

## MSS – COURSE SYLLABUS AND KEY NOTES

### COURSE NUMBER 710 - CLASSROOM

### MANAGER SELF SERVICE

#### Classroom Protocol

1. *Attendance*
2. *Housekeeping and Facility Rules*
3. *Introductions*
4. *Classroom Activity Overview*

#### Modules Overview Discussion

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

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

1. Time and Labor
2. Enterprise Learning Management
3. Performance Management
4. Human Resource Features
5. Travel and Expense Features

**Time and Labor** is the part of the Edison System that deals with time entry. The time can be entered, edited, approved or 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, within or outside of the organization.

**Performance Management** enables managers 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 Resource** enables managers and supervisors to quickly retrieve emergency information for their employees.

**Employee Travel** enables managers and supervisors to approve employee expense reports and travel authorizations.

## Course Lesson 1: Time and Labor Overview

### New Definitions

**Employee ID** – *Employee 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.*

**Time Reporting Code** – *A code that is assigned to reported hours on the employee's timesheet identifying the type of time or leave reported (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.*

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

**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.*

**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.*

### 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 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)

1. Understanding Time and Labor

## Course Lesson 2: The 5 Steps to Processing Timesheets

### Discussion

This section provides an overview of time related activities that a supervisor would complete on a regular basis. Edison is designed to have the employee's immediate supervisor approve their timesheet. However, Alternate Time Approvers have been identified by your agency to process overtime requests and reported time if 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 receive compensation. The five steps are:

**STEP 1 – View Employee Timesheet** – A supervisor can view current or historical timesheets submitted for an employee. The timesheet provides hourly reporting detail and allocation information to Projects or Grants using a Task Profile. To ensure the employee reported the appropriate hours, Time Reporting Codes (TRC) and Task Profiles, the supervisor will need to review the employee's timesheet. If a correction is required, the supervisor can make changes and resubmit the time.

**STEP 2 – Manage Timesheet Exceptions** – Exceptions are generated when reported time 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. The Exceptions are assigned a severity level of Low, Medium or High. Low and Medium severity level Exceptions enable the system to create Payable Time. These Exceptions must be reviewed to determine if a corrective action is required. However, High severity level exceptions require an action or correction prior to this time becoming Payable Time and moving to payroll for processing. If Exceptions are not properly managed, the employee is 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 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 viewed the Employee Timesheet and Managed the Employee's Time Exceptions, 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)

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 section 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, is 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: Processing Occasional Time Activities (informational)

### Discussion

This section provides an overview of time related activities that supervisors will occasionally be required to perform in Edison. These processes will provide important information to the manager. Additionally, this section will demonstrate how to enter time related requests on behalf of the employee.

Tasks that a manager or supervisor may be required to perform on occasion are:

**Supervisor Reports Time On Behalf Of an Employee** – Edison is designed to allow an employee to enter time using Employee Self Service or to allow a Timekeeper to enter time on behalf of an employee. If necessary, a supervisor can enter time on behalf of an employee using Manager Self Service. Your Agency will determine and communicate who is responsible for your employees' time entry.

**Supervisor Enters An Overtime Request On Behalf Of An Employee** – An Overtime Request is required to be in the Edison system for any time worked in excess of the employee's scheduled hours. Edison is designed to allow the employee to enter the overtime request using Employee Self Service or to allow a timekeeper to enter the overtime request on behalf of the employee. However, the supervisor can also enter the request if needed.

**Supervisor Views Employee Overtime Request** – Supervisors can view current or historical overtime requests to verify the amount of overtime that the employees have requested to date or view the comments field to find the reason overtime has been requested and approved in the past.

**Supervisor Views Employee Leave Balances** – All employees' leave balances including sick, annual, and compensatory time are available on a single page within Edison. Service Credit and Sick Leave Bank Enrollment information can also be found on these pages.

**Supervisor Reports and Review Overtime in a Split Week** – If time is worked in excess of regular scheduled hours during a split work week, the system will not process the overtime until after the FLSA time period is complete. This may cause Unprocessed Overtime (UPOT) or Unprocessed Anticipated Overtime (UPAOT) to be generated after Time Administration runs. Once the FLSA time period is complete and after Time Administration runs again, the UPOT and UPAOT will convert to the corresponding overtime TRCs (ROT, POT, ANTOT, etc). Just as the legacy system paid overtime in a split week, the unprocessed overtime will not be paid until the following pay cycle.

### Key Notes:

- An employee's schedule assigns days to be worked and number of hours to be worked each day, not the actual time worked. The schedule row is pre-populated on the employee's timesheet.
- An employee's supervisor has the ability to enter a Timesheet or an Overtime Request on behalf of an employee.

## Activities (UPK – Optional depending on time availability)

1. Supervisor reports time on behalf of an employee
2. Supervisor enter an Overtime Request on behalf of an employee
3. Supervisor views employee Overtime Request
4. Supervisor views employee Leave Balances
5. Supervisor reviews Overtime in a split week

## Course Lesson 5: Enterprise Learning Management

### Discussion

This section provides an overview of the procedures for accessing and using manager self service Enterprise Learning Management (ELM) pages.

### New Definitions

**Team Members** – All employees that report to you as a supervisor according to the Human Resource record.

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

**Learning Financial Administrator** – This role confirms the Chartfield values in the enrollment process.

**Chargeback** – This is 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 can not be a manager/supervisor. Financial Administrator should be a person that does not have anyone that reports to them. This creates a continuous/circular approval process.
- All approvals for training should be made within 24-48 hours max. This eliminates a backlog of training requests and to ensure that learners are enrolled in training in a timely manner.
- In order for a learning administrator to get approval in 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

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

## Course Lesson 6: Understanding the Job Performance Plan Process

### New Definitions

**Performance Documents** – Performance Evaluation templates created in Edison.

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

**Characteristics of Exceptional Performance** – Referred to as 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 Manager 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 (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

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 7: Other Features available to Managers and Supervisors (Demo and Discussion)

URL – <http://intranet.state.tn.us/erp/training.html> (Manager Self Service Online Course)

### 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

### Managing Employee Travel (*Available with Financials Go-Live*)

- Using Summary Approvals for Expense Transactions
- Approving Expense Reports
- Approving Travel Authorizations
- Approving Cash Advances
- Reassigning Approval Work

### Review with Question and Comments

### Evaluation

<http://intranet.state.tn.us/erp/traininghcm.html> (*Bottom of the page*)