

# Manager Self-Service Tips and Tricks

## How to get there

From the Employee Self Service Home Page, select **Manager Home Page**



## MANAGER SELF SERVICE

Additional Notifications	Recruiting
<a href="#">→ Actions List</a>	<a href="#">→ Applicant Manager</a>
<a href="#">→ Inbox</a>	
Employee Management	Reference
<a href="#">→ Compensation</a>	<a href="#">→ Emergency Contacts</a>
<a href="#">→ Employee Goals</a>	<a href="#">→ Employee Notes</a>
<a href="#">→ Employee Profile</a>	<a href="#">→ Event Schedule</a>
<a href="#">→ Employee Notes</a>	<a href="#">→ Organization Outline</a>
<a href="#">→ Labor Management (Applets)</a>	<a href="#">→ Phone List</a>
<a href="#">→ Performance Reviews</a>	
<a href="#">→ Training</a>	

## 1. Organization Outline

Provides a list of positions (and the employees in that position) that report to the manager using a hierarchical layout; identifies # of budgeted and # of assigned FTEs for each position.

Reference
<a href="#">→ Emergency Contacts</a>
<a href="#">→ Employee Notes</a>
<a href="#">→ Event Schedule</a>
<a href="#">→ Organization Outline</a>
<a href="#">→ Phone List</a>

1. Under Reference, select **Organization Outline**

## Manager Self-Service Tips and Tricks

A list of positions that report to the manager will be displayed...

### ORGANIZATION OUTLINE

Expand All Positions

- 28\_04 - VP, Customer Supp & CIO (1 budgeted/1 assigned)  
(1 FTE) Barbara F Radice
  - ▶ 22\_15 - Corporate Liaison (1 budgeted/1 assigned)
  - ▶ 26\_02 - Director, Access Center (1 budgeted/1 assigned)
    - ▶ 06\_55 - CSR, Access Center II (1 budgeted/1 assigned)
    - ▶ 12\_13 - RN, Res Nurse, Adm&GWYN (1 budgeted/1 assigned)
    - ▶ 23\_37 - Manager, Customer Support Services (1 budgeted/1 assigned)
      - ▶ 05\_37 - CSA, I (12 budgeted/12 assigned)
      - ▶ 07\_41 - CSA, Lead (1 budgeted/1 assigned)
    - ▶ 25\_23 - Manager, Ext. Care Svcs. (1 budgeted/1 assigned)
      - ▶ 07\_33 - LVN, ECS (9.55 budgeted/7.6 assigned)
      - ▶ 11\_60 - RN, ECS Non Case Manager (16.8 budgeted/14.1 assigned)

For each position, the # of budgeted and the # of assigned (or filled) positions will be listed.

2. Click on the drop-down arrow ▶ (to the left of the position title) to expand the list to see the employees in that position.

- ▶ 25\_23 - Manager, Ext. Care Svcs. (1 budgeted/1 assigned)
  - ▼ 07\_33 - LVN, ECS (9.55 budgeted/7.6 assigned)
    - (1.95 FTE) Vacant**
    - (1 FTE) Diane L Andersen
    - (1 FTE) Diane Burks
    - (1 FTE) William F Jones
    - (1 FTE) Shannon Leach
    - (0.6 FTE) Michelle A LeDuc
    - (1 FTE) Mary G Sanares
    - (1 FTE) Diane M Schultz
    - (0 FTE) Richard L Singleton
    - (1 FTE) Kendrea Wiggins

For under-budget positions, it will indicate the (# FTE) vacant.

Over budget positions will appear as follows (ex. 8 budgeted/ 9 assigned).

3. You can also check **Expand All Positions** to see **all** employees/**all** positions.

### ORGANIZATION OUTLINE

Expand All Positions

# Manager Self-Service Tips and Tricks

## 2. Employee Profile

Employee Management
→ Compensation
→ Employee Goals
→ <u>Employee Profile</u>
→ Employee Notes
→ Labor Management (Applets)
→ Performance Reviews
→ Training

1. Under Reference, select **Employee Profile**
2. A list of the employees that report to the manager will be displayed

### EMPLOYEE PROFILE

<a href="#">Dana M Bryce</a>
<a href="#">Marc A Hahn</a>
<a href="#">Nanette R Johnson</a>
<a href="#">Robert C Knodle</a>
<a href="#">Chris C Mizser</a>
<a href="#">Jean M Piekarz</a>
<a href="#">Diana C Wendel</a>
<a href="#">Janet K Wyss</a>

3. Click on the employee to view their profile; for each employee you will see the following information:
  - **Employee Information:** Employee ID, In Service, In Position
  - **E'EE status:** Employee Status (Active/LOA), Employment Status (FT, PT, etc), Original Hire Date, Last Hire Date
  - **Position Information:** Position Date, Position, Reason, Start Date
  - **Compensation Information:** Salary Date, Position, Base Pay Rate, Frequency, Base Pay Annual, % Inc, Grade
  - **Performance Review Information:** Review Date, Position, Score, Cycle (90 Day, Annual Staff, or Annual Mgr Review), Reason, Reviewer
  - **Address**
  - **Phone**
  - **Emergency Contact Information**

## Manager Self-Service Tips and Tricks

<b>Name</b>	Happy GoLucky				
Employee ID	9030				
Employee Status	Active (10/6/2008)				
In Service	3 Months				
<b>Primary Position</b>	Manager, Hospice Teams				
In Position	3 Months				
Supervisor	Traci E Hawkins, HR Specialist				
Organization	San Diego Hospice				

Employment Date	Employee Status	Employment Status	Hire Date	Last Hire Date	Termination Date
10/6/2008	Active	Full Time	10/6/2008	10/6/2008	

Position Date	Position	Reason	Start Date	Promotion
10/6/2008	Manager, Hospice Teams	None	10/6/2008	

Salary Date	Position	Base Pay Rate	Frequency	Base Pay Annual	% Inc	Grade
10/6/2008	Manager, Hospice Teams	44.00	Hourly	91,520.00		LEVEL25

Position	Annual Compensation	Compa Ratio	Pay Grade Minimum	Pay Grade Maximum
Manager, Hospice Teams	91,520.00	104.82	34.98	48.97

Review Date	Position	Score	Cycle	Cycle Type	Reason	Reviewer
This table currently contains no data.						

	Phone
<a href="#">Home</a>	619-278-1600

### 3. Compensation

1. Under Employee Management, select **Compensation**

Employee Management
→ <a href="#">Compensation</a>
→ <a href="#">Employee Goals</a>
→ <a href="#">Employee Profile</a>
→ <a href="#">Employee Notes</a>
→ <a href="#">Labor Management (Applets)</a>
→ <a href="#">Performance Reviews</a>
→ <a href="#">Training</a>

## Manager Self-Service Tips and Tricks

2. A list of your employees and their salary information will appear in table format...

### COMPENSATION

[Compensation](#) | [Budget](#) | [Proposals](#) | [Approvals](#) | [Return](#)

<a href="#">Name</a> ^	<a href="#">Position</a>	<a href="#">Salary</a>	<a href="#">Compa Ratio</a>	<a href="#">% of Last Increase</a>	<a href="#">Pay Change Date</a>
Travis Barker	Manager, Hospice Teams	72,800.00	83.38		
Happy GoLucky	Manager, Hospice Teams	91,520.00	104.82		
Tom Jones	Manager, Hospice Teams	60,320.00	69.09		
Church Lady	LVN, Homecare (LTC-S)	20.01	0.04		
Queen Mary	Director, Regional Home Care	72,800.00	69.49		
John Obama	Director, Regional Home Care	2,080.00	1.99		
Charles S Sheen	Health Information Specialist	28,080.00	89.70		
Frank Stallone	Director, Regional Home Care	72,800.00	69.49		

3. Sort options: name, position, salary, compa ratio, % of last increase, OR pay change date.

### 4. Phone List

Provides the following numbers for employees that report to the manager:

- Home
- Work(Cell/Direct)
- Personal Cell
- Extension

Reference
<a href="#">→ Emergency Contacts</a>
<a href="#">→ Employee Notes</a>
<a href="#">→ Event Schedule</a>
<a href="#">→ Organization Outline</a>
<a href="#">→ Phone List</a>

1. Under Reference, select **Phone List**

### PHONE LIST

[Return](#)

Name	Type	Phone	Extension
Charles S Sheen	Home	619-278-1600	
	Personal Cell	619-278-1500	
	Work (Cell/Direct)	619-278-1600	
Church Lady			
Frank Stallone			
Happy GoLucky	Home	619-278-1600	
	Work (Cell/Direct)	619-345-6789	6565
John Obama			
Queen Mary			
Tom Jones	Home	6192345673	
	Work (Cell/Direct)	619-278-6514	6514
Travis Barker	Home	619-278-1600	
	Personal Cell	619-278-1500	
	Work (Cell/Direct)	619-234-6752	6565

# Manager Self-Service Tips and Tricks

## 5. Performance Review List

1. Under Employment Management, select **Performance Reviews**



### PERFORMANCE REVIEW LIST

Retur

Employee	Position	Performance Cycle	Review Type	Score	Due Date	Status
Plekarz, Jean	<a href="#">Director, MedStafAdm &amp; HIM</a>	TEST Manager 2 COMMON 2008	Manager Review	0	1/7/2009	In Progress
Wyss, Janet	<a href="#">Manager, HACM</a>	TEST Manager 2 COMMON 2008	Manager Review	N/A	12/15/2008	In Progress

2. As reviews become due, they will appear in Performance Review List with a Status of "In Progress."

**IMPORTANT:** The Due Date in the Performance Review List refers to the Performance Cycle End Date and does not necessarily correspond to the actual employee's Review Due Date.

- Annual Staff Reviews are set up to become due based on the Last Date of Hire.
- Annual Manager Reviews have a common due date.

To verify the Employee's Review Due Date

- Check the Employee Profile for the Last Date of Hire OR

### Filter Options

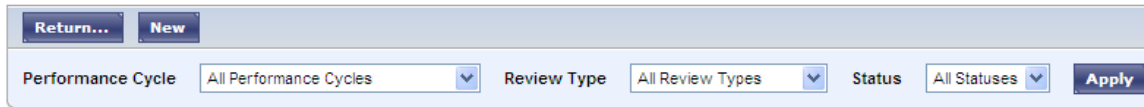
You can filter the list of performance reviews to show only those with:

- A specific Performance Cycle (90-Day, Annual 08, Merit 2008, etc)
- Review Type
- Status (In Progress, Finalized, etc)
- Or a combination of all 3

## Manager Self-Service Tips and Tricks

Select the filters you wish to apply from the drop down menu and then click Apply.

### PERFORMANCE REVIEW LIST



### Sort

<a href="#">Employee</a>	<a href="#">Position</a>	<a href="#">Performance Cycle</a>	<a href="#">Review Type</a>	<a href="#">Score</a>	<a href="#">Due Date</a>	<a href="#">Status</a> ^
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To sort the list of performance reviews, click on one of the following column headers/titles:

- Employee
- Position
- Performance Cycle
- Review Type
- Score
- Due Date
- Status

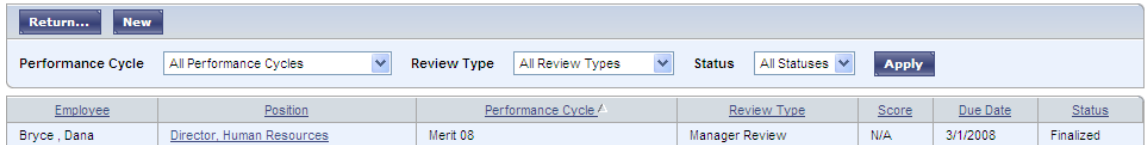
Click a second time to sort the list in the reverse order. Note: You can only sort by one column at a time.

**For 2008, performance review information was entered into KRONOS.**

**To look up the score for a 2008 review...**

1. Go to the Performance Review List.
2. Find the Employee record with a Performance Cycle of "Merit 2008" etc, Score of "N/A", and Status of "Finalized".

PERFORMANCE REVIEW LIST Return



<a href="#">Employee</a>	<a href="#">Position</a>	<a href="#">Performance Cycle</a> ^	<a href="#">Review Type</a>	<a href="#">Score</a>	<a href="#">Due Date</a>	<a href="#">Status</a>
Bryce , Dana	<a href="#">Director, Human Resources</a>	Merit 08	Manager Review	N/A	3/1/2008	Finalized

3. Then click on their position for that record to open the review.

<a href="#">Employee</a>	<a href="#">Position</a>
Bryce , Dana	<a href="#">Director, Human Resources</a>
Hahn , Marc	<a href="#">Director, Information Technologies</a>

## Manager Self-Service Tips and Tricks

4. The overall score will appear in the General Comments section.

### PERFORMANCE EVALUATION FORM

Print Preview...					
Employee	[REDACTED]	Reviewer	Barbara Radice	Performance Ratings	5 - 5
Employee Position	[REDACTED]	Due Date	3/1/2008		4 - 4
Employee ID	[REDACTED]	Last Reviewer			3 - 3
Hire Date	10/22/2000	Last Review Date			2 - 2
Employee Status	Active	Performance Cycle	Merit 08		1 - 1
Attachment					

**Instructions** This is a form used to enter the employee score for the review period.

#### COMPETENCY CATEGORIES

<b>Overall Score</b>			
Enter the Overall Performance Evaluation Score			
<b>Comments</b>			
<input type="text"/>	Category Score	N/A	
<b>General Comments</b>			
<input type="text" value="The overall score will appear here"/>	Overall Score	N/A	

## 6. Event Schedule

Calendar View of Birthdays and Anniversaries for your staff.

Reference
→ <a href="#">Emergency Contacts</a>
→ <a href="#">Employee Notes</a>
→ <a href="#">Event Schedule</a>
→ <a href="#">Organization Outline</a>
→ <a href="#">Phone List</a>

1. Under Reference, select **Event Schedule**

# Manager Self-Service Tips and Tricks

The current month will open and the current day will be highlighted.

EVENT SCHEDULE Return



Events

→ View List of Events for January 2009

Select a Month  Select a Year

January 2009						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9 <a href="#">1 Birthday(s)</a>	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Click on the Birthday or Anniversary link for the day to see name of the employee

9 <a href="#">1 Birthday(s)</a> 	OR	30 <a href="#">1 Anniversary</a> 
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To select a month other than the current one, select the month and year from the drop down lists and click Go.

Select a Month  Select a Year   