MSS Course Syllabus and Key Notes

Course Number 710

Manager Self-Service – Auditorium

Auditorium Protocol

1. Attendance (Did you sign-in?)
2. Housekeeping and Auditorium Rules
3. Introductions
4. PowerPoint Presentation

Auditorium Session Expectations

During today's session managers and supervisors will learn:

1. How to find Edison training information
2. How to use the training tool – User Productivity Kit (UPK)
3. The different Edison Modules
4. New terminology used in Edison
5. The overall Time and Labor process
6. The 5-steps required to process time for employees
7. The Overtime Request Process
8. How to process occasional time activities that require involvement by managers and supervisors
9. Other features available in Edison for managers and supervisors, such as: Enterprise Learning Management, Performance Evaluation, and Human Resources.
10. Where to access additional information that will enhance their learning, such as: Edison online training website, Computer-Based Training (CBT) and other online training.
11. Where to request assistance when needed

It is important to note that this auditorium session serves as an introduction for managers and supervisors who will be using the Edison System. Managers and supervisors are encouraged to further their learning by completing the online MSS self-study course, or by completing the MSS self-study CBT.

How to find Edison Training Information (Demo)

All training materials are available online at http://intranet.state.tn.us/erp

How to Use the UPK (PowerPoint Demo from Training Website)

Edison Modules Overview (Discussion)

Manager Self-Service (MSS) is a part of the software functionality that is available in the Edison System. It provides managers and supervisors with online access to the State of Tennessee's Human Resources System. Managers and supervisors only have access to the employees that report to them via their security roles in Edison. The functions that can be performed are also predefined.

There are four areas in which Manager Self-Service is available. They are:

1. Time and Labor
2. Enterprise Learning Management
3. Performance Management
4. Human Resources

Time and Labor is the part of the Edison System that deals with entering and approving employee time. Employee time can be entered, edited, approved and denied in the Time and Labor Module. This module also keeps track of all employee absences.

Enterprise Learning Management is the facility within Edison that enables the State of Tennessee to manage, track, deliver and report on learning delivered through established methods both inside and outside of the organization.

Performance Management enables managers and supervisors to plan, evaluate and manage performance for their employees. Performance Evaluation documents will be documented online and some will be routed within Edison to appropriate management for review and approval/denial.

Human Resources enables managers and supervisors to view other information regarding their employees, such as: emergency contact information.

New Terminology / Definitions (Time and Labor)

Following are some of the new terms associated with Edison Time and Labor Module:

Employee ID (Empl ID) – A random identification number assigned to each State of Tennessee employee that will be the primary employee identifier in Edison.

Exception – A condition that exists regarding reported time when it does not comply with Time and Labor Rules. All Exceptions require review or action by a manager or supervisor.

Payable Time – The resulting time after Time Administration has successfully applied all applicable Time and Labor rules to reported time. Payable time is sent to payroll for processing.

Reported Time – The time submitted on the employee's timesheet.

Time Reporting Code (TRC) – A code that is assigned to reported hours on the employee's timesheet identifying the type of time or leave reported. (For example: Sick, Regular Hours or Annual)

Time Administration – The core process in Time and Labor that applies all applicable Time and Labor rules to reported time. The end result of the Time Administration is either payable time that will be sent to payroll for processing or exceptions that are not passed to payroll.

Task Profile – Assigned to an employee's reported time to account for payroll costs associated with a specific task. The Task Profile charges the identified time to the appropriate financial chart-string.

Task Group – Assigned to an employee to determine Task Profiles available for selection on the time sheet.

Course Lesson 1: Time and Labor Overview

Discussion

This lesson provides an overview of the Edison Time and Labor roles and responsibilities, the Edison Time and Labor process, and the Edison time approval steps for managers and supervisors.

Key Notes

- Employees are required to enter time on a weekly basis in the Edison System. The supervisor is responsible for approving employee time by the Time and Labor cut-off date.
- If reported time does not comply with the Time and Attendance rules, exceptions are created. Exceptions must be corrected by the Timekeeper or supervisor.

Activities (UPK Demo Script)

1. Understanding Time and Labor

Course Lesson 2: 5 Steps to Processing Employee Timesheets

Discussion

This lesson provides an overview of time-related activities that managers and supervisors will complete on a regular basis. Edison is designed to have the employee's immediate supervisor approve his/her timesheet. Note: Alternate Time Approvers have been identified to process overtime requests and reported time when the immediate supervisor is not available.

There are 5 steps in Edison that a manager or supervisor must complete in order to process an employee's timesheet. Managers or supervisors must complete this process in order for employees to be paid for Reported Time. The 5 steps are described below.

STEP 1: ***View Employee Timesheet*** – A manager or supervisor can view current or historical timesheets submitted for an employee. The timesheet provides hourly reporting detail and, when appropriate, allocation information for Projects or Grants. A manager or supervisor should review every employee's timesheet information in order to ensure that hours are assigned correctly to Time Reporting Codes (TRC) and Task Profiles. If a correction is required, the manager or supervisor can make changes and resubmit the time.

STEP 2: ***Manage Timesheet Exceptions*** – Exceptions are generated when Reported Time from individual employees needs further review. The hours reported on the timesheet may simply need to be verified, or the hours may not comply with State of Tennessee's Attendance and Leave Policies and Procedures. Exceptions are assigned a severity level of Low, Medium or High. Exceptions at a Low or

Medium severity level allow the system to create Payable Time. These Exceptions must be reviewed to determine if a corrective action is required. However, Exceptions at a High severity level require an action or correction prior to Reported Time becoming Payable Time and moving to payroll for processing. If Exceptions are not properly managed, employees are at risk of not being paid.

***STEP 3:* View Employee's Payable Time (Summary) –** The Payable Time Summary page displays one week's Payable Time by date and then by TRC. The Payable Time Summary provides a snapshot view of an employee's Payable Time.

***STEP 4:* View Employee's Payable Time (Details)** – After the timekeeper or supervisor has completed STEP 1 and STEP 2, Edison Time Administration processes and applies appropriate Time and Labor rules to all reported hours. The supervisor then views the employee's Payable Time to see details of all hours that will be passed to payroll for processing.

***STEP 5:* Approve Employee's Payable Time –** This is the last step in the approval process. After the supervisor or Alternate Time Approver approves the employee's Payable Time, the time is sent to payroll for processing.

Key Notes

- Edison requires employee time be entered and approved on a weekly basis.
- The immediate supervisor or Alternate Time Approver is the final approval prior to the employee's time passing to the payroll system for processing.
- Multiple individuals have been identified to approve time in the absence of the supervisor. Your agency Time and Labor Administrator can provide a list of Alternate Time Approvers.

Activities (UPK-Demo)

1. View Employee's Timesheet
2. Manage Timesheet Exceptions
3. View Employee's Payable Time (Summary)
4. View Employee's Payable Time (Details)
5. Approve Employee's Payable Time

Course Lesson 3: Overtime Request (Daily Process)

Discussion

This lesson provides an overview of Overtime Request process. An Overtime Request is required to be in the Edison System for any time worked in excess of the employee's scheduled hours. This would include employees receiving cash compensation or compensatory time. The Overtime Request must be approved by the employee's supervisor or the Alternate Time Approver prior to the timesheet submission. Overtime requests can be submitted for a time period as well as for a day. A time period is the employee's official work week, which in most cases, falls within the seven-day period beginning Sunday and ending Saturday.

Key Notes

- An Overtime Request is required to be in the Edison System for any time worked in excess of the employee's scheduled hours.
- All Overtime Requests must be approved.
- The employee can enter the Overtime Request in Edison using Employee Self-Service. However, some agencies may have timekeepers enter these requests on behalf of the employee.

Activities (UPK)

1. Supervisor Approves/Denies Employee Overtime Request

Course Lesson 4: Enterprise Learning Management

Discussion

This lesson provides an overview of the procedures for accessing and using Manager Self-Service Enterprise Learning Management (ELM) pages.

New Terminology / Definitions

Following are some of the new terms associated with Enterprise Learning Management Module:

Team Members – All employees that report to you as an immediate supervisor (i.e., your direct reports) according to the Human Resource record.

Learner – Any individual who will be enrolled in a training activity.

Learning Financial Administrator – The role that confirms the chartfield values in the enrollment process.

Chargeback – The mechanism used in billing an internal agency for learning events.

Activity – A training course with a date and time assigned.

Team Members Learning Details – A list of all team members and their corresponding training details.

Key Notes

- Team Members is a list of all employees that report to you as recorded in Human Resources record. You can view details about each employee's learning.
- Learning Approvals is a list of your direct reports pending learning requests. You can also approve or drop requests on this page.
- Financial Administrator cannot be a manager or supervisor. A Financial Administrator should be a person that does not have anyone reporting to him or her. This creates a continuous/circular approval process.
- All approvals for training should be made within a maximum of 24-48 hours. This eliminates a backlog of training requests and ensures that learners are enrolled in training in a timely manner.

- In order for a learning administrator to get approval in the absence of a manager, the manager has to contact security to re-route the approval process. There has to be a beginning and end date assigned to this process.

Activities (UPK – Demo Location)

1. Supervisor Enrolls Team Members Into an Activity
2. Supervisor Approves Employee Training Enrollment
3. Supervisor Drops Team Member From Activity

Course Lesson 5: Understanding the Job Performance Plan Process

New Definitions

Following are some of the terms associated with the Job Performance Plan Process:

Performance Documents – Performance Evaluation templates created in Edison.

Major Job Responsibilities – Refers to job performance responsibilities on the current State paper job performance planning and evaluation document.

Characteristics of Exceptional Performance – Refers to characteristics of exceptional performance on the current State paper job performance planning and evaluation document.

Discussion

The Job Performance Plan (Job Plan) process documents the discussion between the immediate supervisor and the employee for the purpose of explaining and clarifying the evaluation process, major job duties and responsibilities, and the performance necessary to achieve an exceptional rating.

The Job Performance Plan (Job Plan) consists of major job responsibilities and characteristics of exceptional performance (i.e., performance expectations necessary to complete the assigned tasks at an exceptional level) for which performance will be assessed.

Key Notes

- Agency Performance Evaluation Coordinators will usually initiate the Job Performance Plan (Job Plan).
- It is the responsibility of the Manager to determine the major job responsibilities and characteristics of exceptional performance assigned to the individual employee.
- No ratings or assessment of performance are ever recorded on a Job Performance Plan.
- Managers should provide employees without computer access with a paper copy of their Job Performance Plan (Job Plan) at the time of discussion.

Activities (Demo Location)

1. Manager Modifies The Job Performance Plan (Job Plan).

2. Manager Makes Job Plan Available, Marks Discussion Held

3. Manager Acknowledges and Completes Job Performance Plan

Course Lesson 6: Other Features Available to Managers/Supervisors (Demo and Discussion)

URL – http://intranet.state.tn.us/erp

Time and Labor

Processing Occasional Time Activities

- Supervisor reports time on behalf of an employee
- Supervisor enter an Overtime Request on behalf of an employee
- Supervisor views employee Overtime Request
- Supervisor views employee Leave Balances
- Supervisor reviews Overtime in a split week

Enterprise Learning Management

Other ELM Topics:

- Supervisor Views Team Member Learning Details
- Learning Financial Administrator Approves Training Enrollment
- Supervisor Denies Team Member Enrollment
- Supervisor Assigns Supplemental Learning
- View Team Member Assigned Objectives
- View Team Member Certification Status

Performance Evaluations

Interim Review Process:

- Creates Interim Review
- Reviews and Modifies the Interim Review
- Rate the Interim Review
- Make Interim Review available and mark Review Held
- Acknowledge Interim Review
- Completes Interim Review

Formal Review Process:

- Review and Modify Formal Performance Evaluation
- Rate the Formal Performance Evaluation
- Make the Formal Evaluation Available
- Enter Date of Discussion and mark Review Held

- Acknowledge the Formal Performance Evaluation
- Submit the Formal Performance Evaluation
- Approve/Deny the Formal Performance Evaluation
- Appointing Authority Approve/Deny the Performance Evaluation
- Complete the Formal Performance Evaluation

View Historical Performance Documents:

- View Historical Performance Documents

Human Resources

- View Emergency Contact Information

Review with Question and Comments

Evaluation