	John Rhys	1007 - Patient Care Assistant	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Patrick Roy	1002 - Director of Nursing-Med Center	Active	08/18/2000	08/18/2000
<input type="checkbox"/>	Nicholas Smith	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	raj ken	6206 - Regional Sales Manager	Leave of Absence	04/07/2010	04/07/2010

Submit Reset

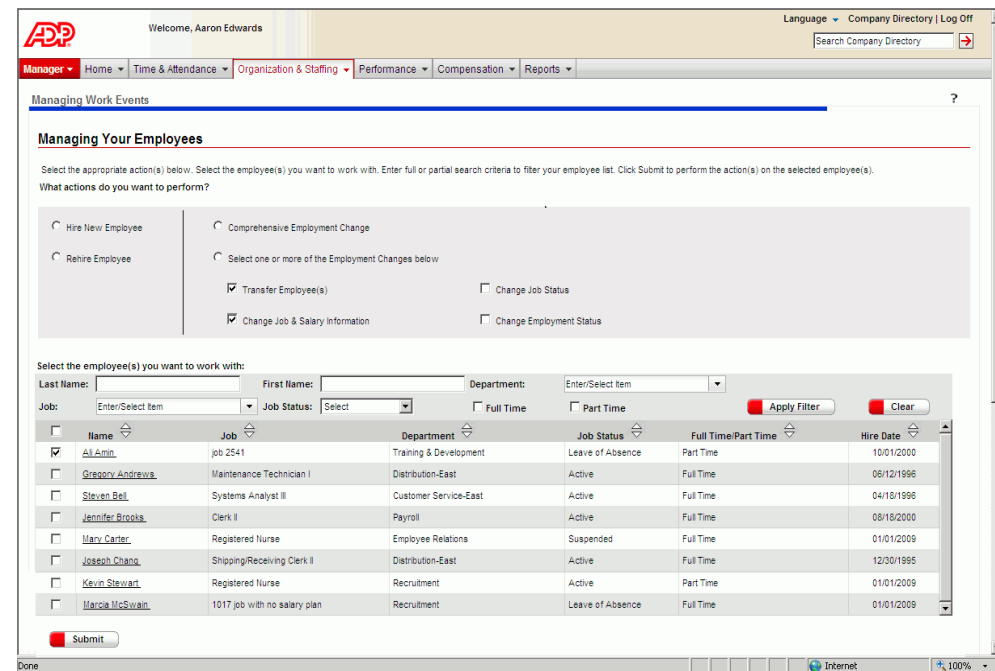
Local Intranet 100%

Figure 6-1. Managing Work Events Page

Figure 6-2 shows an example of the Managing Work Events page if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Version 5.03.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.



Welcome, Aaron Edwards

Language Company Directory | Log Off

Search Company Directory

Manager Home Time & Attendance Organization & Staffing Performance Compensation Reports

Managing Work Events

Managing Your Employees

Select the appropriate action(s) below. Select the employee(s) you want to work with. Enter full or partial search criteria to filter your employee list. Click Submit to perform the action(s) on the selected employee(s).

What actions do you want to perform?

Hire New Employee Comprehensive Employment Change

Rehire Employee Select one or more of the Employment Changes below

Transfer Employee(s) Change Job Status

Change Job & Salary Information Change Employment Status

Select the employee(s) you want to work with:

Last Name: First Name: Department: Enter/Select Item

Job: Enter/Select Item Job Status: Select Full Time Part Time Apply Filter Clear


<input type="checkbox"/>	Name	Job	Department	Job Status	Full Time/Part Time	Hire Date
<input checked="" type="checkbox"/>	Ali Amin	job 2541	Training & Development	Leave of Absence	Part Time	10/01/2000
<input type="checkbox"/>	Gregory Andrews	Maintenance Technician I	Distribution-East	Active	Full Time	06/12/1996
<input type="checkbox"/>	Steven Bell	Systems Analyst III	Customer Service-East	Active	Full Time	04/18/1996
<input type="checkbox"/>	Jennifer Brooks	Clerk II	Payroll	Active	Full Time	08/18/2000
<input type="checkbox"/>	Mary Carter	Registered Nurse	Employee Relations	Suspended	Full Time	01/01/2009
<input type="checkbox"/>	Joseph Chang	Shipping/Receiving Clerk II	Distribution-East	Active	Full Time	12/30/1995
<input type="checkbox"/>	Kevin Stewart	Registered Nurse	Recruitment	Active	Part Time	01/01/2009
<input type="checkbox"/>	Marica McSwain	1017 job with no salary plan	Recruitment	Leave of Absence	Full Time	01/01/2009

Submit


Internet 100%

Figure 6-2. Managing Work Events Page

2. Select the employee for whom you want to initiate the selected job actions and click **Submit**. The Start Work Events page displays.

 Only a single employee can be selected for multiple job actions.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

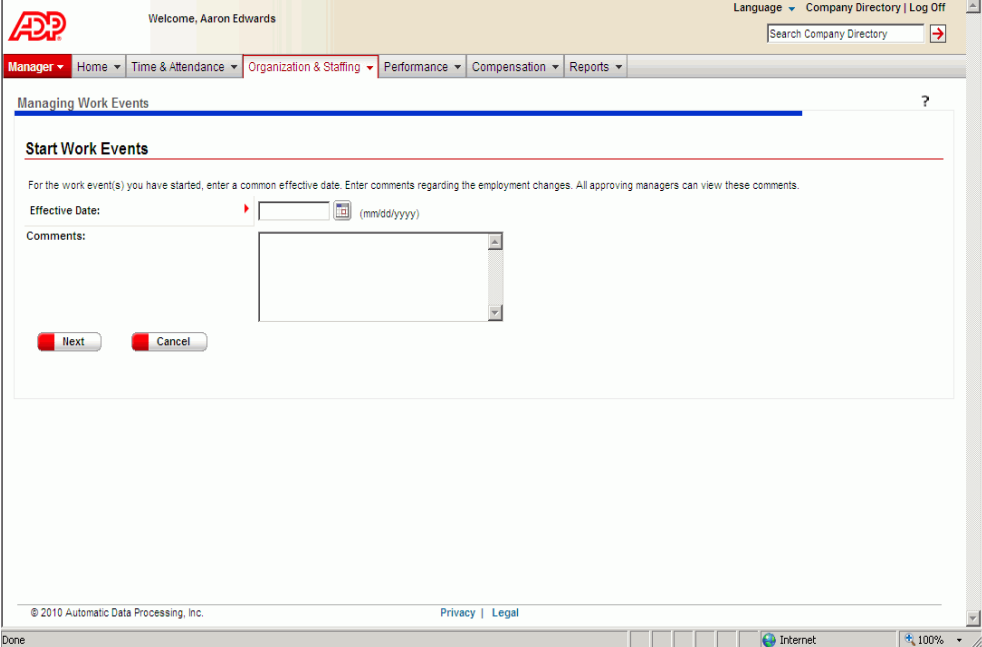


Figure 6-3. Start Work Event Page

3. From the **Effective Date** field, enter or select a date you want to be applied to all the job actions you have selected. This date will appear in the **Effective Date** field for each job action page.
4. In the **Comment** field, you can enter comments you may have regarding the work event. This is an optional field.
5. Click **Next**, to advance to the first job action that you have selected.

The first job action page displays, with the selected job actions listed across the top of the page. The job action you are currently on is highlighted.



More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and links for Language, Company Directory, and Log Off. Below this is a menu bar with options: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and features a search icon in the top right corner. The employee's name, 'Kieran Collins', is displayed prominently. Below the name, there is a 'Transfer' job action link with a red arrow icon and a sub-link 'Change Job and Salary Info'. A form follows, containing the following information:


Employee Name:	Kieran Collins	Status:	Active
Employee ID:	222054	Job:	1006 - Staffing Coordinator
Hire Date:	01/01/2009	Department:	222004 - Employee Relations
Service Date:	01/01/2009	Location:	NORC2 - Georgia R&D
Employee Type:	Salaried	Pay Group:	ET2
		Payroll Department Number:	

Below the form, there is a 'Type of Transfer:' label and a dropdown menu currently set to 'Select...'. At the bottom of the form, there are 'Submit' and 'Cancel' buttons. The footer of the page includes the copyright notice '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'.


Figure 6-4. Managing Work Events - Single Employee - Multiple Job Actions Page

- Complete the fields as needed for the job action. For specifics, see the specific procedure for that job action.

- Click **Submit** to send the job action to work flow and continue to the next job action. When you click **Submit** on the last job action, the last job action is submitted to workflow and the Work Events Summary page displays.

 The process order is to step through each job action for the employee.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

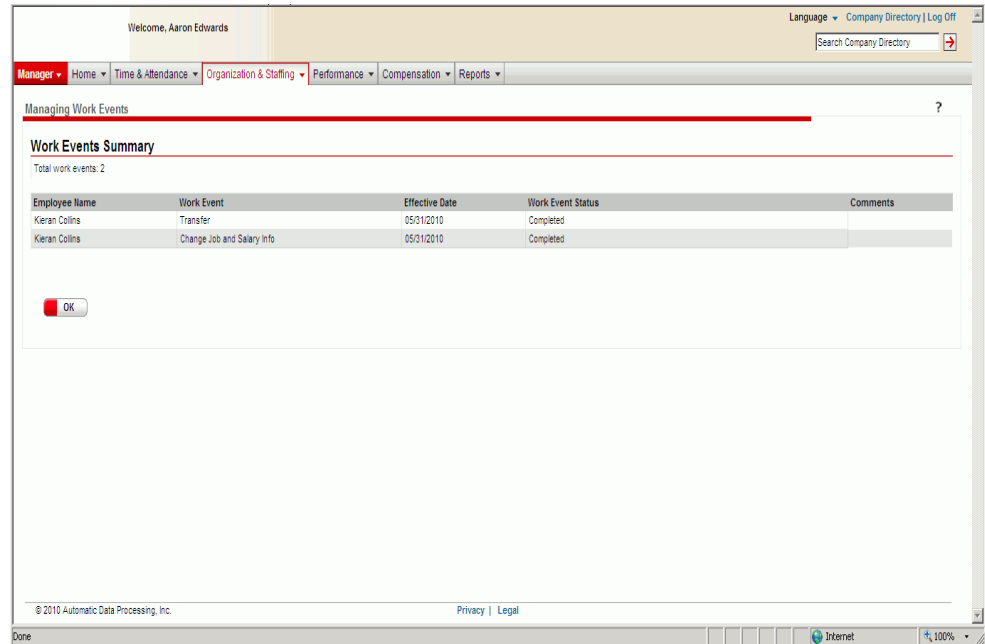


Figure 6-5. Work Events Summary Page

- Once you have finished reviewing the process status on the Work Events Summary page, click **OK**. You are returned to the page from which you began the work event, the Direct Report page or the Managing Work Events page.



End of procedure

You have finished creating a work event consisting of multiple job actions for a single employee and submitting them for approval.

For specifics on transferring employees to a new manager, new department, or new location and submitting for approval see, “[Transferring Employees](#)” on page 6-44.

For specifics on changing an employee’s job status see, “[Changing an Employee’s Job Status](#)” on page 6-64.

For specifics on changing an employee’s job and salary information for promotions, demotions, lateral job changes and/or salary changes see, “[Changing an Employee’s Job and Salary Information](#)” on page 6-71.


For specifics on placing an employee on leave, returning an employee from leave, and/or terminating an employee see, “[Changing an Employee’s Employment Status](#)” on page 6-104.

Updating Multiple Employees with a Single Job Action

This method allows you to do single job action for multiple employees without having to start over each time. A job action, such as Transfer, Change Job Status, Change Job & Salary, and Change Employment Status, can be selected for a multiple employees through a single task. However, each employee's job action is submitted independently, processed independently, and listed individually in approval history.

To initiate a single job action for multiple employees, do the following:

1. From the Managing Work Events page, select the job actions you want to perform.

 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the employee changes below** option to enable the individual job action check boxes.



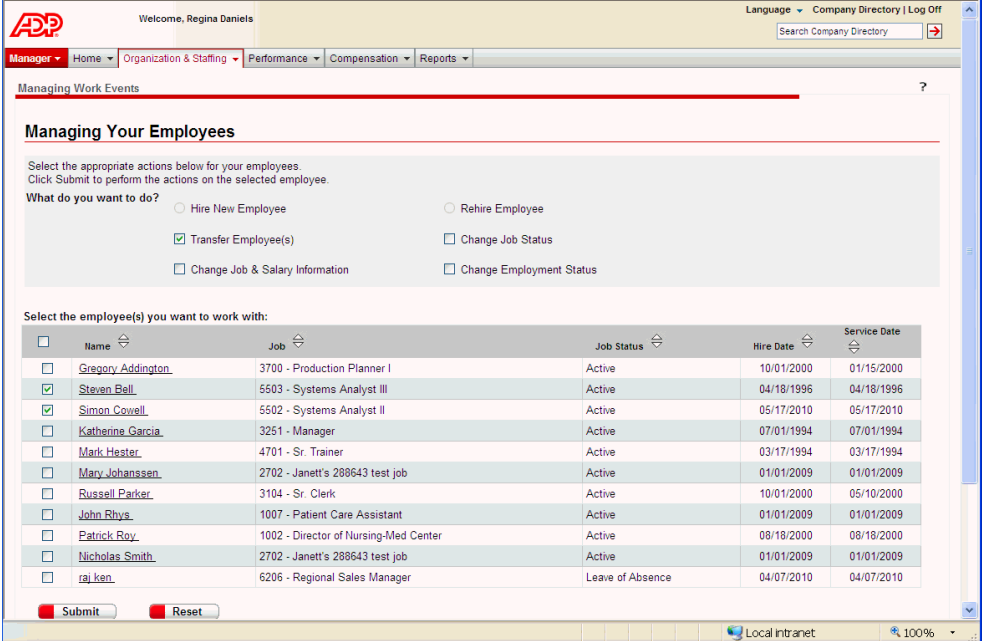
 The Managing Work Events page displays all job actions available to you, as well as your direct reports.

Figure 6-6 shows an example of the Managing Work Events page, with a single job action selected for multiple employees.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



Welcome, Regina Daniels | Language | Company Directory | Log Off

Manager | Home | Organization & Staffing | Performance | Compensation | Reports

Managing Work Events

Managing Your Employees

Select the appropriate actions below for your employees.
Click Submit to perform the actions on the selected employee.

What do you want to do?

Hire New Employee Rehire Employee

Transfer Employee(s) Change Job Status

Change Job & Salary Information Change Employment Status

Select the employee(s) you want to work with:

<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input type="checkbox"/>	Gregory Addington	3700 - Production Planner I	Active	10/01/2000	01/15/2000
<input checked="" type="checkbox"/>	Steven Bell	5503 - Systems Analyst III	Active	04/18/1996	04/18/1996
<input checked="" type="checkbox"/>	Simon Cowell	5502 - Systems Analyst II	Active	05/17/2010	05/17/2010
<input type="checkbox"/>	Katherine Garcia	3251 - Manager	Active	07/01/1994	07/01/1994
<input type="checkbox"/>	Mark Hester	4701 - Sr Trainer	Active	03/17/1994	03/17/1994
<input type="checkbox"/>	Mary Johanssen	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Russell Parker	3104 - Sr Clerk	Active	10/01/2000	05/10/2000
<input type="checkbox"/>	John Rhys	1007 - Patient Care Assistant	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Patrick Roy	1002 - Director of Nursing-Med Center	Active	08/18/2000	08/18/2000
<input type="checkbox"/>	Nicholas Smith	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	raj ken	6206 - Regional Sales Manager	Leave of Absence	04/07/2010	04/07/2010

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Figure 6-6. Managing Work Events Page

Figure 6-7 shows an example of the Managing Work Events page if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Version 5.03.

ADP Welcome, Aaron Edwards Language Company Directory | Log Off

Manager Home Time & Attendance Organization & Staffing Performance Compensation Reports

Managing Work Events

Managing Your Employees

Select the appropriate action(s) below. Select the employee(s) you want to work with. Enter full or partial search criteria to filter your employee list. Click Submit to perform the action(s) on the selected employee(s).
What actions do you want to perform?

Hire New Employee
 Comprehensive Employment Change
 Rehire Employee
 Select one or more of the Employment Changes below

Transfer Employee(s)
 Change Job Status
 Change Job & Salary Information
 Change Employment Status

Select the employee(s) you want to work with:

Last Name: First Name: Department: Enter/Select Item

Job: Enter/Select Item Job Status: Select Full Time Part Time Apply Filter Clear

<input type="checkbox"/>	Name	Job	Department	Job Status	Full Time/Part Time	Hire Date
<input checked="" type="checkbox"/>	Ali Amin	job 2541	Training & Development	Leave of Absence	Part Time	10/01/2000
<input checked="" type="checkbox"/>	Gregory Andrews	Maintenance Technician I	Distribution-East	Active	Full Time	06/12/1996
<input checked="" type="checkbox"/>	Steven Bell	Systems Analyst III	Customer Service-East	Active	Full Time	04/18/1996
<input type="checkbox"/>	Jennifer Brooks	Clerk II	Payroll	Active	Full Time	09/19/2000
<input type="checkbox"/>	Mary Carter	Registered Nurse	Employee Relations	Suspended	Full Time	01/01/2009
<input type="checkbox"/>	Joseph Chang	Shipping/Receiving Clerk II	Distribution-East	Active	Full Time	12/30/1995
<input type="checkbox"/>	Kevin Stewart	Registered Nurse	Recruitment	Active	Part Time	01/01/2009
<input type="checkbox"/>	Marcia McSwain	1017 job with no salary plan	Recruitment	Leave of Absence	Full Time	01/01/2009

Submit

Figure 6-7. Managing Work Events Page

2. Select the employees for whom you want to initiate the selected job action and click **Submit**. The Start Work Events page displays.

ADP Welcome, Aaron Edwards Language Company Directory | Log Off

Manager Home Time & Attendance Organization & Staffing Performance Compensation Reports

Managing Work Events

Start Work Events

For the work event(s) you started, enter comments regarding the employment changes. All approving managers can view these comments.

Comments:

Next Cancel

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Figure 6-8. Start Work Events Page

3. In the **Comment** field, you can enter comments you may have regarding the work event. This is an optional field.

More info


For a description of the fields on this page or for related tasks, click the (Help icon) provided in the right-hand corner of the Self Service page.

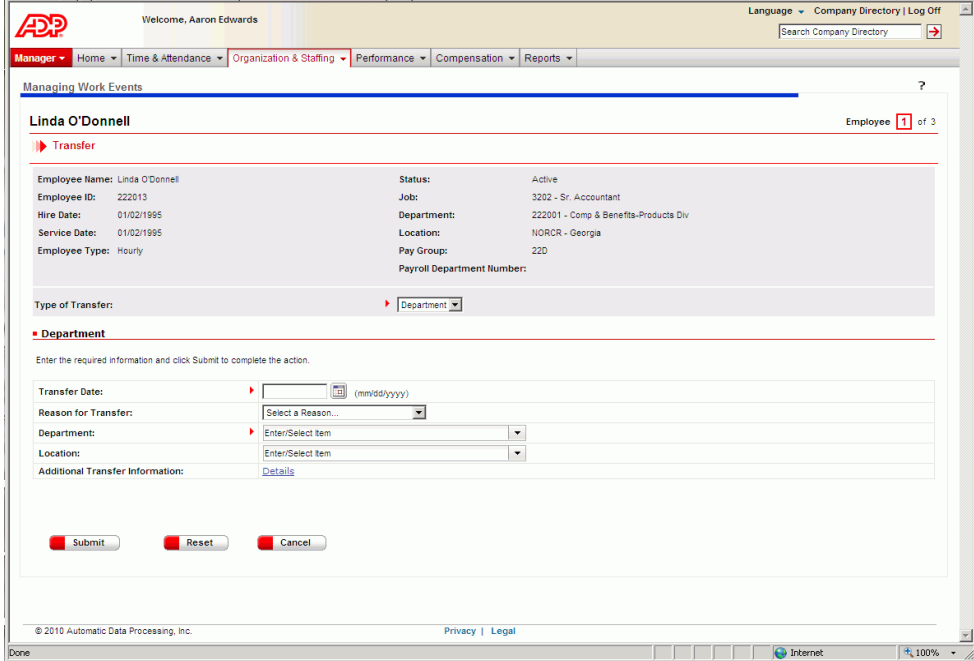
More info

For a description of the fields on this page or for related tasks, click the (Help icon) provided in the right-hand corner of the Self Service page.

- Click **Next**, to advance to the job action for the first employee you selected.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The main menu includes Manager, Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The current page is 'Managing Work Events' for employee Linda O'Donnell. The page displays the following information:

Employee Name:	Linda O'Donnell	Status:	Active
Employee ID:	222013	Job:	3202 - Sr. Accountant
Hire Date:	01/02/1995	Department:	222001 - Comp & Benefits-Products Div
Service Date:	01/02/1995	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	22D
		Payroll Department Number:	

The 'Type of Transfer' is set to 'Department'. The form below the 'Department' section contains the following fields:

- Transfer Date: (mm/dd/yyyy)
- Reason for Transfer: (Select a Reason...)
- Department: (Enter/Select Item)
- Location: (Enter/Select Item)
- Additional Transfer Information: (Details)


Buttons for Submit, Reset, and Cancel are located at the bottom of the form.

Figure 6-9. Start Work Events Page

- Complete the fields as needed for the job action. For specifics, see the specific procedure for that job action.


The number of employees included in the work event is indicated in the top right of the page in the **Employee** field. The current employee is indicated by a boxed number.

- When you have completed the appropriate selections, click **Submit** to submit the job action for the employee to workflow and continue to the job action for the next employee.

 If you are submitting multiple employees for a single action and any of the selected employees have a pending action, the submission for that employee is canceled. The cancellation is listed on the work events summary for the work event. Approval is required before you can submit the additional changes. Check Approval History for more information. The other submissions continue.

When you click **Submit** on the last job action, the last job action is submitted and the Work Events Summary page displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

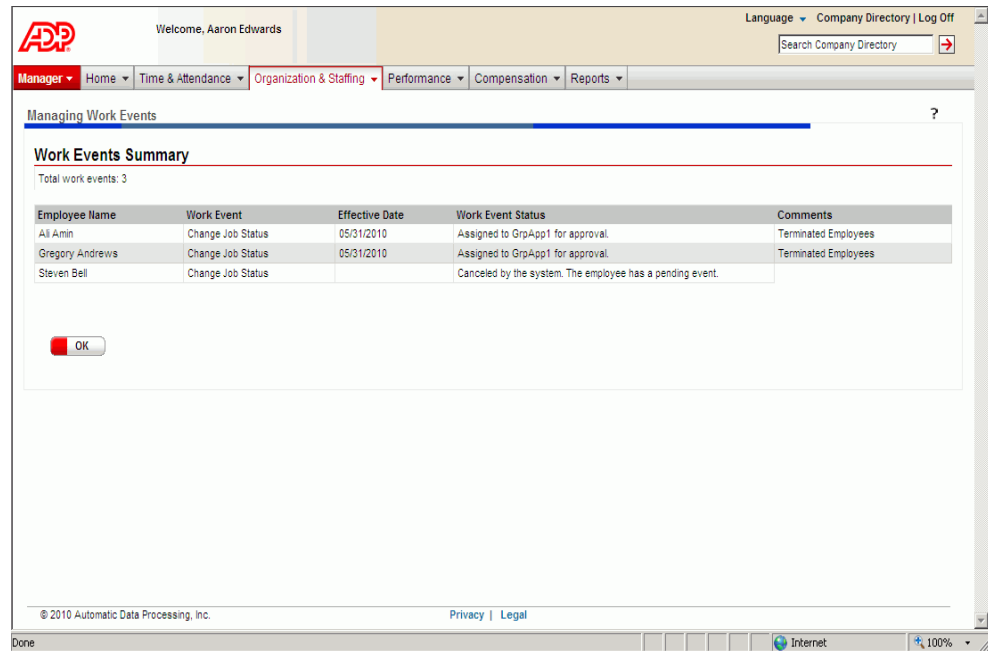


Figure 6-10. Work Events Summary Page

- Once you have finished reviewing the process status on the Work Events Summary page, click **OK**. You are returned to the page from which you began the work event, the Direct Report page or the Managing Work Events page.



End of procedure

You have finished creating a work event consisting of single job actions for a multiple employees and submitting them for approval.

For specifics on transferring employees to a new manager, new department, or new location and submitting for approval see, [“Transferring Employees”](#) on page 6-44.


For specifics on changing an employee’s job status see, [“Changing an Employee’s Job Status”](#) on page 6-64.

For specifics on changing an employee’s job and salary information for promotions, demotions, lateral job changes and/or salary changes see, [“Changing an Employee’s Job and Salary Information”](#) on page 6-71.

For specifics on placing an employee on leave, returning an employee from leave, and/or terminating an employee see, [“Changing an Employee’s Employment Status”](#) on page 6-104.

Viewing Employee Profiles

The Employee Profile page displays job, pay, personal, compensation, performance, contact, and career data for the selected employee. Employee profiles can be accessed from the Managing Work Events page, the Direct Reports page, and the Employee Selection page.

 The Employee Selection page is accessed when you select the **Employee Career Profile**, **Enroll Employee in Training**, or **Employee Training Summary** tasks from the **Organization & Staffing** tab. For more information on these tasks, see [Chapter 7](#), “Managing Employee Career and Training Information.”

Information displayed in the employee profile depends on the data available as well as which areas of the employee profile your administrator has enabled.

Viewing employee profiles includes the following tasks:

- [Viewing Employee Profiles from the Managing Work Events Page](#)
- [Viewing Employee Profiles from the Direct Reports Page](#)
- [Viewing Employee Profiles from the Employee Selection Page](#)

Viewing Employee Profiles from the Managing Work Events Page

Tasks

Viewing Employee Profiles

Viewing Employee Profiles from the Managing Work Events Page

Viewing Employee Profiles from the Direct Reports Page

Viewing Employee Profiles from the Employee Selection Page

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

To view employee profiles from the Managing Work Events page, do the following:

- From the **Organization & Staffing** tab, select **Managing Work Events**. The Managing Work Events page displays with the manager's direct reports listed.

Welcome, Regina Daniels

Language Company Directory | Log Off

Search Company Directory

Manager Home Organization & Staffing Performance Compensation Reports

Managing Work Events

Managing Your Employees

Select the appropriate actions below for your employees. Click Submit to perform the actions on the selected employee.

What do you want to do?

Hire New Employee Rehire Employee

Transfer Employee(s) Change Job Status

Change Job & Salary Information Change Employment Status

Select the employee(s) you want to work with:

<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input type="checkbox"/>	Gregory Addington	3700 - Production Planner I	Active	10/01/2000	01/15/2000
<input type="checkbox"/>	Steven Bell	5503 - Systems Analyst III	Active	04/18/1996	04/18/1996
<input type="checkbox"/>	Simon Cowell	5502 - Systems Analyst II	Active	05/17/2010	05/17/2010
<input type="checkbox"/>	Katherine Garcia	3251 - Manager	Active	07/01/1994	07/01/1994
<input type="checkbox"/>	Mark Hester	4701 - Sr. Trainer	Active	03/17/1994	03/17/1994
<input type="checkbox"/>	Mary Johansson	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Russell Parker	3104 - Sr. Clerk	Active	10/01/2000	05/10/2000
<input type="checkbox"/>	John Rhys	1007 - Patient Care Assistant	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Patrick Roy	1002 - Director of Nursing-Med Center	Active	08/18/2000	08/18/2000
<input type="checkbox"/>	Nicholas Smith	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	raj.ken	6206 - Regional Sales Manager	Leave of Absence	04/07/2010	04/07/2010

Submit Reset

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Figure 6-11. Managing Work Events Page

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

Welcome, Aaron Edwards

Language Company Directory | Log Off

Search Company Directory

Manager Home Time & Attendance Organization & Staffing Performance Compensation Reports

Managing Work Events

Managing Your Employees

Select the appropriate action(s) below. Select the employee(s) you want to work with. Enter full or partial search criteria to filter your employee list. Click Submit to perform the action(s) on the selected employee(s).

What actions do you want to perform?

Hire New Employee Comprehensive Employment Change

Rehire Employee Select one or more of the Employment Changes below

Transfer Employee(s) Change Job Status

Change Job & Salary Information Change Employment Status

Select the employee(s) you want to work with:

Last Name: First Name: Department: Enter/Select Item

Job: Enter/Select Item Job Status: Select Full Time Part Time Apply Filter Clear

<input type="checkbox"/>	Name	Job	Department	Job Status	Full Time/Part Time	Hire Date
<input checked="" type="checkbox"/>	Ali Ann	job 2541	Training & Development	Leave of Absence	Part Time	10/01/2000
<input type="checkbox"/>	Gregory Andrews	Maintenance Technician I	Distribution-East	Active	Full Time	06/12/1996
<input type="checkbox"/>	Steven Bell	Systems Analyst III	Customer Service-East	Active	Full Time	04/18/1996
<input type="checkbox"/>	Jennifer Brooks	Clerk II	Payroll	Active	Full Time	03/18/2000
<input type="checkbox"/>	Mary Carter	Registered Nurse	Employee Relations	Suspended	Full Time	01/01/2009
<input type="checkbox"/>	Joseph Chang	Shipping/Receiving Clerk II	Distribution-East	Active	Full Time	12/30/1995
<input type="checkbox"/>	Kevin Stewart	Registered Nurse	Recruitment	Active	Part Time	01/01/2009
<input type="checkbox"/>	Marcie McSwain	1017 job with no salary plan	Recruitment	Leave of Absence	Full Time	01/01/2009

Submit


Done Internet 100%

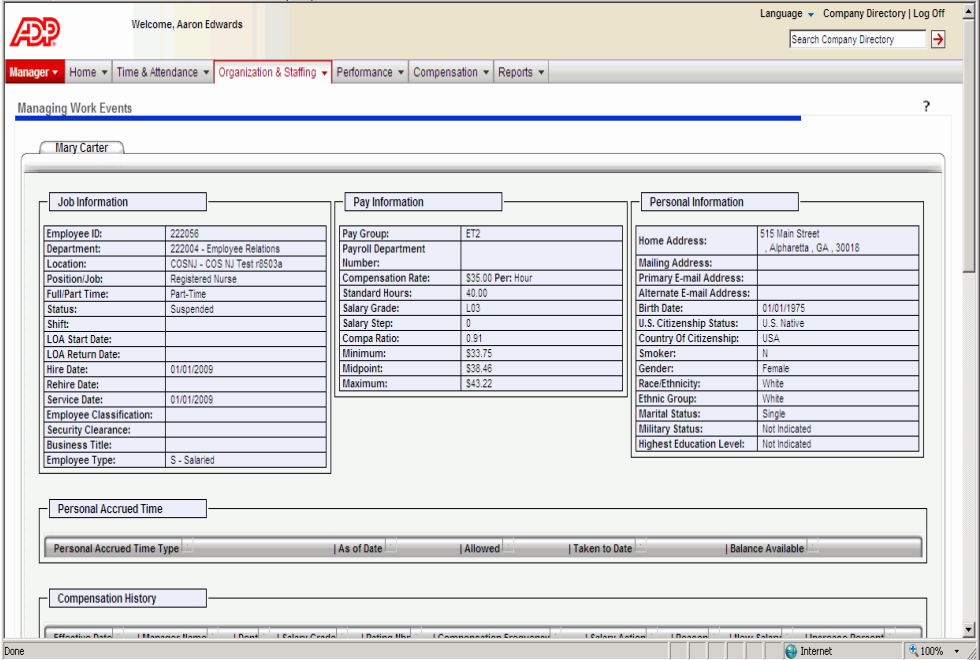
Figure 6-12. Managing Work Events Page with Search Fields

Depending on your HR/payroll system of record, a maximum of 300 results can be displayed for a number of searchable fields. If your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Version 5.03, search fields are available at the top of the page that allow you to filter the employee list. For more information, see “[Search and Filtering Tips](#)” on page 6-3.

- Click the underlined **Employee Name** for the employee whose employment data you want to view. The Employee Profile page displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



Job Information		Pay Information		Personal Information	
Employee ID:	222056	Pay Group:	ET2	Home Address:	515 Main Street Alpharetta, GA, 30018
Department:	222004 - Employee Relations	Payroll Department Number:		Mailing Address:	
Location:	COSNJ - COS NJ Test r8503a	Compensation Rate:	\$35.00 Per Hour	Primary E-mail Address:	
Position/Job:	Registered Nurse	Standard Hours:	40.00	Alternate E-mail Address:	
Full/Part Time:	Part-Time	Salary Grade:	L03	Birth Date:	01/01/1975
Status:	Suspended	Salary Step:	0	U.S. Citizenship Status:	U.S. Native
Shift:		Compa Ratio:	0.91	Country Of Citizenship:	USA
LOA Start Date:		Minimum:	\$33.75	Smoker:	N
LOA Return Date:		Midpoint:	\$38.46	Gender:	Female
Hire Date:	01/01/2009	Maximum:	\$43.22	Race/Ethnicity:	White
Rehire Date:				Ethnic Group:	White
Service Date:	01/01/2009			Marital Status:	Single
Employee Classification:				Military Status:	Not Indicated
Security Clearance:				Highest Education Level:	Not Indicated
Business Title:					
Employee Type:	S - Salaried				

Figure 6-13. Employee Profile Page

Information shown in the Employee Profile is divided into the following categories:

- **Job Information**
- **Pay Information**
- **Personal Information**
- **Personal Accrued Time**
- **Compensation History**
- **Performance History**
- **Telephone Number**
- **Emergency Contacts**
- **Job History**
- **Education**
- **Languages**
- **Skills**
- **Licenses/Certifications**

Information displayed in the employee profile depends on the data available as well as which areas of the employee profile your administrator has enabled.

- Click **Print** to print the employee profile.
- Click **Cancel** to return to the Manager Work Events page.



 What's next

You have finished viewing employees through the Managing Work Events page. Next you will review employee profiles from the Direct Reports page.

Viewing Employee Profiles from the Direct Reports Page

To view employee profiles from the Direct Reports page, do the following:

1. From the **Organization & Staffing** tab, select **Direct Reports**. The Direct Reports page displays.

Employees reporting directly to you are displayed in the employee list area. Any of your direct reports who also have employees reporting to them will have the  (Direct Reports icon) displayed next to their name. Click  to drill down and view the direct reports of your direct reports.


 **Tasks**
Viewing Employee Profiles

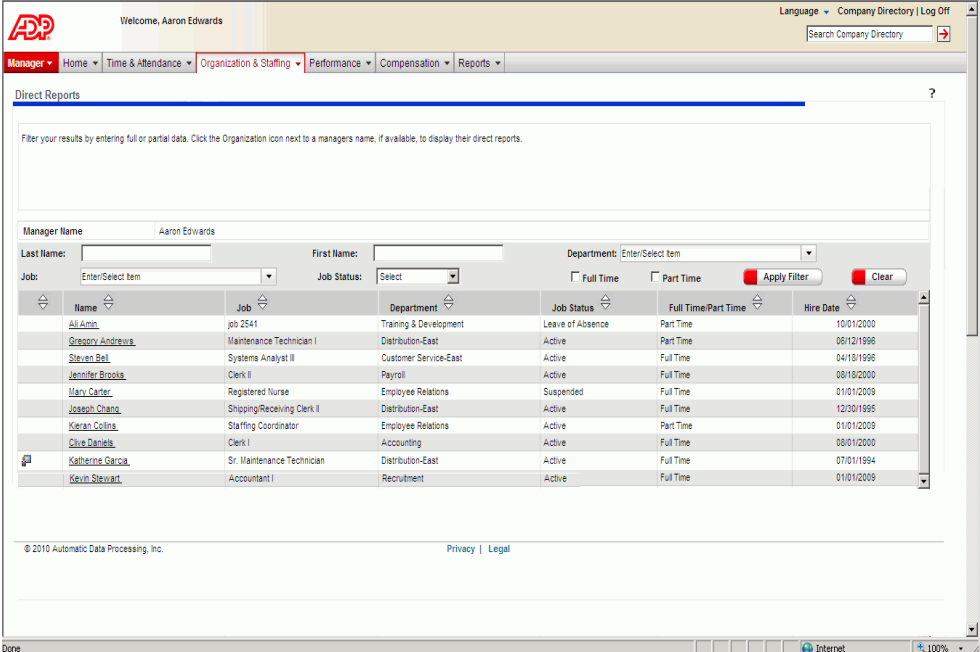
Viewing Employee Profiles from the Managing Work Events Page

 **Viewing Employee Profiles from the Direct Reports Page**

Viewing Employee Profiles from the Employee Selection Page

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



Direct Reports

Filter your results by entering full or partial data. Click the Organization icon next to a managers name, if available, to display their direct reports.

Manager Name: Aaron Edwards

Last Name: First Name: Department: Enter/Select Item

Job: Enter/Select Item Job Status: Select Full Time Part Time

Name	Job	Department	Job Status	Full Time/Part Time	Hire Date
Ali Amic	job 2541	Training & Development	Leave of Absence	Part Time	10/01/2000
Oregon Andrews	Maintenance Technician I	Distribution-East	Active	Part Time	08/12/1996
Steven Bell	Systems Analyst III	Customer Service-East	Active	Full Time	04/18/1996
Jennifer Brooks	Clerk II	Payroll	Active	Full Time	08/18/2000
Mary Carter	Registered Nurse	Employee Relations	Suspended	Full Time	01/01/2009
Joseph Chango	Shipping/Receiving Clerk II	Distribution-East	Active	Full Time	12/30/1995
Keran Collins	Staffing Coordinator	Employee Relations	Active	Part Time	01/01/2009
Clive Daniels	Clerk I	Accounting	Active	Full Time	08/01/2000
Katherine Garcia	Sr. Maintenance Technician	Distribution-East	Active	Full Time	07/01/1994
Kevin Stewart	Accountant I	Recruitment	Active	Full Time	01/01/2009

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Figure 6-14. Direct Reports Page

-  The search fields at the top of the Direct Reports page are only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Version 5.03.

The initial display of direct reports is limited by the HR/payroll system of record to 999. However, you can use the search fields to display direct reports beyond this initial display. For example, the page initially displays 999 direct reports but the direct report you want to use is John Stewart in department 123 but he isn't listed. In the **Last Name** search field, enter Stewart and click **Apply Filter**. John Stewart should display in the filtered listing.

- Click the underlined **Name** for the employee whose profile you want to view, then select **Employee Profile** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

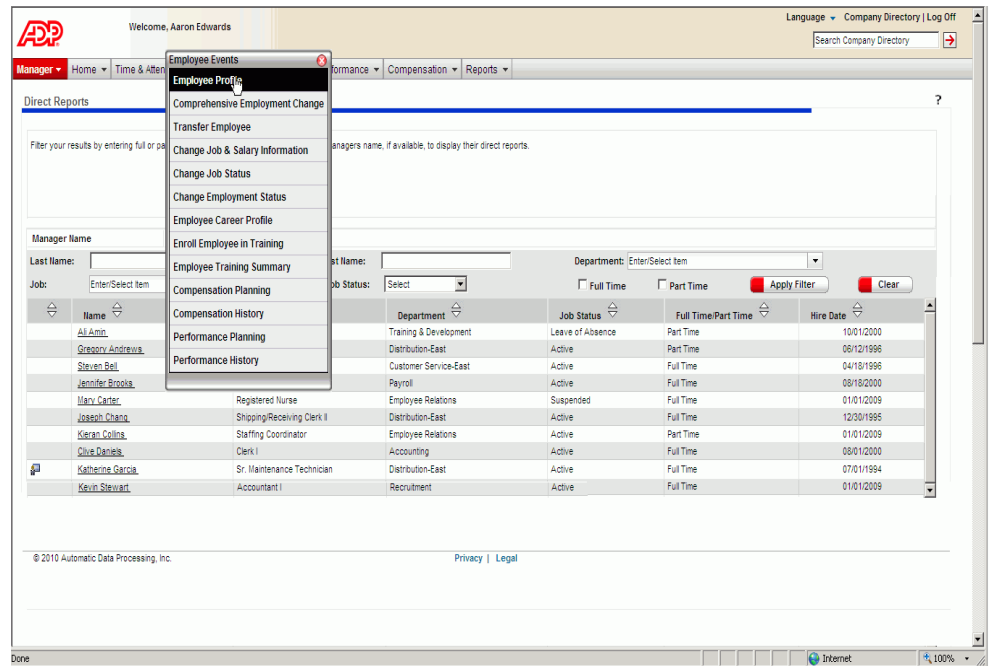


Figure 6-15. Employee Event Selection Menu

The Employee Profile page for the selected employee displays, as shown in [Figure 6-13](#) on page 6-17.

- Click **Print** to print the employee profile.
- Click **Cancel** to return to the Direct Reports page.
 - Depending on your HR/payroll system of record, a maximum of 300 results can be displayed for a number of searchable fields. If available, you can limit the employee listing by using the filter fields at the top of the page. For more information, see [“Search and Filtering Tips”](#) on page 6-3.

What's next

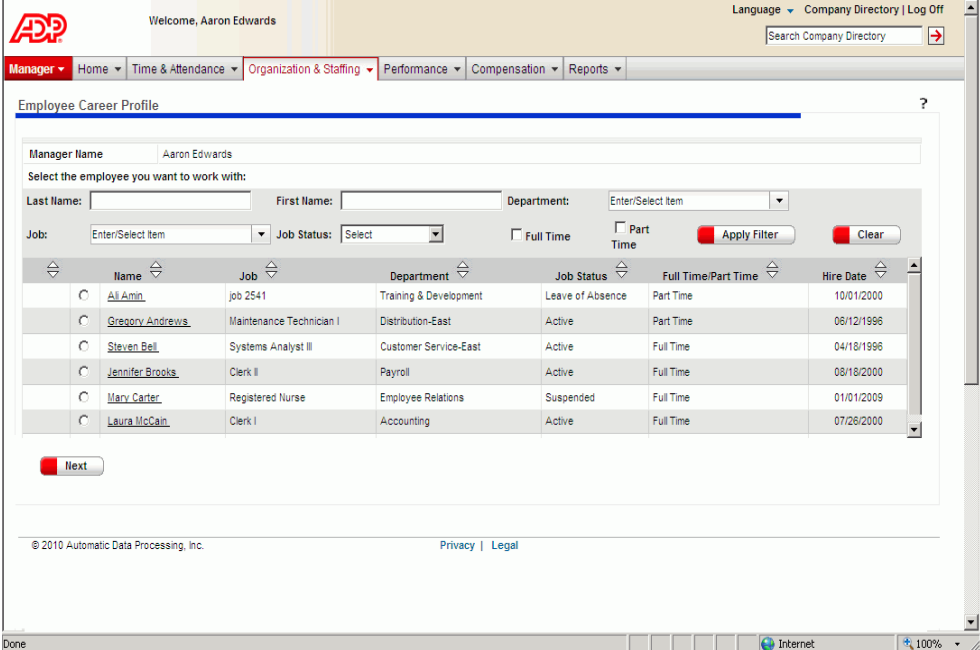
You have finished viewing employees through the Direct Reports page. Next you will review employee profiles from the Employee Selection page.

Viewing Employee Profiles from the Employee Selection Page

-    **Tasks**
- Viewing Employee Profiles**
- Viewing Employee Profiles from the Managing Work Events Page
 - Viewing Employee Profiles from the Direct Reports Page
 -  **Viewing Employee Profiles from the Employee Selection Page**

To view and print employee profiles from the Employee Selection page, do the following:


- From the **Organization & Staffing** tab, select either the **Employee Career Profile**, **Enroll Employee in Training**, or **Employee Training Summary** task. The Employee Selection page displays.





The screenshot shows the ADP Employee Selection Page. At the top, there is a navigation menu with tabs: Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. Below the menu, the page title is "Employee Career Profile". There are search filters for Last Name, First Name, Department, Job, and Job Status. A "Next" button is visible at the bottom left of the search area. Below the filters is a table of employee profiles.

Name	Job	Department	Job Status	Full Time/Part Time	Hire Date
<u>Ali Amin</u>	job 2541	Training & Development	Leave of Absence	Part Time	10/01/2000
<u>Gregory Andrews</u>	Maintenance Technician I	Distribution-East	Active	Part Time	08/12/1998
<u>Steven Bell</u>	Systems Analyst III	Customer Service-East	Active	Full Time	04/18/1996
<u>Jennifer Brooks</u>	Clerk II	Payroll	Active	Full Time	08/18/2000
<u>Mary Carter</u>	Registered Nurse	Employee Relations	Suspended	Full Time	01/01/2009
<u>Laura McCain</u>	Clerk I	Accounting	Active	Full Time	07/28/2000

Figure 6-16. Employee Selection Page

-  For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

 The search fields are only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Version 5.03.
 - From the employee list area, click the underlined **Name** for the employee whose profile you want to view. The Employee Profile page for the selected employee displays, as shown in [Figure 6-13](#) on page 6-17.
 - Click **Print** to print the employee profile.
 - Click **Cancel** to return to the Employee Selection page.
-  Depending on your HR/payroll system of record, a maximum of 300 results can be displayed for a number of searchable fields. If available, you can limit the employee listing by using the filter fields at the top of the page. For more information, see [“Search and Filtering Tips”](#) on page 6-3.



End of procedure

You have finished looking at employee profiles.


Initiating the Hiring Process

Managers can initiate hiring new employees, as well as rehiring former employees, and then submit the hire/rehire for approval. Once the hire/rehire has been approved within Self Service, the final processing of the hire/rehire is completed by a practitioner in your HR/payroll system of record. The new employee will not be listed in the manager's direct reports until the practitioner has completed the hire process in your HR/payroll system of record. For additional information, see the *Hiring, Staffing, and Job Maintenance Guide*.

What information a manager can enter in Self Service depends on how the Portal administrator has configured the hire process. At a minimum, the following pages need to be completed:

- For New Hires – New Hire Start and the Submit page
- For Rehires – Rehire Prompt, Rehire Start, and the Submit page

The "active" version of the hire/rehire pages display when the page is accessed from the Managing Work Events page, which means the manager is able to enter information in the fields provided. When the page is accessed either through the Approval or Notification page, the fields are display-only. However, for hires/rehires that have been rejected, these pages are active through the Message Center Notifications page for the originating manager, allowing the manager to make corrections to the hire/rehire information. This allows the originating manager to make corrections through the Notifications page rather than re-enter all new information through the Managing Work Events pages.

 The New Hire and Rehire processes are very similar, so both are covered in this section. Differences between the two procedures differ only in their starting pages.



Some of the pages include searchable drop-down fields and/or search fields. For more information, see “[Search and Filtering Tips](#)” on page 6-3.

Initiating the new hire/rehire process includes the following tasks:

- [Completing the Rehire Prompt Page \(rehires only\)](#)
- [Completing the Rehire Start Page \(rehires only\)](#)
- [Completing the New Hire Start Page \(new hires only\)](#)
- [Completing the Personal Data - Part A Page](#)
- [Completing the Personal Data - Part B Page](#)
- [Completing the Job Data - Part A Page](#)
- [Completing the Job Data - Part B Page](#)
- [Completing the Pay Information Page](#)
- [Completing the Citizenship Page](#)
- [Completing the Additional Hire Information Page](#)
- [Completing the Submit Page](#)

Completing the Rehire Prompt Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The Rehire Prompt page is used to begin the rehire process.

This is for rehires only. For New Hires, see “Completing the New Hire Start Page” on page 6-26.

To complete the Rehire Prompt page, do the following:

1. From the Managing Work Events page (see [Figure 6-11](#) on page 6-16), select the **Rehire Employee** work event option and click **Submit**. The Rehire Prompt page displays.

The Managing Work Events page displays all job actions available to you, as well as your direct reports.

Figure 6-17. Rehire Prompt Page

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

2. Enter the candidates **Social Security Number** or **Previous Employee ID**.

Valid formats for social security number include the following: 000000000 or 000-00-0000. Enter numbers only. Per the Social Security Administration, these additional prefixes are supported: 001-665, 667-772. The following numbers are invalid: 111-11-1111, 123-45-5678, and any number beginning with 8, 9, 000, 666, and any number with 00 in the middle or ending with 000. The Social Security Number is masked on the Rehire Start page. All numbers except the last four are masked. Format is: XXX-XX-9999.


3. Click **Next** to advance to the Rehire Start page.

 What's next

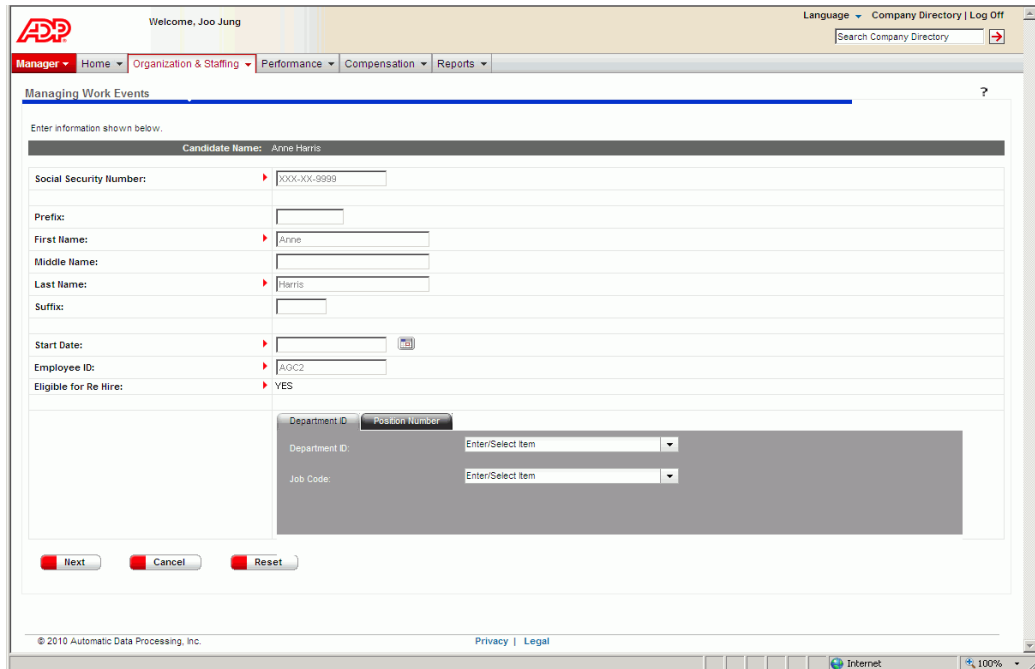
You have finished entering the required information on the Rehire Prompt page. Next, you must enter the required information on the Rehire Start page.

Completing the Rehire Start Page

The Rehire Start page is used to proceed with the rehire process after you have selected the candidate from the Rehire Prompt page.

 This is for rehires only. For New Hires, see “Completing the New Hire Start Page” on page 6-26.

Some fields on the Rehire Start page will automatically populate, based on the information entered on the Rehire Prompt page. The **Eligible for Rehire** field displays if the candidate is eligible for rehire. This setting depends on what was entered when the employee resigned previously from the company, and defaults in from your HR/payroll system of record.



ADP Welcome, Joo Jung Language Company Directory | Log Off

Manager Home Organization & Staffing Performance Compensation Reports

Managing Work Events ?

Enter information shown below.

Candidate Name: Anne Harris

Social Security Number: 000-XX-9999

Prefix:

First Name: Anne

Middle Name:

Last Name: Harris

Suffix:

Start Date:

Employee ID: AGC2

Eligible for Re Hire: YES

Department ID: Enter/Select Item



Position Number: Enter/Select Item

Job Code: Enter/Select Item

Next Cancel Reset

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Figure 6-18. Rehire Start Page

 For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

   Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

✓ Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page


Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page


To complete the Rehire Start page, do the following:

1. Enter the candidate's name information. Fields include the **Prefix**, **First Name**, **Middle Name**, **Last Name**, and **Suffix**. The **First Name** and **Last Name** fields are automatically populated, but can be changed.


 Required fields are indicated with a red arrow.

2. Enter the candidate's proposed **Start Date**. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.

3. Select either the **Position Number** tab or the **Department ID** tab, but not both. (See [“Using the Searchable Drop-Down Fields”](#) on page 6-4.)

 Fields on the Job Data - Part A page and the Pay Information page are automatically populated based on the **Position Number** or **Department ID/Job Code** combination selected.

4. Click **Next** to advance to the next page of the rehire process.

 The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Personal Data - Part A page.



What's next

You have completed entering the required information on the Rehire Start page. Next complete the Personal Data - Part A page.

Completing the New Hire Start Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The New Hire Start page is used to begin the new hire process.

This is for a new hire only. To begin the rehire process, see “Completing the Rehire Prompt Page” on page 6-23.

To complete the New Hire Start page, do the following:

1. From the Managing Work Events page (see [Figure 6-11](#) on page 6-16), select the **Hire New Employee** work event option and click **Submit**. The New Hire Start page displays.


Required fields are indicated with a red arrow.

Figure 6-19. New Hire Start Page


- i** For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.
- If available, enter the candidate's **Social Security Number** to identify the person for social security benefits. Valid formats include the following: 000000000 or 000-00-0000.

Enter numbers only. Per the Social Security Administration, these additional prefixes are supported: 001-665, 667-772. The following numbers are invalid: 111-11-1111, 123-45-5678, and any number beginning with 8, 9, 000, 666, and any number with 00 in the middle or ending with 000.
- Enter the candidate's name information. Fields include the **Prefix, First Name, Middle Name, Last Name, and Suffix**.
- Enter the candidate's proposed **Start Date**. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.

5. Select either the **Position Number** tab or the **Department ID** tab, but not both. (See “Using the Searchable Drop-Down Fields” on page 6-4.)

 Fields on the New Hire/Rehire Job Data - Part A page and the New Hire/Rehire Pay Information page are automatically populated based on the **Position Number** or **Department ID/Job Code** combination selected.

6. Click **Next** to advance to the next page of the hire process.

 The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Personal Data - Part A page.



What's next

You have completed the New Hire Start page. Next complete the Personal Data - Part A page.

Completing the Personal Data - Part A Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

✓ Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The Personal Data - Part A page is used to enter new hire/rehire candidate personal information.



The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the Personal Data - Part A page displays when you click **Next** from the New Hire Start page. This page can also be accessed by selecting the step from the left navigation area of the New Hire/Rehire pages.

During a rehire, the information on this page may pre-populate with the candidate's available data if your administrator has configured this page to allow data from previous employment to display. You can edit the fields as necessary.

Figure 6-20. Personal Data - Part A Page

i For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

To complete the Personal Data - Part A page, do the following:

1. Enter the candidate's **Street** information.
 -  Enter any additional address information in the **Address Line 3** field. This field is for informational purposes only, and not used in the mailing address.
2. Enter the **City/Town** where the candidate lives.
3. Select the state from the **State/Province** field.
4. Enter the candidate's postal or zip code in the **Postal/ZIP** field. Use one of the following formats: 12345 or 12345-6789.
5. Enter the **County** where the candidate lives.
6. Enter the candidate's **Home Phone** number. If either 7 or 10 digits are entered with no special characters or spaces, the North American format will automatically be applied.
7. Click **Next** to advance to the next page of the hire process, or select the next step from the left navigation area of the New Hire/Rehire pages.
 -  The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Personal Data - Part B page.



What's next

You have completed entering information on the Personal Data - Part A page. Next complete the Personal Data - Part B page.

Completing the Personal Data - Part B Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The Personal Data - Part B page is used to enter additional new hire/rehire candidate personal information.

The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the Personal Data - Part B page displays when you click **Next** from the Personal Data - Part A page. This page can also be accessed by selecting the step from the left navigation area of the New Hire/Rehire pages.




During a rehire, the information on this page may pre-populate with the candidate's available data if your administrator has configured this page to allow data from previous employment to display. You can edit the fields as necessary.

Figure 6-21. Personal Data - Part B Page

i For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

To complete the Personal Data - Part B page, do the following:

1. Select the candidate's **Race/Ethnicity**.
2. Select the candidate's **Ethnic Group**.
3. Select the candidate's **Gender**.
4. Select the candidate's **Marital Status**.
5. Select the candidate's **Highest Education Level**.
6. Enter the candidate's **Birth Date**. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.

7. Select the **Disabled** check box if the candidate is disabled.
8. Select the candidate's **VETS-100A** military status information, if applicable, as follows:
 - a. From the **Military Status** field, select candidate's VETS-100A status. Default value is **Not Indicated**.
 -  The corresponding status displays in the **VETS-100 Military Status** field. You can change the value if needed.
 - b. Select the **Disabled Veteran** check box if the candidate is considered disabled under the VETS-100A guidelines.
9. Select the candidate's **VETS-100** military status information, if applicable, as follows:
 - a. If you have selected a value in the **VETS-100A Military Status** field, a corresponding value populates the **VETS-100 Military Status** field. You can change the status as needed.
 - b. Select the **Disabled Veteran** check box if the candidate is considered disabled under the VETS-100 guidelines.
10. Enter the candidate's **Military Discharge Date**. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
 -  The date entered in this field is used in determining newly separated veteran status for VETS reporting. For VETS-100A reporting, an employee is considered a recently separated veteran if the employee's discharge date is within three years of the VETS-100A report period. For VETS-100 reporting, an employee is considered a recently separated veteran if the employee's discharge date is within one year of the VETS-100 reporting period.
11. Click **Next** to advance to the next page of the hire process, or select the next step from the left navigation area of the New Hire/Rehire pages.
 -  The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Job Data - Part A page.

**What's next**

You have completed entering information on the Personal Data - Part B page. Next complete the Job Data - Part A page.

Completing the Job Data - Part A Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

☑ Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The Job Data - Part A page is used to enter new hire/rehire candidate job information.

The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the Job Data - Part A page displays when you click **Next** from the Personal Data - Part B page. This page can also be accessed by selecting the step from the left navigation area of the New Hire/Rehire pages.

Fields on the Job Data - Part A page are automatically populated, based on what the manager selected for a **Position Number** or **Job Code** on the New Hire/Rehire Start page. If **Position Number** was selected and Position Management in your HR/Payroll system of record is set to Partial or Full, these fields are display-only and cannot be overridden. If **Job Code** was selected, you can change the values of these fields.

During a rehire, the information on this page may pre-populate with the candidate's available data if your administrator has configured this page to allow data from previous employment to display. You can edit the fields as necessary.

The screenshot displays the ADP Self Service Manager's Guide interface. At the top, it says 'Welcome, Aaron Edwards' and includes navigation links for 'Language', 'Company Directory', and 'Log Off'. Below this is a menu bar with options: 'Manager', 'Home', 'Time & Attendance', 'Organization & Staffing', 'Performance', 'Compensation', and 'Reports'. The main content area is titled 'Managing Work Events' and shows a progress bar with 8 steps. Step 3, 'Job Data Part A', is highlighted. The form contains the following fields:

- Regular/Temporary: Regular
- Full/Part Time: Full-Time
- Shift: Select Shift
- Work Location: NORCR - Georgia
- Reporting Location: NORCR - Georgia
- Holiday Schedule: Holiday Schedule
- Clock Number: (empty)
- Data Control: (empty)

At the bottom of the form are four buttons: 'Next', 'Previous', 'Cancel', and 'Reset'. A help icon (?) is located in the top right corner of the form area. The footer of the page includes '© 2010 Automatic Data Processing, Inc.', 'Privacy', and 'Legal'.


Figure 6-22. Job Data - Part A Page

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

To complete the Job Data - Part A page, do the following:


1. If **Position Number** was selected on the New Hire Start page and Position Management in your HR/Payroll system of record is set to **Partial** or **Full**, the field values on this page cannot be changed. If **Job Code** was selected, you can select the new value, if needed, from the following fields:

- **Regular/Temporary** – Select if the employee is a regular or temporary employee.
- **Full/Part Time** – Select if the employee is full or part time.
- **Rate Code** – Select the shift rate code. This field is only available if your HR/payroll system of record is Enterprise HR with Enterprise Payroll (EPayroll).
- **Shift** – Select the employee’s shift, if applicable.
- **Work Location** and **Reporting Location** – Select the employee's appropriate work and reporting locations, as needed. (See “Using the Searchable Drop-Down Fields” on page 6-4.)
- **Holiday Schedule** – Select the holiday schedule associated with the job.
- **Clock Number** – Enter the clock number code as needed. This code is used for special coding or as a form of employee identification on AutoPay.

 The **Clock Number** and **Data Control** fields are not applicable and are hidden if your HR/payroll system of record is ADP Enterprise HR with Enterprise Payroll (EPayroll).

- **Data Control** – Enter a code as needed for special coding on AutoPay.

2. Click **Next** to advance to the next page of the hire process, or select the next step from the left navigation area of the New Hire/Rehire pages.

 The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Job Data - Part B page.



What's next

You have completed entering information on the Job Data - Part A page. Next complete the Job Data - Part B page.

Completing the Job Data - Part B Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

✓ Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The Job Data - Part B page is used to enter additional new hire/rehire candidate job information.

The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the Job Data - Part B page displays when you click **Next** from the Job Data - Part A page. This page can also be accessed by selecting the step from the left navigation area of the New Hire/Rehire pages.

During a rehire, the information on this page may pre-populate with the candidate's available data if your administrator has configured this page to allow data from previous employment to display. You can edit the fields as necessary.


The screenshot displays the ADP Self Service Manager interface. At the top, it says 'Welcome, Aaron Edwards' and includes a search bar for the company directory. A navigation menu is visible with options like Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main section is titled 'Managing Work Events' and shows 'Step 4 of 8' for 'Candidate Name: Roger Johnson'. A list of steps on the left includes: 1. Personal Data Part A, 2. Personal Data Part B, 3. Job Data Part A, 4. Job Data Part B (highlighted), 5. Pay Info, 6. Citizenship, 7. Additional Hire Info, and 8. Ready To Submit. The form fields include: Full Time Student (checkbox), Reason For Action (dropdown), Employee Classification (dropdown), Referral Source (dropdown), Business Title (text input), Security Clearance (dropdown), Bargaining Unit (dropdown), Union Code (text input with value '1199'), and Union Seniority Date (text input with value '05/31/2010'). At the bottom, there are four buttons: Next, Previous, Cancel, and Reset.

Figure 6-23. Job Data - Part B Page

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

To complete the Job Data - Part B page, do the following:

1. Select the **Full Time Student** option if the candidate is a full-time student.
2. From the **Reason for Action** field, select the reason for hiring this candidate.
3. From the **Employee Classification** field, select the candidate's employee classification.
4. From the **Referral Source** field, select the source (such as job posting or employee) that referred the candidate to the company.
5. In the **Business Title** field, enter the candidate's official business title, which may or may not be the same as the candidate's job title.
6. Select the **Security Clearance** the candidate's security level.
7. In the **Bargaining Unit** field, select the unit of the local union to which the candidate belongs for contract bargaining purposes, if applicable.
8. In the **Union Code** field, enter the union identifier for the union to which the candidate belongs, if applicable.
9. In the **Union Seniority Date** field, enter the date on which the candidate's union seniority ranking is based, if applicable. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
10. Click **Next** to advance to the next page of the hire process, or select the next step from the left navigation area of the New Hire/Rehire pages.

 The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Pay Information page.



What's next

You have completed entering information on the Job Data - Part B page. Next complete the Pay Information page.

Completing the Pay Information Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

✓ Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The Pay Information page is used to enter new hire/rehire candidate pay information.

The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the Pay Information page displays when you click **Next** from the Job Data - Part B page. This page can also be accessed by selecting the step from the left navigation area of the New Hire/Rehire pages.

Fields on the Information page are automatically populated, based on what was selected for a **Position Number** or **Job Code** on the New Hire/Rehire Start page. If **Position Number** was selected and Position Management in your HR/Payroll system of record is set to **Partial** or **Full**, most fields are display-only and cannot be overridden. If **Job Code** was selected, you can change the values of most of these fields. See the following steps for details.

Selected **Job Code**, **Salary Plan**, **Salary Grade**, and **Compensation Frequency** fields are always display-only.

The screenshot shows the ADP web interface for 'Managing Work Events'. The user is Aaron Edwards. The page is titled 'Step 5 of 8' and is for candidate 'Roger Johnson'. The form contains the following fields:

- Selected Job Code: 1014, Respiratory Therapist
- Salary Plan: MD, MidPoint Plan: Non-exempts
- Salary Grade: N07, NonExempt 07
- Compensation Frequency: Hourly
- Salary Step: [Select Salary Step]
- Compensation: 0.00 per [Select Frequency]
- Standard Hours: 40.00
- Paygroup: Autolink Exp Flds Bi-Weekly
- Employment Type: Salaried
- Variable Pay Plan: [Select Variable Pay Plan]
- Split Base: [Select Split Base]
- Allow Draw: [checkbox]
- Geographic Differential: [Select Geographic Differential]


Navigation buttons at the bottom: Next, Previous, Cancel, Reset.

Figure 6-24. Pay Information Page


For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

To complete the Pay Information page, do the following:

1. From the **Salary Step** field, select the salary step code.

 This field may be enabled, disabled, or automatically populated with a value that cannot be changed. The availability of this field depends on how salary steps and/or multi-steps are defined in your HR/payroll system of record. If this field is enabled, you can select a value from the drop-down list.


2. From the **Compensation** and **per** fields, enter the candidate's compensation and select the frequency.

 These fields may be enabled, disabled, or automatically populated with a value that cannot be changed. The availability of these fields depends on how salary steps and/or multi-steps are defined in your HR/payroll system of record.

3. The **Standard Hours** field displays the standard hours for the job. You can enter a new value in this field as needed.

4. If **Position Number** was selected on the New Hire/Rehire Start page, and Position Management in your HR/Payroll system of record is set to **Partial** or **Full**, the following field values cannot be changed. If **Job Code** was selected, you can enter or select new values, if needed, in the following fields:

- **Paygroup** – Select the employee's paygroup.


 If you change the pay group, you must also change the employment type, if needed. Employment type will not automatically default from the new pay group selected.

- **Employment Type** – Select the employment type. Options are Hourly, Salaried, or Exception Hourly.
- **Variable Pay Plan** – Select the variable pay plan.
- **Split Base** – Select the split base. This field is not active unless a **Variable Pay Plan** has been selected.
- **Geographical Differential** – Select the geographical differential for the location, if available.

5. You can select or clear the **Allow Draw** check box. This field is not active unless a variable pay plan has been selected.

 This field is automatically populated when **Position Number** or **Job Code** was selected on the New Hire/Rehire Start page.

6. Click **Next** to advance to the next page of the hire process, or select the next step from the left navigation area of the New Hire/Rehire pages.

 The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Citizenship page.



What's next

You have completed entering information on the Pay Information page. Next complete the Citizenship page.

Completing the Citizenship Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

☑ Completing the Citizenship Page

Completing the Additional Hire Information Page

Completing the Submit Page

The Citizenship page is used to enter new hire/rehire candidate citizenship information.

The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the Citizenship page displays when you click **Next** from the Pay Information page. This page can also be accessed by selecting the step from the left navigation area of the New Hire/Rehire pages.

The screenshot shows the ADP Self Service Manager's Guide interface. At the top, it says 'Welcome, Aaron Edwards' and has a search bar for 'Company Directory'. Below that is a navigation menu with 'Manager' selected. The main content area is titled 'Managing Work Events' and shows 'Step 6 of 8' for 'Candidate Name: Roger Johnson'. The page is divided into two columns. The left column is a navigation menu with steps 1 through 8, where '6. Citizenship' is highlighted. The right column contains the following fields:

- Citizenship Status: U.S. Native (dropdown)
- Authorization and Identity (List A) Document: (text input)
- Authorization and Identity Document Expiration Date: (date input)
- Identity (List B) Document: (text input)
- Identity Expiration Date: (date input)
- Authorization (List C) Document: (text input)
- Authorization Expiration Date: (date input)
- Non US Country of Citizenship 1: Select a Country (dropdown)
- Non US Country of Citizenship 2: Select a Country (dropdown)
- Visa Type: None - U.S. Citizen (dropdown)
- Visa Number: (text input)
- Visa Expiration Date: (date input)
- Passport Number: (text input)
- Passport Expiration Date: (date input)
- Country Issuing Passport: USA (dropdown)


 At the bottom of the form are four buttons: Next, Previous, Cancel, and Reset. A help icon (?) is in the top right corner of the form area. The footer of the page includes '© 2010 Automatic Data Processing, Inc.', 'Privacy | Legal', and a browser status bar showing 'Internet' and '100%' zoom.


Figure 6-25. Citizenship Page

❶ For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.


To complete the Citizenship page, do the following:

1. Select the candidate's **Citizenship Status**.
2. In the **Authorization and Identity (List A) Document** field, enter the form of proof of the candidate provided from List A. If you have entered a form in this field, in the **Authorization and Identity Document Expiration Date** field, enter the candidate's authorization and identity (List A) document expiration date. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar

 Candidates must provide one document from List A, or one document from List B and a document from List C. For more information, refer to the INS form I-9, *Employment Eligibility Verification*.

 If your HR/payroll system of record is a version prior to V4.05/5.01, **Citizen Proof 1** and **Citizen Proof 2** fields are used instead to enter the form of proof the candidate presented for employment eligibility.

3. In the **Identity (List B) Document** field, enter the form of proof the candidate provided from List B, if applicable. If you have entered a form in this field, in the **Identity Expiration Date** field, enter the candidate's identity (List B) document expiration date. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
4. In the **Authorization (List C) Document** field, enter the form of proof the candidate provided from List C, if applicable. If you have entered a form in this field, in the **Authorization Expiration Date** field, enter the candidate's authorization (List C) document expiration date. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
5. In the **Non US Country of Citizenship 1** and **Non US Country of Citizenship 2** fields, select the country code of any other country where the candidate holds citizenship, if applicable.
6. Enter the candidate's Visa information by selecting the candidate's **Visa Type**, entering the **Visa Number**, and entering the **Visa Expiration Date**. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
7. Enter the candidate's passport information by entering the **Passport Number** and the **Passport Expiration Date**. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar. Select the country that issued the candidate's passport from the **Country Issuing Passport** field.
8. Click **Next** to advance to the next page of the hire process, or select the next step from the left navigation area of the New Hire/Rehire pages.

 The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Additional Hire Information page.

What's next

You have completed the Citizenship page. Next complete the Additional Hire Information page.

Completing the Additional Hire Information Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

✓ Completing the Additional Hire Information Page

Completing the Submit Page

The Additional Hire Information page is used to enter new hire/rehire additional information. Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system or record. Any information you enter in these fields will be passed back to your system of record once this event has been processed. Refer to the *Using ADP Enterprise HR Guide* or *Using HR Anytime Guide* for details on setting up the field labels and values for additional information fields, and assigning those values to employees in your HR/payroll system of record.

If all hire pages have been enabled, the Additional Hire Information page displays when you click **Next** from the Citizenship page. This page can also be accessed by selecting the step from the left navigation area of the New Hire/Rehire pages.

During a rehire, the information on this page may pre-populate with the candidate's available data if your administrator has configured this page to allow data from previous employment to display. You can edit the fields as necessary.


The screenshot displays the ADP Self Service Manager's Guide interface. At the top, it shows the user's name 'Welcome, Aaron Edwards' and navigation options like 'Language', 'Company Directory', and 'Log Off'. Below this is a navigation menu with 'Organization & Staffing' selected. The main content area is titled 'Managing Work Events' and shows a progress bar with 8 steps. Step 7, 'Additional Hire Info', is highlighted. The form contains various fields including Custom Area 1-4, Flag 1-7, Date A-D, and User 1-8. A help icon (?) is visible in the top right corner.

Figure 6-26. Additional Hire Information Page

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

To complete the Additional Hire Information page, do the following:

1. Enter, change or delete data from the available Additional Hire Information fields, as needed.
2. Click **Next** to advance to the next page of the hire process, or select the next step from the left navigation area of the New Hire/Rehire pages.

 The hire pages available depend on which pages your Portal administrator has configured for the hire process. If all hire pages have been enabled, the next page in the process is the Submit page.



What's next

You have completed the Additional Hire Information page. Next complete the Submit page.

Completing the Submit Page

Tasks

Initiating the Hiring Process

Completing the Rehire Prompt Page

Completing the Rehire Start Page

Completing the New Hire Start Page

Completing the Personal Data - Part A Page

Completing the Personal Data - Part B Page

Completing the Job Data - Part A Page

Completing the Job Data - Part B Page

Completing the Pay Information Page

Completing the Citizenship Page

Completing the Additional Hire Information Page

☑ Completing the Submit Page

The Submit page is used to submit the new hire/rehire candidate for approval.

The fields on the Submit page are automatically populated and are display-only, except for the **Comments** field. This page is the last step in the new hire process. Once you click **Submit** to initiate the approval process for this event, you will not be able to return to previous pages. If you wish to review your entries before submitting for approval, click the **Previous** button to step back through prior new hire pages.

The screenshot shows the ADP web interface for a manager named Aaron Edwards. The page is titled "Managing Work Events" and is "Step 8 of 8" in the process. The candidate name is "Roger Johnson". The form contains the following fields:

Start Date:	05/31/2010
Department ID:	222003, Recruitment
Job Code:	1014, Respiratory Therapist
Comments:	<input type="text"/>

At the bottom of the form, there are three buttons: "Submit", "Previous", and "Cancel". A help icon (?) is located in the top right corner of the form area. The footer of the page includes "© 2010 Automatic Data Processing, Inc." and "Privacy | Legal".

Figure 6-27. Submit Page


i For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The Submit page displays the following information:

- **Candidate Name** – Proposed candidate's name.
- **Start Date** – Candidate's proposed start date.
- **Department ID** – Department identification for the candidate's proposed position.
- **Job Code** – Job code for the candidate's proposed position.

To complete the Submit page, do the following:

1. Enter any comments you would like the approver to see into the **Comments** field. Comments will be viewable for all approvers, as well as through Approval History.
2. Click **Submit** to initiate the approval process for this event. You are returned to the Managing Work Events page, which displays a message indicating to whom this task has been sent.

 If an approval workflow has not been set up for the hire process, the hire proposal is immediately accepted. The final processing of the hire/rehire is completed in your HR/payroll system of record. For additional information, see the *Hiring, Staffing, and Job Maintenance Guide*.



End of procedure

You have completed submitting your new hire/rehire request. This is the last step in the hiring process.

Transferring Employees

The Transfer page allows managers to transfer employees that report to them to another manager, department, or location. If your administrator has enabled the indirect report update option, you can change information for both your direct and indirect reports.

Managers can transfer employees through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events** task.

Select the **Type of Transfer** to display the corresponding detail fields. The "active" version of the Transfer page displays when the page is accessed from the Direct Reports page or Managing Work Events page, which means the manager is able to enter information in the fields provided. Note that required fields are indicated on the page by red arrows. When the page is accessed from the Approvals, Notifications, or Approval History pages, the fields are display-only.



A manager can transfer an employee within the departments to which that manager has security access. If the manager does not have security access to the department where the employee is to be transferred, the transfer must be handled by a practitioner through your HR/payroll system of record.



Some of the transfer pages include searchable drop-down fields. For more information, see [“Using the Searchable Drop-Down Fields”](#) on page 6-4. In addition, if your HR/payroll system of record is ADP Enterprise HR or HR Anytime Version 5.03, the Direct Reports and the Work Events Summary pages include search fields at the top of the page that allow you to filter your employee list. For more information, see [“Using Search Fields to Filter Results”](#) on page 6-3.

Transferring employees can include the following tasks:

- [Transferring an Employee to a New Manager](#)
- [Transferring an Employee to a New Department](#)
- [Transferring an Employee to a New Location](#)

Transferring an Employee to a New Manager

Tasks

Transferring Employees


Transferring an Employee to a New Manager

Transferring an Employee to a New Department

Transferring an Employee to a New Location

If you are transferring an employee to a new position, use the Change Job & Salary Information page (see “Changing an Employee’s Job and Salary Information” on page 6-71 for more information).


Managers can transfer employees through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events** task.

 If multiple job actions need to be performed on an employee, see “Updating Multiple Job Actions for a Single Employee” on page 6-6. If multiple employees need a job action performed, see “Updating Multiple Employees with a Single Job Action” on page 6-11. The two procedures can only be done through the Managing Work Events task.

To transfer an employee to another manager and submit for approval, do the following:

1. From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Transfer Employee** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

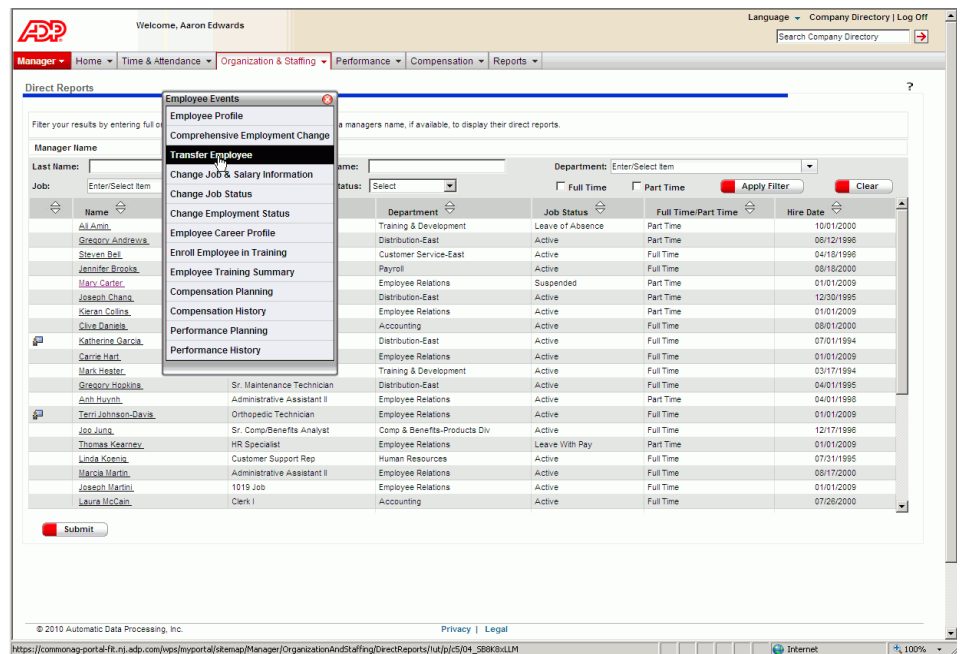




Figure 6-28. Employee Event Selection Menu with Transfer Employee Selected

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Transfer Employee(s)** action option. Select the employee(s) you want to transfer by clicking the check box next to the employee's name, then click **Submit**.

 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

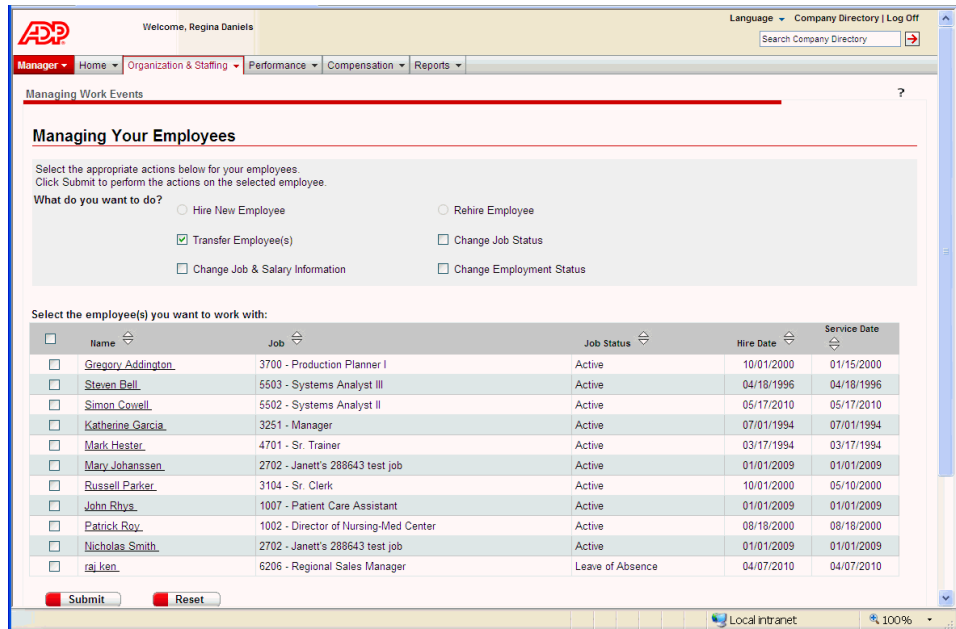



Figure 6-29. Managing Work Events with Transfer Employee(s) Action Selected

The Start Work Events page displays.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

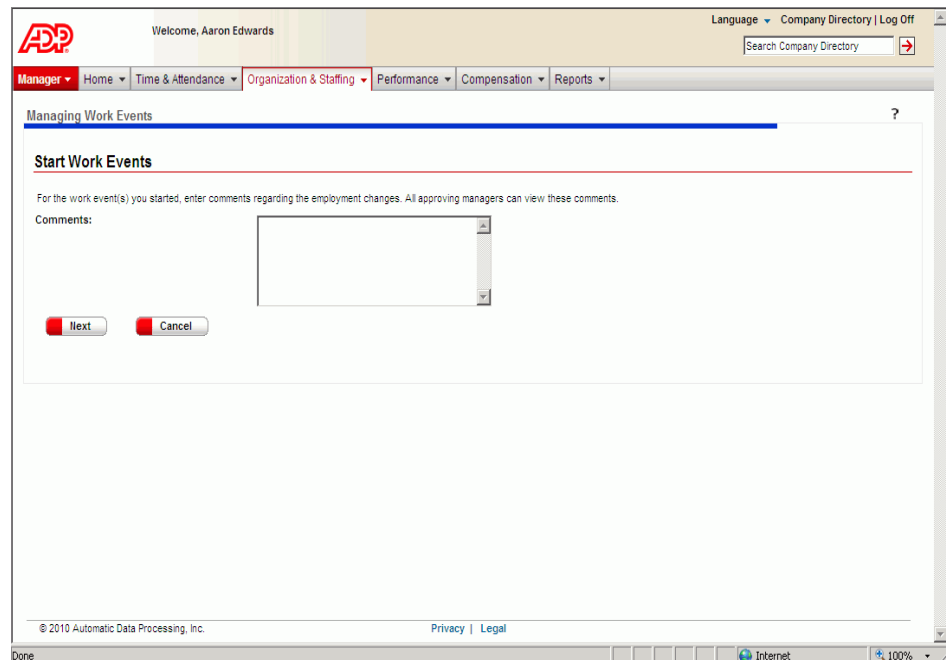



Figure 6-30. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
3. Click **Next**. The Transfer selection page displays, with summary job information for the selected employee shown at the top of the page.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Transfer page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

 **More info**
 For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

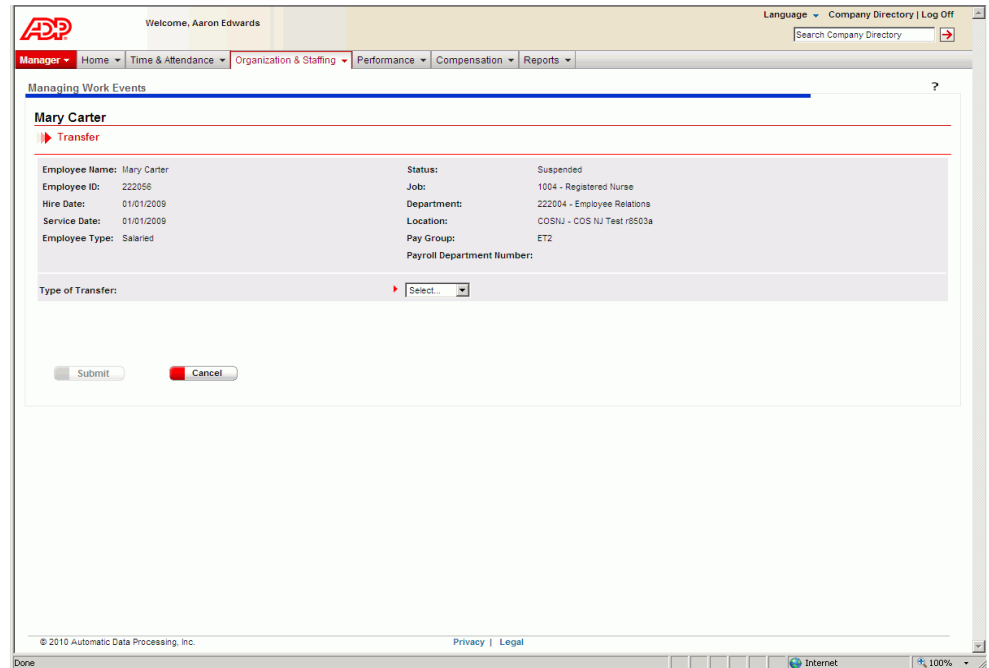



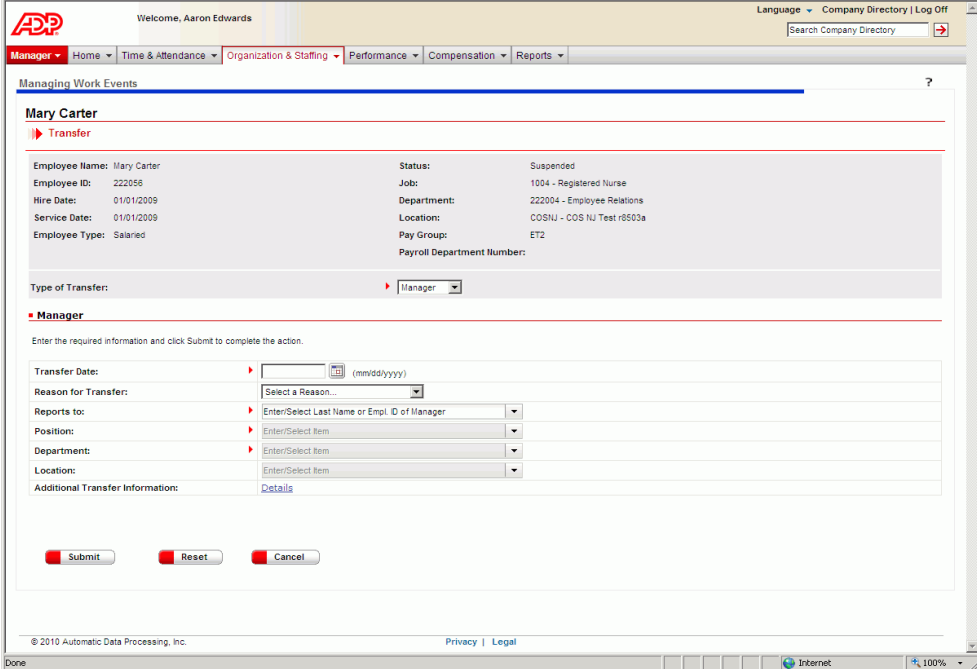
Figure 6-31. Transfer Page

4. Select **Manager** from the **Type of Transfer** field. The manager transfer fields display. Required fields are indicated by a red arrow.

- Which fields are available depends on the Position Management setting in your HR/payroll system of record, as well as the update allowed setting in the selected employee's job record. You must select either a **Position** or a **Department**, but not both.




More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The navigation menu includes Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and displays details for 'Mary Carter'. The 'Transfer' section is active, showing a 'Type of Transfer' dropdown set to 'Manager'. Below this, the 'Manager' section is expanded, displaying a form with the following fields: 'Transfer Date' (calendar icon, format mm/dd/yyyy), 'Reason for Transfer' (dropdown menu), 'Reports to' (dropdown menu), 'Position' (dropdown menu), 'Department' (dropdown menu), and 'Location' (dropdown menu). There is also an 'Additional Transfer Information' link. At the bottom of the form are 'Submit', 'Reset', and 'Cancel' buttons. The footer includes '© 2010 Automatic Data Processing, Inc.' and 'Privacy | Legal' links.


Figure 6-32. Transfer Page with Manager Transfer Fields Displayed

5. In the **Transfer Date** field, enter the date the transfer will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
6. Select the **Reason for Transfer**.
 -  Reasons available in the drop down list depend on which active action reasons were selected in HR/payroll system of record to display in Self Service.
7. From the **Reports to** field, select the new manager the employee will be reporting to. (See “Using the Searchable Drop-Down Fields” on page 6-4.)
8. Select a **Position**, if applicable. Values available are based on the manager selected in the Reports To field. (See “Using the Searchable Drop-Down Fields” on page 6-4.)
 -  The **Position** field is not available if Position Management in your HR/payroll system of record is set to **None**. If you select a position, the associated default values populate the **Department** and **Location** fields, which are then display-only.
9. Select the **Department**, if applicable. Values available are based on the manager selected in the Reports to field. (See “Using the Searchable Drop-Down Fields” on page 6-4.)
 -  The **Department** field is display-only if a position was selected from the **Position** field. If the **Position** field is available and the update allowed setting in the selected employee's job record is Yes, and you have not selected a position, you can select a **Department**. The **Position** field is then disabled, and the **Location** field is populated with the default location for the selected department.

10. The **Location** field may initially display the default location for the selected department. Select the appropriate location, as needed. (See “Using the Searchable Drop-Down Fields” on page 6-4.)

 The **Location** field is display-only if a position was selected from the **Position** field.

11. Click the **Additional Transfer Information Details** link, if available, to access the Additional Information fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

 **More info**




For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

Figure 6-33. Additional Transfer Information Page

12. Click **Next**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Transfer page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

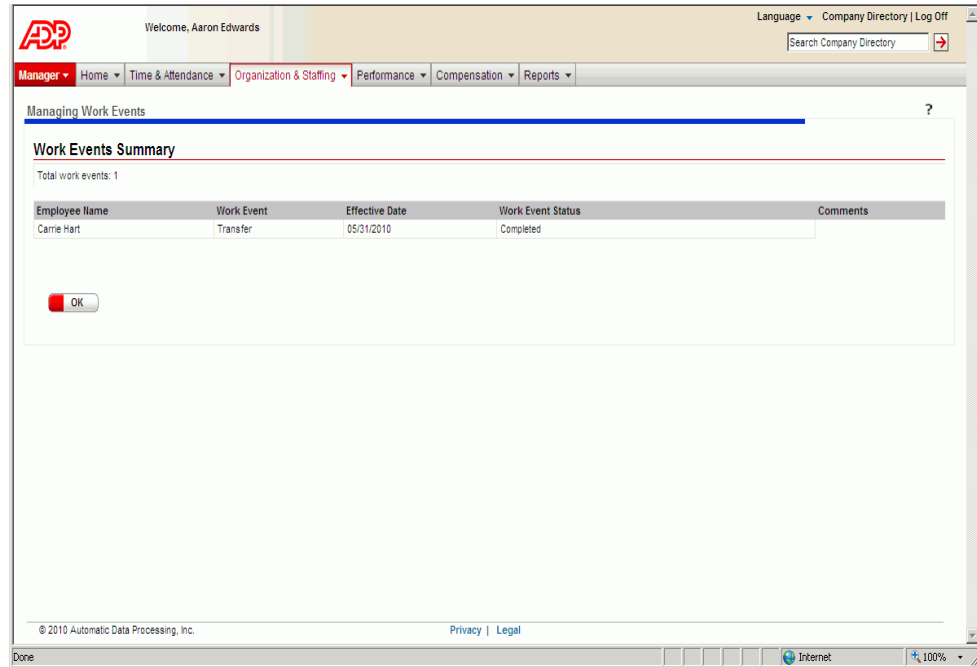


Figure 6-34. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

13. Review the following information:

- **Total Work Events** – Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** – Displays the employee’s name for which a job action was submitted.
- **Work Event** – Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** – Displays the date the job action goes into effect.
- **Work Event Status** – Display the status of the work event.
- **Comments** – Displays comments you enter on the Start Work Events page.

14. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have finished transferring an employee to a new manager.

For information on transferring an employee to a new department, see “Transferring an Employee to a New Department” on page 6-51.

For information on transferring an employee to a new location, see “Transferring an Employee to a New Location” on page 6-58.

Transferring an Employee to a New Department



Transferring Employees

Transferring an Employee to a New Manager

Transferring an Employee to a New Department

Transferring an Employee to a New Location

If you are transferring an employee to a new position, use the Change Job & Salary Information page (see “Changing an Employee’s Job and Salary Information” on page 6-71 for more information).

Managers can transfer employees through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events** task.

If multiple job actions need to be performed on an employee, see “Updating Multiple Job Actions for a Single Employee” on page 6-6. If multiple employees need a job action performed, see “Updating Multiple Employees with a Single Job Action” on page 6-11. The two procedures can only be done through the Managing Work Events task.

To transfer an employee to another Staffing department and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Transfer Employee** from the Employee Event selection menu.




For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP Self Service Manager's Guide interface. The top navigation bar includes "Manager", "Home", "Time & Attendance", "Organization & Staffing", "Performance", "Compensation", and "Reports". The "Organization & Staffing" tab is active, and the "Direct Reports" page is displayed. The "Employee Events" menu is open, showing options such as "Employee Profile", "Comprehensive Employment Change", "Transfer Employee", "Change Job & Salary Information", "Change Job Status", "Change Employment Status", "Employee Career Profile", "Enroll Employee in Training", "Employee Training Summary", "Compensation Planning", "Compensation History", "Performance Planning", and "Performance History". The "Transfer Employee" option is selected. The main content area shows a list of employees with columns for Name, Department, Job Status, Full Time/Part Time, and Hire Date. The "Submit" button is visible at the bottom of the page.

Figure 6-35. Employee Event Selection Menu with Transfer Employee Selected


- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Transfer Employee(s)** action option. Select the employee(s) you want to transfer by clicking the check box next to the employee's name, then click **Submit**.

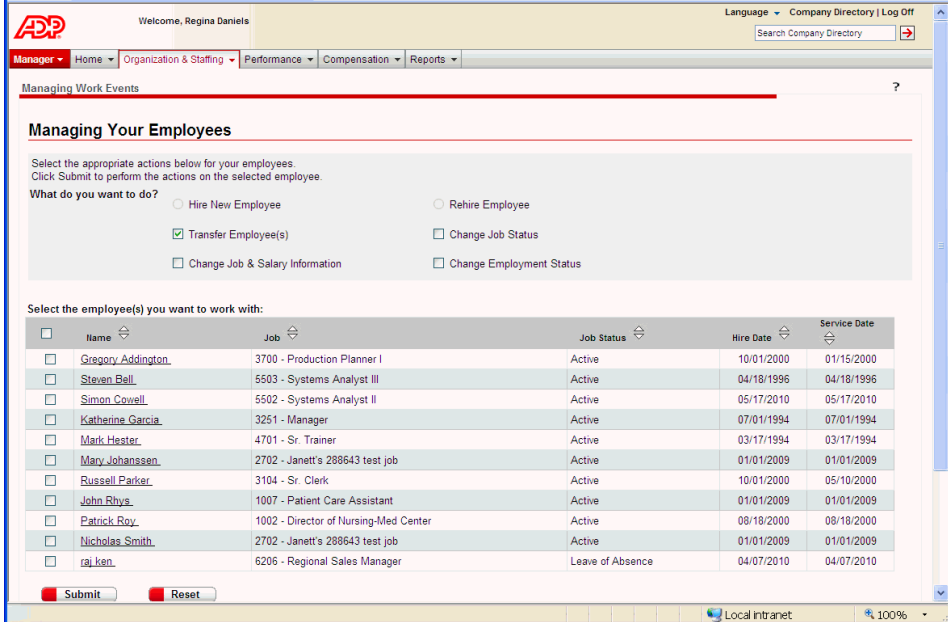
 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.



More info

For a description of the fields on this page or for related tasks, click

the  (Help icon) provided in the right-hand corner of the Self Service page.



ADP Welcome, Regina Daniels Language Company Directory | Log Off
 Search Company Directory

Manager Home Organization & Staffing Performance Compensation Reports

Managing Work Events

Managing Your Employees

Select the appropriate actions below for your employees.
 Click Submit to perform the actions on the selected employee.

What do you want to do?

Hire New Employee Rehire Employee
 Transfer Employee(s) Change Job Status
 Change Job & Salary Information Change Employment Status


Select the employee(s) you want to work with:

<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input type="checkbox"/>	Gregory Addington	3700 - Production Planner I	Active	10/01/2000	01/15/2000
<input type="checkbox"/>	Steven Ball	5503 - Systems Analyst III	Active	04/18/1996	04/18/1996
<input type="checkbox"/>	Simon Cowell	5502 - Systems Analyst II	Active	05/17/2010	05/17/2010
<input type="checkbox"/>	Katherine Garcia	3251 - Manager	Active	07/01/1994	07/01/1994
<input type="checkbox"/>	Mark Hester	4701 - Sr. Trainer	Active	03/17/1994	03/17/1994
<input type="checkbox"/>	Mary Johansson	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Russell Parker	3104 - Sr. Clerk	Active	10/01/2000	05/10/2000
<input type="checkbox"/>	John Rhys	1007 - Patient Care Assistant	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Patrick Roy	1002 - Director of Nursing-Med Center	Active	08/18/2000	08/18/2000
<input type="checkbox"/>	Nicholas Smith	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	raj ken	6206 - Regional Sales Manager	Leave of Absence	04/07/2010	04/07/2010

Submit Reset


Local Intranet 100%

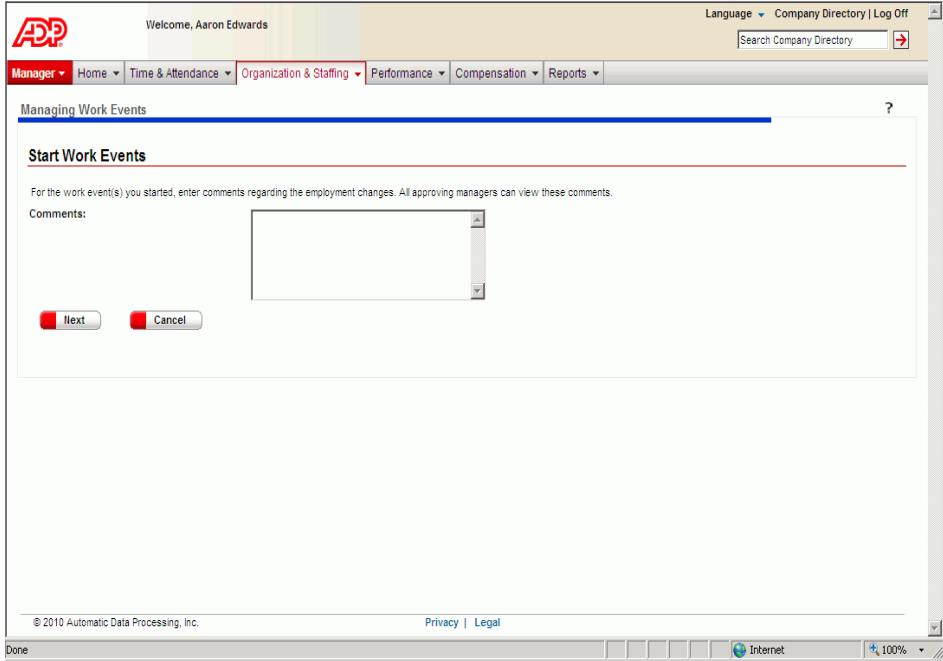
Figure 6-36. Managing Work Events with Transfer Employee(s) Action Selected

 In addition to a single action for a single employee, you can select multiple job actions for a single employee or multiple employees for a single job action. For more information see, “[Updating Multiple Job Actions for a Single Employee](#)” on page 6-6 or “[Updating Multiple Employees with a Single Job Action](#)” on page 6-11.

The Start Work Events page displays.


More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page




The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there is a navigation menu with options: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and contains a sub-section 'Start Work Events'. Below this, there is a text area labeled 'Comments' with a placeholder box. At the bottom of the form, there are two buttons: 'Next' and 'Cancel'. The footer of the page includes the copyright notice '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'.

Figure 6-37. Start Work Events Page


2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

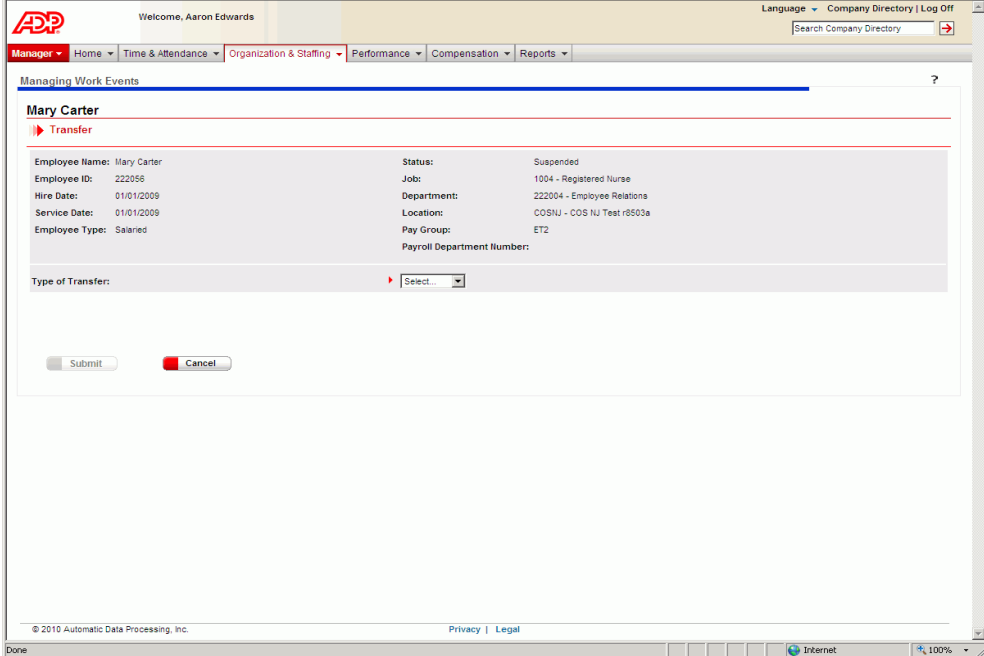
- Click **Next**. The Transfer selection page displays with summary job information for the selected employee shown at the top of the page.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Transfer page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager interface. The user is logged in as Aaron Edwards. The page title is "Managing Work Events" and the employee name is "Mary Carter". The "Transfer" option is selected. The employee details are as follows:

Employee Name:	Mary Carter	Status:	Suspended
Employee ID:	222056	Job:	1004 - Registered Nurse
Hire Date:	01/01/2009	Department:	222004 - Employee Relations
Service Date:	01/01/2009	Location:	COSIU - COS IU Test r5503a
Employee Type:	Salaried	Pay Group:	ET2
		Payroll Department Number:	


The "Type of Transfer" field is a dropdown menu with a red arrow pointing to the right, currently set to "Select...". Below the dropdown are "Submit" and "Cancel" buttons. The footer of the page includes "© 2010 Automatic Data Processing, Inc." and "Privacy | Legal" links.

Figure 6-38. Transfer Page

- Select **Department** from the **Type of Transfer** field. The department transfer fields display. Required fields are indicated by a red arrow.

Which options are available depend on the Position Management and update allowed settings in your HR/payroll system of record. If Position Management is set to **Full** or **Partial** and updates allowed is set to **No**, only the Manager option is available. Which fields are available depends on the Position Management setting in your HR/payroll system of record, as well as the update allowed setting in the selected employee's job record. You must select either a **Position** or a **Department**, but not both.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

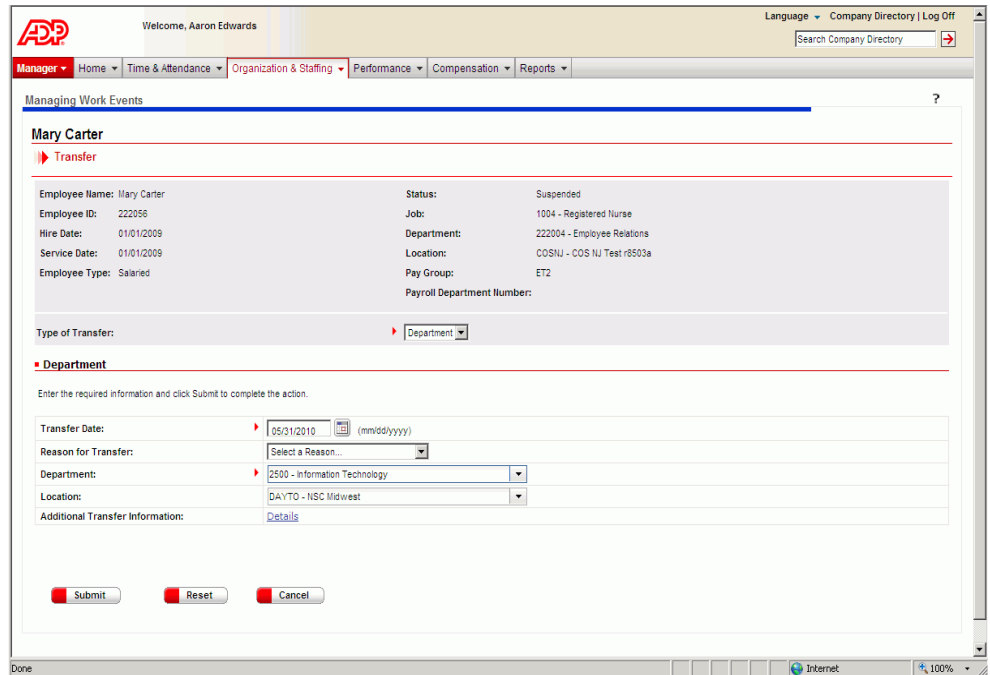


Figure 6-39. Transfer page with Department Transfer Fields Displayed

5. In the **Transfer Date** field, enter the date the transfer will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
6. Select the **Reason for Transfer**.


Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.

7. Select the department from the **Department** field. (See “Using the Searchable Drop-Down Fields” on page 6-4.).


If there is a default location associated with the selected department, the value defaults into the **Location** field.

8. The **Location** field may initially display the default location for the selected department. (See “Using the Searchable Drop-Down Fields” on page 6-4.)

9. Click the **Additional Transfer Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-33](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

10. Click **Next**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Transfer page for the next employee displays. If you selected more than one event for this employee, the next event will display.

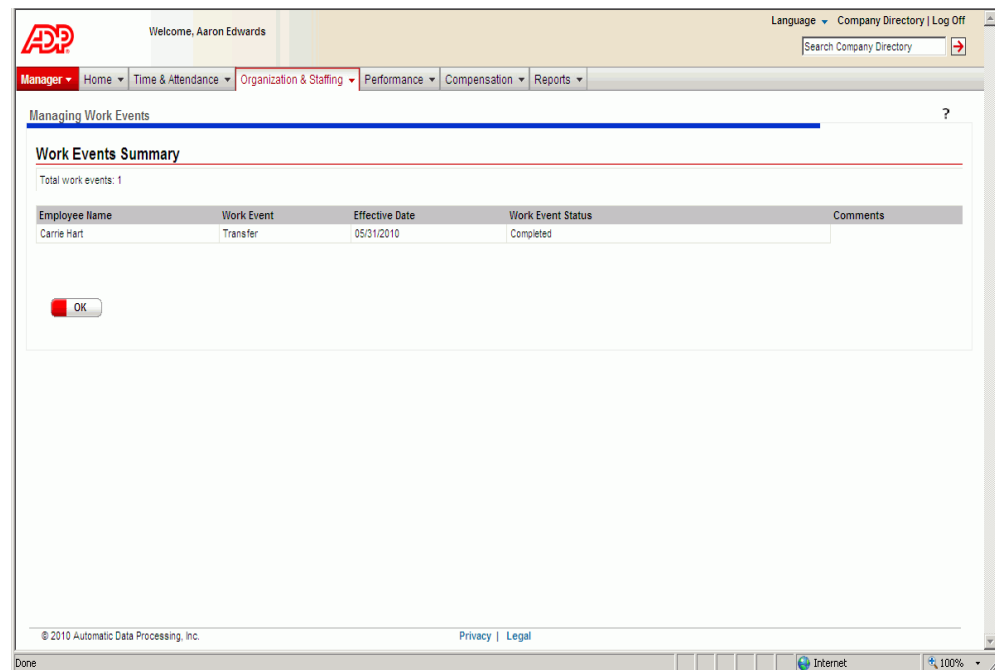



Figure 6-40. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

11. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

- **Work Event Status** - Display the status of the work event.
 - **Comments** - Displays comments you enter on the Start Work Events page.
12. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.

**End of procedure**

You have finished transferring an employee to a new department.

For information on transferring an employee to a new manager, see [“Transferring an Employee to a New Manager”](#) on page 6-45.

For information on transferring an employee to a new location, see [“Transferring an Employee to a New Location”](#) on page 6-58.

Transferring an Employee to a New Location

Tasks

Transferring Employees

Transferring an Employee to a New Manager

Transferring an Employee to a New Department

Transferring an Employee to a New Location

If you are transferring an employee to a new position, use the Change Job & Salary Information page (see “[Changing an Employee’s Job and Salary Information](#)” on page 6-71 for more information).

Managers can transfer employees through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events** task.

If multiple job actions need to be performed on an employee, see “[Updating Multiple Job Actions for a Single Employee](#)” on page 6-6. If multiple employees need a job action performed, see “[Updating Multiple Employees with a Single Job Action](#)” on page 6-11. The two procedures can only be done through the Managing Work Events task.

To transfer an employee to another location and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Transfer Employee** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

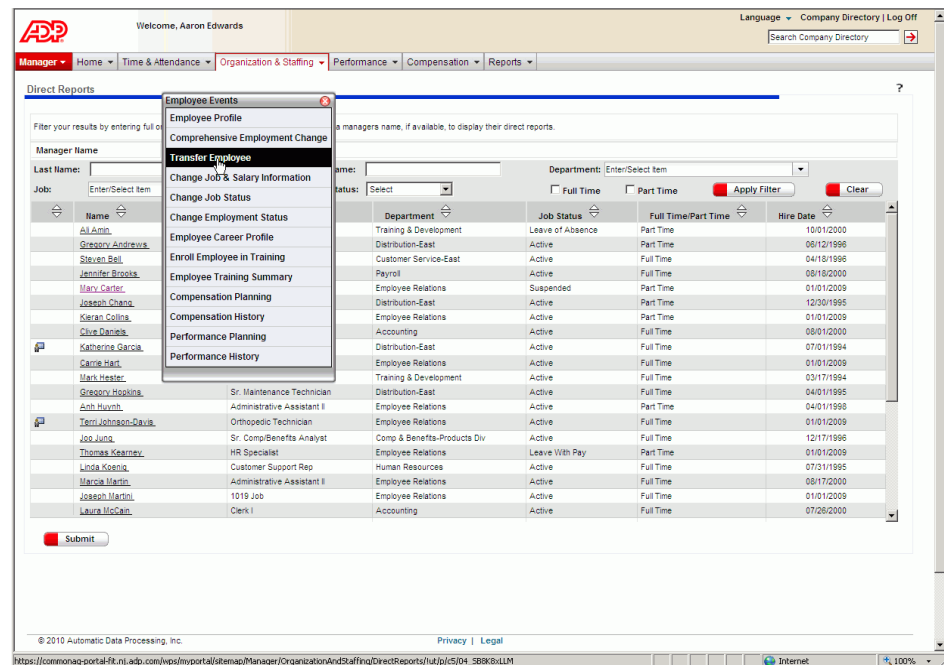




Figure 6-41. Employee Event Selection Menu with Transfer Employee Selected

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Transfer Employee(s)** action option. Select the employee(s) you want to transfer by clicking the check box next to the employee's name, then click **Submit**.

 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

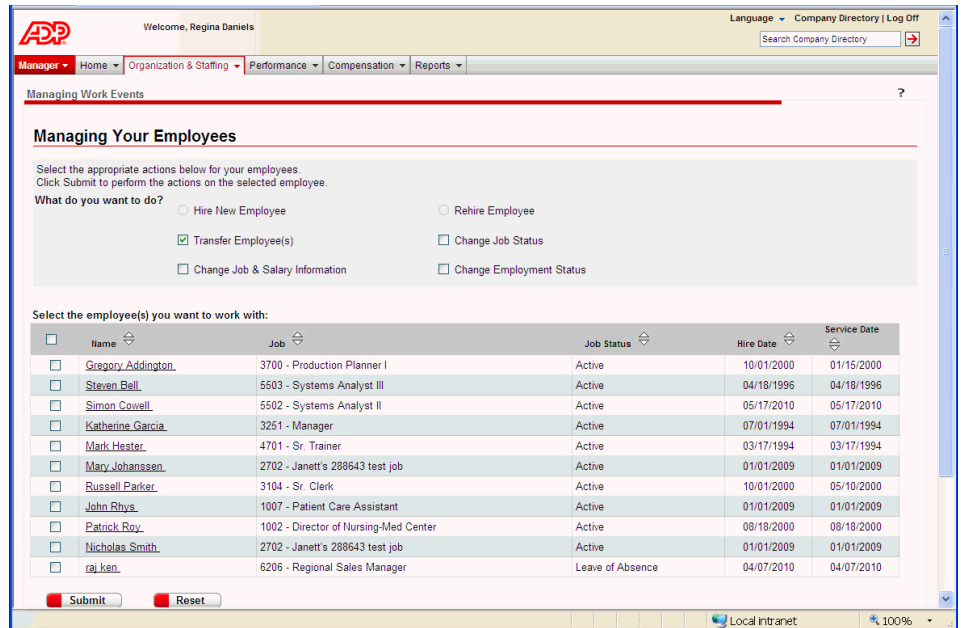



Figure 6-42. Managing Work Events with Transfer Employee(s) Action Selected

The Start Work Events page displays.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

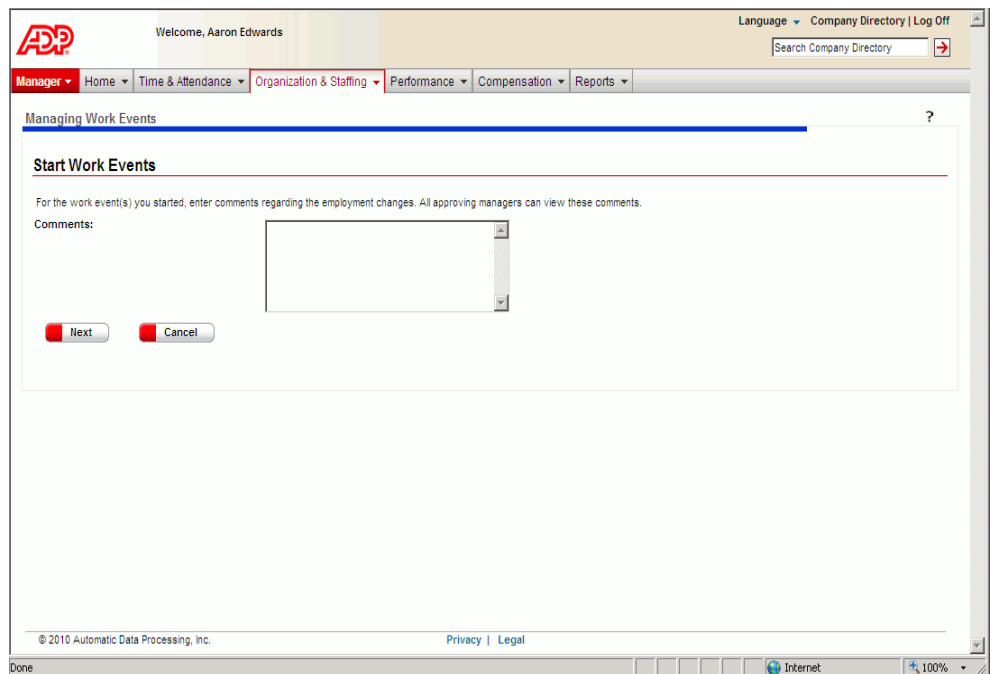




Figure 6-43. Start Work Events Page

- In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.


 If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

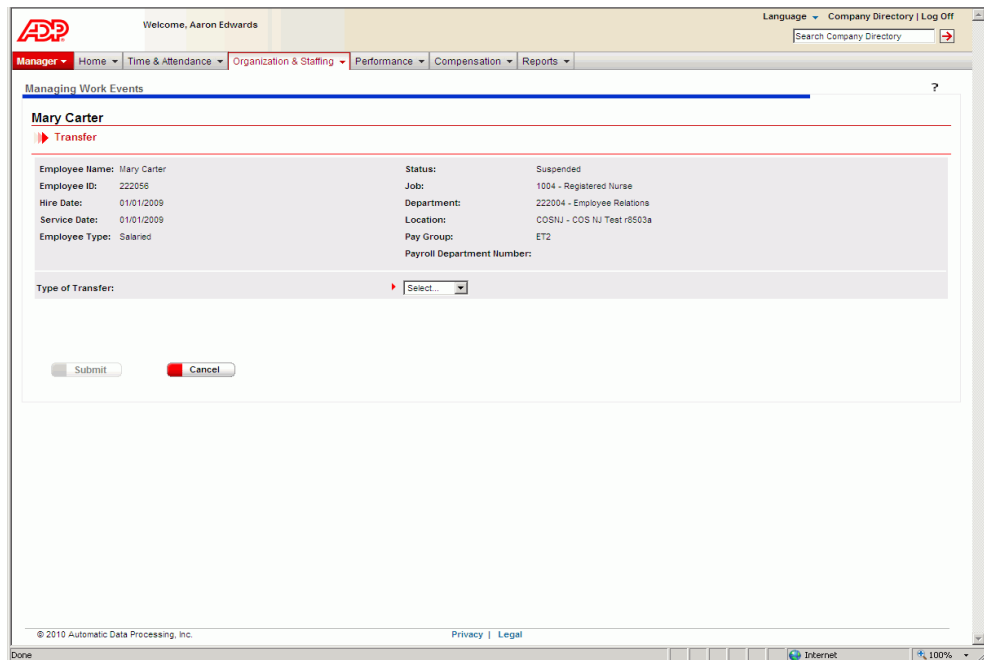
- Click **Next**. The Transfer selection page displays with summary job information for the selected employee shown at the top of the page.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Transfer page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.



More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager interface. The user is logged in as Aaron Edwards. The navigation menu includes Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and shows a 'Transfer' action for 'Mary Carter'. Employee details are displayed in two columns:

Employee Name:	Mary Carter	Status:	Suspended
Employee ID:	222056	Job:	1004 - Registered Nurse
Hire Date:	01/01/2009	Department:	222004 - Employee Relations
Service Date:	01/01/2009	Location:	COSNJ - COS NJ Test r8503a
Employee Type:	Salaried	Pay Group:	ET2
		Payroll Department Number:	


Below the details is a 'Type of Transfer:' dropdown menu with a 'Select...' option. At the bottom are 'Submit' and 'Cancel' buttons. The footer includes '© 2010 Automatic Data Processing, Inc.' and 'Privacy | Legal' links.

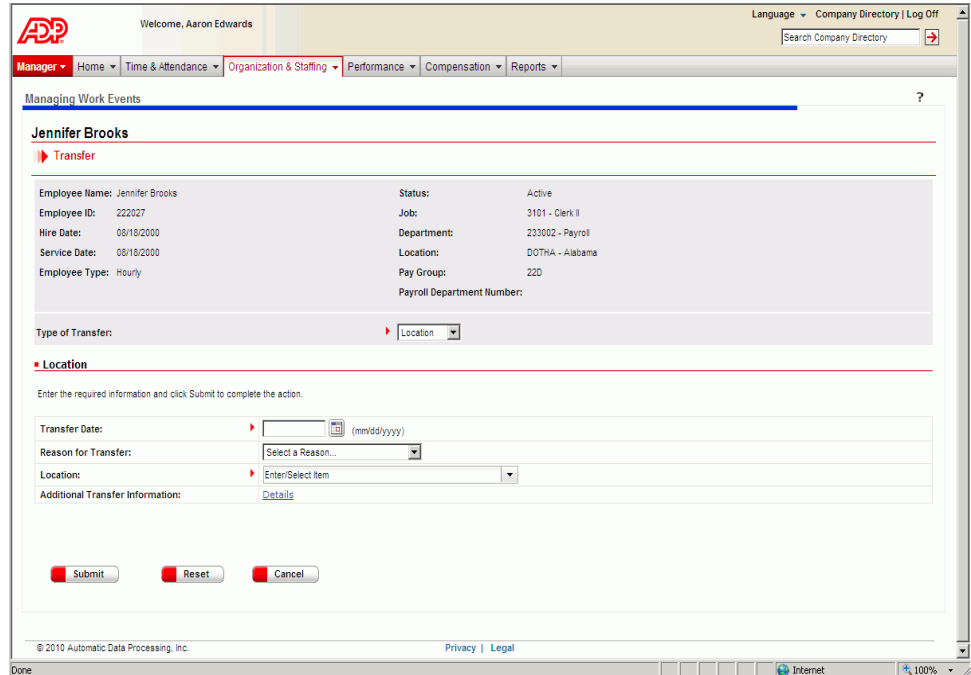
Figure 6-44. Transfer Page

- Select **Location** from the **Type of Transfer** field. The location transfer fields display. Required fields are indicated by a red arrow.

- Which options are available depend on the Position Management and update allowed settings in your HR/payroll system of record. If Position Management is set to **Full** or **Partial** and updates allowed is set to **No**, only the **Manager** option is available.



More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page




The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there is a navigation menu with options like Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled "Managing Work Events" and shows details for "Jennifer Brooks". Below the employee information, there is a "Transfer" section with a "Type of Transfer" dropdown set to "Location". Underneath, the "Location" section is expanded, showing a form with fields for "Transfer Date", "Reason for Transfer", "Location", and "Additional Transfer Information". The "Transfer Date" field has a calendar icon and a placeholder "(mm/dd/yyyy)". The "Reason for Transfer" field has a dropdown menu with "Select a Reason..." as the current selection. The "Location" field has a dropdown menu with "Enter/Select Item" as the current selection. At the bottom of the form, there are "Submit", "Reset", and "Cancel" buttons.

Figure 6-45. Transfer page with Location Transfer Fields Displayed


5. In the **Transfer Date** field, enter the date the transfer will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
6. Select the **Reason for Transfer**.
 -  Reasons available in the drop down list depend on which action reasons were selected in your HR/payroll system of record to display in Self Service.
7. Select the **Location**. (See “Using the Searchable Drop-Down Fields” on page 6-4.) Click the **Additional Transfer Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-33](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.
 -  Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

8. Click **Next**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Transfer page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page

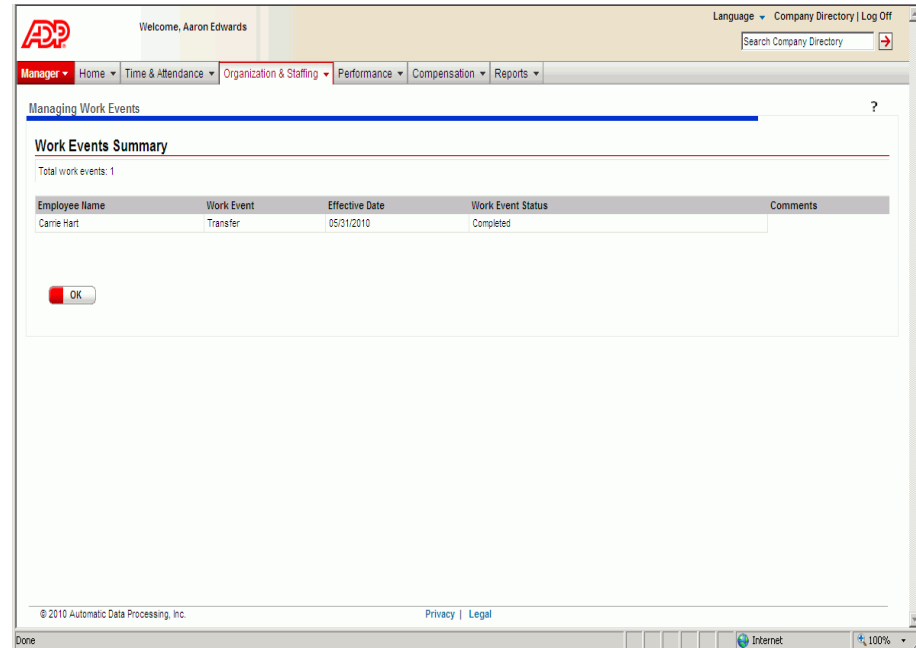


Figure 6-46. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

9. Review the following information:
- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
 - **Employee Name** - Displays the employee's name for which a job action was submitted.
 - **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
 - **Effective Date** - Displays the date the job action goes into effect.
 - **Work Event Status** - Display the status of the work event.
 - **Comments** - Displays comments you enter on the Start Work Events page.
10. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.

**End of procedure**

You have finished transferring an employee to a new department.

For information on transferring an employee to a new manager, see [“Transferring an Employee to a New Manager”](#) on page 6-45.

For information on transferring and employee to a new department, see [“Transferring an Employee to a New Department”](#) on page 6-51.

Changing an Employee's Job Status

The Change Job Status page allows managers to change job information for employees who report to them and submit the job action for approval. If your administrator has enabled the indirect report update option, you can change information for both your direct and indirect reports.

Managers can make employee job changes through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events** task.


The "active" version of the Change Job Status page displays when the page is accessed from the Direct Reports page or the Managing Work Events page, which means the manager is able to enter information in the fields provided. When the page is accessed from the Approvals, Notifications, or Approval History pages, the fields are display-only.

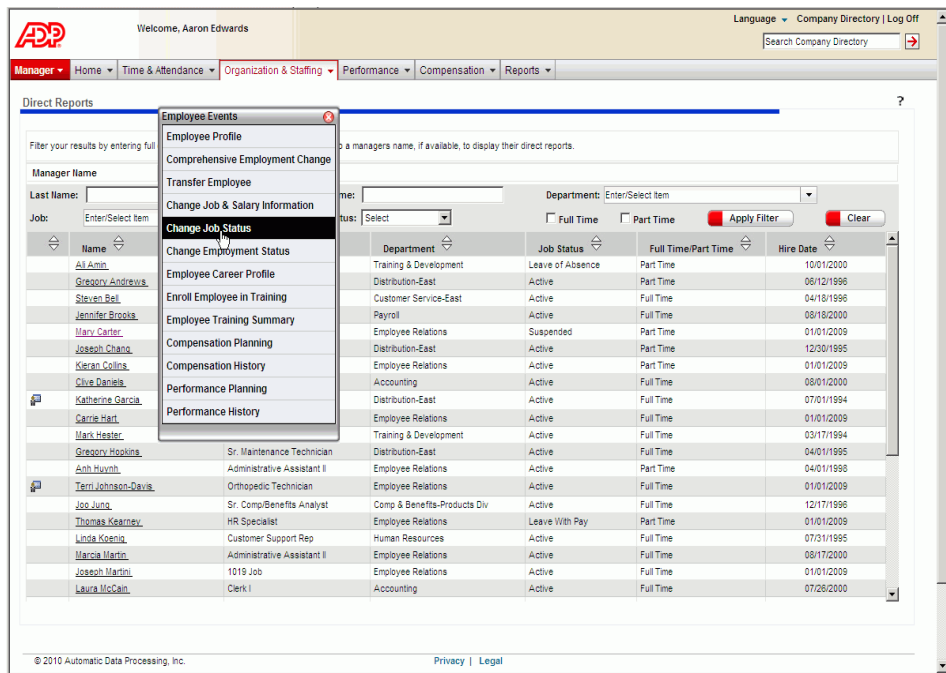
📄 If multiple job actions need to be performed on an employee, see [“Updating Multiple Job Actions for a Single Employee”](#) on page 6-6. If multiple employees need a job action performed, see [“Updating Multiple Employees with a Single Job Action”](#) on page 6-11. The two procedures can only be done through the Managing Work Events task.

To change an employee's job status, do the following:

1. From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Job Status** from the Employee Event selection menu.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The navigation menu includes Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The Organization & Staffing tab is active, and the Direct Reports page is displayed. The Employee Event Selection Menu is open, and 'Change Job Status' is selected. The menu options include: Employee Profile, Comprehensive Employment Change, Transfer Employee, Change Job & Salary Information, Change Job Status, Change Employment Status, Employee Career Profile, Enroll Employee in Training, Employee Training Summary, Compensation Planning, Compensation History, Performance Planning, and Performance History.

Name	Department	Job Status	Full Time/Part Time	Hire Date
Al Amin	Training & Development	Leave of Absence	Part Time	10/01/2000
Gregory Andrews	Distribution-East	Active	Part Time	06/12/1996
Steven Bell	Customer Service-East	Active	Full Time	04/18/1996
Jennifer Brooks	Payroll	Active	Full Time	08/18/2000
Mary Carter	Employee Relations	Suspended	Part Time	01/01/2009
Joseph Chang	Distribution-East	Active	Part Time	12/08/1995
Karan Collins	Employee Relations	Active	Part Time	01/01/2009
Cara Daniels	Accounting	Active	Full Time	08/01/2000
Katherine Garcia	Distribution-East	Active	Full Time	07/01/1994
Carrie Hart	Employee Relations	Active	Full Time	01/01/2009
Mark Heister	Training & Development	Active	Full Time	03/17/1994
Gregory Hopkins	Distribution-East	Active	Full Time	04/01/1995
Ash Huynh	Administrative Assistant II	Active	Part Time	04/01/1998
Terr Johnson-Davis	Orthopedic Technician	Active	Full Time	01/01/2009
Joe Jung	Sr. Comp/Benefits Analyst	Active	Full Time	12/17/1996
Thomas Kearney	HR Specialist	Leave With Pay	Part Time	01/01/2009
Linda Koenig	Customer Support Rep	Active	Full Time	07/31/1995
Marcia Martin	Administrative Assistant II	Active	Full Time	08/17/2000
Joseph Martin	1019 Job	Active	Full Time	01/01/2009
Laura McCain	Clerk I	Active	Full Time	07/28/2000

Figure 6-47. Employee Event Selection Menu with Change Job Status Selected

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Job Status** action option. Select the employee(s) whose job status you want to change by clicking the check box next to the employee's name, then click **Submit**.
- 💡 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

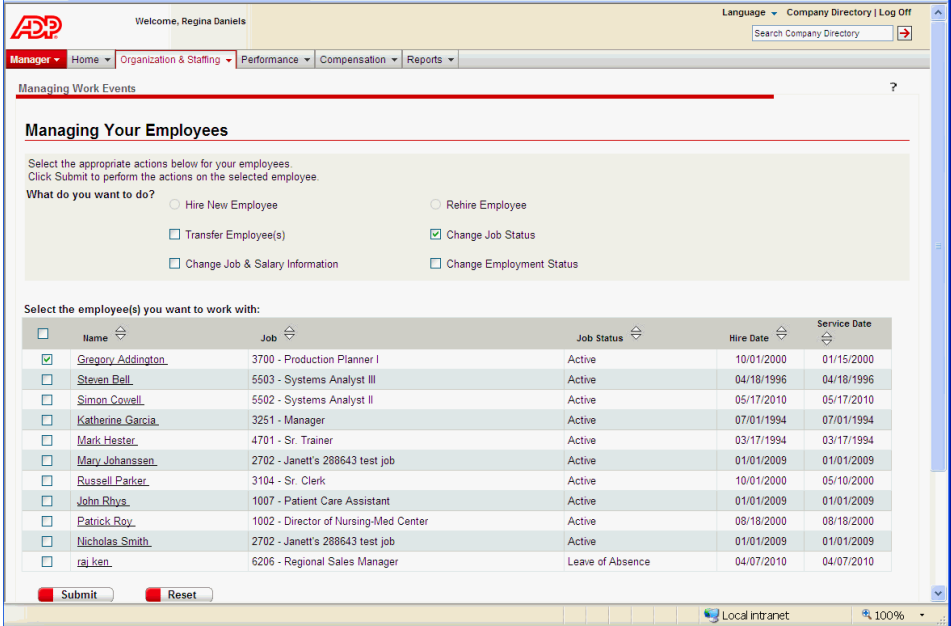


Figure 6-48. Managing Work Events with Change Job Status Option Selected

The Start Work Events page displays.




More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with the ADP logo and a welcome message for Aaron Edwards. The main menu includes 'Home', 'Time & Attendance', 'Organization & Staffing' (highlighted), 'Performance', 'Compensation', and 'Reports'. Below the navigation bar, the page title is 'Managing Work Events' with a help icon in the top right. The sub-section is 'Start Work Events'. A message states: 'For the work event(s) you started, enter comments regarding the employment changes. All approving managers can view these comments.' Below this is a 'Comments:' label followed by a large text input area. At the bottom of the form are 'Next' and 'Cancel' buttons. The footer of the page includes '© 2010 Automatic Data Processing, Inc.', 'Privacy | Legal', and a browser status bar showing 'Internet' and '100%' zoom.

Figure 6-49. Start Work Events Page


2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

- Click **Next**. The Change Job Status page displays with summary job information for the selected employee shown at the top of the page.



The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Job Status page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

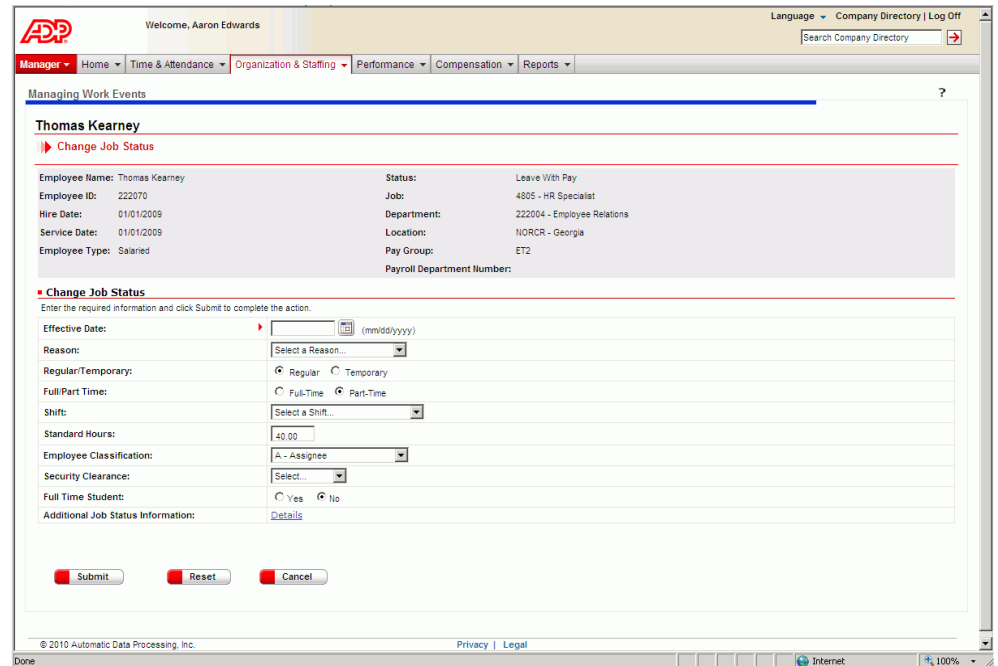




Figure 6-50. Change Job Status Page

- In the **Effective Date** field, enter the date the job status change will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
- Select the **Reason** for the job status change.
 - Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
- The **Regular/Temporary** field initially displays the selected employee's current information. To change the employee's regular/temporary job status, select the appropriate option.
 - If the employee's job record in your HR/payroll system of record indicates that no updates are allowed, these options are display only, and cannot be changed.
- The **Full/Part Time** field initially displays the selected employee's current information. To change the employee's full/part time job status, select the appropriate option.
 - If the employee's job record in your HR/payroll system of record indicates that no updates are allowed, these options are display only, and cannot be changed.

8. The **Shift** field initially displays the selected employee's current shift information, if any. To change the employee's shift information, select the shift code and description from the drop down list.
 -  If the employee's job record in your HR/payroll system of record indicates that no updates are allowed, the shift field is display only, and cannot be changed.
9. The **Standard Hours** field initially displays the selected employee's standard hours. To change the employee's standard hours, enter the appropriate numeric value.
 -  If the employee's job record in your HR/payroll system of record indicates that no updates are allowed, the standard hours is display only, and cannot be changed.
10. The **Employee Classification** field initially displays the selected employee's current classification. To change the employee's classification, select the classification code and description from the drop down list.
11. The **Security Clearance** field initially displays the selected employee's current security clearance level. To change the employee's security clearance, select the security code and description from the drop down list.
12. The **Full Time Student** field initially displays the selected employee's current status. To change the employee's full time student status, select the appropriate option.
13. Click the **Additional Job Status Information Details** link, if available, to access the Additional Information fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.


More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation menu with options: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and contains a section for 'Additional Job Status Change Information'. This section includes a sub-header 'Additional Job Status Change Information' and a description: 'Update, edit, or add employee Job Status Change information.' Below this, there are several input fields: 'Select a value' (dropdown), 'Custom Area 1-4' (text boxes), 'Flag 1-7' (dropdowns), 'Date A-D' (date pickers with '(mm/dd/yyyy)' format), and 'User 1-8' (dropdowns with 'Enter/Select item' text).


Figure 6-51. Additional Job Status Information Page

14. Click **Next**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee on the Managing Work Events page, the Change Job Status page for the next employee displays. If you selected more than one event for this employee, the next event will display.



More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

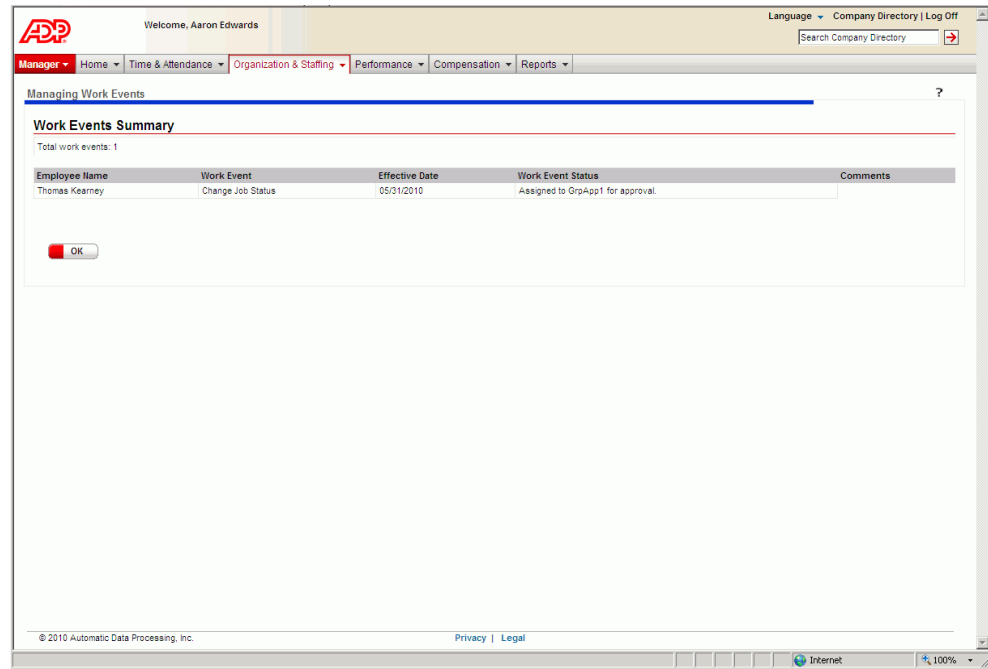


Figure 6-52. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

15. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

16. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have finished changing an employee's job status and submitting it for approval.


Changing an Employee's Job and Salary Information


The Change Job & Salary Information page allows managers to change job and/or salary information for employees who report to them. If your administrator has enabled the indirect report update option, you can change information for both your direct and indirect reports.

Actions available are promotion, demotion, lateral change, and salary change. Managers can perform additional salary changes for all of these options, with the exception of the lateral change. Select the **Change Job & Salary Info** type to display the corresponding detail fields.

Managers can make job and/or salary changes through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events** task.

The "active" version of the Change Job & Salary page displays when the page is accessed from the Direct Reports page or the Managing Work Events page, which means the manager is able to enter information in the fields provided. Note that required fields are indicated on the page by red arrows. When the page is accessed from the Approvals, Notifications, or Approval History pages, the fields are display-only.

 If multiple job actions need to be performed on an employee, see [“Updating Multiple Job Actions for a Single Employee”](#) on page 6-6. If multiple employees need a job action performed, see [“Updating Multiple Employees with a Single Job Action”](#) on page 6-11. The two procedures can only be done through the Managing Work Events task.

 Some of the transfer pages include searchable drop-down fields. For more information, see [“Using the Searchable Drop-Down Fields”](#) on page 6-4. In addition, if your HR/payroll system of record is ADP Enterprise HR or HR Anytime Version 5.03, the Direct Reports and the Work Events Summary pages include search fields at the top of the page that allow you to filter your employee list. For more information, see [“Using Search Fields to Filter Results”](#) on page 6-3.

Changing an employee's job and salary information can consist of the following tasks:

- [Promoting an Employee](#)
- [Demoting an Employee](#)
- [Performing a Lateral Job Change](#)
- [Changing an Employee's Salary](#)

Promoting an Employee

To promote an employee and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Job & Salary Information** from the Employee Event selection menu.

Tasks

Changing an Employee's Job and Salary Information

Promoting an Employee

Demoting an Employee

Performing a Lateral Job Change

Changing an Employee's Salary

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The navigation menu includes Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The 'Direct Reports' page is active, displaying a table of employees. An 'Employee Events' menu is open over the table, with 'Change Job & Salary Information' selected. The table has columns for Name, Department, Job Status, Full Time/Part Time, and Hire Date. The following table represents the data visible in the screenshot:

Name	Department	Job Status	Full Time/Part Time	Hire Date	
Ali Amin	Training & Development	Leave of Absence	Part Time	10/01/2000	
Gregory Andrews	Distribution-East	Active	Part Time	08/12/1998	
Steven Bell	Customer Service-East	Active	Full Time	04/18/1998	
Jennifer Brooks	Payroll	Active	Full Time	08/18/2000	
Mary Carter	Employee Relations	Suspended	Part Time	01/01/2009	
Joseph Chang	Distribution-East	Active	Part Time	12/30/1995	
Kieran Collins	Employee Relations	Active	Part Time	01/01/2009	
Clive Daniels	Accounting	Active	Full Time	08/01/2000	
Katherine Garcia	Distribution-East	Active	Full Time	07/01/1994	
Carrie Hart	Employee Relations	Active	Full Time	01/01/2009	
Mark Heister	Training & Development	Active	Full Time	03/17/1994	
Gregory Hopkins	Distribution-East	Active	Full Time	04/01/1995	
Ash Huynh	Administrative Assistant II	Employee Relations	Active	Part Time	04/01/1998
Terri Johnson-Davis	Orthopedic Technician	Employee Relations	Active	Full Time	01/01/2009
Joe Jung	Sr. Comp/Benefits Analyst	Comp & Benefits-Products Div	Active	Full Time	12/17/1998
Thomas Kearney	HR Specialist	Employee Relations	Leave With Pay	Part Time	01/01/2009
Linda Koehn	Customer Support Rep	Human Resources	Active	Full Time	07/31/1995
Marcia Martin	Administrative Assistant II	Employee Relations	Active	Full Time	08/17/2000
Joseph Martin	1019 Job	Employee Relations	Active	Full Time	01/01/2009
Laura McLean	Clerk I	Accounting	Active	Full Time	07/28/2000

Figure 6-53. Employee Event Selection Menu with Change Job and Salary Information Selected

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Job & Salary Information** action option. Select the employee(s) whose job and/or salary you want to change by clicking the check box next to the employee's name, then click **Submit**.
- 💡 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

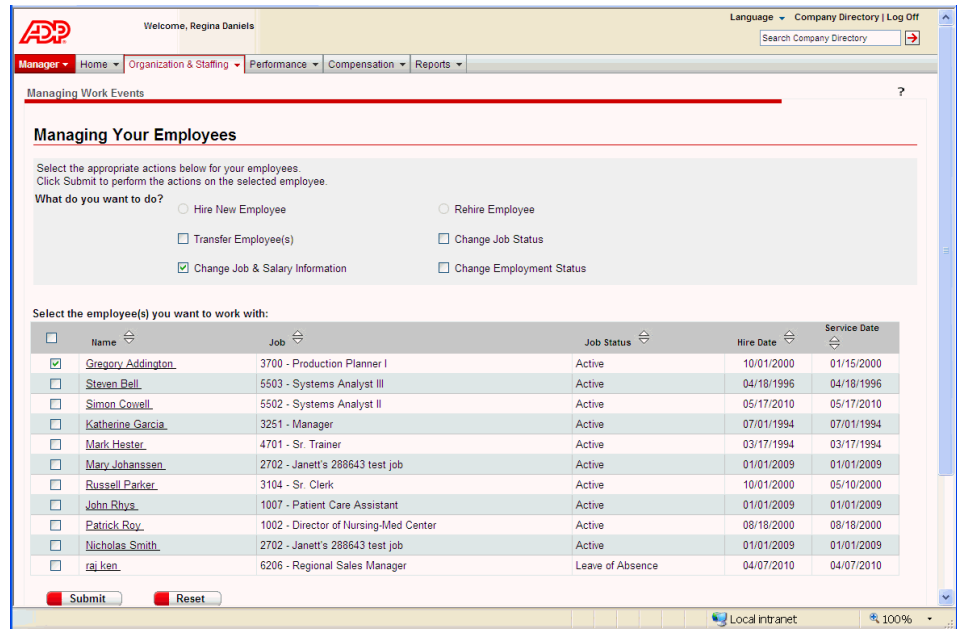


Figure 6-54. Managing Work Events with Change Job & Salary Information Option Selected


The Start Work Events page displays.




More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page


Figure 6-55. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

3. Click **Next**. The Change Job & Salary Information selection page displays with summary job and salary information for the selected employee.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Job & Salary Information page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

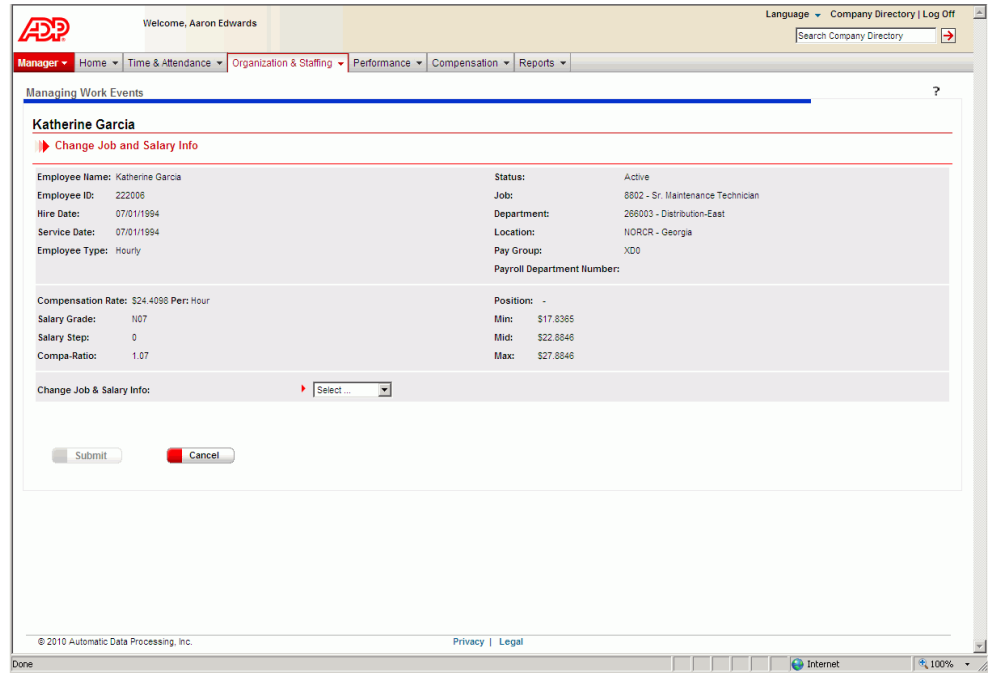


Figure 6-56. Change Job & Salary Information Page

- Select **Promotion** from the **Change Job & Salary Info** field. The Promotion fields display. Required fields are indicated by a red arrow.

The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The main navigation bar includes Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The 'Managing Work Events' section is active, showing details for Katherine Garcia. The 'Change Job & Salary Info' dropdown menu is set to 'Promotion'. The 'Promotion' section contains the following fields and options:

- Effective Date:** (mm/dd/yyyy) with a calendar icon.
- Reason:** Select a reason... (dropdown menu).
- Position:** Enter/Select Item (dropdown menu).
- Job:** Enter/Select Item (dropdown menu).
- Business Title:** (text input field).
- Employee Type:** Select a type... (dropdown menu).
- Salary Step:** Select a step... (dropdown menu).
- Change Rate:** Radio buttons for Percent, Amount, and Per Hour.
- New Salary:** (text input field).
- Percentage Change:** (text input field).
- Additional Job Salary Information:** Details (link).

A pop-up window titled 'Salary Data for '8802 - Sr. Maintenance Technician'' is displayed on the right, showing the following data:


Min:	\$17,5034
Mid:	\$22,4217
Max:	\$27,3399
Salary Grade:	N07
Salary Step:	0
Salary Amount:	\$0.0000

At the bottom of the form are buttons for Submit, Reset, and Cancel. The footer includes copyright information for ADP and links for Privacy and Legal.


Figure 6-57. Change Job & Salary Information Page with Promotion Fields Displayed

- In the **Effective Date** field, enter the date the promotion will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.

- Select the **Reason** for the promotion from the drop down list.


 Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.

- From the **Position** field, select the position code and description. (See “Using the Searchable Drop-Down Fields” on page 6-4.)


 Values available are based on the departments the manager has security access to in your HR/payroll system of record. The **Salary Data** for the selected position displays to the right of the **Position** field.

This field is not available if Position Management in your HR/payroll system of record is set to None. If you select a position, the associated default values populate the **Job**, **Employee Type**, and **Salary Step** fields, which are then display-only.

More info


For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

- From the **Job** field, select the job code and description. (See “Using the Searchable Drop-Down Fields” on page 6-4.)


 The **Salary Data** for the selected job displays to the right of the **Job** field.

The **Job** field is display-only if a position was selected from the **Position** field. If you have not selected a position, you can select a job from the **Job** field. The **Position** field is then disabled, and the **Salary Step** field is populated with the default value, if any, and is display-only.


- The **Business Title** field initially displays the employee's current business title, if available. Enter the employee's business title as needed. Maximum field length is 50 characters.
- From the **Employee Type** field, select the employee type and description from the drop down list. The drop down list is populated with the employee types and descriptions defined in your HR/payroll system of record for the employee's pay group.

 This field is display-only if the update allowed setting in the selected employee's job record is set to No.

- Select the **Salary Step**, if available, from the drop down list.

 This field's availability depends on the compensation type and multi-step settings in your HR/payroll system of record. Values may be defaulted into the field, and the field disabled.

- Select the **Change Rate** option, either **Percent** or **Amount**, and enter the percent or amount of the pay change, positive or negative. The **Per** field displays Year or Hour, depending on the position or job selected. The new salary is displayed in the **New Salary** field.

 Your administrator may have configured the **Change Rate** field to only have one option, **Percent** or **Amount** available.

The **Percentage Change/Amount Change** field label changes depending on which **Change Rate** option is selected. Negative values are displayed in red.

13. Click the **Additional Job & Salary Information Details** link, if available, to access the Additional Information fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to system of record once this event has been processed.

More info
 For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

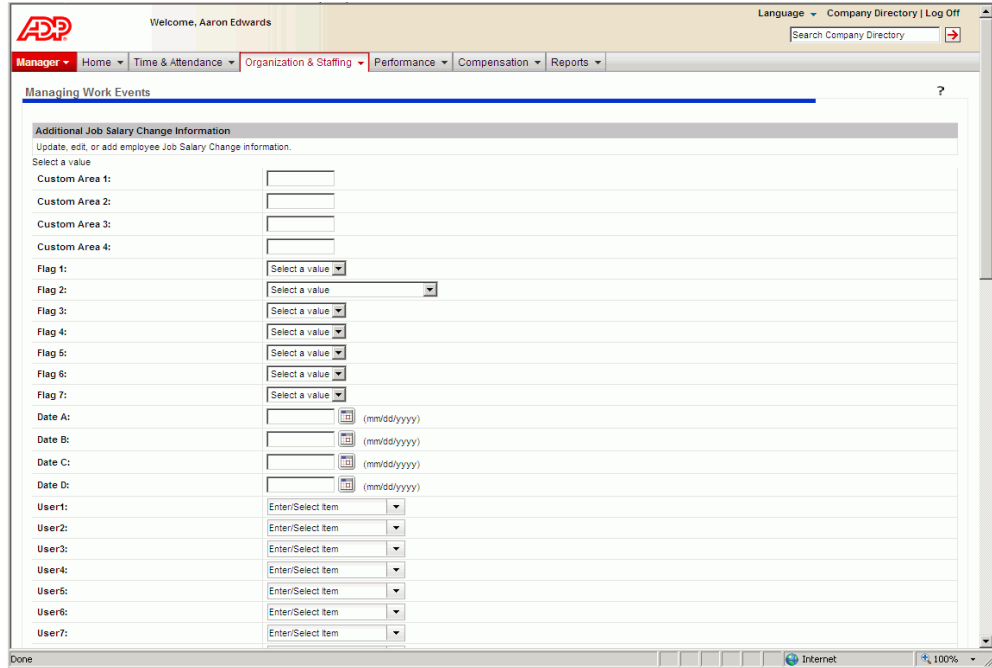


Figure 6-58. Additional Job & Salary Information Page

14. To perform an additional salary change, select **Yes** in the **Would you like to perform an additional salary change?** field. The Salary Change fields display.

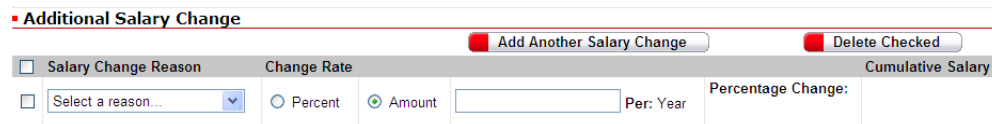




Figure 6-59. Salary Change fields

15. Complete the following:


- a. Select the **Salary Change Reason** from the drop down list. Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
- b. Select the **Change Rate** option, either **Percent** or **Amount** (as available), and enter the percent or amount of the pay change, positive or negative. The **Per** field displays Year or Hour, depending on the **Position** or **Job** selected. The **Percent Change/Amount Change** and **Cumulative** fields display the new salary values.

 To add another salary change, click **Add Another Salary Change**. To delete a salary change listed in the Additional Salary Change area, select the appropriate check box to the left of the reason field and click **Delete Checked**.

16. Click **Next**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Job & Salary Information page for the next employee displays. If you selected more than one job action for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

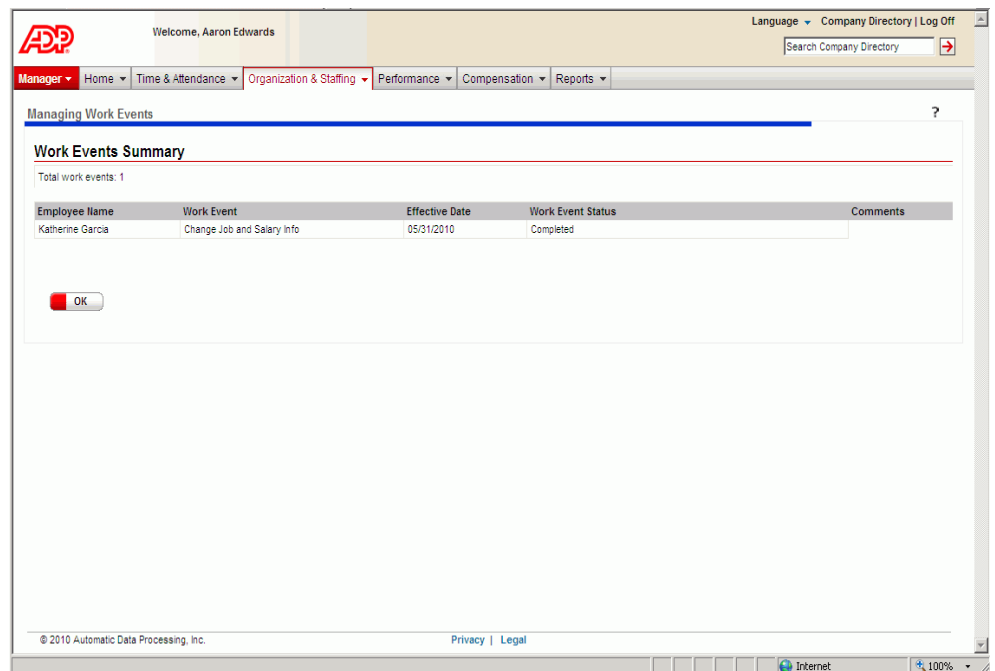


Figure 6-60. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

17. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

18. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed initiating a promotion for an employee and submitting it for approval.

For information on demoting an employee, see “[Demoting an Employee](#)” on page 6-81.

For information on initiating a lateral job change for an employee, see “[Performing a Lateral Job Change](#)” on page 6-89.

For information on changing an employee's salary, see “[Changing an Employee's Salary](#)” on page 6-96.

Demoting an Employee

To demote an employee and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Job & Salary Information** from the Employee Event selection menu.

Tasks

Changing an Employee's Job and Salary Information

- Promoting an Employee
- Demoting an Employee**
- Performing a Lateral Job Change
- Changing an Employee's Salary

More info


For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The navigation menu includes Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Direct Reports' and displays a list of employees. An 'Employee Events' menu is open over the list, with 'Change Job & Salary Information' selected. The menu options include Employee Profile, Comprehensive Employment Change, Transfer Employee, Change Job & Salary Information, Change Job Status, Change Employment Status, Employee Career Profile, Enroll Employee in Training, Employee Training Summary, Compensation Planning, Compensation History, Performance Planning, and Performance History. The background shows a table of direct reports with columns for Name, Department, Job Status, Full Time/Part Time, and Hire Date.

Name	Department	Job Status	Full Time/Part Time	Hire Date
Ali Amin	Training & Development	Leave of Absence	Part Time	10/01/2000
Gregory Andrews	Distribution-East	Active	Part Time	06/12/1998
Steven Bell	Customer Service-East	Active	Full Time	04/18/1996
Jennifer Brooks	Payroll	Active	Full Time	08/18/2000
Mary Carter	Employee Relations	Suspended	Part Time	01/01/2009
Joseph Chan	Distribution-East	Active	Part Time	12/30/1995
Kieran Collins	Employee Relations	Active	Part Time	01/01/2009
Clive Daniels	Accounting	Active	Full Time	08/01/2000
Katherine Garcia	Distribution-East	Active	Full Time	07/01/1994
Carrie Hart	Employee Relations	Active	Full Time	01/01/2009
Mark Heister	Training & Development	Active	Full Time	03/17/1994
Gregory Hopkins	Distribution-East	Active	Full Time	04/01/1995
Anh Huynh	Employee Relations	Active	Part Time	04/01/1998
Terri Johnson-Davis	Employee Relations	Active	Full Time	01/01/2009
Joe Juba	Sr. Comp/Benefits Analyst	Comp & Benefits-Products Div	Full Time	12/17/1998
Thomas Kearney	HR Specialist	Employee Relations	Leave With Pay	01/01/2009
Linda Koehn	Customer Support Rep	Human Resources	Active	07/01/1995
Marcia Martin	Administrative Assistant II	Employee Relations	Active	08/17/2000
Joseph Martin	1019 Job	Employee Relations	Active	01/01/2009
Laura McCain	Clerk I	Accounting	Active	07/28/2000


Figure 6-61. Employee Event Selection Menu with Change Job & Salary Information Selected

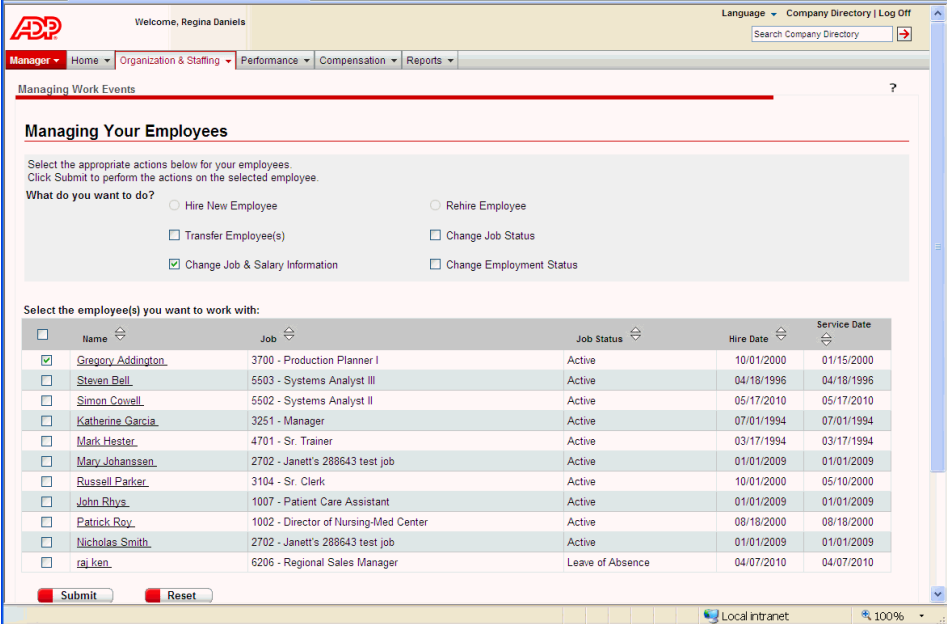
- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Job & Salary Information** action option. Select the employee(s) whose job and/or salary you want to change by clicking the check box next to the employee's name, then click **Submit**.

 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.



More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



ADP Welcome, Regina Daniels Language Company Directory | Log Off

Manager Home Organization & Staffing Performance Compensation Reports

Managing Work Events

Managing Your Employees

Select the appropriate actions below for your employees. Click Submit to perform the actions on the selected employee.

What do you want to do?

Hire New Employee Rehire Employee

Transfer Employee(s) Change Job Status

Change Job & Salary Information Change Employment Status

Select the employee(s) you want to work with:


<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input checked="" type="checkbox"/>	Gregory Addington	3700 - Production Planner I	Active	10/01/2000	01/15/2000
<input type="checkbox"/>	Steven Ball	5503 - Systems Analyst III	Active	04/18/1996	04/18/1996
<input type="checkbox"/>	Simon Cowell	5502 - Systems Analyst II	Active	05/17/2010	05/17/2010
<input type="checkbox"/>	Katherine Garcia	3251 - Manager	Active	07/01/1994	07/01/1994
<input type="checkbox"/>	Mark Hester	4701 - Sr. Trainer	Active	03/17/1994	03/17/1994
<input type="checkbox"/>	Mary Johansson	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Russell Parker	3104 - Sr. Clerk	Active	10/01/2000	05/10/2000
<input type="checkbox"/>	John Rhys	1007 - Patient Care Assistant	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Patrick Roy	1002 - Director of Nursing-Med Center	Active	08/18/2000	08/18/2000
<input type="checkbox"/>	Nicholas Smith	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	raj.ken	6206 - Regional Sales Manager	Leave of Absence	04/07/2010	04/07/2010

Local intranet 100%

Figure 6-62. Managing Work Events with Change Job & Salary Information Option Selected

The Start Work Events page displays.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

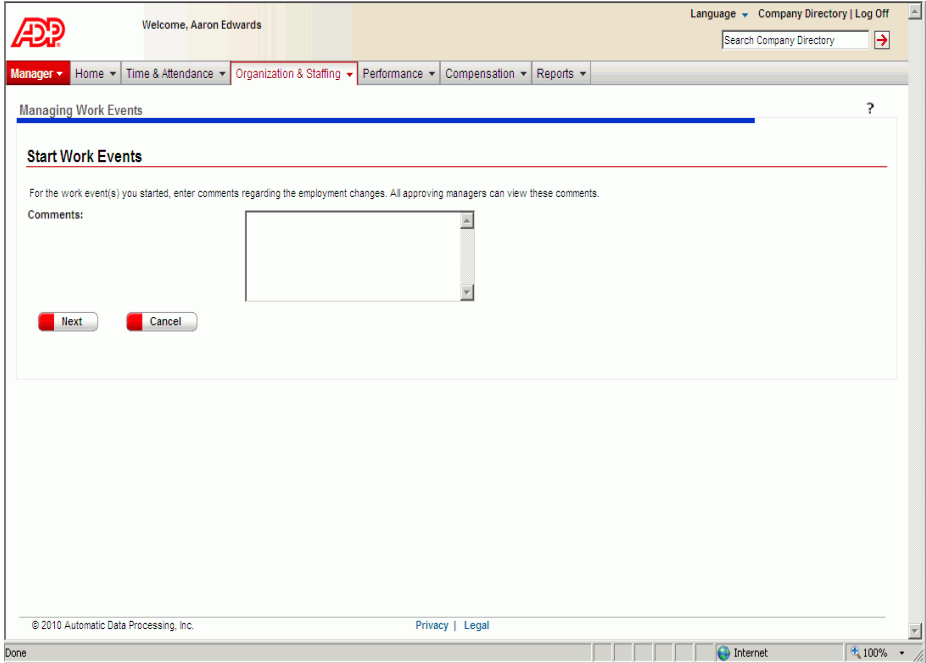





Figure 6-63. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

3. Click **Next**. The Change Job & Salary Information selection page displays with summary job and salary information for the selected employee.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Job & Salary Information page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

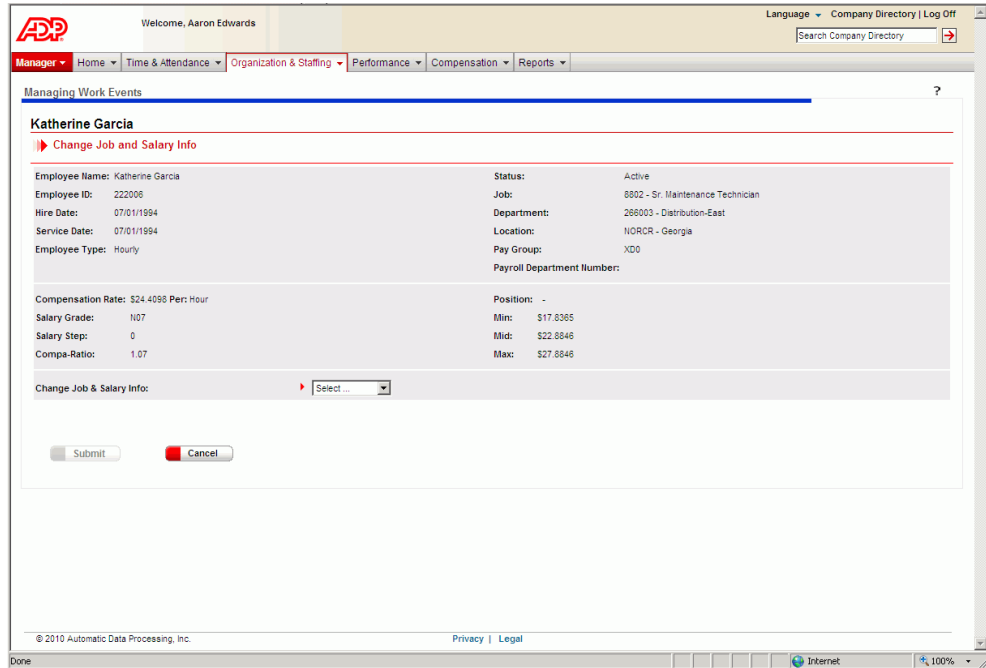


Figure 6-64. Change Job & Salary Information Page

4. Select **Demotion** from the **Change Job & Salary Info** field. The Demotion fields display. Required fields are indicated by a red arrow.

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The page is titled "Managing Work Events" and shows the profile for Katherine Garcia. The "Change Job & Salary Info" section is active, and the "Demotion" option is selected. The "Demotion" section contains several fields: "Effective Date" (with a calendar icon), "Reason" (a dropdown menu), "Position" (a dropdown menu), "Job" (a dropdown menu), "Business Title" (a text field), "Employee Type" (a dropdown menu), and "Salary Step" (a dropdown menu). There are also radio buttons for "Change Rate" (Percent or Amount) and a "Percentage Change" field. A "New Salary" section is also present. At the bottom, there are "Submit", "Reset", and "Cancel" buttons. On the right side, a "Salary Data for '8802 - Sr. Maintenance Technician'" box displays the following information:


Min:	\$17,5034
Mid:	\$22,4217
Max:	\$27,3399
Salary Grade:	N07
Salary Step:	0
Salary Amount:	\$0.0000

Figure 6-65. Change Job & Salary Information Page with Demotion Fields Displayed

5. In the **Effective Date** field, enter the date the demotion will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
6. Select the **Reason** for the demotion from the drop down list.
 - Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
7. From the **Position** field, select the position code and description. (See “Using the Searchable Drop-Down Fields” on page 6-4.)
 - Values available are based on the departments the manager has security access to in your HR/payroll system of record. The **Salary Data** for the selected position displays to the right of the **Position** field.

This field is not available if Position Management in your HR/payroll system of record is set to None. If you select a position, the associated default values populate the **Job**, **Employee Type**, and **Salary Step** fields, which are then display-only.


- From the **Job** field, select the job code and description. (See “Using the Searchable Drop-Down Fields” on page 6-4.)

 The **Salary Data** for the selected job displays to the right of the **Job** field.


The **Job** field is display-only if a position was selected from the **Position** field. If you have not selected a position, you can select a job from the Job field. The **Position** field is then disabled, and the **Salary Step** field is populated with the default value, if any, and is display-only.

- The **Business Title** field initially displays the employee's current business title, if available. Enter the employee's business title as needed. Maximum field length is 50 characters.


- From the **Employee Type** field, select the employee type and description from the drop down list. The drop down list is populated with the employee types and descriptions defined in HR/payroll system of record for the employee's pay group.

 This field is display-only if the update allowed setting in the selected employee's job record is set to No.

- Select the **Salary Step**, if available, from the drop down list.


 This field's availability depends on the compensation type and multi-step settings in HR/payroll system of record. Values may be defaulted into the field, and the field disabled.

- Select the **Change Rate** option, either **Percent** or **Amount** and enter the percent or amount of the pay change, positive or negative. The **Per** field displays Year or Hour, depending on the position or job selected. The new salary is displayed in the **New Salary** field.

 Your administrator may have configured the **Change Rate** field to only have one option, **Percent** or **Amount** available.

The **Percentage Change/Amount Change** field label changes depending on which **Change Rate** option is selected. Negative values are displayed in red.


- Click the **Additional Job & Salary Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-58](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.


- To perform an additional salary change, select **Yes** in the **Would you like to perform an additional salary change?** field. The Salary Change fields display, as shown in [Figure 6-59](#).

15. Complete the following:


- a. Select the **Salary Change Reason** from the drop down list. Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
- b. Select the **Change Rate** option, either **Percent** or **Amount** (as available) and enter the percent or amount of the pay change, positive or negative. The **Per** field displays Year or Hour, depending on the position or job selected. The **Percent Change/Amount Change** and **Cumulative** fields display the new salary values.

 To add another salary change, click **Add Another Salary Change**. To delete a salary change listed in the **Additional Salary Change** area, select the appropriate check box to the left of the reason field and click **Delete Checked**.

16. Click **Next**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Job & Salary Information page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

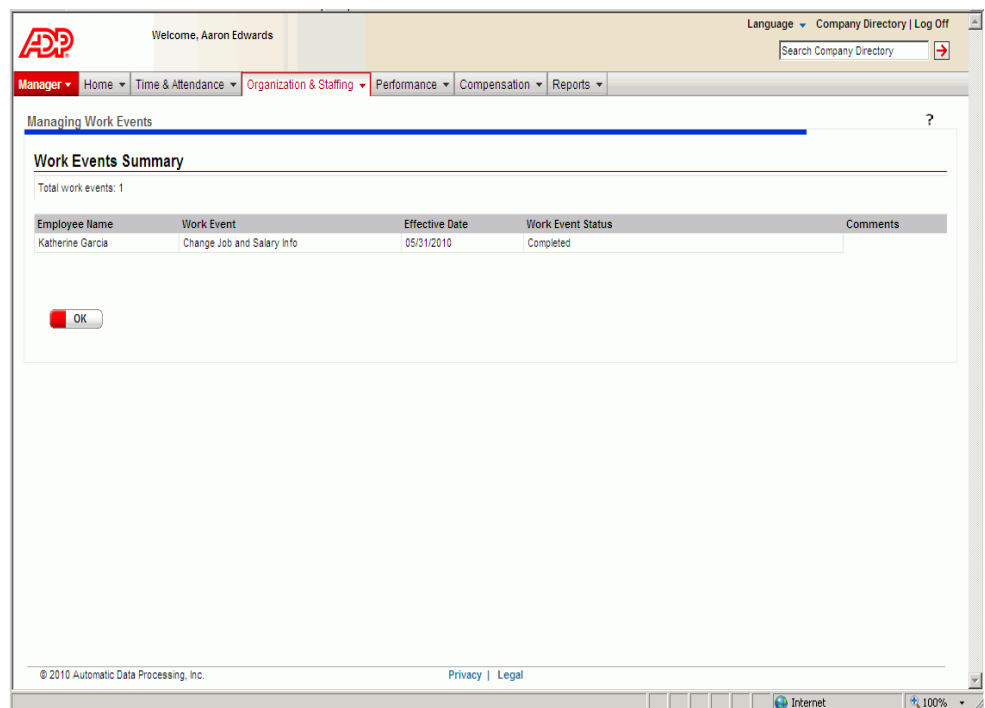


Figure 6-66. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

17. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

18. When you have finished reviewing the information, click OK. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed initiating a demotion for an employee and submitting it for approval.

For information on promoting an employee, see [“Promoting an Employee”](#) on page 6-72.

For information on initiating a lateral job change for an employee, see [“Performing a Lateral Job Change”](#) on page 6-89.

For information on changing an employee's salary, see [“Changing an Employee's Salary”](#) on page 6-96.

Performing a Lateral Job Change

To perform a lateral job change for an employee and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Job & Salary Information** from the Employee Event selection menu.

Tasks

- Changing an Employee's Job and Salary Information
 - Promoting an Employee
 - Demoting an Employee
- Performing a Lateral Job Change
 - Changing an Employee's Salary

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

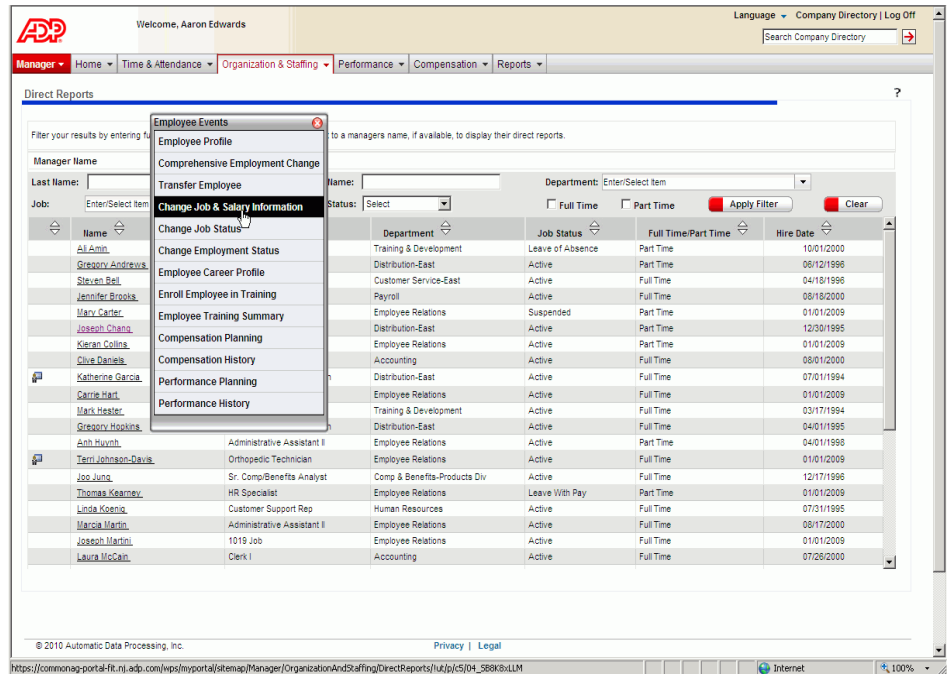


Figure 6-67. Employee Event Selection Menu with Change Job & Salary Information Selected

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Job & Salary Information** action option. Select the employee(s) whose job and/or salary you want to change by clicking the check box next to the employee's name, then click **Submit**.
- 💡 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

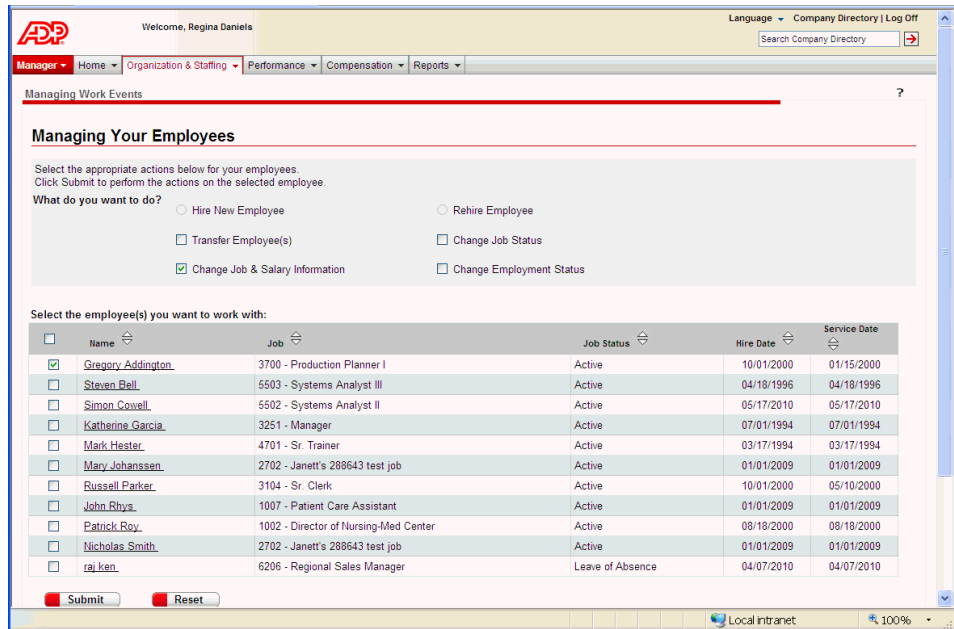



Figure 6-68. Managing Work Events with Change Job & Salary Information Option Selected

The Start Work Events page displays.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

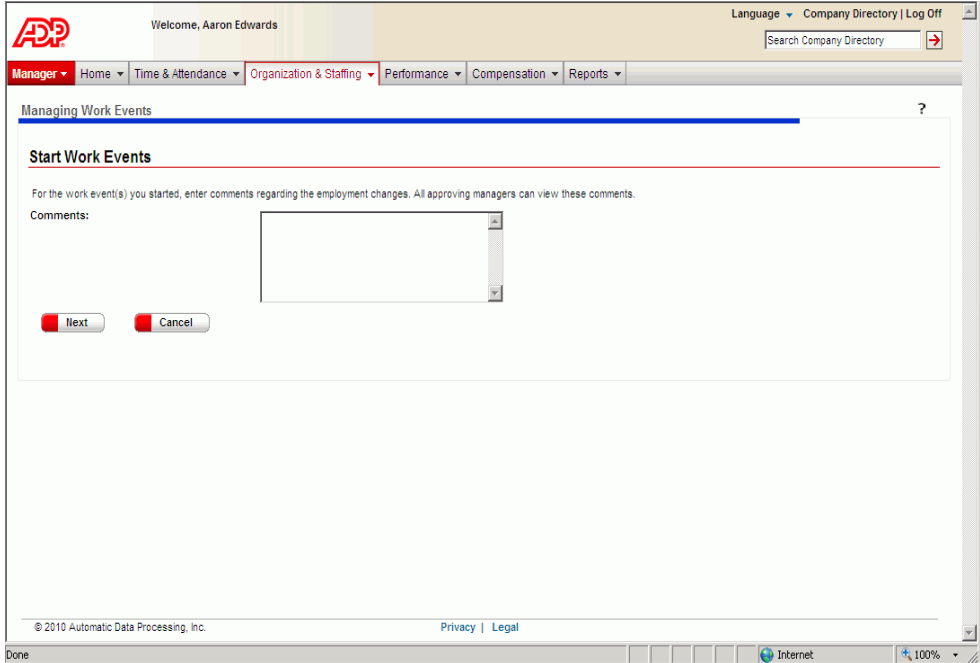





Figure 6-69. Start Work Events Page

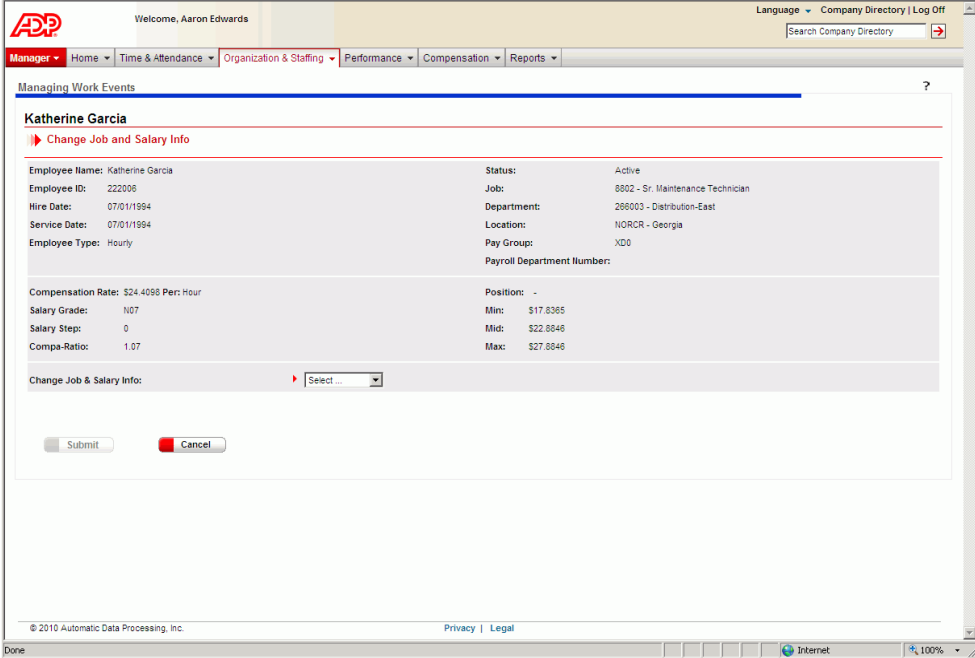
2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

- Click **Next**. The Change Job & Salary Information selection page displays with summary job and salary information for the selected employee.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Job & Salary Information page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with tabs for Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The 'Organization & Staffing' tab is active. Below the navigation bar, the page title is 'Managing Work Events'. The main content area displays the name 'Katherine Garcia' and a link to 'Change Job and Salary Info'. Below this link, there is a summary of employee information:

Employee Name: Katherine Garcia	Status: Active
Employee ID: 222008	Job: 8802 - Sr. Maintenance Technician
Hire Date: 07/01/1994	Department: 286003 - Distribution-East
Service Date: 07/01/1994	Location: NORCR - Georgia
Employee Type: Hourly	Pay Group: X00
	Payroll Department Number:
Compensation Rate: \$24.4088 Per Hour	Position: -
Salary Grade: N07	Min: \$17.8365
Salary Step: 0	Mid: \$22.8648
Compa-Ratio: 1.07	Max: \$27.8648

Below the summary, there is a 'Change Job & Salary Info:' section with a dropdown menu labeled 'Select ...'. At the bottom of this section are 'Submit' and 'Cancel' buttons. The footer of the page includes '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'.

Figure 6-70. Change Job & Salary Information Page

4. Select **Lateral Change** from the **Change Job & Salary Info** field. The Lateral Change fields display. Required fields are indicated by a red arrow.

i More info
 For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there's a navigation bar with 'Manager', 'Home', 'Time & Attendance', 'Organization & Staffing', 'Performance', 'Compensation', and 'Reports'. The main content area is titled 'Managing Work Events' and shows details for 'Katherine Garcia'. Under 'Change Job & Salary Info', the 'Lateral Change' option is selected. The form includes fields for 'Effective Date' (with a calendar icon), 'Reason' (a dropdown menu), 'Position' (a dropdown menu), 'Job' (a dropdown menu), 'Business Title' (a text field), 'Employee Type' (a dropdown menu), 'Salary Step' (a dropdown menu), 'Change Rates' (radio buttons for 'Percent' and 'Amount', and a 'Per: Hour' field), and 'New Salary' (a text field). A 'Percentage Change' field is also present. A 'Salary Data for 8802 - Sr. Maintenance Technician' pop-up is displayed on the right, showing 'Min: \$17,5034', 'Mid: \$22,4217', 'Max: \$27,3399', 'Salary Grade: N07', 'Salary Step: 0', and 'Salary Amount: \$0.0000'. At the bottom, there are 'Submit', 'Reset', and 'Cancel' buttons. The footer includes '© 2010 Automatic Data Processing, Inc.', 'Privacy | Legal', and 'Done'.

Figure 6-71. Change Job & Salary Information Page with Lateral Change Fields Displayed

5. In the **Effective Date** field, enter the date the change will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.

This field defaults to the current date.

6. Select the **Reason** for the lateral change from the drop down list.


Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.

7. From the **Position** field, select the position code and description. (See “Using the Searchable Drop-Down Fields” on page 6-4.)

Values available are based on the departments the manager has security access to in your HR/payroll system of record. The **Salary Data** for the selected position displays to the right of the **Position** field.

This field is not available if Position Management in your HR/payroll system of record is set to None. If you select a position, the associated default values populate the **Job**, and **Employee Type** fields, which are then display-only.


8. From the **Job** field, select the job code and description. (See “Using the Searchable Drop-Down Fields” on page 6-4.)

 The **Salary Data** for the selected job displays to the right of the **Job** field.


The **Job** field is display-only if a position was selected from the **Position** field. If you have not selected a position, you can select a job from the **Job** field. The **Position** field is then disabled, and the **Salary Step** field is populated with the default value, if any, and is display-only.

9. The **Business Title** field initially displays the employee's current business title, if available. Enter the employee's business title as needed. Maximum field length is 50 characters.


10. From the **Employee Type** field, select the employee type and description from the drop down list. The drop down list is populated with the employee types and descriptions defined in your HR/payroll system of record for the employee's pay group.

 This field is display-only if the update allowed setting in the selected employee's job record is set to No.

11. Click the **Additional Job & Salary Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-58](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.


 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to system of record once this event has been processed.

12. Click **Next**. If this is the last employee, the Work Events Summary page displays.

-  If you selected more than one employee, the Change Job & Salary Information page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page

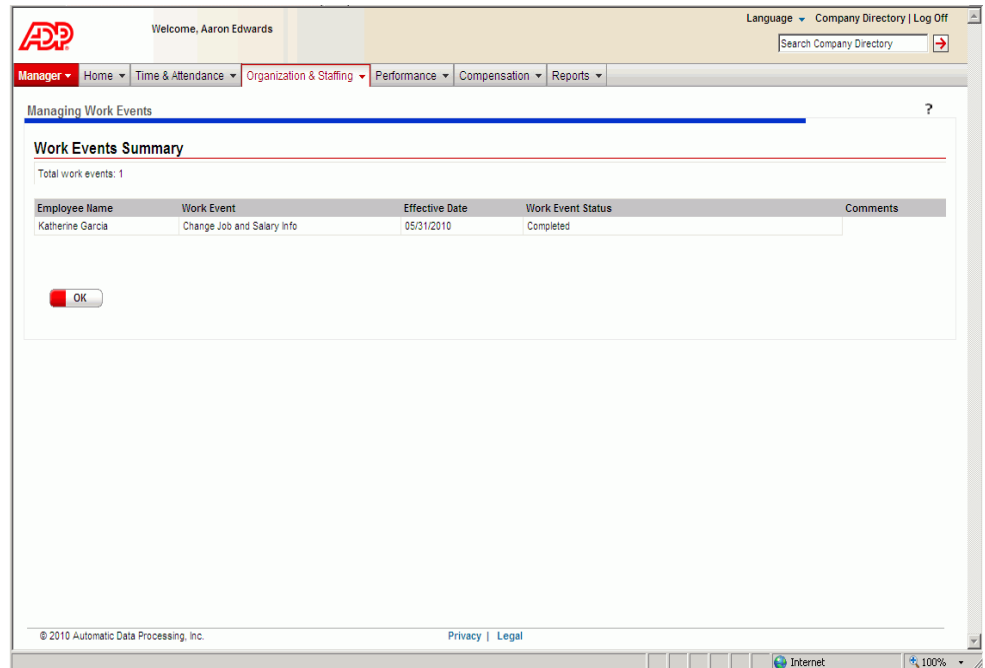


Figure 6-72. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

13. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

14. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed initiating a demotion for an employee and submitting it for approval.

For information on promoting an employee, see “Promoting an Employee” on page 6-72.

For information on demoting an employee, see “Demoting an Employee” on page 6-81.

For information on changing an employee's salary, see “Changing an Employee's Salary” on page 6-96.

Changing an Employee's Salary

To change an employee's salary and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Job & Salary Information** from the Employee Event selection menu.

Tasks

Changing an Employee's Job and Salary Information

- Promoting an Employee
- Demoting an Employee
- Performing a Lateral Job Change

Changing an Employee's Salary

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP web interface for a manager named Aaron Edwards. The 'Organization & Staffing' tab is active, and the 'Direct Reports' page is displayed. An 'Employee Events' dropdown menu is open, with 'Change Job & Salary Information' selected. The background shows a table of direct reports with columns for Name, Department, Job Status, Full Time/Part Time, and Hire Date. The table lists various employees such as Ali Amin, Gregory Andrews, Steven Bell, Jennifer Brooks, Mary Carter, Joseph Chang, Keran Collins, Clive Daniels, Katherine Garcia, Carrie Hart, Mari Hester, Gregory Hopkins, Anh Huynh, Terri Johnson-Dava, Joo Jung, Thomas Kearney, Linda Koenig, Marcia Martin, Joseph Martin, and Laura McCain.

Figure 6-73. Employee Event Selection Menu with Change Job & Salary Information Selected

- From the Managing Work Events page, select the **Change Job & Salary Information** action option. Select the employee(s) whose job and/or salary you want to change by clicking the check box next to the employee's name, then click **Submit**.
- 💡 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

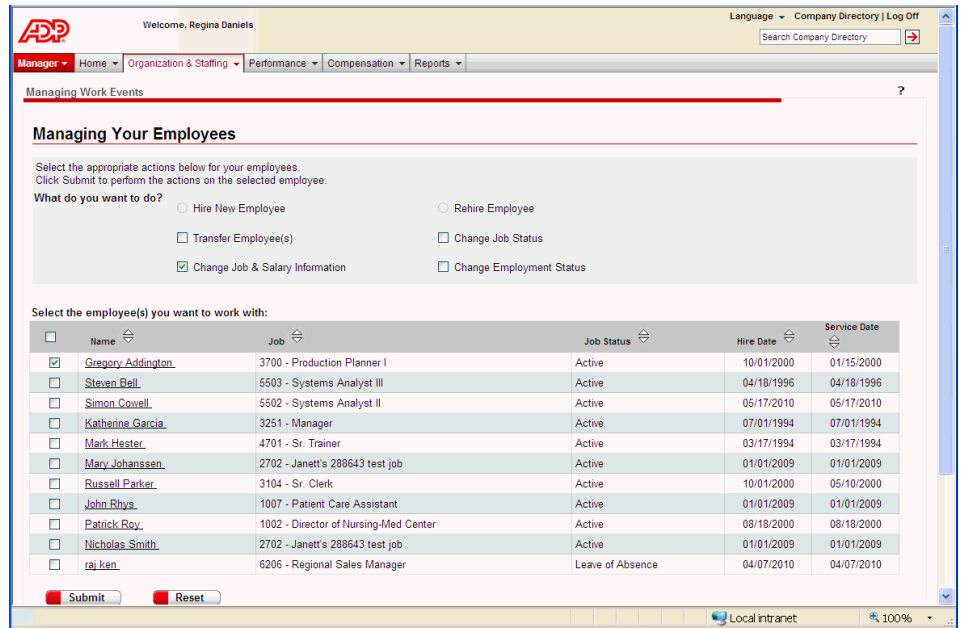


Figure 6-74. Managing Work Events with Change Job & Salary Information Option Selected


The Start Work Events page displays.




More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page


Figure 6-75. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

- Click **Next**. The Change Job & Salary Information selection page displays with summary job and salary information for the selected employee.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Job & Salary Information page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

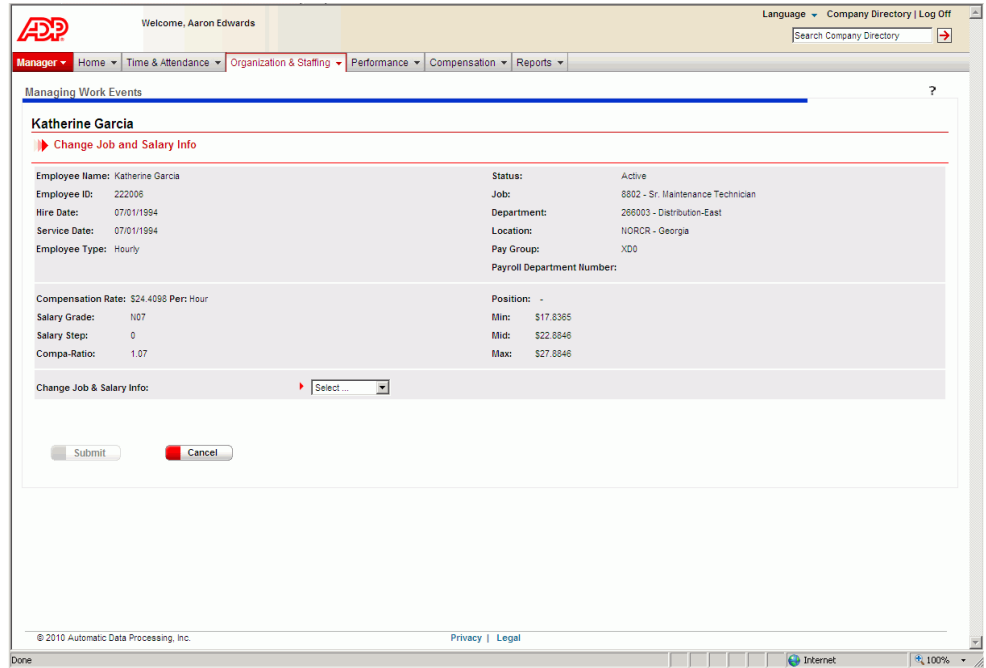




Figure 6-76. Change Job & Salary Information Page

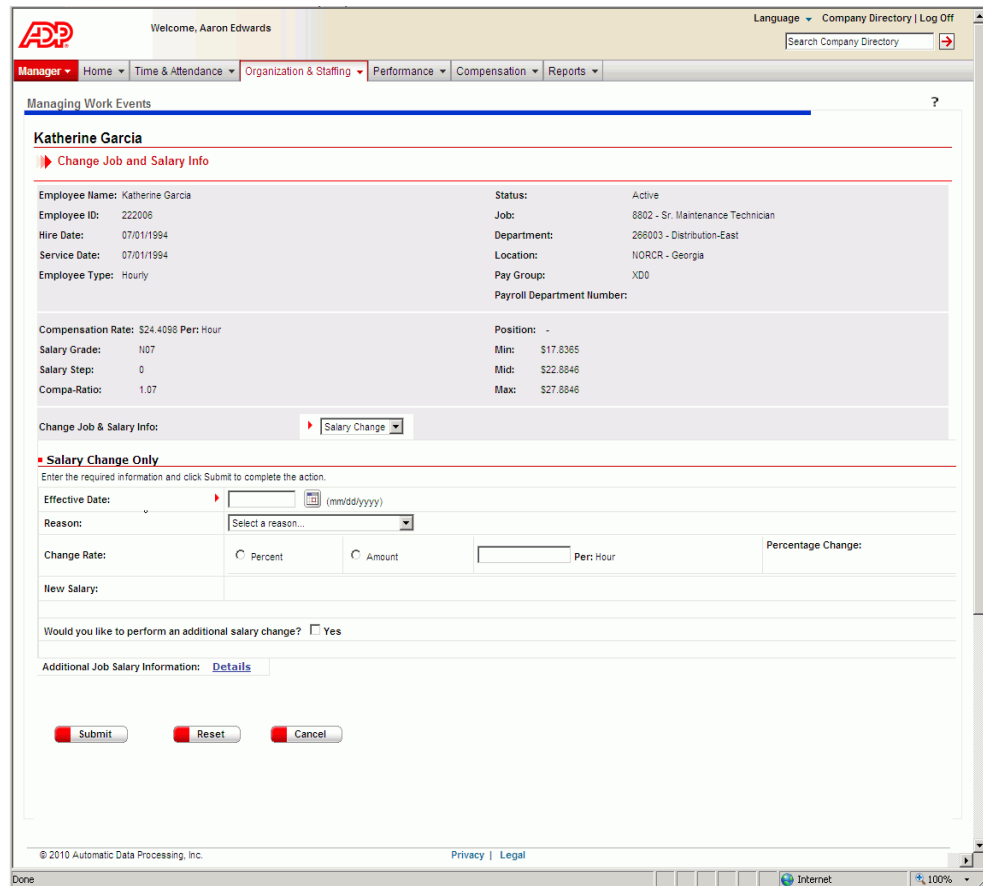
 If the new salary for an employee is above the maximum of the established salary grade range, a confirmation message displays. A confirmation message also displays if the employee is already above the established maximum salary grade before the salary change.

- Select **Salary Change** from the **Change Job & Salary Info** field. The Salary fields display. Required fields are indicated by a red arrow.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



Welcome, Aaron Edwards

Language Company Directory | Log Off

Search Company Directory

Manager Home Time & Attendance Organization & Staffing Performance Compensation Reports

Managing Work Events

Katherine Garcia

Change Job and Salary Info

Employee Name: Katherine Garcia	Status: Active
Employee ID: 222006	Job: 8802 - Sr. Maintenance Technician
Hire Date: 07/01/1994	Department: 266003 - Distribution-East
Service Date: 07/01/1994	Location: NORCR - Georgia
Employee Type: Hourly	Pay Group: XD0
	Payroll Department Number:

Compensation Rate: \$24,4088 Per: Hour	Position: -
Salary Grade: N07	Min: \$17,8365
Salary Step: 0	Mid: \$22,8846
Compe-Ratio: 1.07	Max: \$27,8846

Change Job & Salary Info: Salary Change

Salary Change Only

Enter the required information and click Submit to complete the action.

Effective Date: (mm/dd/yyyy)

Reason:

Change Rate: Percent Amount Per: Hour Percentage Change:

New Salary:

Would you like to perform an additional salary change? Yes

Additional Job Salary Information: [Details](#)


© 2010 Automatic Data Processing, Inc. Privacy | Legal

Figure 6-77. Change Job & Salary Information Page with the Salary Fields Displayed

- In the **Effective Date** field, enter the date the salary will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
- Select the **Reason** for the salary change from the drop down list.
 - Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
- Select the **Change Rate** option, either **Percent** or **Amount** and enter the percent or amount of the pay change, positive or negative. The **Per** field displays Year or Hour, depending on the employee's compensation frequency. The new salary is displayed in the **New Salary** field.
 - Your administrator may have configured the **Change Rate** field to only have one option, **Percent** or **Amount** available.

The **Percentage Change/Amount Change** field label changes depending on which **Change Rate** option is selected. Negative values are displayed in red.


8. Click the **Additional Job & Salary Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-58](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.


9. To perform an additional salary change, select **Yes** in the **Would you like to perform an additional salary change?** field. The **Salary Change** fields display, as shown in [Figure 6-59](#).

10. Complete the following:

- a. Select the **Salary Change Reason** from the drop down list. Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
- b. Select the **Change Rate** option, either **Percent** or **Amount** (as available) and enter the percent or amount of the pay change, positive or negative. The **Per** field displays Year or Hour, depending on the employee's compensation frequency. The **Percent Change/Amount Change** and **Cumulative** fields display the new salary values.


 To add another salary change, click **Add Another Salary Change**. To delete a salary change listed in the **Additional Salary Change** area, select the appropriate check box to the left of the reason field and click **Delete Checked**.

11. Click **Next**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Job & Salary Information page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page

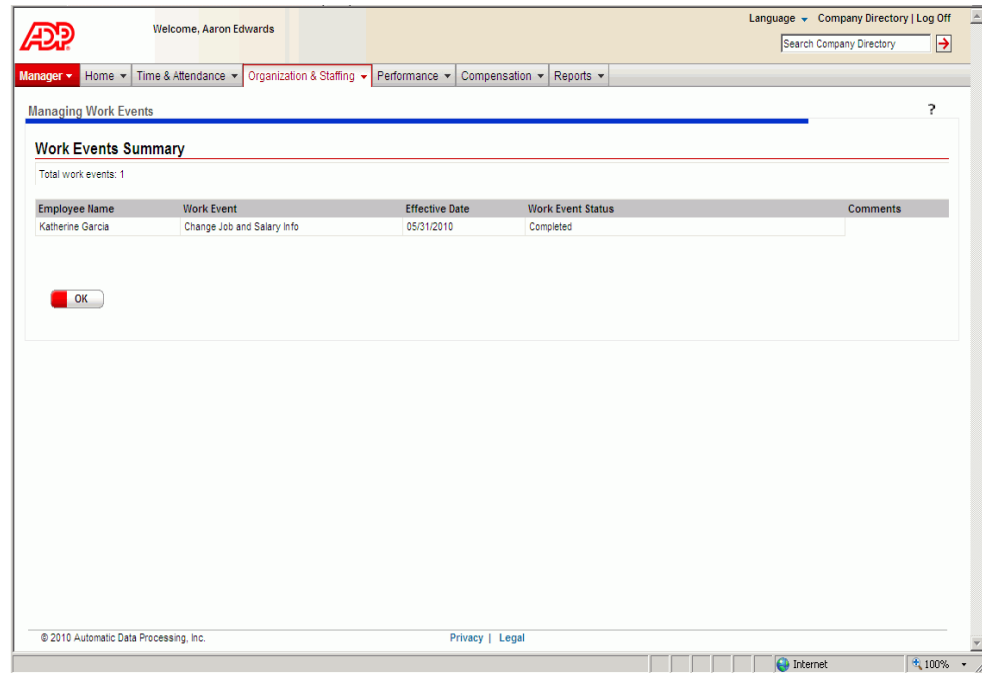


Figure 6-78. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

12. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

13. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.

**End of procedure**

You have completed initiating a demotion for an employee and submitting it for approval.

For information on promoting an employee, see [“Promoting an Employee”](#) on page 6-72.

For information on demoting an employee, see [“Demoting an Employee”](#) on page 6-81.

For information on initiating a lateral job change for an employee, see [“Performing a Lateral Job Change”](#) on page 6-89.


Changing an Employee's Employment Status

The Change Employment Status page allows managers to change the employment status of employees who report to them and submit the job action for approval. If your administrator has enabled the indirect report update option, you can change information for both your direct and indirect reports.

Managers can make employee job changes through either the **Direct Reports** or **Managing Work Events** task. Indirect and direct reports can be accessed through **Direct Reports**. Only direct reports can be accessed through the **Managing Work Events** task.

Actions available are placing an employee on leave, returning an employee from leave, placing an employee on suspension, returning an employee from suspension, and terminating an employee.

The "active" version of the Change Employment Status page displays when the page is accessed from the Direct Reports page or the Managing Work Events page, which means the manager is able to enter information in the fields provided. Note that required fields are indicated on the page by red arrows. When the page is accessed from the Approvals, Notifications, or Approval History pages, the fields are display-only.

 If multiple job actions need to be performed on an employee, see [“Updating Multiple Job Actions for a Single Employee”](#) on page 6-6. If multiple employees need a job action performed, see [“Updating Multiple Employees with a Single Job Action”](#) on page 6-11. The two procedures can only be done through the Managing Work Events task.

Changing an employee's employment status can include the following tasks:

- [Placing an Employee on Leave](#)
- [Returning an Employee from Leave](#)
- [Placing an Employee on Suspension](#)
- [Returning an Employee from Suspension](#)
- [Terminating an Employee](#)

Placing an Employee on Leave



Changing an Employee's Employment Status

Placing an Employee on Leave

Returning an Employee from Leave

Placing an Employee on Suspension

Returning an Employee from Suspension

Terminating an Employee

To place an employee on a Leave of Absence and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Employment Status** from the Employee Event selection menu.

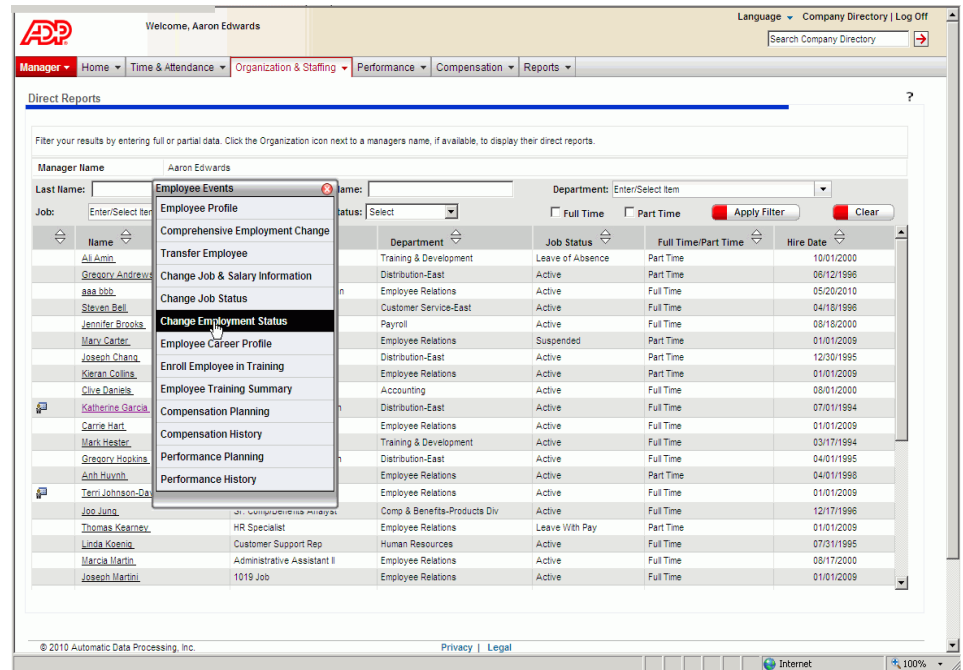




Figure 6-79. Employee Event Selection Menu with Change Employment Status Selected

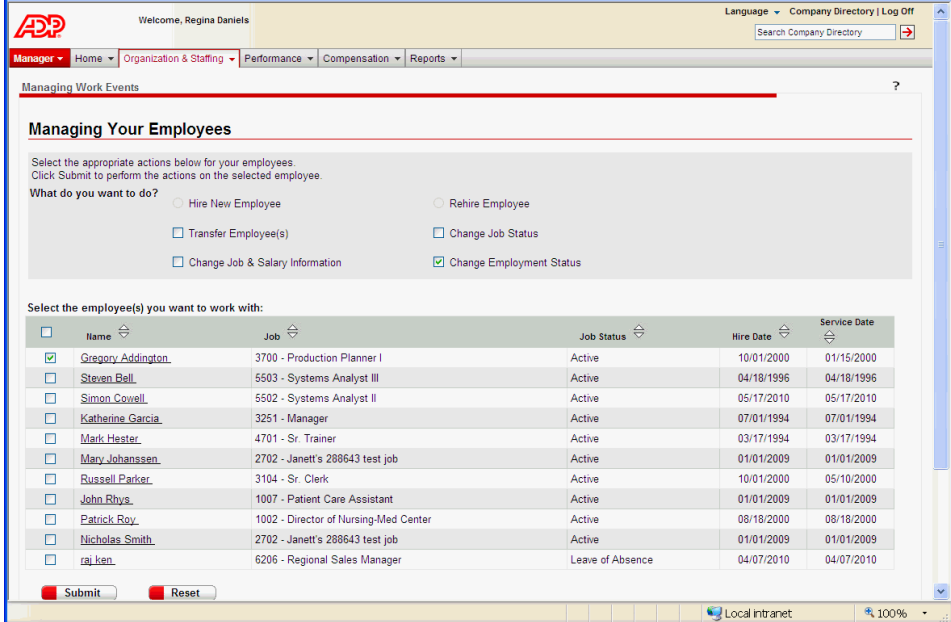
- i** For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Employment Status** action option. Select the employee(s) whose employment status you want to change by clicking the check box next to the employee's name, then click **Submit**.

 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.




The screenshot shows the ADP Managing Work Events page. The page title is "Managing Your Employees". Below the title, there is a section titled "What do you want to do?" with several radio button options: "Hire New Employee", "Rehire Employee", "Transfer Employee(s)", "Change Job Status", "Change Job & Salary Information", and "Change Employment Status". The "Change Employment Status" option is selected. Below this section, there is a table titled "Select the employee(s) you want to work with:". The table has columns for "Name", "Job", "Job Status", "Hire Date", and "Service Date". The first row, "Gregory Addington", is selected with a checkmark. Below the table, there are "Submit" and "Reset" buttons.

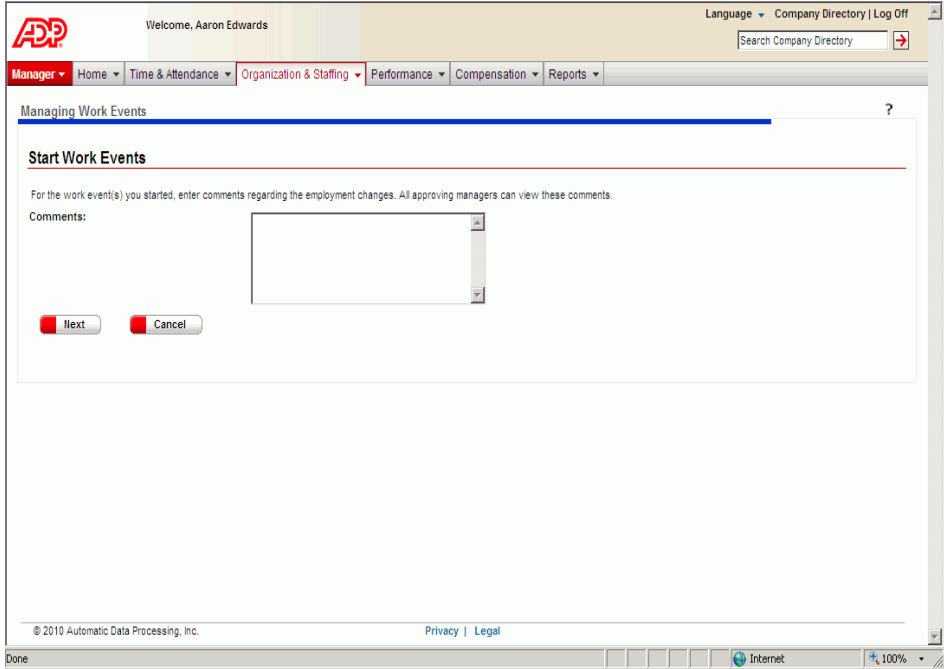
<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input checked="" type="checkbox"/>	Gregory Addington	3700 - Production Planner I	Active	10/01/2000	01/15/2000
<input type="checkbox"/>	Steven Bell	5503 - Systems Analyst III	Active	04/18/1996	04/18/1996
<input type="checkbox"/>	Simon Cowell	5502 - Systems Analyst II	Active	05/17/2010	05/17/2010
<input type="checkbox"/>	Katherine Garcia	3251 - Manager	Active	07/01/1994	07/01/1994
<input type="checkbox"/>	Mark Hester	4701 - Sr. Trainer	Active	03/17/1994	03/17/1994
<input type="checkbox"/>	Mary Johanssen	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Russell Parker	3104 - Sr. Clerk	Active	10/01/2000	05/10/2000
<input type="checkbox"/>	John Rhys	1007 - Patient Care Assistant	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Patrick Roy	1002 - Director of Nursing-Med Center	Active	08/18/2000	08/18/2000
<input type="checkbox"/>	Nicholas Smith	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	raj ken	6206 - Regional Sales Manager	Leave of Absence	04/07/2010	04/07/2010

Figure 6-80. Managing Work Events with Change Employment Status Option Selected

The Start Work Events page displays.


 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page




The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and a search bar for the Company Directory. Below the navigation bar, the 'Managing Work Events' section is active, displaying the 'Start Work Events' form. The form includes a 'Comments' field with a text area and a vertical scrollbar, and two buttons labeled 'Next' and 'Cancel'. The footer of the page contains the copyright notice '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'.

Figure 6-81. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.


- Click **Next**. The Change Employment Status selection page displays with summary job and salary information for the selected employee.

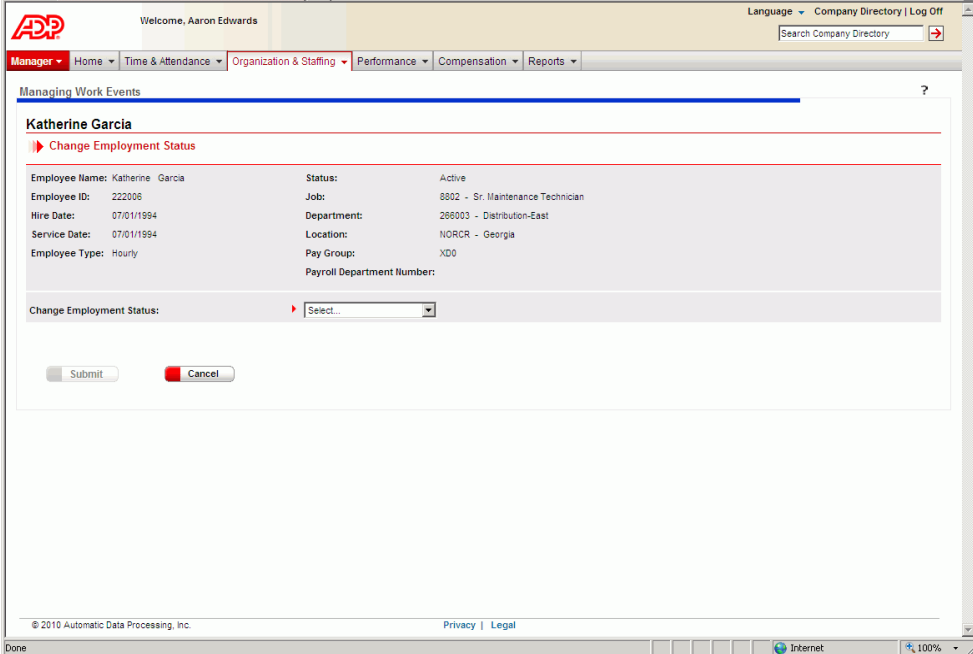
 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Employment Status page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.



More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and links for Language, Company Directory, and Log Off. Below this is a menu bar with options: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and features a red header for 'Katherine Garcia'. A red arrow points to the 'Change Employment Status' link. Below this, a table displays employee details:


Employee Name:	Katherine Garcia	Status:	Active
Employee ID:	222006	Job:	8802 - Sr. Maintenance Technician
Hire Date:	07/01/1994	Department:	268003 - Distribution-East
Service Date:	07/01/1994	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	XD0
		Payroll Department Number:	

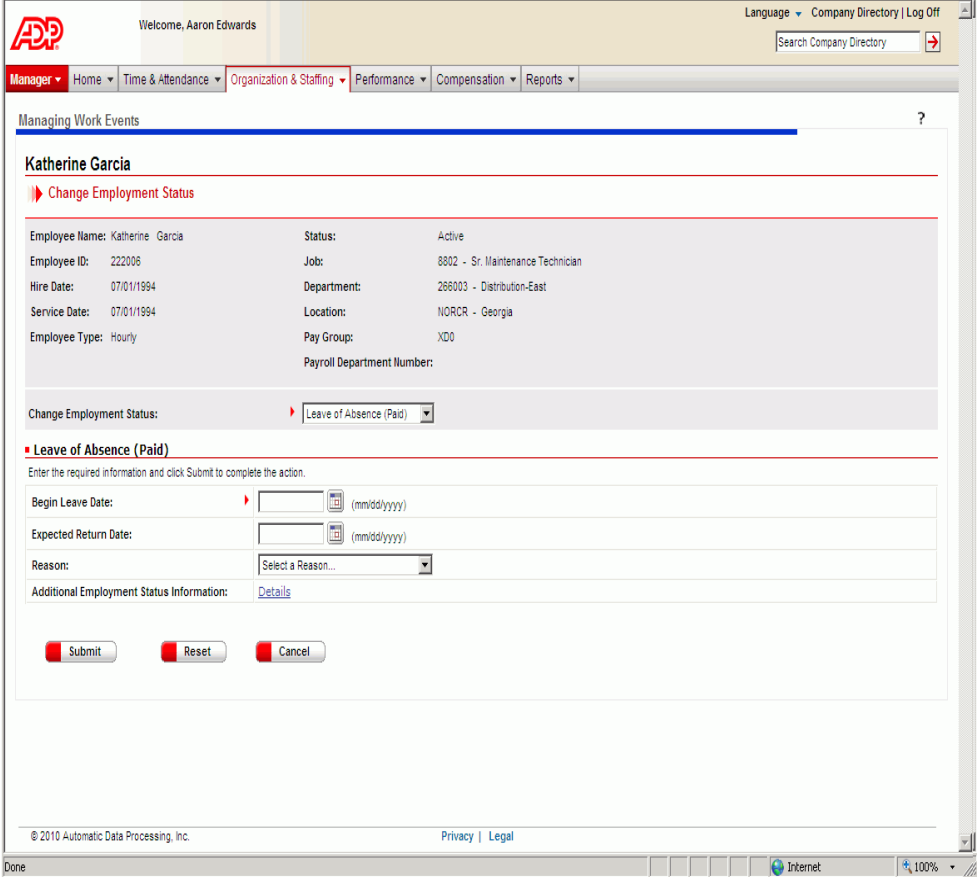
Below the table, there is a 'Change Employment Status:' label followed by a dropdown menu currently set to 'Select...'. At the bottom of the form are 'Submit' and 'Cancel' buttons. The footer of the page includes '© 2010 Automatic Data Processing, Inc.', 'Privacy | Legal', and a browser status bar showing 'Internet' and '100%' zoom.

Figure 6-82. Change Employment Status Page

4. Select the **Leave of Absence (Paid or Unpaid)** option from the **Change Employment Status** field. The Leave of Absence fields display. Required fields are indicated by a red arrow.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The navigation menu includes Manager, Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and displays information for Katherine Garcia. The 'Change Employment Status' section is expanded, showing a dropdown menu set to 'Leave of Absence (Paid)'. Below this, the 'Leave of Absence (Paid)' section is active, displaying the following fields:

Employee Name:	Katherine Garcia	Status:	Active
Employee ID:	222006	Job:	8802 - Sr. Maintenance Technician
Hire Date:	07/01/1994	Department:	266003 - Distribution-East
Service Date:	07/01/1994	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	XD0
		Payroll Department Number:	


The 'Change Employment Status' dropdown is set to 'Leave of Absence (Paid)'. Below this, the 'Leave of Absence (Paid)' section is active, displaying the following fields:

- Begin Leave Date:** (Required field, indicated by a red arrow) with a calendar icon and format (mm/dd/yyyy).
- Expected Return Date:** (Required field, indicated by a red arrow) with a calendar icon and format (mm/dd/yyyy).
- Reason:** (Required field, indicated by a red arrow) with a dropdown menu labeled 'Select a Reason...'. Below the dropdown is a link for 'Additional Employment Status Information: Details'.

At the bottom of the form are three buttons: Submit, Reset, and Cancel. The footer of the page includes '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'.

Figure 6-83. Change Employment Status Page with Leave of Absence Fields Displayed

5. In the **Begin Leave Date** field, enter the date the leave will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
6. In the **Expected Return Date** field, enter the estimated date employee is to return from leave. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
7. Select the **Reason** for the leave.

 Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.

8. Click the **Additional Employment Status Information Details** link, if available, to access the Additional Information fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to system of record once this event has been processed.



More info


For a description of the fields on this page or for related tasks, click the (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the 'Additional Employment Status Change Information' page in the ADP Self-Service Manager. The page is titled 'Managing Work Events' and includes a navigation menu with options like Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area contains a form with the following fields:


- Custom Area 1:
- Custom Area 2:
- Custom Area 3:
- Custom Area 4:
- Flag 1:
- Flag 2:
- Flag 3:
- Flag 4:
- Flag 5:
- Flag 6:
- Flag 7:
- Date A:
- Date B:
- Date C:
- Date D:
- User 1:
- User 2:
- User 3:
- User 4:
- User 5:
- User 6:

Figure 6-84. Additional Employment Status Information Page

9. Click **Submit**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Employment Status page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

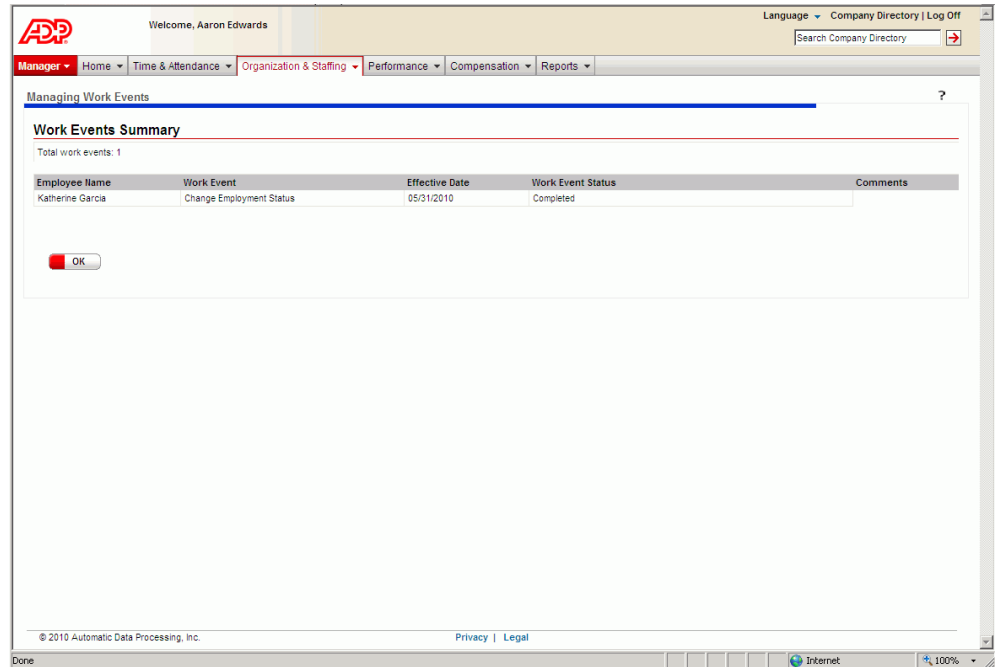


Figure 6-85. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

10. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

11. When you have finished reviewing the information, click OK. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed placing an employee on leave, either paid or unpaid, and submitting it for approval.

For information on returning an employee from leave, see [“Returning an Employee from Leave”](#) on page 6-113.

For information on placing an employee on suspension, see [“Placing an Employee on Suspension”](#) on page 6-120.

For information on returning an employee from suspension, see [“Returning an Employee from Suspension”](#) on page 6-128.

For information on terminating an employee, see [“Terminating an Employee”](#) on page 6-134.

Returning an Employee from Leave

To return an employee from leave and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Employment Status** from the Employee Event selection menu.

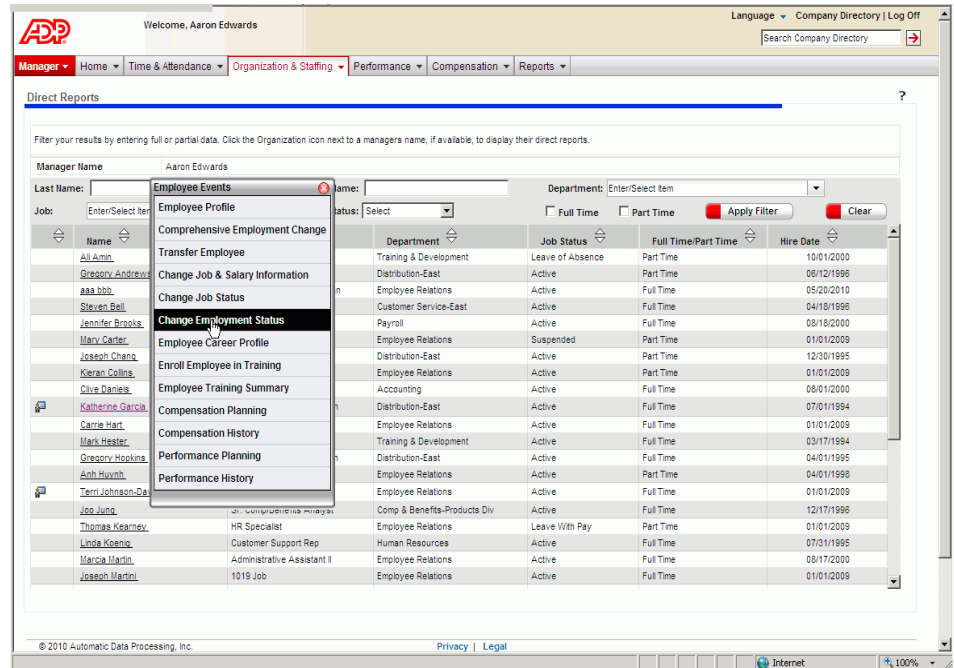


Figure 6-86. Employee Event Selection Menu with Change Employment Status Selected

- i** For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

Tasks

Changing an Employee's Employment Status

- Placing an Employee on Leave
- Returning an Employee from Leave

Placing an Employee on Suspension

Returning an Employee from Suspension

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.


- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Employment Status** action option. Select the employee(s) whose employment status you want to change by clicking the check box next to the employee's name, then click **Submit**.



Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.



More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.


The screenshot shows the ADP 'Managing Work Events' page. At the top, there is a navigation bar with 'Manager' selected. Below it, a 'Managing Your Employees' section contains several radio button options: 'Hire New Employee', 'Rehire Employee', 'Transfer Employee(s)', 'Change Job Status', 'Change Job & Salary Information', and 'Change Employment Status'. The 'Change Employment Status' option is selected. Below this, a table lists employees with checkboxes for selection. The first employee, Gregory Addington, is selected. At the bottom, there are 'Submit' and 'Reset' buttons.

<input type="checkbox"/>	Name	Job	Job Status	Hire Date	Service Date
<input checked="" type="checkbox"/>	Gregory Addington	3700 - Production Planner I	Active	10/01/2000	01/15/2000
<input type="checkbox"/>	Steven Bell	5503 - Systems Analyst III	Active	04/18/1996	04/18/1996
<input type="checkbox"/>	Simon Cowell	5502 - Systems Analyst II	Active	05/17/2010	05/17/2010
<input type="checkbox"/>	Katherine Garcia	3251 - Manager	Active	07/01/1994	07/01/1994
<input type="checkbox"/>	Mark Hester	4701 - Sr. Trainer	Active	03/17/1994	03/17/1994
<input type="checkbox"/>	Mary Johansson	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Russell Parker	3104 - Sr. Clerk	Active	10/01/2000	05/10/2000
<input type="checkbox"/>	John Rhys	1007 - Patient Care Assistant	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	Patrick Roy	1002 - Director of Nursing-Med Center	Active	08/18/2000	08/18/2000
<input type="checkbox"/>	Nicholas Smith	2702 - Janett's 288643 test job	Active	01/01/2009	01/01/2009
<input type="checkbox"/>	raj ken	6206 - Regional Sales Manager	Leave of Absence	04/07/2010	04/07/2010

Figure 6-87. Managing Work Events with Change Employment Status Option Selected

The Start Work Events page displays.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

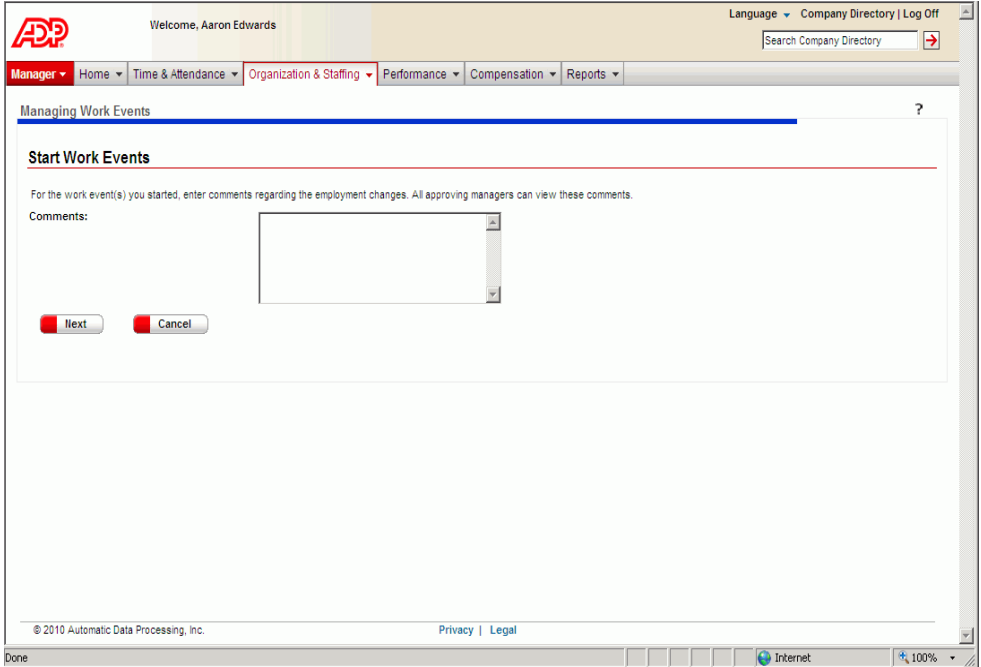




Figure 6-88. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.


3. Click **Next**. The Change Employment Status selection page displays with summary job and salary information for the selected employee.

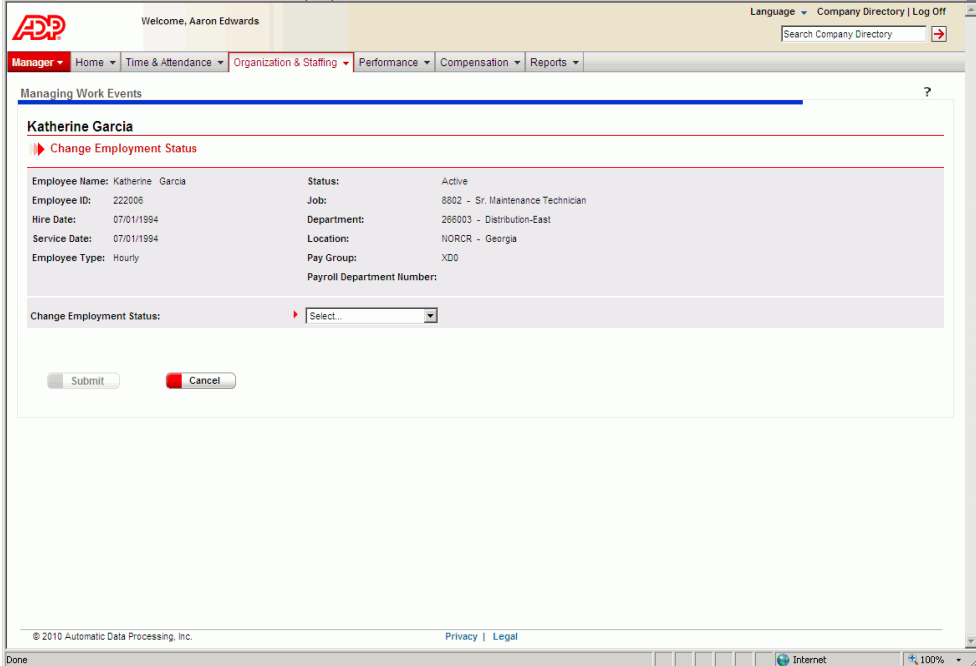
 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Employment Status page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.



More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and links for Language, Company Directory, and Log Off. Below this is a menu with options: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled "Managing Work Events" and features a sub-header for "Katherine Garcia" with a "Change Employment Status" link. A table displays employee details:

Employee Name:	Katherine Garcia	Status:	Active
Employee ID:	222006	Job:	8802 - Sr. Maintenance Technician
Hire Date:	07/01/1994	Department:	266003 - Distribution-East
Service Date:	07/01/1994	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	XD0
		Payroll Department Number:	


Below the table, there is a "Change Employment Status:" label followed by a dropdown menu currently set to "Select...". At the bottom of the form are "Submit" and "Cancel" buttons. The footer contains copyright information for ADP (© 2010 Automatic Data Processing, Inc.) and links for Privacy and Legal.

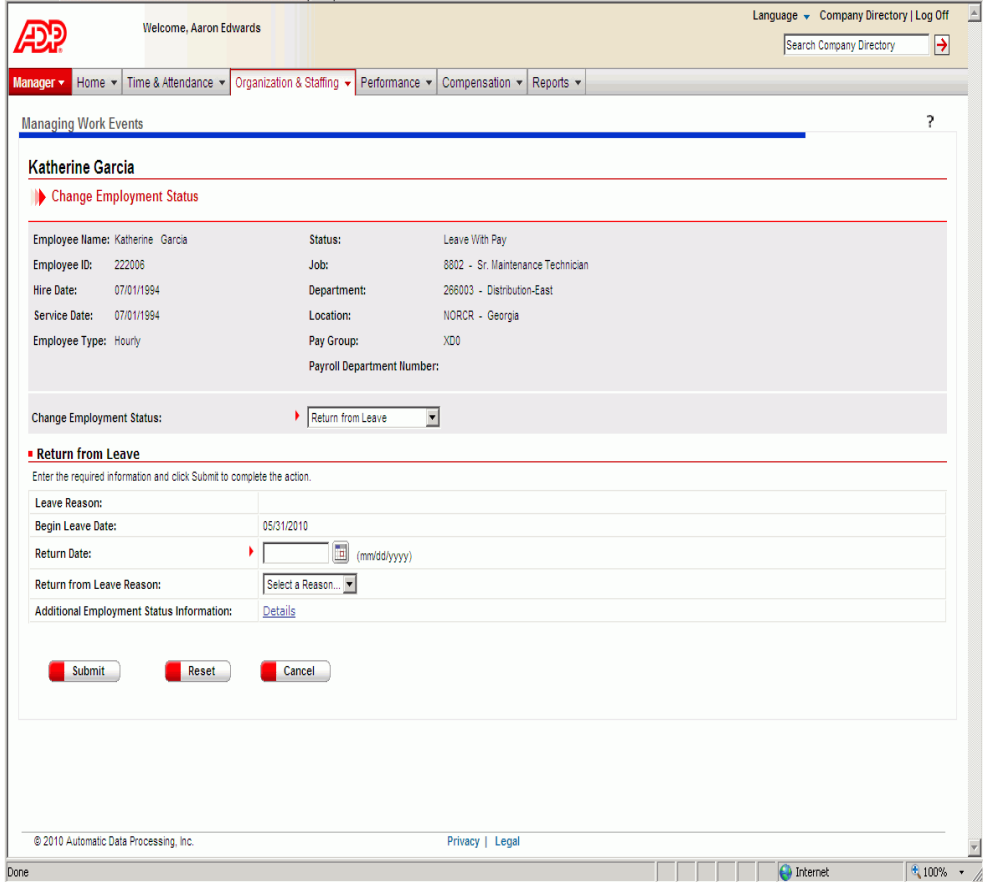
Figure 6-89. Change Employment Status Page

- Select the **Return from Leave** option from the **Change Employment Status** field. The Return from Leave fields display. Required fields are indicated by a red arrow.

More info

For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page




The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there is a navigation menu with options like Manager, Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and displays information for 'Katherine Garcia'. A red arrow points to the 'Change Employment Status' link. Below this, a table lists employee details: Employee Name (Katherine Garcia), Employee ID (222006), Hire Date (07/01/1994), Service Date (07/01/1994), Employee Type (Hourly), Status (Leave With Pay), Job (8802 - Sr. Maintenance Technician), Department (288003 - Distribution-East), Location (NORCR - Georgia), Pay Group (X00), and Payroll Department Number. The 'Change Employment Status' dropdown menu is set to 'Return from Leave'. Below this, the 'Return from Leave' section is active, showing a form with the following fields: Leave Reason (empty), Begin Leave Date (05/31/2010), Return Date (with a red arrow and a calendar icon), Return from Leave Reason (with a dropdown menu), and Additional Employment Status Information (with a 'Details' link). At the bottom of the form are 'Submit', 'Reset', and 'Cancel' buttons. The footer of the page includes the copyright notice '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'.

Figure 6-90. Change Employment Status Page with the Return from Leave Fields Displayed


- In the **Return Date** field, enter the date the employee returned from leave. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.

 This field is populated with the **Expected Return Date**, if entered when the employee was placed on leave.


- In the **Return From Leave Reason** field, select the return reason.
- Click the **Additional Employment Status Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-84](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

8. Click **Submit**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Employment Status page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

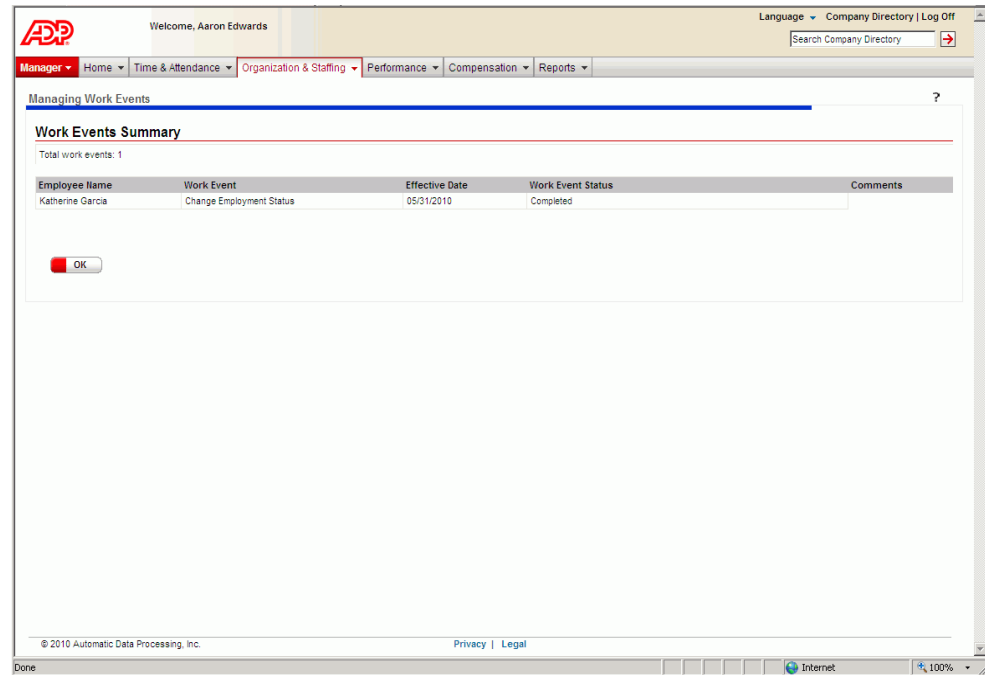


Figure 6-91. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

9. Review the following information:
- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
 - **Employee Name** - Displays the employee's name for which a job action was submitted.
 - **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
 - **Effective Date** - Displays the date the job action goes into effect.
 - **Work Event Status** - Display the status of the work event.
 - **Comments** - Displays comments you enter on the Start Work Events page.
10. When you have finished reviewing the information, click OK. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed returning an employee from leave and submitting for approval.

For information on placing an employee on leave, either paid or unpaid, see [“Placing an Employee on Leave”](#) on page 6-105.

For information on placing an employee on suspension, see [“Placing an Employee on Suspension”](#) on page 6-120.

For information on returning an employee from suspension, see [“Returning an Employee from Suspension”](#) on page 6-128.

For information on terminating an employee, see [“Terminating an Employee”](#) on page 6-134.

Placing an Employee on Suspension

To place an employee on a Leave of Absence and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Employment Status** from the Employee Event selection menu.

Tasks

Changing an Employee's Employment Status

Placing an Employee on Leave

Returning an Employee from Leave

Placing an Employee on Suspension

Returning an Employee from Suspension

Terminating an Employee

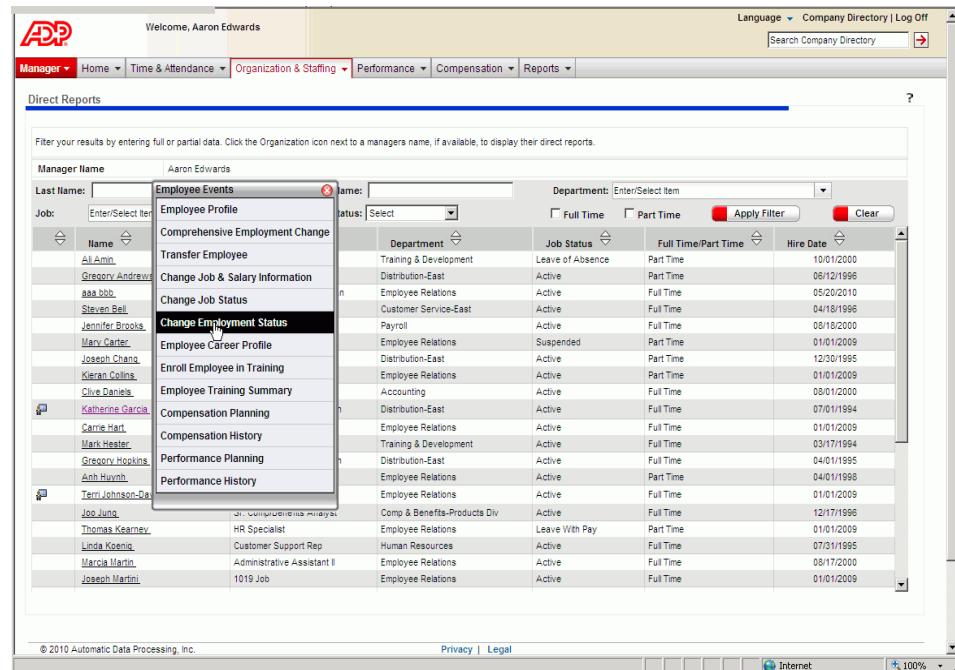




Figure 6-92. Employee Event Selection Menu with Change Employment Status Selected

- i** For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Employment Status** action option. Select the employee(s) whose employment status you want to change by clicking the check box next to the employee's name, then click **Submit**.

 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

 **More info**

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

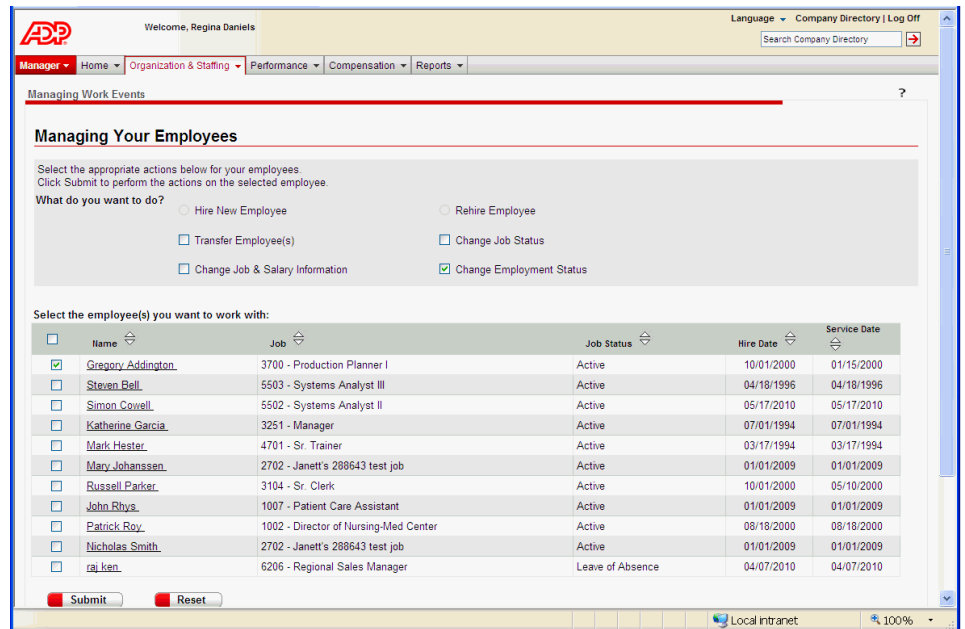


Figure 6-93. Managing Work Events with Change Employment Status Option Selected

The Start Work Events page displays.



More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

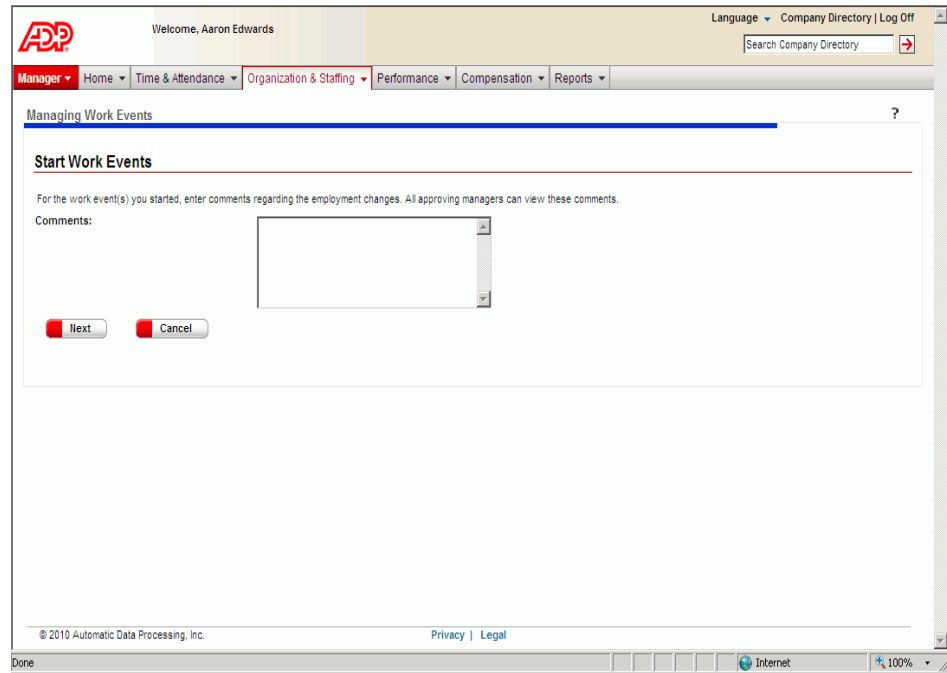


Figure 6-94. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 - ☰ If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

3. Click **Next**. The Change Employment Status selection page displays with summary job and salary information for the selected employee.



The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Employment Status page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.



More info

For a description of the fields on this page or for related tasks, click the

(Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and a search bar for the Company Directory. Below the navigation bar, there are several tabs: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and features a red header for 'Katherine Garcia'. Underneath, there is a 'Change Employment Status' section with a red arrow icon. This section contains a table of employee details:

Employee Name:	Katherine Garcia	Status:	Active
Employee ID:	222006	Job:	8802 - Sr. Maintenance Technician
Hire Date:	07/01/1994	Department:	266003 - Distribution-East
Service Date:	07/01/1994	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	XD0
		Payroll Department Number:	

Below the table, there is a 'Change Employment Status:' label followed by a dropdown menu with 'Select...' as the current selection. At the bottom of this section, there are two buttons: 'Submit' and 'Cancel'.

At the bottom of the page, there is a footer with the copyright notice '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'. The browser's address bar shows 'Internet' and a zoom level of '100%'.

Figure 6-95. Change Employment Status Page

- Select the **Suspension** option from the **Change Employment Status** field. The Suspension fields display. Required fields are indicated by a red arrow.



More info

For a description of the fields on this page or for related tasks, click the

(Help icon) provided in the right-hand corner of the Self Service page

ADP Welcome, Aaron Edwards Language Company Directory | Log Off Search Company Directory

Manager Home Time & Attendance Organization & Staffing Performance Compensation Reports

Direct Reports ?

Jennifer Brooks

Change Employment Status

Employee Name: Jennifer Brooks	Status: Active
Employee ID: 222027	Job: 1021 - Job w/ salary step not assign
Hire Date: 08/18/2000	Department: 233002 - Payroll
Service Date: 08/18/2000	Location: HDQTR - Corporate Headquarters
Employee Type: Hourly	Pay Group: 220
	Payroll Department Number:

Change Employment Status: Suspension

Enter the required information and click Submit to complete the action.

Suspension Date: (mm/dd/yyyy)

Expected Return Date: (mm/dd/yyyy)

Suspension Reason: Select a Reason...

Additional Employment Status Information: [Details](#)

Submit Reset Cancel

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Figure 6-96. Change Employment Status Page with Suspension Fields Displayed

- In the **Suspension Date** field, enter the date the suspension goes into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
- In the **Expected Return Date** field, enter the estimated date employee is to return from suspension. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
- Select the **Suspension Reason** for the employee's suspension..



Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.

8. Click the **Additional Employment Status Information Details** link, if available, to access the Additional Information fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to system of record once this event has been processed.

More info




For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

Figure 6-97. Additional Employment Status Information Page

9. Click **Submit**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Employment Status page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

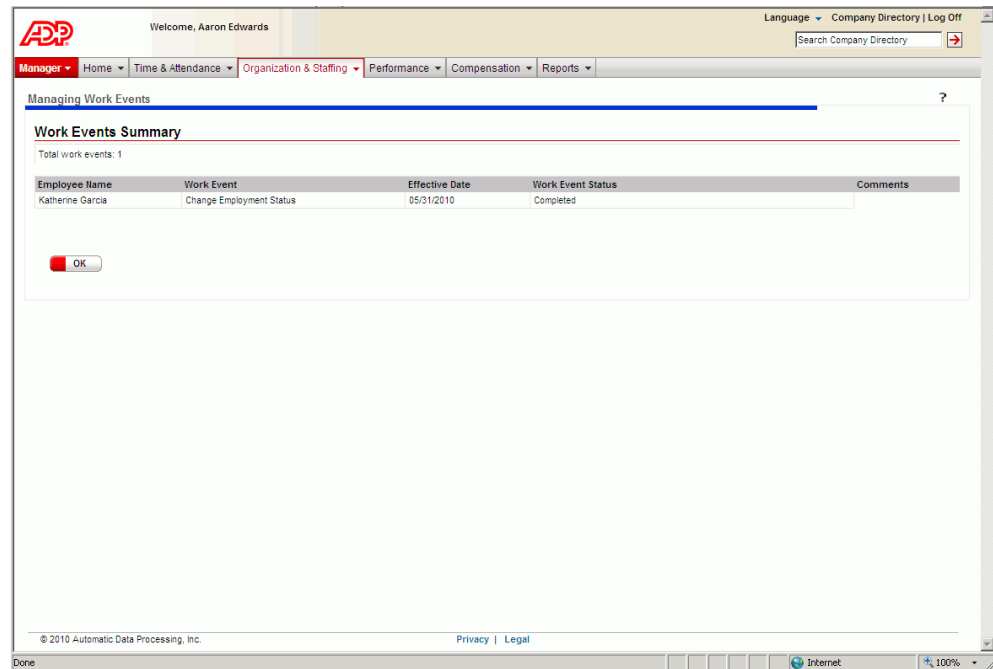


Figure 6-98. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

10. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

11. When you have finished reviewing the information, click **OK**. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed placing an employee on suspension, and submitting it for approval.

For information on placing an employee on leave, either paid or unpaid, see [“Placing an Employee on Leave”](#) on page 6-105.

For information on placing an employee on suspension, see [“Returning an Employee from Leave”](#) on page 6-113.

For information on returning an employee from suspension, see [“Returning an Employee from Suspension”](#) on page 6-128.

For information on terminating an employee, see [“Terminating an Employee”](#) on page 6-134.

Returning an Employee from Suspension

To return an employee from leave and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Employment Status** from the Employee Event selection menu.

Tasks

Changing an Employee's Employment Status

Placing an Employee on Leave

Returning an Employee from Leave

Placing an Employee on Suspension

Returning an Employee from Suspension

Terminating an Employee

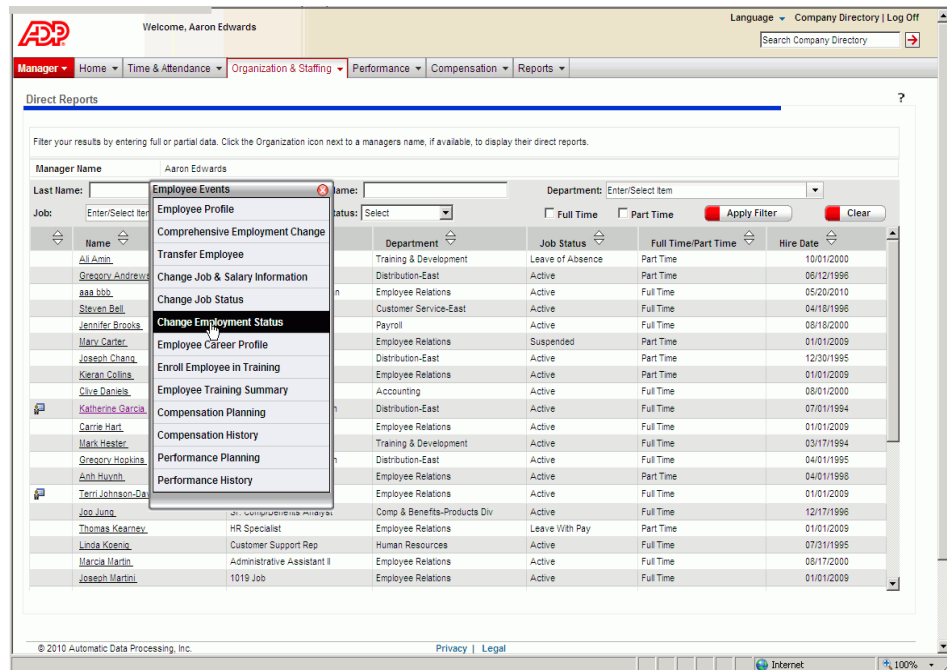


Figure 6-99. Employee Event Selection Menu with Change Employment Status Selected

- i** For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Employment Status** action option. Select the employee(s) whose employment status you want to change by clicking the check box next to the employee's name, then click **Submit**.
- 💡 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

i More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

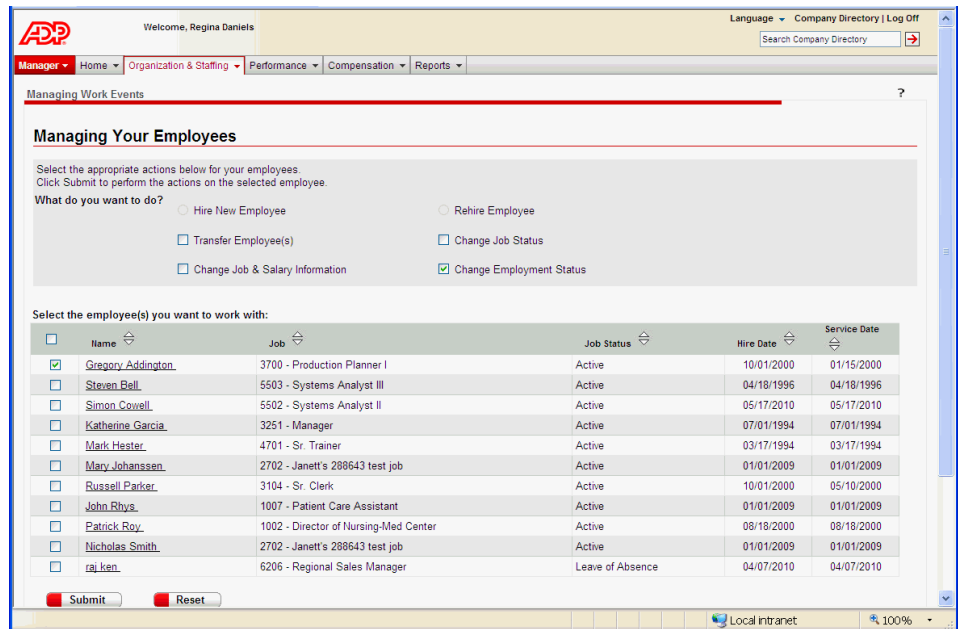


Figure 6-100. Managing Work Events with Change Employment Status Option Selected

The Start Work Events page displays.




More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and links for Language, Company Directory, and Log Off. Below this is a menu with options: Manager, Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and contains a sub-section 'Start Work Events'. A note states: 'For the work event(s) you started, enter comments regarding the employment changes. All approving managers can view these comments.' Below this is a 'Comments:' label followed by a large text input field. At the bottom of the form are 'Next' and 'Cancel' buttons. A help icon (?) is located in the top right corner of the main content area. The footer includes '© 2010 Automatic Data Processing, Inc.', 'Privacy | Legal', and a browser status bar showing 'Done', 'Internet', and '100%' zoom.

Figure 6-101. Start Work Events Page

2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

3. Click **Next**. The Change Employment Status selection page displays with summary job and salary information for the selected employee.



The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Employment Status page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.



More info

For a description of the fields on this page or for related tasks, click the

(Help icon) provided in the right-hand corner of the Self Service page

The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and links for Language, Company Directory, and Log Off. Below this is a menu with options: Manager, Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and features a sub-header for 'Katherine Garcia'. A red arrow points to the 'Change Employment Status' link. Below this, a table displays employee details:

Employee Name:	Katherine Garcia	Status:	Active
Employee ID:	222006	Job:	8802 - Sr. Maintenance Technician
Hire Date:	07/01/1994	Department:	266003 - Distribution-East
Service Date:	07/01/1994	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	XD0
		Payroll Department Number:	


Below the table, there is a 'Change Employment Status:' label followed by a dropdown menu currently set to 'Select...'. At the bottom of the form are 'Submit' and 'Cancel' buttons. The footer of the page includes copyright information for © 2010 Automatic Data Processing, Inc., and links for Privacy and Legal.

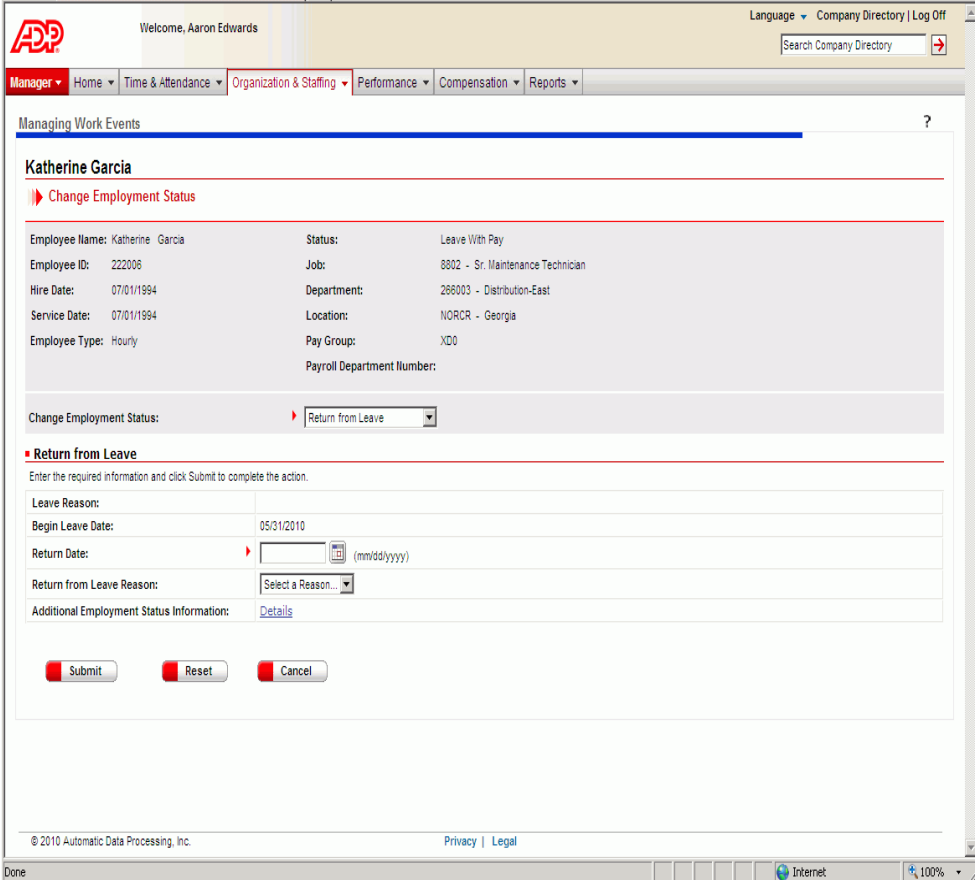
Figure 6-102. Change Employment Status Page

- Select the **Return from Suspension** option from the **Change Employment Status** field. The Return from Suspension fields display. Required fields are indicated by a red arrow.

More info



For a description of the fields on this page or for related tasks, click the

 (Help icon) provided in the right-hand corner of the Self Service page




The screenshot shows the ADP Self Service Manager's Guide interface. The user is logged in as Aaron Edwards. The navigation menu includes Manager, Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled 'Managing Work Events' and shows details for Katherine Garcia. A red arrow points to the 'Change Employment Status' link. Below this, a table displays employee information: Employee Name (Katherine Garcia), Employee ID (222006), Hire Date (07/01/1994), Service Date (07/01/1994), Employee Type (Hourly), Status (Leave With Pay), Job (8802 - Sr. Maintenance Technician), Department (286003 - Distribution-East), Location (NORCR - Georgia), Pay Group (X00), and Payroll Department Number. A dropdown menu for 'Change Employment Status' is set to 'Return from Leave'. Below this, a section titled 'Return from Leave' contains a form with the following fields: Leave Reason (text input), Begin Leave Date (05/31/2010), Return Date (text input with a calendar icon and a red arrow, format mm/dd/yyyy), Return from Leave Reason (dropdown menu with 'Select a Reason...' option), and Additional Employment Status Information (link to Details). At the bottom of the form are three buttons: Submit, Reset, and Cancel. The footer of the page includes the copyright notice '© 2010 Automatic Data Processing, Inc.' and links for Privacy and Legal.


Figure 6-103. Change Employment Status Page with the Return from Leave Fields Displayed

- In the **Return Date** field, enter the date the employee returned from leave. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
 -  This field is populated with the **Expected Return Date**, if entered when the employee was placed on leave.
- In the **Return From Leave Reason** field, select the return reason.
- Click the **Additional Employment Status Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-84](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.
 -  Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

8. Click **Submit**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Employment Status page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

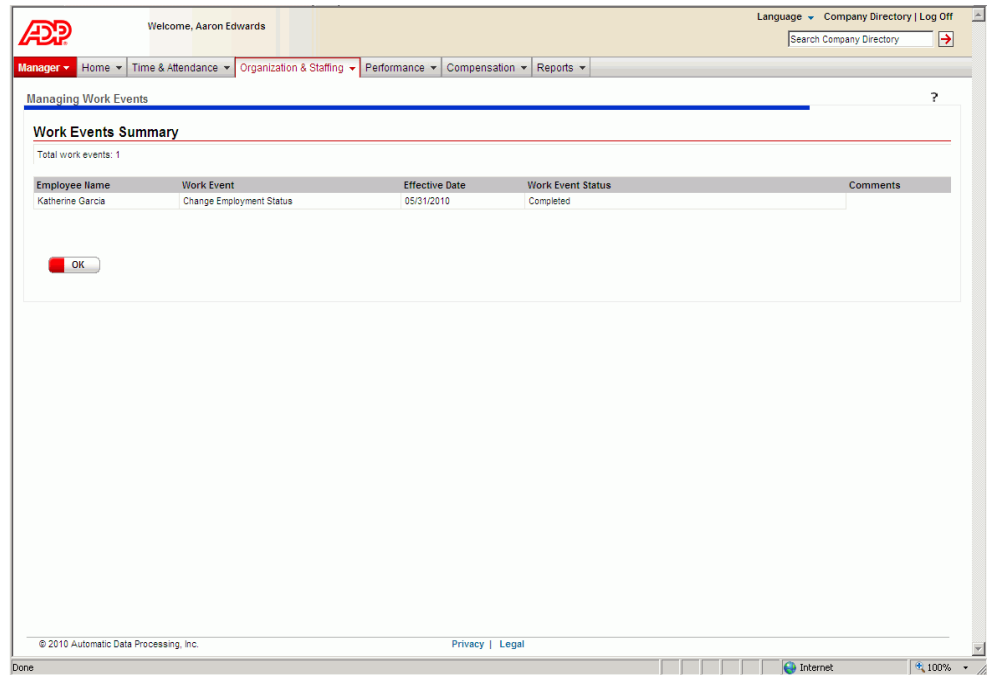


Figure 6-104. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

9. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

10. When you have finished reviewing the information, click OK. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed returning an employee from leave and submitting for approval.

For information on placing an employee on leave, either paid or unpaid, see “Placing an Employee on Leave” on page 6-105.

For information on placing an employee on suspension, see “Returning an Employee from Leave” on page 6-113.

For information on returning an employee from suspension, see “Placing an Employee on Suspension” on page 6-120.

For information on terminating an employee, see “Terminating an Employee” on page 6-134.

Terminating an Employee

To terminate an employee and submit for approval, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Change Employment Status** from the Employee Event selection menu.



Tasks

Changing an Employee's Employment Status

Placing an Employee on Leave

Returning an Employee from Leave

Placing an Employee on Suspension

Returning an Employee from Suspension

Terminating an Employee

The screenshot shows the ADP Self Service Manager interface. At the top, there is a navigation bar with tabs: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. Below the navigation bar, the 'Direct Reports' page is displayed. A search filter is visible at the top of the page. The main content area shows a table of employees. The 'Employee Events' menu is open over the table, and 'Change Employment Status' is selected. The table has columns for Name, Department, Job Status, Full Time/Part Time, and Hire Date. The footer of the page includes the copyright information: © 2010 Automatic Data Processing, Inc. and links for Privacy and Legal.

Figure 6-105. Employee Event Selection Menu with Change Employment Status Selected

- For a description of the fields on this page or for related tasks, click the (Help icon) provided in the right-hand corner of the Self Service page.

- Select **Managing Work Events**. The Managing Work Events page displays. Select the **Change Employment Status** action option, select the employee(s) whose employment status you want to change by clicking the check box next to the employee's name, then click **Submit**.
- 💡 Depending on your HR/payroll system of record, you may have to first select the **Select one of more of the Employment Changes below** option to enable the individual job action check boxes.

i More info
 For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

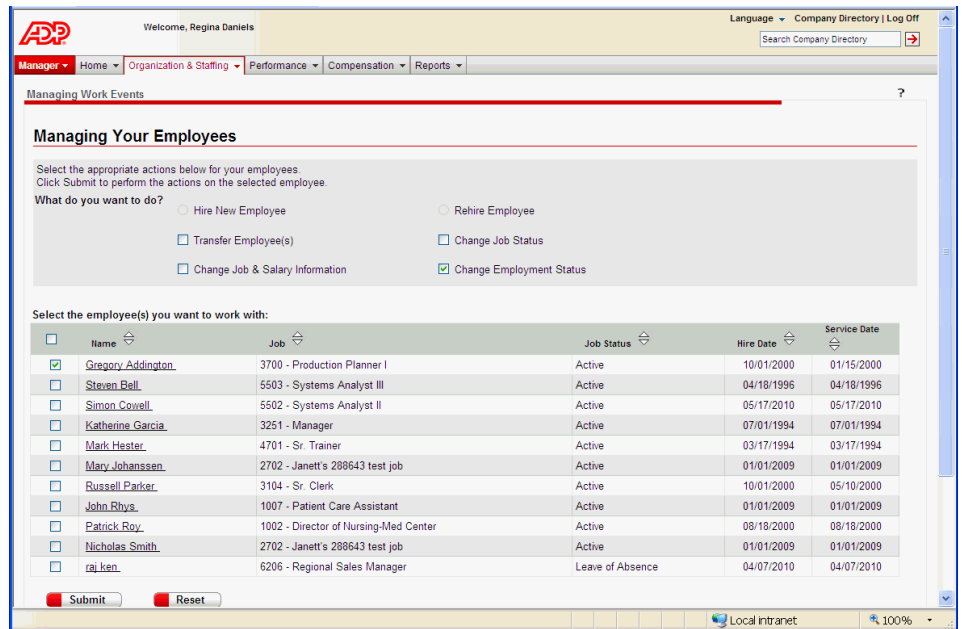


Figure 6-106. Managing Work Events with Change Employment Status Option Selected

The Start Work Events page displays.




More info


For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page


Figure 6-107. Start Work Events Page

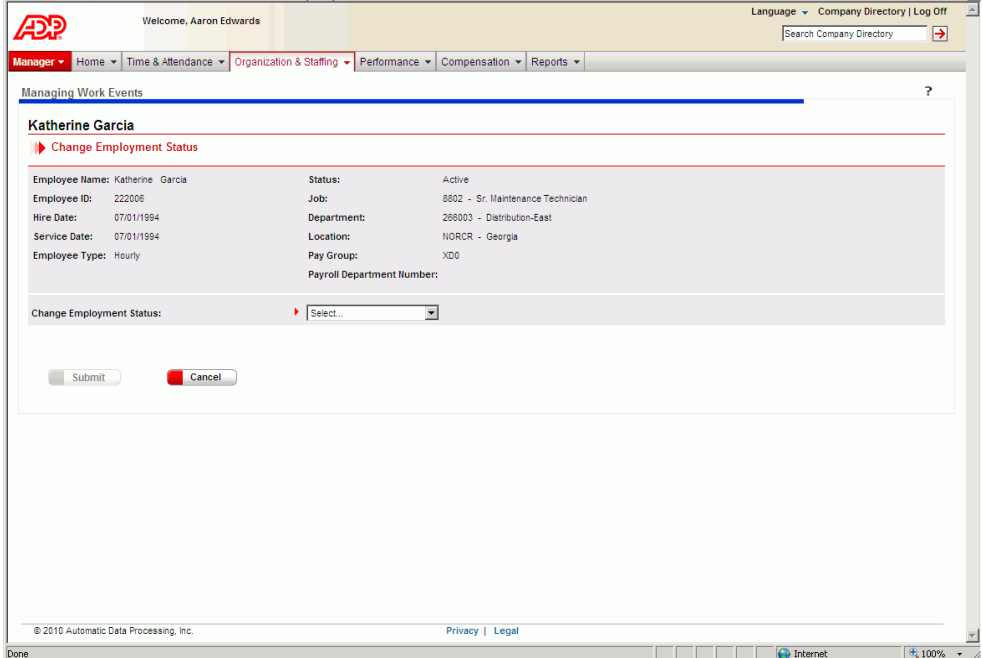
2. In the **Comments** field, enter a comment if appropriate. The comment is viewable by all approvers, as well as through Approval History.
 -  If the work event is for a single employee with multiple job actions, an **Effective Date** field becomes available. The effective date you select applies to all of the job actions in the work event.

- Click **Next**. The Change Employment Status selection page displays with summary job and salary information for the selected employee.

 The header bar will display either **Managing Work Events** or **Direct Reports**, indicating from which page you accessed the Change Employment Status page. If more than one employee has been selected for the job action, it is indicated by a number in the top right corner of the page.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page



The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there is a navigation bar with the ADP logo, a welcome message for Aaron Edwards, and a search bar for the Company Directory. Below the navigation bar, there are several tabs: Manager, Home, Time & Attendance, Organization & Staffing (selected), Performance, Compensation, and Reports. The main content area is titled "Managing Work Events" and features a sub-header for "Katherine Garcia". A red arrow points to the "Change Employment Status" link. Below this, a table displays employee details:

Employee Name:	Katherine Garcia	Status:	Active
Employee ID:	222006	Job:	8802 - Sr. Maintenance Technician
Hire Date:	07/01/1994	Department:	266003 - Distribution-East
Service Date:	07/01/1994	Location:	NORCR - Georgia
Employee Type:	Hourly	Pay Group:	XD0
		Payroll Department Number:	

Below the table, there is a "Change Employment Status:" label followed by a dropdown menu currently set to "Select...". At the bottom of the form, there are "Submit" and "Cancel" buttons. The footer of the page includes the copyright notice "© 2010 Automatic Data Processing, Inc." and links for "Privacy" and "Legal".

Figure 6-108. Change Employment Status Page


4. Select **Terminate** from the **Change Employment Status** field. The Terminate fields display. Required fields are indicated by a red arrow.

The screenshot shows the ADP Self Service Manager interface for a user named Aaron Edwards. The main content area is titled 'Managing Work Events' and displays the profile for 'Katherine Garcia'. Under the 'Change Employment Status' section, the 'Change Employment Status' dropdown menu is set to 'Terminate'. This action has triggered the display of several required fields, each marked with a red arrow. The fields are: 'Termination Date' (format mm/dd/yyyy), 'Reason for Termination' (a dropdown menu), 'Eligible for Re Hire' (radio buttons for Yes and No), 'Eligible for Severance' (radio buttons for Yes and No), 'Date Notice Given' (format mm/dd/yyyy), 'Date Last Worked' (format mm/dd/yyyy), and 'Date of Death' (format mm/dd/yyyy). At the bottom of the form, there are three buttons: 'Submit', 'Reset', and 'Cancel'. The footer of the page includes the copyright notice '© 2010 Automatic Data Processing, Inc.' and links for 'Privacy' and 'Legal'.


Figure 6-109. Change Employment Status Page with Terminate Fields Displayed

5. In the **Termination Date** field, enter the date the employee is to be terminated. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
6. Select the **Reason for Termination** from the drop down list.
 - Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
7. Select the appropriate option in the **Eligible for Rehire** field.
 - Default setting is **Yes**. However, if the termination reason is Death, this field defaults to **No** and is disabled.
8. Select the appropriate option in the **Eligible for Severance** field.
 - Default setting is **No**. If the termination reason is Death, this field defaults to **No** and is disabled.
9. In the **Date Notice Given** field, enter the date the employee gave notice. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
10. In the **Date Last Worked** field, enter the last day the employee worked for the company. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
 - If this date is not entered in Self Service, the termination date is used as the default date last worked in your HR/payroll system of record.


More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page


11. In the **Date of Death** field, if available, enter the date of the employee's death. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.

 This field is not active unless Death was selected as the termination reason.


12. Click the **Additional Employment Status Information Details** link, if available, to access the Additional Information fields, as shown in [Figure 6-84](#). You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Portal administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

13. Click **Submit**. If this is the last employee, the Work Events Summary page displays.

 If you selected more than one employee, the Change Employment Status page for the next employee displays. If you selected more than one event for this employee, the next event will display.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page

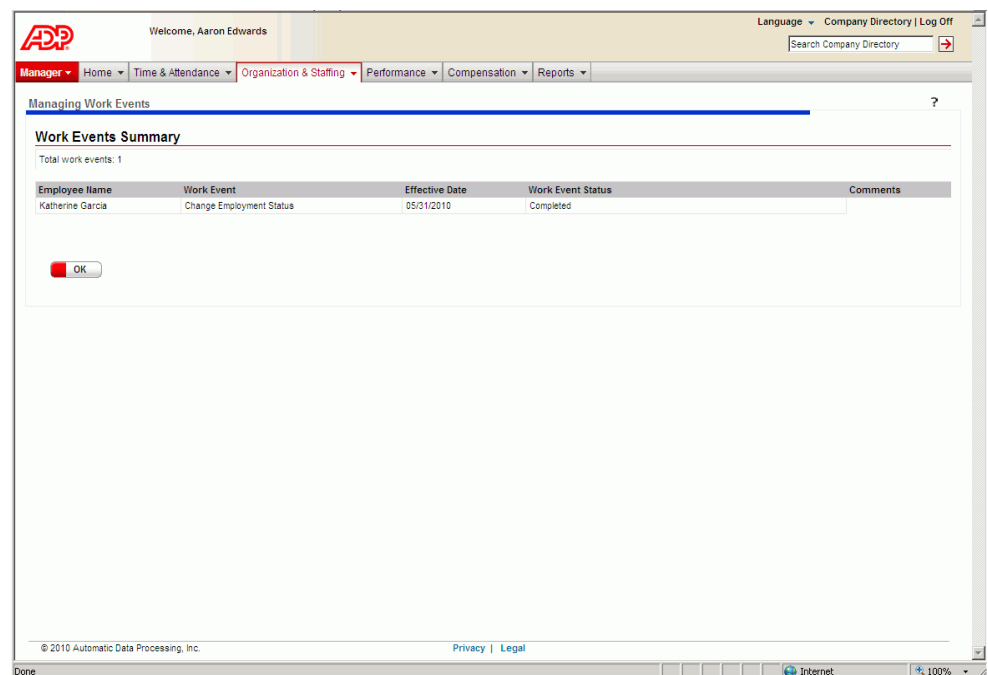


Figure 6-110. Work Events Summary Page

The Work Events Summary page lets you review the information regarding the work event(s) that you have submitted. The fields on this page are display only.

14. Review the following information:

- **Total Work Events** - Displays the total number of work events submitted. This includes the events that were canceled or rejected.
- **Employee Name** - Displays the employee's name for which a job action was submitted.
- **Work Event** - Displays the type of job action submitted. Available types are Transfer, Change Job Status, Change Job & Salary, and Change Employment Status.
- **Effective Date** - Displays the date the job action goes into effect.
- **Work Event Status** - Display the status of the work event.
- **Comments** - Displays comments you enter on the Start Work Events page.

15. When you have finished reviewing the information, click OK. You are returned to the page (Manager Work Events or Direct Reports) from which you accessed this page.



End of procedure

You have completed terminating an employee and submitting for approval.


For information on placing an employee on leave, either paid or unpaid, see [“Placing an Employee on Leave”](#) on page 6-105.

For information on returning an employee from leave, see [“Returning an Employee from Leave”](#) on page 6-113.


For information on placing an employee on suspension, see [“Placing an Employee on Suspension”](#) on page 6-120.

For information on returning an employee from suspension, see [“Returning an Employee from Suspension”](#) on page 6-128.

Using the Comprehensive Employment Change

 The availability of the comprehensive employment change depends on your HR/payroll system of record. Whether this event is available to you depends on how your administrator has configured your security access in Self Service.

Managers can change job information for employees who report to them and submit the job action for approval. If your administrator has enabled the indirect report update option, you can change information for both your direct and indirect reports. The Comprehensive Employment Change page allows you to update employment information for an employee in a single, inclusive task that encompasses job, employment, compensation, and payroll (if appropriate) information. The page displays all the job actions available to you in a tabbed format that allows you click through the job actions you can perform.


 If there is a pending work event for the selected employee, the Comprehensive Employment Change page does not display when you click **Submit**. You receive the message, “Employee has previous changes pending approval. Approval is required before you can submit additional changes. Check Approval History for more information.” displays. The pending event must be completed before you can make further changes for the employee. New hires and rehires events cannot be part of a comprehensive work event.

You can create and update a comprehensive employment change through either **Direct Reports** or through **Managing Work Events**. Indirect and direct reports can be accessed through Direct Reports. Only direct reports can be accessed through the **Managing Work Events** task. Creating and updating a comprehensive employment change includes the following tasks:

- [Initiating a Comprehensive Employment Change for an Employee](#)
- [Changing an Employee's Job Information](#)
- [Changing an Employee's Employment Information](#)
- [Changing an Employee's Compensation Information](#)
- [Changing an Employee's Payroll Information](#)

 Some of the pages include searchable drop-down fields and/or search fields. For more information, see “[Search and Filtering Tips](#)” on page 6-3.

Initiating a Comprehensive Employment Change for an Employee

 The Comprehensive Employment Change is available only if your HR/payroll system of record is ADP Enterprise HR or HR Anytime Version 5.03. In addition, your security settings will determine if you have access to this option.

To create or update a comprehensive employment change for an employee, do the following:

Choose one of the following paths:

- From the Direct Reports page, click the underlined employee **Name**, then select **Comprehensive Employment Change** from the Employee Event selection menu. The Comprehensive Employment Change page displays.
- From the Managing Work Events page, select the **Comprehensive Employment Change** action option, select the employee whose employment information you want to change by clicking the check box next to the employee's name, then click **Submit**. The Comprehensive Employment Change page displays.

Tasks

Using the Comprehensive Employment Change

Initiating a Comprehensive Employment Change for an Employee

Changing an Employee's Job Information

Changing an Employee's Employment Information

Changing an Employee's Compensation Information

Changing an Employee's Payroll Information

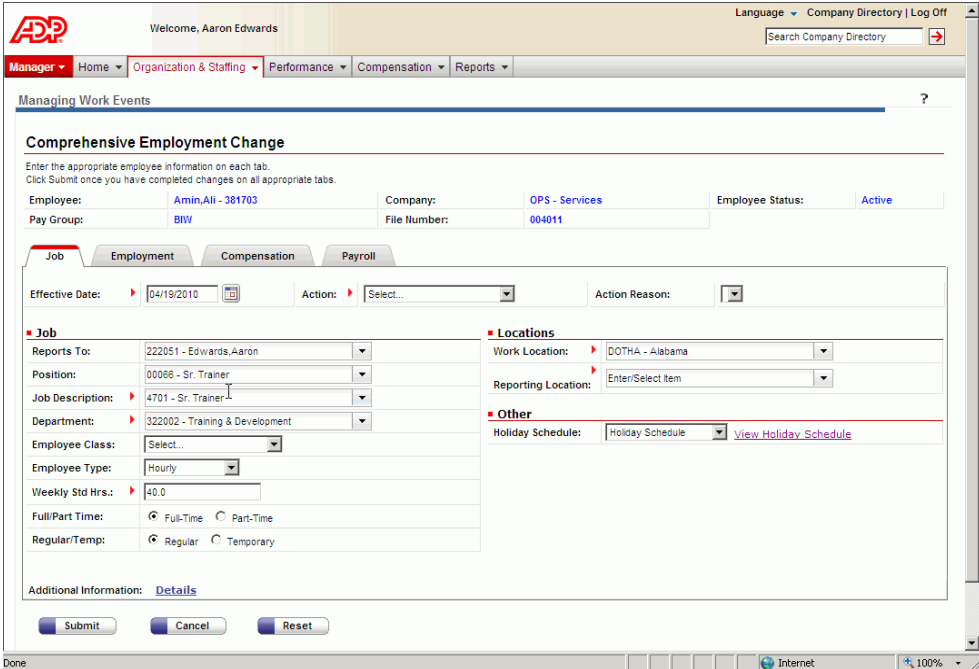





Figure 6-111. Comprehensive Employment Change - Job Page

 For a description of the fields on this page or for related tasks, click the  (Help Icon) provided in the right-hand corner of the Self Service page.

1. Click on the appropriate tab make the appropriate selections to complete or update your comprehensive work event.
2. Creating or updating a comprehensive employment change can include the following tasks:
 - [Changing an Employee's Job Information](#)
 - [Changing an Employee's Employment Information](#)
 - [Changing an Employee's Compensation Information](#)
 - [Changing an Employee's Payroll Information](#)

 Your HR/payroll system of record determines if the **Payroll** tab displays and is available.
3. Once you have completed all of your updates, click **Submit** to submit to work flow and initiate the approval process for the comprehensive work event. A **Comments** window displays for you to enter any appropriate comments.
4. Enter any comments for the changes you have made and click **OK**. The comments are optional. You are returned to the page (Managing Work Events or Direct Reports) from which you accessed this page.

**What's next**

You have finished initiating a comprehensive employment change. Next, you can change an employee's job information for that comprehensive employment change.

Changing an Employee's Job Information

The Job page displays as the initial page of a comprehensive employment change. To complete the Job page, do the following:

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Initiating a Comprehensive Employment Change for an Employee

Changing an Employee's Job Information

Changing an Employee's Employment Information

Changing an Employee's Compensation Information

Changing an Employee's Payroll Information

Figure 6-112. Comprehensive Employment Change - Job Page

i For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

1. In the **Effective Date** field, enter the date the job status change will go into effect. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar. The effective date you enter is applied to the changes you make on all the tabs for the comprehensive work event.
2. Select the **Action** and the **Action Reason** the associated changes are taking place for the employee. The choices made here are applied to the changes you make on all the tabs for the comprehensive work event. The reasons available depend on what was setup for your HR/payroll system of record.

📄 The **Actions** and **Action Reasons** available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.

3. From the **Reports to** field, select the new manager the employee will be reporting to. For more information, see “Using the Searchable Drop-Down Fields” on page 6-4.
4. Select a position from the **Position** field, if applicable. Values available are based on the manager selected in the **Reports To** field. For more information, see “Using the Searchable Drop-Down Fields” on page 6-4.

The **Position** field is not available if Position Management in your HR/payroll system of record is set to **None**. If you select a position, the associated default values populate the **Department** and **Location** fields, which are then display-only.

5. Select a job code and description from the **Job Description** field, if applicable, to change the employee's current job code and description.


The **Job Description** field is display-only if a position was selected from the **Position** field. If you have not selected a position, you can select a job from the **Job** field. The **Position** field is then disabled, and the **Salary Step** field is populated with the default value, if any, and is display-only.

6. Select the department from the **Department** field, if applicable. Values available are based on the manager selected in the **Reports to** field. For more information, see [“Using the Searchable Drop-Down Fields”](#) on page 6-4.

If there is a default location associated with the selected department, the value defaults into the **Location** field.


The **Department** field is display-only if a position was selected from the **Position** field. If the **Position** field is available and the update allowed setting in the selected employee's job record is Yes, and you have not selected a position, you can select a **Department**. For more information, see [“Using the Searchable Drop-Down Fields”](#) on page 6-4. The **Position** field is then disabled, and the **Location** field is populated with the default location for the selected department.

7. The **Employee Class** field initially displays the selected employee's current classification. To change the employee's classification, select the appropriate classification code and description from the drop down list.
8. From the **Employee Type** field, select the employee type and description from the drop down list. The drop down list is populated with the employee types and descriptions defined in your HR/payroll system of record for the employee's pay group.
9. The **Standard Hours** field displays the standard hours for the job. You can enter a new value in this field as needed. The minimum and maximum amounts allowed the field are dependent on the HR/payroll system of record.
10. Select **Full** or **Part Time** from the **Full/Part Time** field if applicable. The options are display-only if a position was selected from the **Position** field. If you have not selected a position, you can change the selection.
11. The **Shift** field initially displays the selected employee's current shift information, if any. To change the employee's shift information, select the shift code and description from the drop down list. The availability and value of this field depends on your HR/payroll system of record. This field is display only if a position was selected from the Position field.

 Note: If the employee's job record in your HR/payroll system of record indicates that no updates are allowed, the shift field is display only, and cannot be changed.

12. Select **Regular** or **Temporary** from the **Regular/Temp** field if applicable. The options are display-only if a position was selected from the **Position** field. If you have not selected a position, you can change the selection. For more information, see [“Using the Searchable Drop-Down Fields”](#) on page 6-4.

13. From the **Location** area, select the employee's appropriate **Work Location** and **Reporting Location**. The values of these fields may initially display the default locations for the selected department. They are display-only if a position was selected from the **Position** field. For more information, see “Using the Searchable Drop-Down Fields” on page 6-4.
14. Select the **Holiday Schedule** associated with the job if needed. This field is display only if a position is selected for the **Position** field.
15. Click **View Holiday Schedule** to display the details for the holiday schedule for the current year. If no schedule is available for the current year, a message displays.
16. Click the **Additional Information Details** link, if available, to access the **Additional Information** fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Self Service Administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.



What's next

You have finished changing an employee's information. Next you can change the employee's employment information.

Changing an Employee's Employment Information

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Changing an Employee's Employment Information

Changing an Employee's Compensation Information

Changing an Employee's Payroll Information

The Employment page allows you to provide leave of absence information and other employment related information. To complete the Employment page of the Comprehensive Employment Change, do the following:

1. Click the **Employment** tab to display the Employment page. The **Effective Date**, **Action**, and **Action Reason** are carried over from the Job page as display only values.



The screenshot shows the ADP Self Service Manager's Guide interface. At the top, there's a navigation bar with 'Manager' and various menu options like 'Home', 'Time & Attendance', 'Organization & Staffing', 'Performance', 'Compensation', and 'Reports'. The main content area is titled 'Managing Work Events' and 'Comprehensive Employment Change'. It displays employee details for 'Brooks, Jennifer - 222027' from 'DSS - Cons Prod' company. The 'Employment' tab is selected, showing fields for 'Effective Date' (08/09/2010), 'Action', and 'Action Reason'. Below this are two main sections: 'Employment Related Dates' and 'Other'. The 'Employment Related Dates' section includes fields for Hire Date, Rehire Date, Length of Service, Begin Leave Date, Expected Return Date, Termination Date, Date Last Worked, Date Notice Given, and Date of Death. The 'Other' section includes checkboxes for 'Full Time Student', 'Eligible for Rehire', and 'Eligible for Severance', along with dropdown menus for 'Referral Source', 'Security Clearance', 'Union', 'Bargaining Unit', and 'Supervisor'. At the bottom, there are 'Submit', 'Cancel', and 'Reset' buttons.

Figure 6-113. Comprehensive Employment Change - Employment Page


i For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The **Hire Date**, **Rehire Date**, and **Length of Service** are provided as display only.

2. From the **Employment Related Dates** area, update the following information as appropriate for the comprehensive work event:
 - If the **Action** and **Action Reason** for the comprehensive work event relate to a leave of absence, either paid or unpaid, you need to designate the dates for the leave.
 - In the **Begin Leave Date** field, enter the date the leave will go into effect. The **Begin Leave Date** defaults to the effective date you entered on the Job page..
 - In the **Expected Return Date** field, enter the estimated date employee is to return from leave. You can either enter the date manually (format mm/dd/ yyyy), or select the date from the calendar.
 - If the **Action** and **Action Reason** for the comprehensive work event was a termination, you need to provide dates for the employee gave notice and last day they worked, and the termination date. The **Termination Date** defaults to the effective date you entered on the Job page.

- In the **Date Notice Given** field, enter the date the employee gave notice. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar. The date defaults to the effective date you entered on the Job page.
 - In the **Date Last Worked** field, enter the last day the employee worked for the company. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
 -  If this date is not entered in Self Service, the termination date is used as the default date last worked in your HR/payroll system of record.
 - If the **Action** for the comprehensive work event was a termination and the **Action Reason** was death, enter the date of death for the employee in the **Date of Death** field. You can either enter the date manually (format mm/dd/yyyy), or select the date from the calendar.
 -  This field is not active unless Death was selected as the termination reason.
 - If the **Action** and **Action Reason** for the comprehensive work event relates to a suspension, select or enter the **Expected Return Date**. The **Suspension Date** defaults to the effective date you entered on the Job page.
3. From the **Other** area, update the following information as appropriate.
- Select the **Full Time Student** option if the employee is a full-time student. The option defaults to the employee's current status.
 - Select the **Eligible for Rehire** option if the action selected was termination and the reason was not death.
 - Select the **Eligible for Severance** option if the action selected was termination and the reason was not death.
 - Select the employee's **Referral Source** if available. This is the source (such as job posting or employee) that referred the employee to the company. The availability and value of this field depends on your HR/payroll system of record.
 - Select the employee's **Security Clearance** if available. The availability and value of this field depends on your HR/payroll system of record.
 - In the **Business Title** field, enter the employee's official business title, which may or may not be the same as the employee's job title.
 - From the **Union Code** field, select the union identifier for the union to which the employee belongs, if applicable. The availability and value of this field depends on your HR/payroll system of record. This field is display only if a position was selected from the **Position** field.

- From the **Bargaining Unit** field, select the unit of the local union to which the candidate belongs for contract bargaining purposes, if applicable. The values available for selection are based on the **Union Code** selected. If none is selected, all Bargaining Units are available for selection. This field is display only if a position was selected from the **Position** field.
- Select the employee's **Supervisor** if applicable. The value displayed, if any, depends on your HR/payroll system of record.
- Click the **Additional Information Details** link, if available, to access the **Additional Information** fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the **Additional Information** fields are available, as well as which fields you have access to for each event, is determined by your Self Service Administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.



What's next

You have finished changing an employee's employment information. Next you can change the employee's compensation information.

Changing an Employee's Compensation Information

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Using the Comprehensive Employment Change

Initiating a Comprehensive Employment Change for an Employee

Changing an Employee's Job Information

Changing an Employee's Employment Information

Changing an Employee's Compensation Information

Changing an Employee's Payroll Information

The Compensation page allows you to update information regarding an employee's compensation, salary plans, and make salary changes.

All fields on the Compensation page are display only if any of the following Actions was selected on the Job page.

- DTA - Job Status Change
- POS - Lateral Change
- PLA - Placed on Paid Leave
- LOA - Place on Unpaid Leave
- RFL - Return from Leave
- TER - Terminate


If none of these actions have been selected, you can update the Compensation page where appropriated by doing the following:

1. Click on the **Compensation** tab to display the Compensation page. The **Effective Date**, **Action**, and **Action Reason** are carried over from the Job page as display only values.

The screenshot displays the ADP web interface for managing an employee's compensation. At the top, there's a navigation bar with tabs for Home, Time & Attendance, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled 'Comprehensive Employment Change' and includes a 'Managing Work Events' header. Below this, there's a form for entering employee information, including Employee Name (Brooks, Jennifer), Company (DSS - Cons Prod), and Employee Status (Active). The 'Compensation' tab is selected, showing fields for Effective Date (05/19/2010), Action, and Action Reason. The 'Compensation' section contains dropdowns for Comp. Frequency (Hourly), Comp. Rate (12.40), and Annual Benefits Base (0.00). The 'Salary Plan' section shows Salary Plan (MID - MidPoint Plan: Non-exempts), Salary Grade (NonExempt 05), and Salary Step (Select). The 'Salary Change' section has radio buttons for Rate Change (Percent) and Amount, and a field for New Salary. There are also sections for Compensation Statistics and Salary Data for '3101- Clerk II'.


Figure 6-114. Comprehensive Employment Change - Compensation Page

i For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

2. From the **Compensation** area, update the following information as appropriate for the comprehensive work event:
 - Select the employee's new compensation frequency from the **Comp Frequency** field. The value is defaulted from the HR/payroll system of record. If you change the value, the compensation rate is recalculated and displayed in the **Comp Rate** field to replace the calculated rate from the HR/payroll system of record. The **Comp Rate Type** displayed is from the HR/payroll system of record.
 - In the **Annual Benefits Base** field, enter the annual benefits base which is the fixed rate for calculating benefits coverage for the employee, such as a life insurance. If you enter an amount, the HR/payroll system of record uses this to calculate benefits coverage.
3. From the **Salary Plan** area, update the following information as appropriate for the comprehensive work event:
 - From the **Salary Plan** field, select a salary plan for the employee if applicable. A salary plan is a unique identifier assigned to a specific compensation program. For example, a company might organize its employees into separate salary plans for exempt and nonexempt employee. When a job code is selected, the associated salary plan is displayed. The salary plans available are dictated by your HR/payroll system of record. See [page 6-4](#) for tips on searching for a field value.
 - The **Salary Grade** and **Salary Step** fields are also populated when a job code is selected. For complete information on salary step logic and how your HR/payroll system of record has it setup, refer to the documentation for that HR/payroll system of record.
4. From the **Salary Change** area, update the following information as appropriate for the comprehensive work event:
 - From the **Rate Change** field, select whether the rate change is a **Percent** or an **Amount**. Enter an amount or percentage amount, depending on your selection, in the **Amount** field. Once you enter the amount or the percentage, the values for the **New Salary** field and **Amount/Percent Change** are recalculated and displayed.
 -  If the new salary for an employee is above the maximum of the established salary grade range, a confirmation message displays. A confirmation message also displays if the employee is already above the established maximum salary grade before the salary change.
 - To perform an additional salary change, select **Yes** in the **Would you like to perform an additional salary change?** field. The **Salary Change** fields display. Complete the following:
 - a. Select the **Salary Change Reason** from the drop down list. Reasons available in the drop down list depend on which active action reasons were selected in your HR/payroll system of record to display in Self Service.
 - b. Select the **Rate Change** option, either **Percent** or **Amount** (as available) and enter the percent or amount of the pay change, positive or negative. The **Per** field displays **Year** or **Hour**, depending on the employee's compensation frequency. The **Percent Change/Amount Change** and **Cumulative** fields display the new salary values with negative values displaying in red.

 To add another salary change, click **Add Another Salary Change**. To delete a salary change listed in the **Additional Salary Change** area, select the appropriate check box to the left of the reason field and click **Delete**.

5. Click the **Additional Information Details** link, if available, to access the **Additional Information** fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the **Additional Information** fields are available, as well as which fields you have access to for each event, is determined by your Self Service Administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

What's next

You have finished changing an employee's compensation information. Next you can change the employee's payroll information.

Changing an Employee's Payroll Information

Tasks

Using the Comprehensive Employment Change

Initiating a Comprehensive Employment Change for an Employee

Changing an Employee's Job Information

Changing an Employee's Employment Information

Changing an Employee's Compensation Information

☑ Changing an Employee's Payroll Information


This page is only available if your HR/payroll system of record is ADP Enterprise HR with Autolink. If it is available, you can update payroll specific information such as status and payroll department. To complete the Payroll page of the Comprehensive Work Event, do the following:

1. Click on the **Payroll** tab to display the Payroll page. The **Effective Date**, **Action**, and **Action Reason** are carried over from the Job page as display only values. The availability and value of this field depends on your HR/payroll system of record.

Figure 6-115. Comprehensive Employment Change - Payroll Page

i For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

- The **Payroll Status** field displays the employee's current payroll status.
 - From the **Payroll Department** field, select a new payroll department for the employee. The availability and value of this field depends on your HR/payroll system of record. This field is display only if a position was selected from the **Position** field. See [page 6-4](#) for tips on searching for a field value.
2. From the **Pay Rates** area, select a **Rate Type**. The values of this field depend on your HR/payroll system of record.
 - 📄** If the employee's job record in your HR/payroll system of record indicates that no updates are allowed, the shift field is display only, and cannot be changed.
 3. Click the **Additional Information Details** link, if available, to access the **Additional Information** fields. You can enter, change, or delete data in these fields as necessary for the work event you are entering.

 Whether or not the Additional Information fields are available, as well as which fields you have access to for each event, is determined by your Self Service Administrator. The information in these fields initially defaults with data from your HR/payroll system of record. Any information you enter in these fields will be passed back to your system of record once this event has been processed.

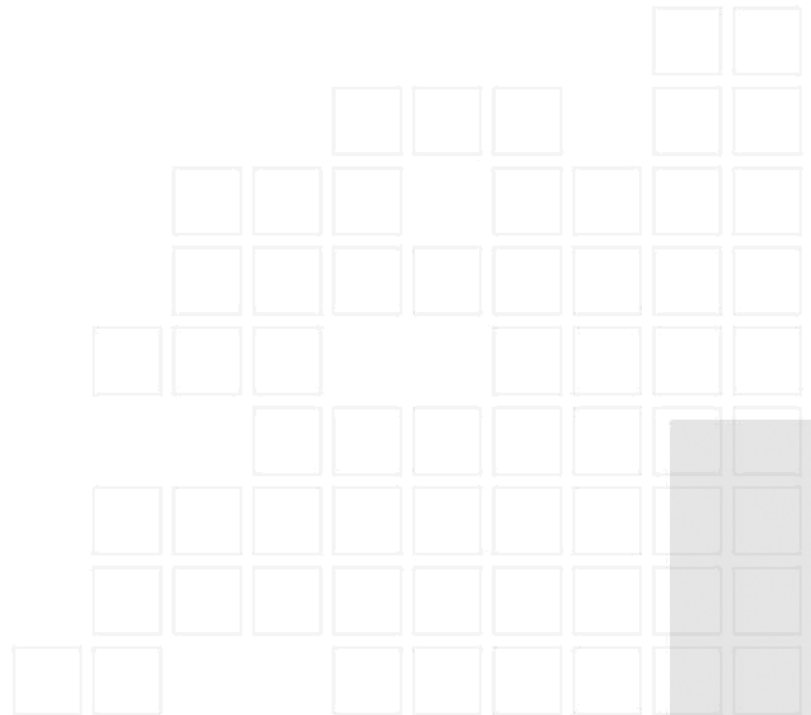


End of procedure

You have finished changing an employee's payroll information. That is the final task in available in creating a comprehensive work event.

Managing Employee Career and Training Information

<u>PAGE</u>	<u>TOPIC</u>
7-2	Introduction
7-3	Managing Employee Career Profiles
7-17	Enrolling Employees in Training
7-24	Accessing Employee Training Summary Information



Introduction

The **Career** tab allows employees to view and change their “resume,” which includes education (degree), languages, skills, and license/certification information. Employees can also search for internal job postings, view their training summary, and enroll in training through the Career tab.

Managers can also manage employee career and training, using the following tasks:

- **Employee Career Profile** - Managers can add and update employee career information.
- **Enroll Employee in Training** - Managers can enroll employees in available training.
- **Employee Training Summary** - Manager’s can view training employee information, as well as cancel an employee’s enrollment in a training activity.

Which employee career and/or training tasks are available to you depends on how your administrator has configured your security access in Self Service. You can perform these employee events on your direct reports, as well as your indirect reports if your administrator has enabled the indirect report update option. If this option has not been enabled, you can initiate these employee events only for your direct reports.

Managing employee career and training information consists of the following tasks:

- [Managing Employee Career Profiles](#)
- [Enrolling Employees in Training](#)
- [Accessing Employee Training Summary Information](#)

Managing Employee Career Profiles

Managing employee career profile information includes the following tasks:

- [Adding or Changing Education Information](#)
- [Adding or Changing Language Information](#)
- [Adding or Changing Skill Information](#)
- [Adding or Changing License/Certificate Information](#)

 Depending on your HR/payroll system of record, a maximum of 300 results can be displayed for a number of searchable fields. If available, you can limit the employee listing by using the search fields at the top of the page to filter your results. For more information on using these fields, see [Chapter 6, "Using Search Fields to Filter Results."](#)

Adding or Changing Education Information

Tasks

Managing Employee Career Profiles


Adding or Changing Education Information

Adding or Changing Language Information

Adding or Changing Skill Information

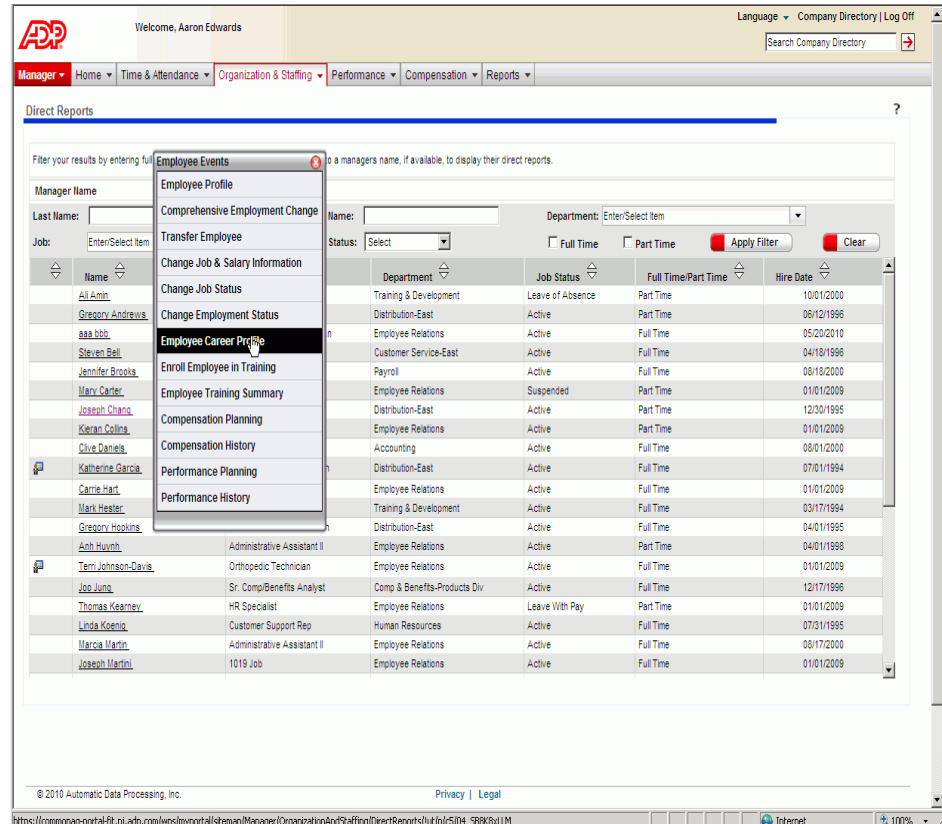
Adding or Changing License/Certificate Information

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.

To add or change education information, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Employee Career Profile** from the Employee Event selection menu.



The screenshot shows the ADP web interface for a manager named Aaron Edwards. The 'Organization & Staffing' tab is active, and the 'Direct Reports' page is displayed. A search menu is open over the 'Employee Events' section, with 'Employee Career Profile' selected. The main table lists direct reports with columns for Name, Department, Job Status, Full Time/Part Time, and Hire Date.

Name	Department	Job Status	Full Time/Part Time	Hire Date
<u>Ali Amin</u>	Training & Development	Leave of Absence	Part Time	10/01/2000
<u>Gregory Andrews</u>	Distribution-East	Active	Part Time	08/12/1998
<u>aaa bbb</u>	Employee Relations	Active	Full Time	05/20/2010
<u>Steven Bell</u>	Customer Service-East	Active	Full Time	04/18/1998
<u>Jennifer Brooks</u>	Payroll	Active	Full Time	08/19/2000
<u>Mary Carter</u>	Employee Relations	Suspended	Part Time	01/01/2009
<u>Joseph Chang</u>	Distribution-East	Active	Part Time	12/30/1995
<u>Kieran Collins</u>	Employee Relations	Active	Part Time	01/01/2009
<u>Clive Daniels</u>	Accounting	Active	Full Time	08/01/2000
<u>Katherine Garcia</u>	Distribution-East	Active	Full Time	07/01/1994
<u>Carrie Hart</u>	Employee Relations	Active	Full Time	01/01/2009
<u>Mark Hester</u>	Training & Development	Active	Full Time	03/17/1994
<u>Gregory Hopkins</u>	Distribution-East	Active	Full Time	04/01/1995
<u>Anh Huynh</u>	Administrative Assistant II	Active	Part Time	04/01/1998
<u>Terr Johnson-Davis</u>	Orthopedic Technician	Active	Full Time	01/01/2009
<u>Joe Jung</u>	Sr. Comp/Benefits Analyst	Active	Full Time	12/17/1998
<u>Thomas Kearney</u>	HR Specialist	Leave With Pay	Part Time	01/01/2009
<u>Linda Keenig</u>	Customer Support Rep	Active	Full Time	07/31/1995
<u>Marcia Martin</u>	Administrative Assistant II	Active	Full Time	08/17/2000
<u>Joseph Martin</u>	1019 Job	Active	Full Time	01/01/2009

Figure 7-1. Employee Event Selection Menu with Employee Career Profile Selected

The search fields at the top of the Direct Reports page are only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Versions 5.03. Search fields allow you to enter criteria to filter your employee list.

The initial display of direct reports is limited by the HR/payroll system of record to 999. However, you can use the search fields to display direct reports beyond this initial display. For example, the page initially displays 999 direct reports but the direct report you want to use is John Steward in department 123 but he isn't listed. In the **Last Name** search field, enter Steward and click **Apply Filter**. John Steward should display in the filtered listing.

- Select **Employee Career Profile**. The Employee Selection page displays. Select the radio button next to the employee whose career profile you want to manage, and click **Next**.

Clicking the underlined employee **Name** on the Employee Selection page accesses the Employee Profile.

i More info
 For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

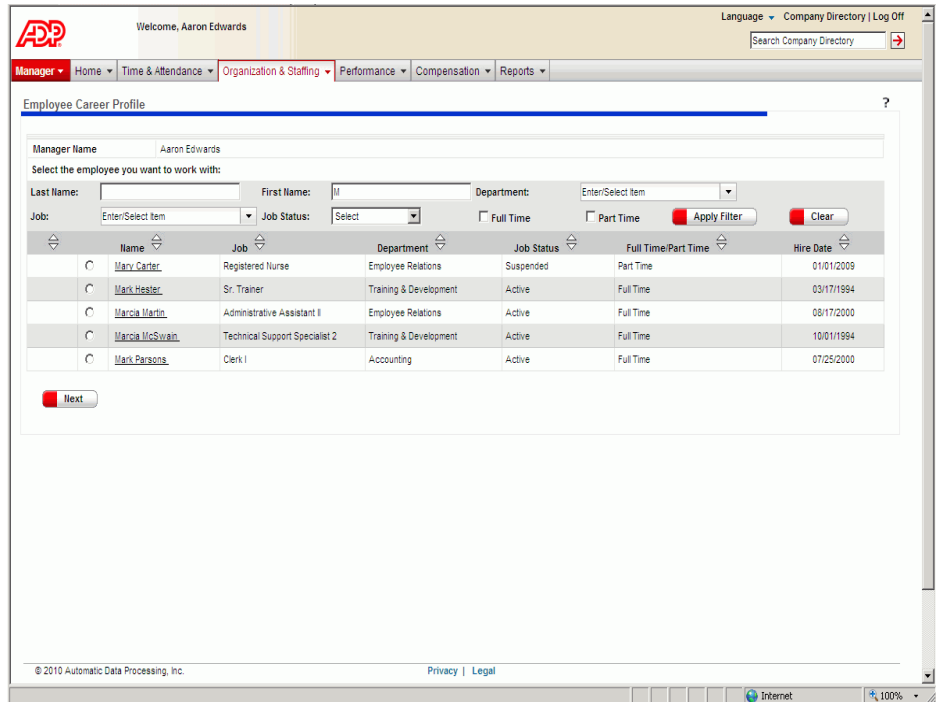


Figure 7-2. Employee Selection Page, Accessed from Employee Career Profile Task

The search fields at the top of the Employee Selection page are only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Versions 5.03. Search fields allow you to enter criteria to filter your employee list.

The Career Profile page displays.



More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

Welcome, Aaron Edwards

Language Company Directory | Log Off

Search Company Directory

Manager Home Time & Attendance Organization & Staffing Performance Compensation Reports

Employee Career Profile ?

This page displays your current experience, education and skills. To edit an existing entry, click on the appropriate underlined description of the item you wish to change. To add information, click **Add New** from the associated category.

Mark Hester

Work History

Job	Start Date
Sr. Trainer	09/01/2001
Trainer	01/01/2000
Sr. Technical Support Spec.	03/17/1994

Education

School	Degree	Graduation Date	GPA
Add New			

Languages

Language	Speak	Read	Write	Proficiency Level
Add New				

Skills

Skill	Proficiency Level	Date Acquired	Date Last Used
Add New			

Licenses and Certificates

License/Certificate Name	License/Certificate Number	Original Date of Issue	Expiration Date
Add New			

Print **Cancel**

Figure 7-3. Career Profile Page

The Career Profile page includes the following information:

- **Work History** – This area displays the employee’s work history information, with the most current job listed first.
- **Education** – This area displays the employee’s education information. You can add new information and change existing information.
- **Languages** – This area displays the employee’s language information. You can add new information and change existing information.
- **Skills** – This area displays the employee’s skill information. You can add new information and change existing information.
- **Licenses and Certificates** – This area displays the employee’s license and certification information. You can add new information and change existing information.

2. From **Education** area, do one of the following:
 - To add new education information, click **Add New**. The Add Education page displays.


i More info
 For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

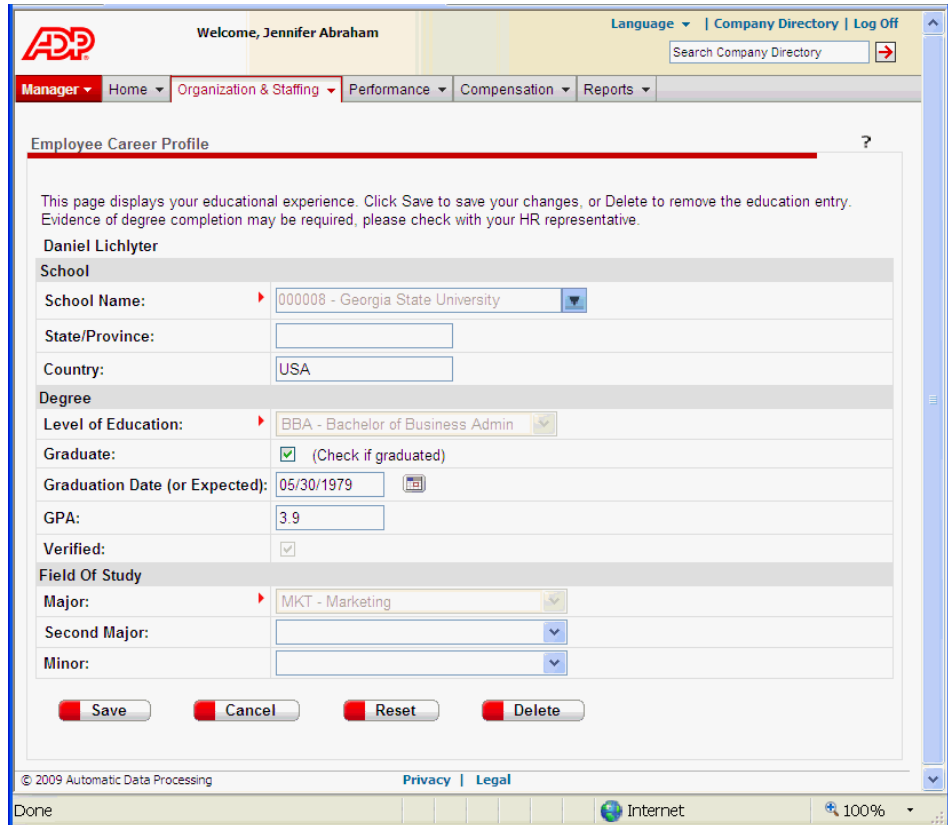
The screenshot shows the 'Add Education' page in the ADP Self Service Manager. The user is logged in as Jennifer Abraham. The page title is 'Employee Career Profile' with a help icon. The form is for Daniel Lichlyter and is divided into three main sections: School, Degree, and Field Of Study. The School section includes fields for School Name, State/Province, and Country. The Degree section includes Level of Education, Graduate status, Graduation Date, GPA, and Verified status. The Field Of Study section includes Major, Second Major, and Minor. At the bottom are Save, Cancel, and Reset buttons. The footer shows copyright information and links for Privacy and Legal.

Figure 7-4. Add Education Page

- To change existing education information, click the underlined school name whose information you want to change. The Update Education page displays.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



ADP Welcome, Jennifer Abraham Language | Company Directory | Log Off

Manager Home Organization & Staffing Performance Compensation Reports

Employee Career Profile ?

This page displays your educational experience. Click Save to save your changes, or Delete to remove the education entry. Evidence of degree completion may be required, please check with your HR representative.

Daniel Lichlyter

School

School Name: 000008 - Georgia State University

State/Province:

Country: USA

Degree

Level of Education: BBA - Bachelor of Business Admin

Graduate: (Check if graduated)

Graduation Date (or Expected): 05/30/1979

GPA: 3.9

Verified:

Field Of Study

Major: MKT - Marketing

Second Major:

Minor:





Save Cancel Reset Delete

© 2009 Automatic Data Processing Privacy | Legal

Done Internet 100%

Figure 7-5. Update Education Page

- Required fields are indicated by a red arrow. You can use the tab key to move from field to field or you can use your mouse to place your cursor in a different field.
- On the Update Education page, the **School Name**, **Level of Education**, **Verified**, and **Major** fields are display only. If this information is incorrect, delete the education entry and add a new one. Evidence of degree completion may be required. Please check with your HR representative.

3. In the **School Name** field, you can do one of the following:
 - Click in the field and press **Enter** or click the down arrow. A list of available schools displays. Select the desired school.
 - To filter search results, click in the field and enter either full or partial data for the code or first part of the description, then click **Enter** or the down arrow. Any value matching the entered data display. Select the desired value. If you get a "no data" message, you must clear the field before entering data for a new search.
 -  Once the field is populated with a valid value, you can click the down arrow to again display all available options, or you can re-filter your results by entering new partial search criteria
 -  When entering search criteria, it is recommended you click **Enter** or the down arrow rather than **Tab** or clicking off the field. If you enter full or partial data and you **Tab** or click off the field and only one value matches the entered data, that value populates the field. However, if more than one value matches, you will get a school name is invalid message. You will then need to either click the down arrow to view valid values, or enter new search criteria and click **Enter** or the down arrow.
 -  The **State/Province** and **Country** fields are automatically populated for the selected school, if they have been entered in your HR/payroll system of record. If your school is not available in the list, contact your Human Resources Department.
4. From the **Level of Education** field, select the level of education attained.
5. Select the **Graduate** check box, if you have graduated.
6. In the **Graduation Date** (or **Expected**) field, enter either the date you expect to graduate or the date you graduated. You can enter the date manually (format mm/dd/yyyy) or select the date from the calendar.
7. In the **GPA** field, enter your grade point average.
8. From the **Major** field, select your major.
9. From the **Second Major** field, select your second major, if applicable.
10. From the **Minor** field, select your minor, if applicable.
11. Click **Save** to save your changes, **Reset** to clear the fields (resets the fields on the Update Education page), or **Cancel** to return to the Career Profile page without saving your changes.
 -  To delete an education entry, click **Delete**. A confirmation dialog displays asking if you are sure you want to delete this degree. Click **OK** to confirm the deletion or **Cancel** to return to the Career Profile page without deleting.

What's next

You have finished adding or changing an employee's education information. Next you will add or change an employee's language information.

Adding or Changing Language Information

Tasks

Managing Employee Career Profiles

Adding or Changing Education Information

Adding or Changing Language Information

Adding or Changing Skill Information

Adding or Changing License/Certificate Information

To add or change education information, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Employee Career Profile** from the Employee Event selection menu (see [Figure 7-1](#) on page 7-4).
 - Select **Employee Career Profile**. The Employee Selection page displays. Select the radio button next to the employee whose career profile you want to manage, and click **Next** (see [Figure 7-2](#) on page 7-5).

Clicking the underlined employee **Name** on the Employee Selection page accesses the Employee Profile.

The Career Profile page displays (see [Figure 7-3](#) on page 7-6).

- From the **Languages** area, do one of the following:
 - To add new language information, click **Add New**. The Add Languages page displays.

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP Employee Career Profile page. At the top, there is a navigation bar with the ADP logo, a welcome message for Jennifer Abraham, and links for Language, Company Directory, and Log Off. Below the navigation bar, there are tabs for Manager, Home, Organization & Staffing, Performance, Compensation, and Reports. The main content area is titled 'Employee Career Profile' and contains a section for 'Languages'. The 'Languages' section has a 'Language:' dropdown menu set to 'Select Language', and checkboxes for 'Speak', 'Read', and 'Write'. Below these are 'Proficiency' and 'Save', 'Cancel', and 'Reset' buttons. The footer shows '© 2009 Automatic Data Processing' and 'Privacy | Legal'.

Figure 7-6. Add Languages Page

- To change existing language information, click the underlined language name whose information you want to change. The Update Languages page displays.

i More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

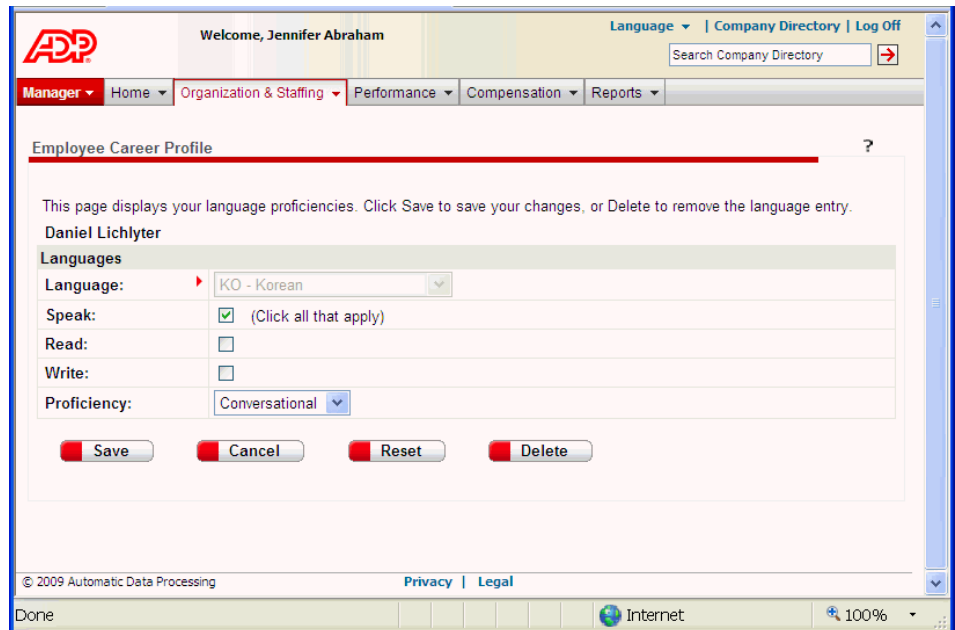


Figure 7-7. Update Languages Page

Required fields are indicated by a red arrow. You can use the tab key to move from field to field or you can use your mouse to place your cursor in a different field.

3. From the **Language** field, select the language. If the language you need to add is not available in the list, contact your Human Resources Department.

On the Update Language page, the **Language** field is display-only.

4. Click on any combination of the **Speak**, **Read**, and **Write** options to denote your proficiency in the language.
5. From the **Proficiency** field select the competence level that best describes your command of the language.
6. Click **Save** to save your changes, **Reset** to clear the fields (resets the fields on the Update Languages page), or **Cancel** to return to the Career Profile page without saving your changes.

To delete a language entry, click **Delete**. A confirmation dialog displays asking if you are sure you want to delete this language. Click **OK** to confirm the deletion or **Cancel** to return to the Career Profile page without deleting.

? What's next

You have finished adding or changing an employee’s language information. Next you will add or change an employee’s skill information.

Adding or Changing Skill Information

Tasks

Managing Employee Career Profiles

Adding or Changing Education Information

Adding or Changing Language Information

Adding or Changing Skill Information

Adding or Changing License/Certificate Information

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

To add or change skill information, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Employee Career Profile** from the Employee Event selection menu (see [Figure 7-1](#) on page 7-4).
 - Select **Employee Career Profile**. The Employee Selection page displays. Select the radio button next to the employee whose career profile you want to manage, and click **Next** (see [Figure 7-2](#) on page 7-5).
 - Clicking the underlined employee **Name** on the Employee Selection page accesses the Employee Profile.

The Career Profile page displays (see [Figure 7-3](#) on page 7-6).
- From the **Skills** area, do one of the following:
 - To add new skill information, click **Add New**. The Add Skills page displays.

Figure 7-8. Add Skills Page

- To change existing skill information, click the underlined skill name whose information you want to change. The Update Skills page displays.

More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

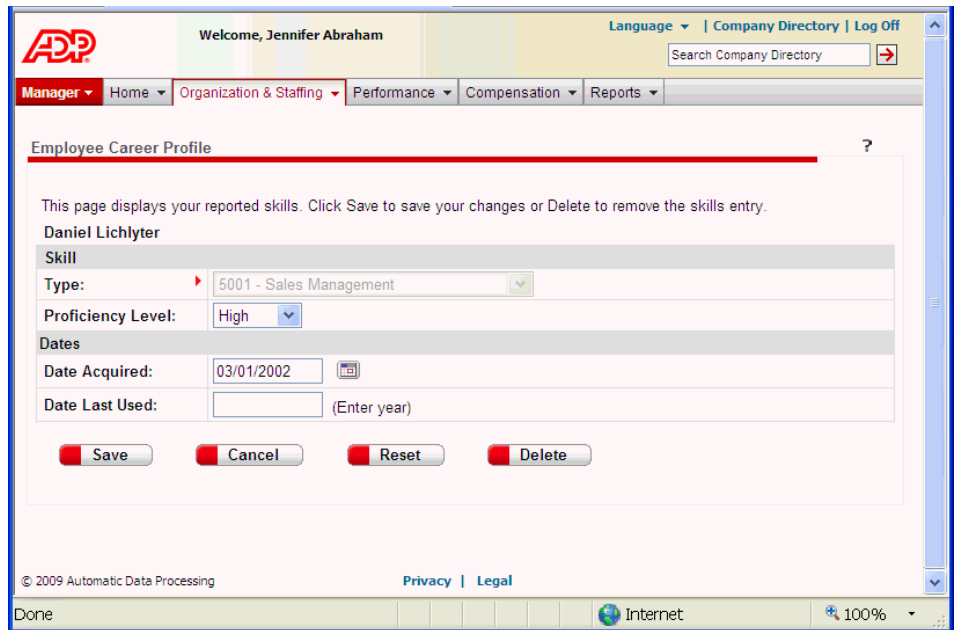



Figure 7-9. Update Skills Page

- Required fields are indicated by a red arrow. You can use the tab key to move from field to field or you can use your mouse to place your cursor in a different field.
- From the **Type** drop-down list, select the description for the skill. You can enter the first number or letter of a description to limit the types listed. If the skill description you need is not available in the list, contact your Human Resources Department.
 - On the Update Skills page, the **Type** field is display-only.
 - From the **Proficiency Level** field, select the appropriate proficiency level.
 - In the **Date Acquired** field, enter the date the skill was acquired. You can enter the date manually (format mm/dd/yyyy) or select the date from the calendar.
 - In the **Date Last Used** field, enter the year (format yyyy) the skill was last used.
 - Click **Save** to save your changes, **Reset** to clear the fields (resets the fields on the Update Skills page), or **Cancel** to return to the Career Profile page without saving your changes.
-  To delete a skill entry, click **Delete**. A confirmation dialog displays asking if you are sure you want to delete this skill. Click **OK** to confirm the deletion or **Cancel** to return to the Career Profile page without deleting.

What's next

You have finished adding or changing an employee's skill information. Next you will add or change an employee's license/certification information.

Adding or Changing License/Certificate Information

Tasks

Managing Employee Career Profiles

Adding or Changing Education Information

Adding or Changing Language Information

Adding or Changing Skill Information

Adding or Changing License/Certificate Information

To add or change license and/or certificate information, do the following:

- From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Employee Career Profile** from the Employee Event selection menu (see [Figure 7-1](#) on page 7-4).
 - Select **Employee Career Profile**. The Employee Selection page displays. Select the radio button next to the employee whose career profile you want to manage, and click **Next** (see [Figure 7-2](#) on page 7-5).
 - Clicking the underlined employee **Name** on the Employee Selection page accesses the Employee Profile.

The Career Profile page displays (see [Figure 7-3](#) on page 7-6).

- From the **Licenses and Certificates** area, do one of the following:
 - To add new license/certificate information, click **Add New**. The Add Licenses and Certificates page displays.

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP Employee Career Profile page for Daniel Lichlyter. The page title is "Employee Career Profile" with a help icon. Below the title, there is a text block: "Enter License/Certification information in the following fields and click Save to add your entry. The Expiration Date you enter may be automatically changed if your system of record has been set up to calculate expiration dates. Evidence of license/certification completion may be required; please check with your HR representative." The form is divided into two sections: "License/Certificates" and "Dates".

License/Certificates Section:

- Type: Select License Type (dropdown menu)
- Identification Number: (text input field) (If Applicable)
- Issuing Organization: (text input field)
- Issuing State: Select State/Province (dropdown menu)
- Issuing Country: USA

Dates Section:

- Original Date of Issue: (calendar icon) (text input field)
- Expiration Date: (calendar icon) (text input field)

At the bottom of the form are three buttons: Save, Cancel, and Reset.

The page footer includes "© 2009 Automatic Data Processing", "Privacy | Legal", and a browser status bar showing "Done", "Internet", and "100%".

Figure 7-10. Add Licenses and Certificates Page

- To change existing skill information, click the underlined skill name whose information you want to change. The Update Licenses and Certificates page displays.



More info

For a description of the fields on this page or for related tasks, click the ? (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP web interface for an employee's career profile. The user is identified as Jennifer Abraham. The page title is 'Employee Career Profile'. A help icon (?) is visible in the top right corner. The main content area contains a form for 'License/Certificates' and 'Dates'. The 'License/Certificates' section includes a 'Type' dropdown menu (set to 'CCP - Certified Compensation Prof'), an 'Identification Number' field (with a red arrow indicating it is required), an 'Issuing Organization' field, an 'Issuing State' dropdown menu (set to 'Select State/Province'), and an 'Issuing Country' dropdown menu (set to 'USA'). The 'Dates' section includes an 'Original Date of Issue' field (set to '04/06/2009') and an 'Expiration Date' field (set to '04/06/2012'). At the bottom of the form are four buttons: 'Save', 'Cancel', 'Reset', and 'Delete'. The browser's address bar shows 'Done' and 'Internet'.

Figure 7-11. Update Licenses and Certificates Page

- Required fields are indicated by a red arrow. You can use the tab key to move from field to field or you can use your mouse to place your cursor in a different field.
- From the **Type** drop-down list, select or enter the description for the license or certificate. You can enter the first number or letter of a description to limit the types listed. If the license or certificate description you need is not available in the list, contact your Human Resources Department.
 - On the Update Licenses and Certificates page, the **Type** and **Original Date of Issue** fields are display-only. Evidence of license or certification completion may be required. Please check with your HR representative.
 - In the **Identification Number** field, enter the number identifying your license or certificate.
 - In the **Issuing Organization** field, enter the name of the organization issuing the license or certificate.
 - In the **Issuing State** field, select the state in which the license or certificate was issued.
 - In the **Original Date of Issue** field, enter the date the license or certificate was originally issued. You can enter the date manually (format mm/dd/yyyy) or select the date from the calendar.

8. In the **Expiration Date** field, enter the date that the license or certificate will expire. You can enter the date manually (format mm/dd/yyyy) or select the date from the calendar.



The date you enter in the **Expiration Date** field may be automatically changed if your system of record has been set up to calculate expiration dates.

9. Click **Save** to save your changes, **Reset** to clear the fields (resets the fields on the Update Licenses and Certificates page), or **Cancel** to return to the Career Profile page without saving your changes.



To delete a skill entry, click **Delete**. A confirmation dialog displays asking if you are sure you want to delete this skill. Click **OK** to confirm the deletion or **Cancel** to return to the Career Profile page without deleting.



End of procedure

You have finished adding or changing an employee's licence/certificate information, which is the last step in managing employee career information.

Enrolling Employees in Training

Enrolling employees in training consists of the following tasks:

- Viewing Available Training Activities
- Checking Prerequisites for a Training Activity
- Checking Availability and Enrolling in a Training Session

Viewing Available Training Activities

To view and print a list of available training activities, do the following:

1. From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Enroll Employee in Training** from the Employee Event selection menu.

Tasks

Enrolling Employees in Training

- Viewing Available Training Activities
- Checking Prerequisites for a Training Activity
- Checking Availability and Enrolling in a Training Session

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

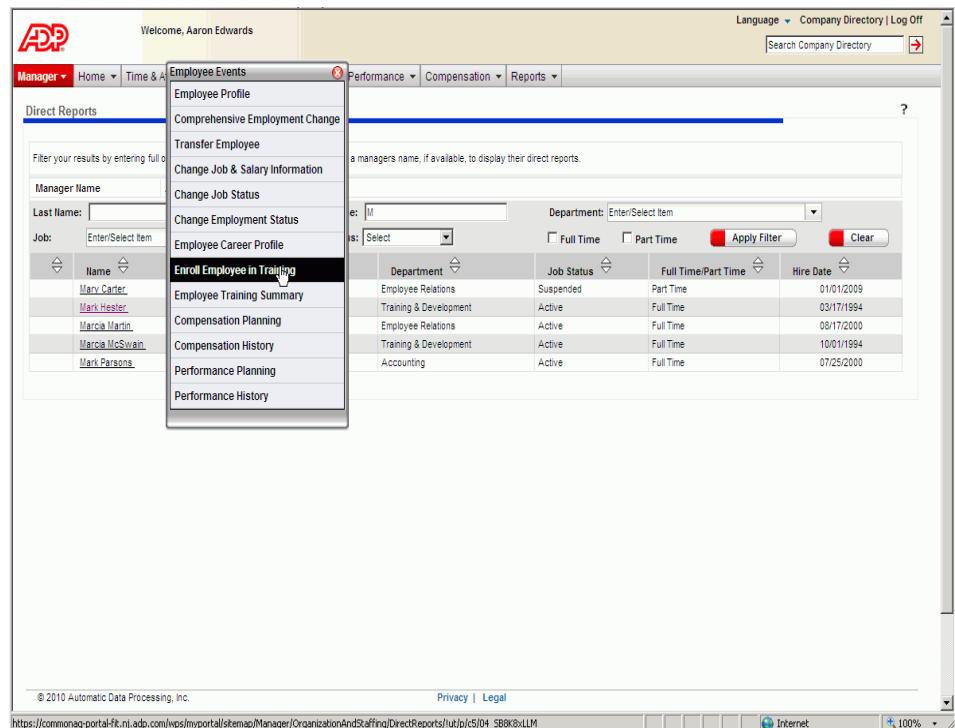


Figure 7-12. Employee Event Selection Menu with Enroll Employee in Training Selected

- Select **Enroll Employee in Training**. The Employee Selection page displays. Select the radio button next to the employee you want to enroll in training, and click **Next**.

- Clicking the underlined employee **Name** on the Employee Selection page accesses the Employee Profile.



More info

For a description of the fields on this page or for related tasks, click the (Help icon) provided in the right-hand corner of the Self Service page.

Manager Name: Aaron Edwards

Select the employee you want to work with:

Last Name: First Name: Department:

Job: Job Status: Full Time Part Time

	Name	Job	Department	Job Status	Full Time/Part Time	Hire Date
<input type="radio"/>	<u>Mary Carter</u>	Registered Nurse	Employee Relations	Suspended	Part Time	01/01/2009
<input type="radio"/>	<u>Mark Hester</u>	Sr. Trainer	Training & Development	Active	Full Time	03/17/1994
<input type="radio"/>	<u>Marcia Martin</u>	Administrative Assistant I	Employee Relations	Active	Full Time	08/17/2000
<input type="radio"/>	<u>Marcia McSwain</u>	Technical Support Specialist 2	Training & Development	Active	Full Time	10/01/1994
<input type="radio"/>	<u>Mark Parsons</u>	Clerk I	Accounting	Active	Full Time	07/25/2000


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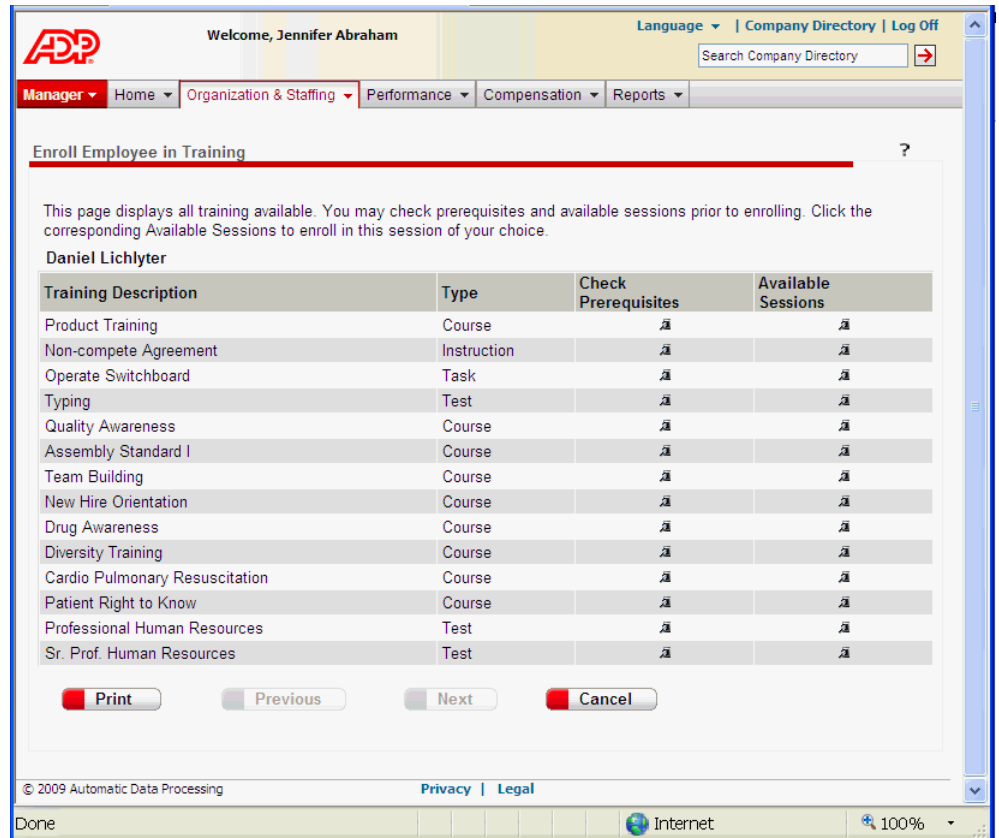
Figure 7-13. Employee Selection Page, Accessed from Enroll Employee in Training Task

- The search fields at the top of the Employee Selection page are only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Versions 5.03. Search fields allow you to enter criteria to filter your employee list.

The Enroll Employee in Training page displays, with a list of available training activities.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



Welcome, Jennifer Abraham | Language | Company Directory | Log Off

Search Company Directory

Manager | Home | Organization & Staffing | Performance | Compensation | Reports

Enroll Employee in Training ?

This page displays all training available. You may check prerequisites and available sessions prior to enrolling. Click the corresponding Available Sessions to enroll in this session of your choice.

Daniel Lichlyter

Training Description	Type	Check Prerequisites	Available Sessions
Product Training	Course	<input type="checkbox"/>	<input type="checkbox"/>
Non-compete Agreement	Instruction	<input type="checkbox"/>	<input type="checkbox"/>
Operate Switchboard	Task	<input type="checkbox"/>	<input type="checkbox"/>
Typing	Test	<input type="checkbox"/>	<input type="checkbox"/>
Quality Awareness	Course	<input type="checkbox"/>	<input type="checkbox"/>
Assembly Standard I	Course	<input type="checkbox"/>	<input type="checkbox"/>
Team Building	Course	<input type="checkbox"/>	<input type="checkbox"/>
New Hire Orientation	Course	<input type="checkbox"/>	<input type="checkbox"/>
Drug Awareness	Course	<input type="checkbox"/>	<input type="checkbox"/>
Diversity Training	Course	<input type="checkbox"/>	<input type="checkbox"/>
Cardio Pulmonary Resuscitation	Course	<input type="checkbox"/>	<input type="checkbox"/>
Patient Right to Know	Course	<input type="checkbox"/>	<input type="checkbox"/>
Professional Human Resources	Test	<input type="checkbox"/>	<input type="checkbox"/>
Sr. Prof. Human Resources	Test	<input type="checkbox"/>	<input type="checkbox"/>

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Done | Internet | 100%

Figure 7-14. Enroll Employee in Training Page

The Enroll Employee in Training page displays the following:

- **Training Description** – Displays the description of the training activity.
 - **Type** – Displays the learning activity type, such as Course, Instruction, Task or Test.
 - **Check Prerequisites** – Click this check box to access the Check Prerequisites page and check prerequisites for the selected learning activity. See [“Checking Prerequisites for a Training Activity”](#) on page 7-20.
 - **Available Sessions** – Click this check box to access the Available Sessions page and enroll in the selected training activity. See [“Checking Availability and Enrolling in a Training Session”](#) on page 7-22.
2. Use the **Next** and **Previous** buttons, if enabled, to navigate through the list of activities.
 3. Click **Print** to print a copy of the available training activities.

What's next

You have finished viewing the available training activities. Next you will check the prerequisites needed for a training activity.

Checking Prerequisites for a Training Activity



Tasks

Enrolling Employees in Training

Viewing Available Training Activities

Checking Prerequisites for a Training Activity

Checking Availability and Enrolling in a Training Session


To check and print a list of prerequisites for a selected training activity, do the following:

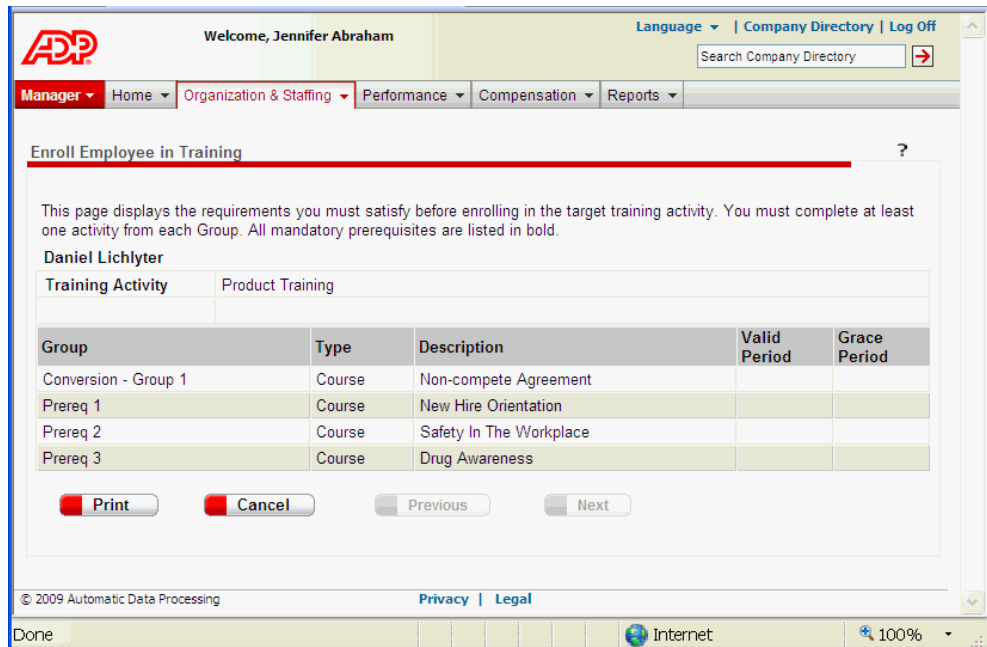
1. From the Enroll in Training page, use the **Previous** and **Next** buttons, if enabled, to navigate to the desired training activity.
2. Click the associated **Check Prerequisites** check box for the training activity for which you wish to see prerequisites. The Check Prerequisites page displays, listing the prerequisites for the selected training activity. All mandatory prerequisites are listed in bold.



You can also access the Check Prerequisites page by clicking **Check Prerequisites** from the Available Sessions page. See “[Checking Availability and Enrolling in a Training Session](#)” on page 7-22 for more information.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



Enroll Employee in Training

This page displays the requirements you must satisfy before enrolling in the target training activity. You must complete at least one activity from each Group. All mandatory prerequisites are listed in bold.

Daniel Lichlyter

Group	Type	Description	Valid Period	Grace Period
Conversion - Group 1	Course	Non-competee Agreement		
Prereq 1	Course	New Hire Orientation		
Prereq 2	Course	Safety In The Workplace		
Prereq 3	Course	Drug Awareness		

Print Cancel Previous Next

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Figure 7-15. Check Prerequisites Page

The Check Prerequisites page displays the following:

- **Training Activity** – Displays the target training activity you selected **Check Prerequisites** for from the Enroll in Training page.
 - **Group** – Displays a description of the prerequisite group.
 - **Type** – Displays the learning activity type, such as Course, Instruction, Task, or Test.
 - **Description** – Displays the prerequisite learning activity's name. All mandatory prerequisites are listed in bold.
 - **Valid Period** – Displays the amount of time for which the learning activity is valid.
 - **Grace Period** – Displays the grace period for the learning activity, which is a brief period after the expiration date during which the student is still considered certified in the learning activity.
3. Use the **Previous** and **Next** buttons, if enabled, to navigate through the list of prerequisites.
 4. Click **Print** to print a copy of the prerequisites for the selected training activity.
 5. Click **Cancel** to return to the Enroll in Training page.



What's next

You have finished checking the prerequisites for a training activity. Next you will check availability for a training activity and enroll in the training session.

Checking Availability and Enrolling in a Training Session

Tasks

Enrolling Employees in Training


Viewing Available Training Activities

Checking Prerequisites for a Training Activity


Checking Availability and Enrolling in a Training Session

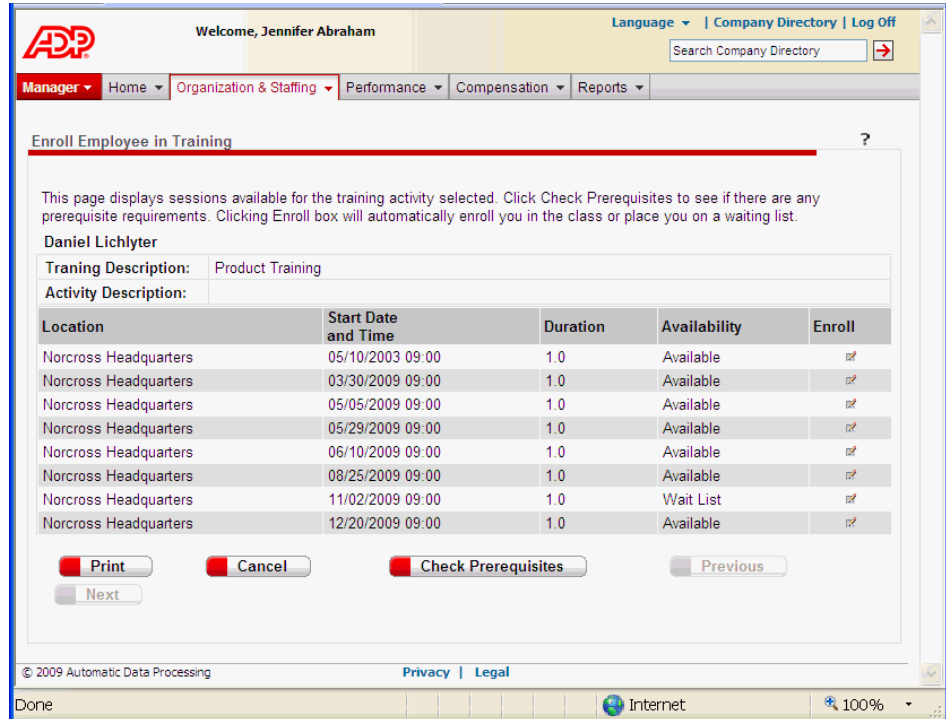
To check session availability for a selected training activity, print session information, and enroll in a training session, do the following:

1. From the Enroll in Training page, use the **Previous** and **Next** buttons, if enabled, to navigate to the desired training activity.
2. Click the associated **Available Sessions** check box for the training activity for which you wish to view session information. The Available Sessions page displays, listing sessions for the selected training activity.

 You can click **Check Prerequisites** to access the Check Prerequisites page and check prerequisite requirements. See “Checking Prerequisites for a Training Activity” on page 7-20 for more information.

More info

For a description of the fields on this page or for related tasks, click the  (Help icon) provided in the right-hand corner of the Self Service page.



Welcome, Jennifer Abraham

Language | Company Directory | Log Off

Search Company Directory

Manager | Home | Organization & Staffing | Performance | Compensation | Reports









Enroll Employee in Training

This page displays sessions available for the training activity selected. Click Check Prerequisites to see if there are any prerequisite requirements. Clicking Enroll box will automatically enroll you in the class or place you on a waiting list.

Daniel Lichlyter

Training Description: Product Training

Activity Description:

Location	Start Date and Time	Duration	Availability	Enroll
Norcross Headquarters	05/10/2003 09:00	1.0	Available	
Norcross Headquarters	03/30/2009 09:00	1.0	Available	
Norcross Headquarters	05/05/2009 09:00	1.0	Available	
Norcross Headquarters	05/29/2009 09:00	1.0	Available	
Norcross Headquarters	06/10/2009 09:00	1.0	Available	
Norcross Headquarters	08/25/2009 09:00	1.0	Available	
Norcross Headquarters	11/02/2009 09:00	1.0	Wait List	
Norcross Headquarters	12/20/2009 09:00	1.0	Available	

Print Cancel Check Prerequisites Previous Next


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Done Internet 100%

Figure 7-16. Available Sessions Page

The Available Sessions page displays the following:

- **Training Description** – Displays the name of the target training activity for which you selected **Available Sessions** from the Enroll in Training page.
 - **Activity Description** – Displays a description of the activities you will complete in this training session.
 - **Location** – Displays the location of the training activity.
 - **Start Date and Time** – Displays the start date and time of the training activity.
 - **Duration** – Displays the length of time to complete the training activity.
 - **Availability** – Displays the availability of the session, such as **Available**, **Wait List**, or **Not Available**.
3. Click the associated **Enroll** check box to enroll in the selected training session. You can only enroll in sessions that are **Available** or **Wait Listed**.


 If you enroll in a session you have already enrolled in, you will get a message informing you that you have already enrolled in this course and session. If you try to enroll in a training session for which you have not met the mandatory prerequisites, you will receive a warning that you have not met the mandatory requirements and to check the prerequisites to determine which learning activity you have not completed. You will need to enroll in any mandatory prerequisite activity before you can complete the enrollment in the activity for which you received the warning message.

Upon successful enrollment, you are returned to the refreshed Enroll in Training page.



End of procedure

You have finished checking for an available session and enrolling an employee in that session, which is the last step in enrolling employees in training.

-  For information on cancelling an employee's enrollment in a training session, see [“Accessing Employee Training Summary Information”](#) on page 7-24.

Accessing Employee Training Summary Information

Managers can view and print an employee's training summary information, as well as cancel an employee's enrollment in a training session.

To access an employee's training information, do the following:

1. From the **Organization & Staffing** tab, choose one of the following paths:
 - Select **Direct Reports**. The Direct Reports page displays. Click the underlined employee **Name**, then select **Employee Training Summary** from the Employee Event selection menu.



More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

The screenshot shows the ADP Self Service Manager interface. The user is logged in as Aaron Edwards. The main navigation bar includes 'Manager', 'Home', and 'Time'. The 'Employee Events' menu is open, and 'Employee Training Summary' is selected. The 'Direct Reports' section is visible, showing a list of employees with columns for Name, Department, Job Status, Full Time/Part Time, and Hire Date. The 'Employee Training Summary' option is highlighted in the menu.

Name	Department	Job Status	Full Time/Part Time	Hire Date
Mary Carter	Employee Relations	Suspended	Part Time	01/01/2009
Mark Hester	Training & Development	Active	Full Time	03/17/1994
Marcia Martin	Employee Relations	Active	Full Time	02/17/2000
Marcia McSwain	Training & Development	Active	Full Time	10/01/1994
Mark Parsons	Accounting	Active	Full Time	07/25/2000

Figure 7-17. Employee Event Selection Menu with Employee Training Summary Selected

- Select **Employee Training Summary**. The Employee Selection page displays. Select the radio button next to the employee you want to enroll in training, and click **Next**.

Clicking the underlined employee **Name** on the Employee Selection page accesses the Employee Profile.

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

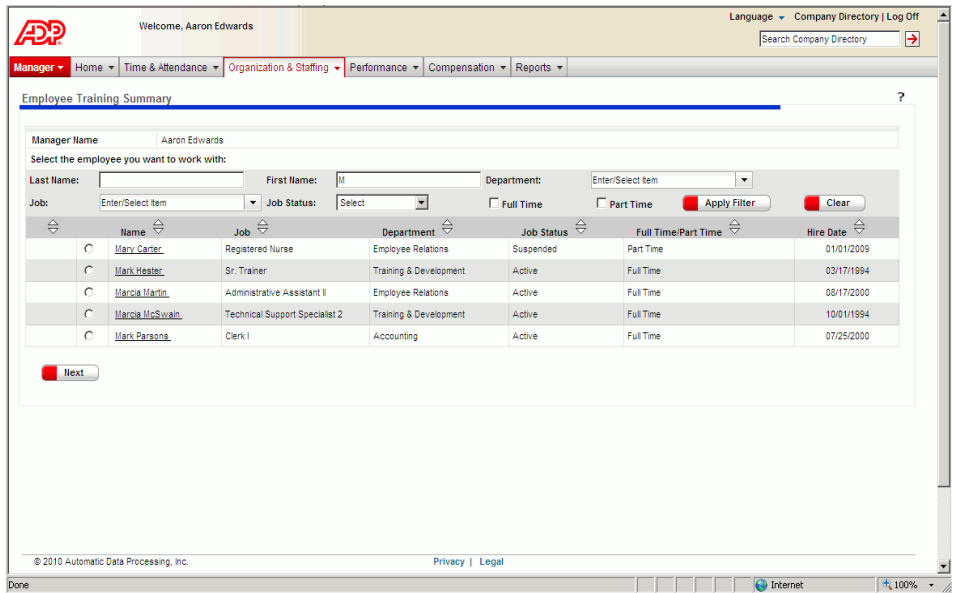


Figure 7-18. Employee Selection Page, Accessed from Employee Training Summary Task

The search fields at the top of the Employee Selection page are only available if your HR/payroll system of record is ADP Enterprise HR or ADP HR Anytime Versions 5.03. Search fields allow you to enter criteria to filter your employee list.

The Employee Training Summary page displays.

More info

For a description of the fields on this page or for related tasks, click the **?** (Help icon) provided in the right-hand corner of the Self Service page.

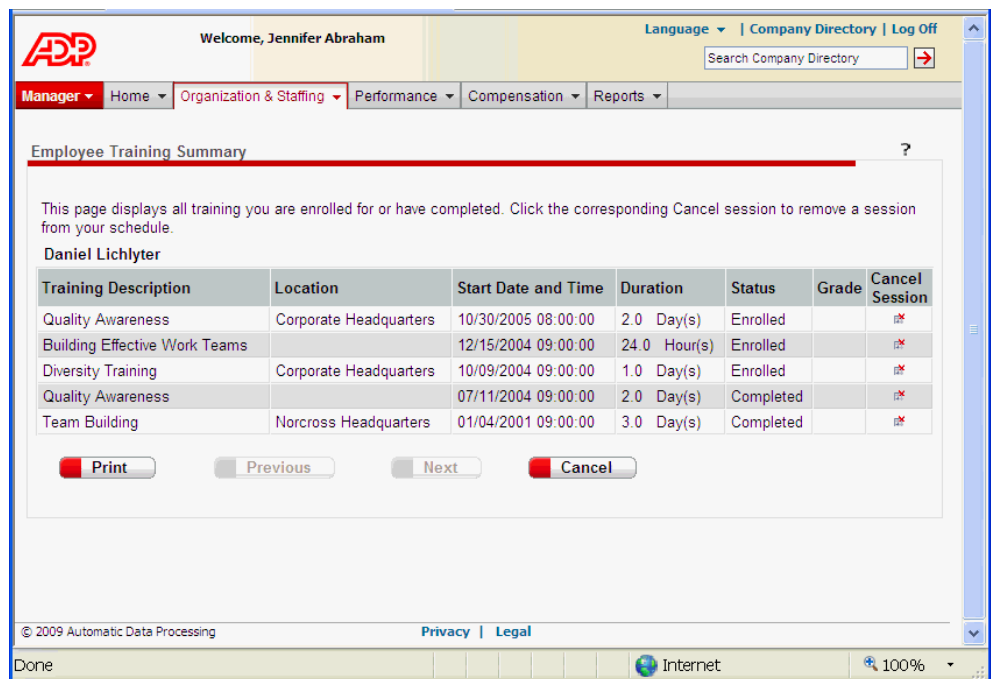


Figure 7-19. Employee Training Summary Page

The Employee Training Summary page displays the following:

- **Training Description** – Displays a description of the training activity.
 - **Location** – Displays the location of the training activity.
 - **Start Date and Time** – Displays the start date and time of the training activity.
 - **Duration** – Displays the length of time to complete the training activity.
 - **Status** – Displays whether you are enrolled, wait listed, or have completed the training activity.
 - **Grade** – Displays your grade for the training activity.
2. Use the **Previous** and **Next** buttons, if enabled, to navigate through the list the employee's training summary information.
 3. Click **Print** to print a copy of the selected employee's training information.
 4. If you need to cancel an employee's enrollment in a training session, do the following:
 - a. Click the associated **Cancel Session** check box. A confirmation dialog box displays asking if you are sure you want to delete this session.
 - b. Click **OK** to confirm the deletion. You are returned to the refreshed Training Summary page. The training activity you selected to delete is no longer listed.

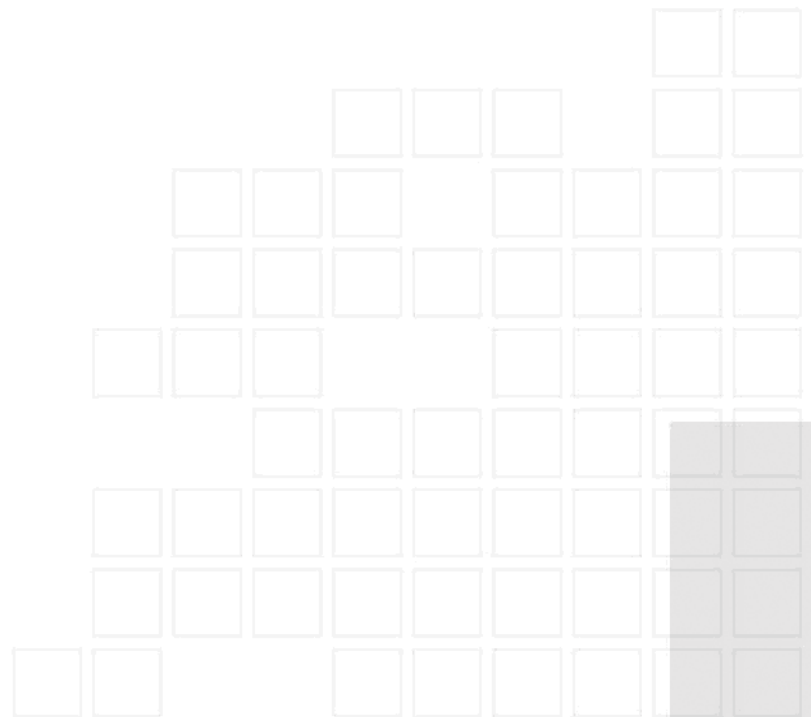


End of procedure

You have finished accessing an employee's training summary information.

Running Manager Reports


<u>PAGE</u>	<u>TOPIC</u>
8-2	Introduction
8-3	Running Team Reports
8-6	Running Employee History Reports



Introduction

The Report feature allows manager's to access a variety of reports that contain their team's employment and compensation information. Managers only have access to information for their direct reports. The following pre-defined reports are available:

- Team Reports
 - Work Profiles
 - Job and Pay Profiles
 - Performance Profiles
 - Anniversary List
 - Birthday List
 - Address & Phone List
 - Team Emergency Contacts
 - International Employee Information
- Employee History Reports
 - Compensation History
 - Performance History

 The number of reports available may vary. Your company administrator can configure reports to not display, as well as change the report label text.

The information available in each report is pre-defined. These reports include the effective-dated information for employees with the statuses of Active, Leave, Paid Leave, and Suspended. The team reports include all the direct reports for a manager. The employee history reports contain information about a single direct report. These history reports include all data of an employee based on tenure.

Only one report can be selected for processing at a time. An activity bar displays while the report is created. You must remain on the Reports page while the report is processing, or the report is cancelled.

The report produces a Microsoft Excel file that can be viewed and manipulated in an Excel spreadsheet. If Excel is not available, the Internet Explorer Download File dialog box displays, allowing you to either Open or Save the report in the application you select.

Running Team Reports

Team reports include all the manager's direct reports. Reports include Active, Paid Leave, Leave, and Suspended employees. You can select a sort option for the team reports. If no sort option is selected, **Employee ID** is used as the default sort. Reports are sorted in ascending order.

To run a team report, do the following:

1. From the **Reports** tab, select **Manager Reports**. The Reports page displays.



More info

For a description of the fields on this page or for related tasks, click the

? (Help icon) provided in the right-hand corner of the Self Service page

Figure 8-1. Reports Page


2. From the **Team Reports** area, select the team report you want to process.
3. Select the report sort option. Options include:

- **Employee ID**
- **Last Name**
- **Department ID**
- **Department Name**
- **Location ID**
- **Location Name**

The sort drop down list box will be populated based the report selected

4. Click **Submit**. A message displays telling you the report will be submitted for processing.

5. Click **OK**. The Report Processing page displays, showing an activity bar while your report is processing.

 Do not leave this page while the report is processing, or your report will be cancelled.

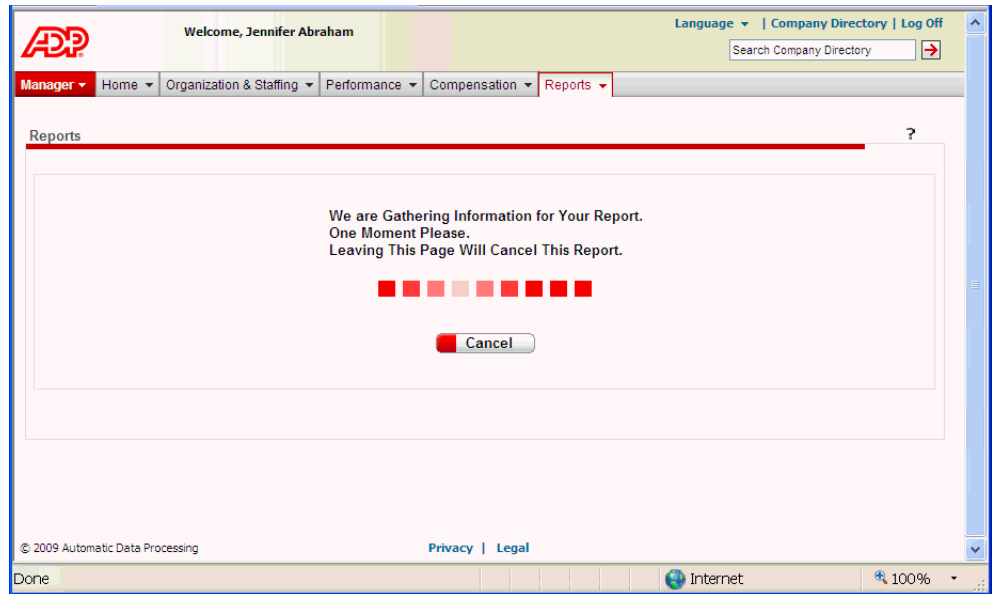


Figure 8-2. Report Processing Page

Once your report has finished processing, the View Report page displays.

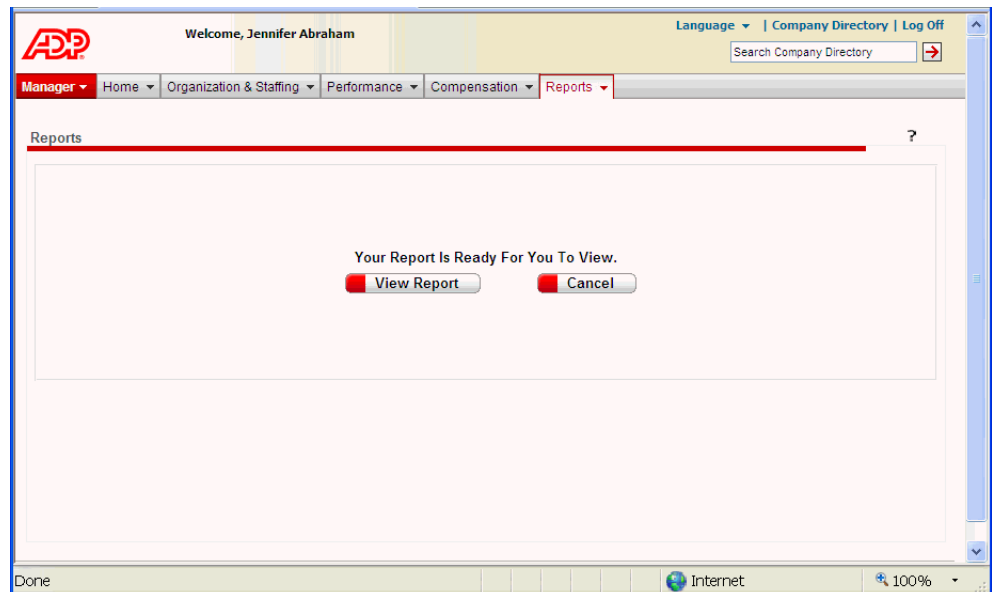

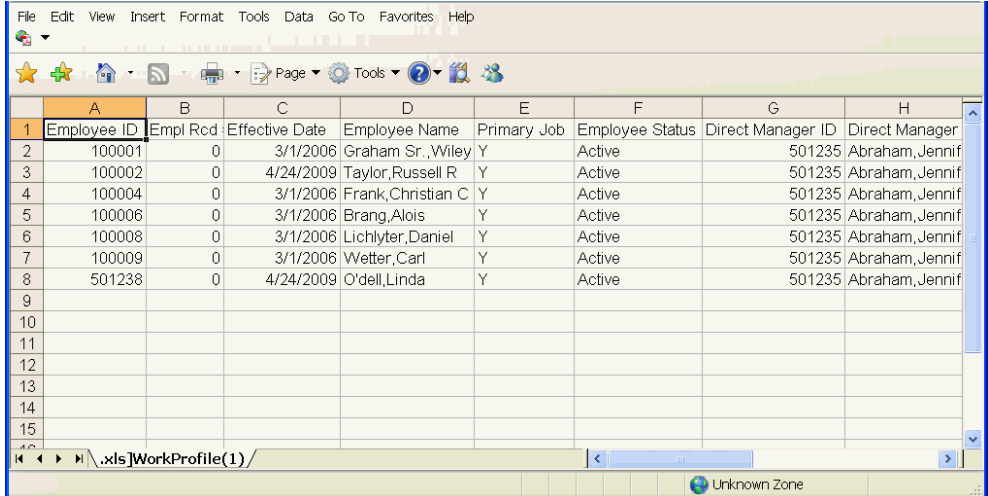


Figure 8-3. View Report Page

6. Click **View Report**. One of the following occurs:
 - Depending on your pop-up settings, if you have Microsoft Excel on your PC your report either opens immediately, or you need to click in the Information Bar, select **Download File**, then click **Open** from the Internet Explorer Download File dialog box.
 - If you do not have Excel on your PC, the Internet Explorer Download File dialog box displays. Click **Open**, then select a program to open the file.
 7. View your report. Make any changes to your report, print or save, as needed. Figure 8-4 shows an example of a team report in Excel.
-  The information in the reports is pre-defined. Making changes to the report, such as renaming report column headings, deleting information, and so forth, must be done in the application in which you have opened the report.



	A	B	C	D	E	F	G	H
1	Employee ID	Empl Rcd	Effective Date	Employee Name	Primary Job	Employee Status	Direct Manager ID	Direct Manager
2	100001	0	3/1/2006	Graham Sr., Wiley	Y	Active	501235	Abraham, Jennif
3	100002	0	4/24/2009	Taylor, Russell R	Y	Active	501235	Abraham, Jennif
4	100004	0	3/1/2006	Frank, Christian C	Y	Active	501235	Abraham, Jennif
5	100006	0	3/1/2006	Brang, Alois	Y	Active	501235	Abraham, Jennif
6	100008	0	3/1/2006	Lichlyter, Daniel	Y	Active	501235	Abraham, Jennif
7	100009	0	3/1/2006	Wetter, Carl	Y	Active	501235	Abraham, Jennif
8	501238	0	4/24/2009	O'dell, Linda	Y	Active	501235	Abraham, Jennif
9								
10								
11								
12								
13								
14								
15								

Figure 8-4. Sample Team Report in Excel



End of procedure

You have finished running team reports for your direct reports. Next you will run history reports on specific direct reports.


Running Employee History Reports

Employee History reports can be run on any of your direct reports with a employment status of Active, Paid Leave, Leave, and Suspended. The Employee History reports include all appropriate data, even if employee previously worked for a different department or manager.


To run an Employee History Report, do the following:

1. From the Reports page **Employee History Reports** area (see [Figure 8-1](#) on page 8-3), select the type of history report you want to process. Available options are:

- **Compensation History**
- **Performance History**

 The corresponding employee field is enabled once you select the history report type.


2. Select the employee for whom you want to run the history report.
3. Click **Submit**. A message displays telling you the report will be submitted for processing.
4. Click **OK**. The Report Processing page displays, as shown in [Figure 8-2](#), showing an activity bar while your report is processing.

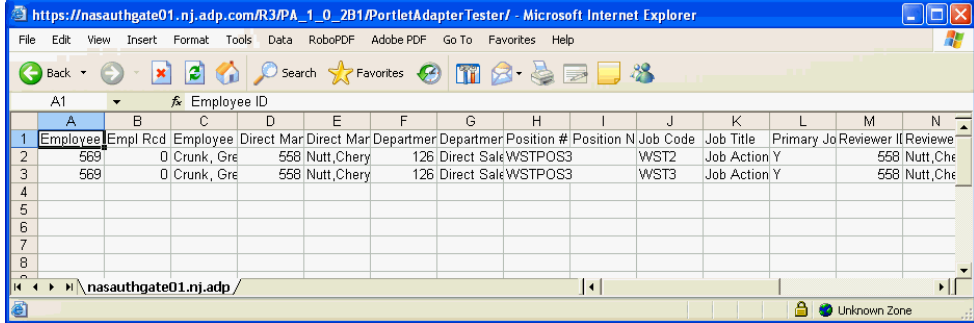
 Do not leave this page while the report is processing, or your report will be cancelled.

Once your report has finished processing, the View Report pages displays, as shown in [Figure 8-3](#).

5. Click **View Report**. One of the following occurs:
 - Depending on your pop-up settings, if you have Microsoft Excel on your PC your report either opens immediately, or you need to click in the Information Bar, select **Download File**, then click **Open** from the Internet Explorer Download File dialog box.
 - If you do not have Excel on your PC, the Internet Explorer Download File dialog box displays. Click **Open**, then select a program to open the file.

- View your report. Make any changes to your report, print or save, as needed. Figure 8-5 shows an example of an employee history report in Excel.

 The information in the reports is pre-defined. Making changes to the report, such as renaming report column headings, deleting information, and so forth, must be done in the application in which you have opened the report.



Employee ID	Empl Rcd	Employee	Direct Mar	Direct Mar	Department	Department	Position #	Position N	Job Code	Job Title	Primary Jo	Reviewer I	Reviewer N
569	0	Crunk, Gre	558	Nutt, Chery	126	Direct Sale	WSTPOS3		WST2	Job Action Y		558	Nutt, Che
569	0	Crunk, Gre	558	Nutt, Chery	126	Direct Sale	WSTPOS3		WST3	Job Action Y		558	Nutt, Che

Figure 8-5. Sample Employee History Report in Excel



End of procedure

You have finished running a history report on a specific direct report.

A

- Action field 3-15, 3-18, 6-144
- Action Reason field 6-144
- Action Taken field 3-8
- Actions column 2-7, 3-7
- Activity Description field 7-23
- Activity field 2-4, 2-6, 2-8, 3-3, 3-5, 3-8
- Add a Service tab 1-23
- Add Another Salary Change button 6-79, 6-87, 6-101
- Add Another Service button 1-20
- Add button 4-9
- Add Education page
 - accessing 7-7
 - illustration of 7-7
- Add Languages page
 - accessing 7-10
 - illustration of 7-10
- Add Proxy Assignment page
 - accessing 2-30
 - illustration of 2-30
- Add proxy assignments 2-29
- Add Skills page
 - accessing 7-12, 7-14
 - illustration of 7-12, 7-14
- Additional Employment Status Information Details link 6-110, 6-117, 6-125, 6-132, 6-139
- Additional Employment Status Information page
 - accessing 6-110, 6-125
 - illustration of 6-110, 6-125
- Additional Hire Information page
 - accessing 6-40
 - completing for new hires and rehires 6-40
 - illustration of 6-40
- Additional Information Details link 6-146
- Additional Information fields
 - change salary 6-101
 - demotion 6-86
 - hire 6-40
 - job and salary 6-78
 - leave of absence 6-110, 6-125
 - promotion 6-78
- Additional Information fields (cont.)
 - rehire 6-40
 - return from leave 6-117, 6-132
 - terminate 6-139
- Additional Job & Salary Information Details link 6-78, 6-86, 6-94, 6-101
- Additional Job & Salary Information page
 - accessing 6-78
 - illustration of 6-78
- Additional Job Status Information Details link 6-68
- Additional Job Status Information page
 - accessing 6-68
 - illustration of 6-69
- Additional Salary Change area 6-87, 6-101
- Additional Transfer Information Details link 6-49, 6-56, 6-61
- Additional Transfer Information page
 - accessing 6-49
 - illustration of 6-49
- Address Line 3 field 6-29
- ADP Enterprise HR
 - versions supported 1-2
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