My Staff

What can you do on My Staff?
My Staff provides a point of access to all the information you need to have about your direct reports. Tiles are available on the Manager Space page for quick access to specific items. The drop-down menus at the top of the Manager Space page provide additional access to all areas available to a manager.

My Staff tile gives you a view of all direct reports.

Double-clicking or right-clicking on an employee and selecting Open gives access to the employee's profile page. Right-click on an employee to view actions you can perform for the employee.

Click the menu option for **My Staff > My Staff** for specific employee information. Tiles are for quick reference display.

Organization Chart
To view your own organization structure.

1. From the top menu bar, select My Staff > My Staff then click on My Organization tab. The chart view is color -coded and displays the following:

- The employees that report directly or indirectly to you.
- Blue denotes staff who are also managers.
- Yellow denotes direct reports.
- Red denotes dotted line reports (functionality that will be available in future).
- Green denotes open positions if no one is currently holding the same position (if you have multiple RN positions and one is vacant, it will not show green as there are other RNs).
- Click Charts and select List to view the same information in list format.

Staff Summary Information

1. From the top menu bar, select **My Staff > My Staff.**
2. On the **My Staff** tab, select the staff for whom you want to view information. To locate a staff member, type the full or partial name in the Search field.

- **Profile:** Click **View Full Profile** to access the employee's full profile.
- **Compensation:** Click **View Compensation Profile** to access the employee's current compensation.
- **Notes:** Click the plus icon to create a new note. Double click an existing note to open and update.
- **Absence Balances:** Shows PTO/Leave balances for the employee.

Birthdays and Anniversaries

To view a list of birthdays and anniversaries for your direct reports.

1. From the top menu bar, click **My Staff > Birthdays and Anniversaries.** Birthdays and Anniversaries in the current month will display a yellow flag; a green flag will display for the next month.

- The left window pane will display upcoming birthdays and anniversaries.
- The right window panes will display all birthday and anniversaries.

2. Click **Search** to locate a specific employee's birthday or anniversary date.

What can you do on the employee profile?

The employee profile contains all the information you can see about your employee. This is the only place from which you can submit personnel actions (Update FTE, Terminate, etc.)

1. From the top menu bar, select **My Staff > My Staff**.
2. Locate the employee and click the **View Full Profile** link on the Profile dashboard.

- **At a Glance:** To view summary information about the employee, including:
  - Employee ID number, position information, direct manager, pay rate.
  - Dates and years of service.
  - General information (relationship to organization, relationship status, work type, remote work status).
  - Work preferences (travel, relocation, locations, overtime, positions).
  - Other preferences
- **Work Assignments:** To view the employee's work assignment (position)
- **Personal Information:** To view and update the employee's contact information, emergency contact, and addresses.
- **Staff:** If a direct report has staff reporting to them, this is where you would see their staff. You will not see this option if the employee profile does not have staff.
- **Compensation:** To view the employee's detailed current and historical compensation. Access the compensation profile from this tab.
- **Payroll:** To view information for tax purposes.
- **Work Preferences:** To view or update the employee's preferences in terms of locations, work schedules.
- **Performance:** Not used in current state, reserved for future use
- **Talent Profile:** To view or update the employee's qualifications
- **Take Notes:** To view your notes on the employee as well as the employee's public notes. You can add a note on this tab by clicking Create. Clicking Public will allow the employee to view the note.
- **Employee Relations:** To view coaching or disciplines
- **Absences:** To view PTO/Leave balance.

In addition, you can submit the following personnel actions from the profile's
Action bar:

- Transfer
- Terminate

Work Assignments
An employee can have multiple work assignments. For each assignment you can view a position description, a position history, and a compensation profile.

1. From the top menu bar, select **My Staff** and click the **View Full Profile** link on the **Profile** dashboard and then click the **Work Assignments** tab.
2. Open a work assignment to view the work assignment details On the work assignment record, you can view the following information:

- **Overview** – Click the Compensation Profile link to view detailed compensation for the work assignment, including this information:
    - Current and historical pay rates. Pay Rate History will show complete pay rate history. Recent Pay Rate History will show the last 4 pay rates.
    - Select Printable Current Compensation to generate a PDF version the employee's compensation.
- **Other Assignments** – To view a list of other work assignments.
- **Position Description** – To view the description of the work assignment.
- **Position History** – To view any position changes that have occurred on the work assignment.

Updating Personal Information
The Personal Information tab on the employee's profile is where you view contact information, emergency contact information and addresses. Managers can add or update information in this area, but it is strongly advised to have the employee add or update their personal information on Employee Space.

If you add personal information for an employee, you would click the Add button on the action bar, enter effective date, enter information and click OK.

If you change or update personal information for the employee, double-click the item to open or right click the item to open, enter effective date, make changes or updates and click OK. Change address also has a Change Address button that can be used.

Talent Profile

What is an employee's talent profile?
An employee's talent profile consists of all the employee's talent attributes; credentials and education (competencies, skills, employment history, achievements and references are not currently used).

Talent attributes are also referred to as *qualifications.*

Talent attributes can be added to an employee profile in multiple ways:

- Employees can modify their own talent profile. Credentials or education added by an employee remain **Not Validated** until you or Human Resources validates them.
- When an employee completes a development activity where the outcome is a credential, that talent attribute is added to the talent profile as soon as the development activity is completed by Organizational Learning & Development.
- You can add or update talent attributes for your own employees. You can create them as validated.
  You can view and validate your employees' talent attributes that are awaiting validation on To Do > Validate Qualifications.
  Your employee may request you to:
    - Renew a credential.
    - Complete an education attainment that was in progress.

You can view all submitted requests awaiting your action under **TO DO > Qualification Requests**.

Adding or updating talent attributes
You may receive an email when a talent attribute is added or changed or when a request to update a talent attribute has been submitted.

To add a talent attribute

1. From the top menu bar, select **My Staff > My Staff** and select the employee for whom you want to add a talent attribute.
2. On the Profile tile, select View Full Profile link or open the employee on **My Staff**.
3. Click the **Talent Profile** tab.
   The employee's competencies, skills, credentials and education appear in separate panels.
4. On the appropriate panel, click **Create**.
   (You many need to scroll down to see some of the panels)
5. Specify the information.
   Use the select fields as much as possible. For example, if you are adding a competency,

try to find a competency that is close or identical to the one you want to add. If you cannot find a value that matches what you need, type the value in the **"Other"** field. You should also consider requesting human resources add the new value.

6. Click **Save**.

The talent attribute is added to your employee's talent profile and visible to the employee and Human Resources.

If you have not validated the talent attribute, the employee can update almost any field. If the talent attribute is validated, the employee can only add comments or an attachment to the record or submit a request to update other fields such as the proficiency. You can update any field.

To update a talent attribute

NOTE: You can update any field in a talent attribute, whatever status it may be in.

1. Open the talent attribute.
2. Change any fields.
3. Click **Save**.

To remove validation or change the validation date

1. Select **My Staff > My Staff > View Full Profile**.
2. Click the **Talent Profile** tab.
3. Open the appropriate talent attribute.
4. Clear the Validate check box or change the validation date.
5. Click **Save**.

Renewing a credential

Credentials may need to be renewed on a cyclical basis. An employee can request your approval to renew a credential. You can cancel the request or renew the credential. You can renew a credential whether a request to renew has been submitted.

You may receive an email notification when an employee has submitted a request to renew a credential.

To cancel a request to renew a credential

1. In manager Space, from the top menu bar, select To DO > Qualification Requests.
2. Select the Skills Renewals or Credential Renewal tab.
3. Select the skill or credential and click Cancel Request to Renew.

The request disappears from the Qualifications Request list. The employee can submit a new request.

To renew a current or expired credential

1. In Manager Space, from the top menu bar, select **To Do > Qualification Requests.**
2. Click the **Credentials Renewal** tab.
3. Click **Renew.**
4. Specify this information.

   Reason

   Select a reason for the action.

   Requested Renewal Date

   Specify or confirm the renewal date.

   Requested Expiration Date

   Specify (or confirm) the expiration date.

   Attachment Description, File Name

   Attach applicable document.

   Comments

   Add comments.

After renewal, the credential disappears from the Qualification Requests View. On the employee's talent profile, the expiration date for the credential is updated.

Completing an education attainment

Employees can have education attainments on their profile that are In Process (for example, they may be enrolled in a college degree program). When they complete the education, they can request that the education be completed on their Talent Profile. As a manager, you can cancel the request or set it as complete. You can complete an employee's education attainment whether a request has been submitted or not.

You may receive an email notification when an employee submits a request to complete an education attainment.

To cancel a request to complete an education attainment

1. In Manager Space, from the top menu bar, select **To Do > Qualification Requests**.
2. Click the **Education Completions** tab.
3. Select the education and click **Cancel Request To Complete**.

The request disappears from the Qualifications Requests list. The employee can submit a new request.

To complete an education attainment

1. In Manager Space, from the top menu bar, select **To Do > Qualification Requests**.
2. Click the **Education Completions** tab.
3. Select the education you want to complete and click Complete.
4. Specify this information:

   Reason

   Select a reason for the action.

   Month, Year

   Specify or confirm the month and year of completion.

   Requested Expiration Date

   Specify (or confirm) the expiration date.

   Attachment Description, File Name

   Attach applicable document.

   Comments

   Add comments.

Personnel Actions

Requesting a status or FTE change – TRANSFER ACTION

You may need to change an employee's relationship status or work type. For example, an active employee who is out on leave may be switched to active leave no pay status or may be in a part time work type moving to a full-time work type.

1. Click **Manager Space** from the top menu bar and select **My Staff > My Staff**.
2. Select the employee for whom you want to request a change.
3. On the employee's profile panel, click **View Full Profile**.
4. Select the "Transfer" button from the panel and select the employee (EE number) you will be making the change for.
5. Specify the effective date.
6. Select the **Action Rea**son of **Status or Non-Elig**.
7. Select the **Relationship Status** or **Work Type** you are changing the employee to, if applicable. If changing FTE or the employee is moving to a non-eligible FTE, change the Full Time Equivalent.

   NOTE: moving an eligible employee to a non-eligible status will send a notification to the employee's InBasket where they will have to acknowledge they are moving to a non-eligible status. The notification will then to Human Resources for final approval.
8. Click **Submit**.

   The request is routed for approval to the HR Business Partner team for approval.
   The new relationship change appears on the direct report's record only after all approvers have approved.

Requesting a termination

1. Select **Manager Space** from the top menu bar, select **My Staff> My Staff.**
2. Select the employee to terminate, click **View Full Profile** or right click the employee on the **My Staff** page and click **Terminate**.
3. Enter the **Effective Date**.
4. Select the **Reason** from the magnifying glass.
5. Enter the **Termination Notice** date.
6. Add any additional information for **Attendance, Attitude, Cooperation, Quality of work, Quantity of work and Would you rehire** by clicking the down arrow and select a rating.
7. Add a **Comment** if you choose.
8. Click **Submit**.
   The request is routed for HR approval. The termination information appears on the direct reports record only after all approvers have approved.

Compensation on employee profile

***You cannot modify an employee's compensation information.

1. Access **My Staff** and select the employee that you want to view.
2. On the **Profile panel**, select **View Full Profile**.
3. Access the **Compensation** tab.
4. To view the employee's compensation for a specific work assignment, on **Compensation by Work Assignment**, open the position. You can access the following information:

- The employee's current and historical pay rates.
- Any allowances or other pay rates included in the compensation.
  NOTE: Select **Printable Current Compensation** to generate a PDF version of the employee's compensation profile.

Your To-Do tasks

1. **Validate Qualifications** – to view and validate all the credentials and education attainments that require validation.
2. **Qualification Requests** – to view all the requests submitted for renewing credentials and for completing an education attainment.

Employee Relations

This section contains procedures a manager can complete related to Employee Relations, such as creating a coaching or a discipline.

What is coaching?

Coaching is a tool to document a meeting between a manager and employee. Typically, this is used to address employee behavior before the issue becomes severe enough to require a discipline. A manager uses coaching to help prepare for the discussion with the employee and to document the discussion. The process of creating a coaching involves the following:

- Identifying the resources involved.
- Creating or attaching any relevant documentation and/or notes.
- Identify a related discipline.
- Tracking correspondence.

After the coaching is created, a manager can create a meeting with the parties involved and can later update the coaching information after the meeting takes place.

Coaching and Discipline is available from the **Employee Relations** tab on the employee's profile.

Coaching differences for Human Resources

In addition to a manager, the HR business partner team can also create or access coaching. The HR business partner team can view some information that the manager can't, as well as perform additional actions.

- The HR business partner team can view all Employee Relation items, such as notes, coaching, disciplines and grievances for each employee from the Resources list.
- The HR business partner team can see all notes or coaching across the organization
- The HR business partner team has access to fields used for reporting. When a coaching is created by a manager, the employee's primary work assignment, manager and HR business partner team contact information are all saved on the coaching and can't be changed by a manager. The HR business partner team, however, can change these fields.
- The HR business partner team has access to grievances and can create one as a result of coaching if needed.

Creating a coaching

Use this procedure to create a coaching for an employee. A coaching is a tool to document a meeting between a manage and an employee. Coaching will be sent to the HR business partner team for review.

1. Select **Manager Space > My Staff**.
2. Open the resource for which you are creating the coaching and select the **Employee Relations** tab.
3. In the Coaching section, click **Create**.
4. Specify this information:

   Group

   Select the group related to the employee.

   Type

   Select the type of behavior for which you are creating the coaching.

   Meeting

   Select the date if the meeting for this coaching.

   Follow Up

   If there is an additional follow-up meeting scheduled, select the date. You can also select this date later.

   Behavior

   Describe the behavior that is the topic of the meeting.

   Desired Behavior

   Describe the desired behavior that you would like the employee to implement.
5. You can create a note from the coaching, if desired. Creating a note at this time is optional. You can later attach an existing note to the coaching. If you create a note here, after you save it, it is available on the **Notes** tab.

   Date/Time

   Specify the date and time for this note.

   Note

   Add the note.

   Type

   Select the type of incident for which this note is being taken. For example, select “Attendance” if the employee was unexpectedly absent.

   Public

   If you select this check box, the note is visible to the employee.

   Source

   Select the source for the note. For example, if a manager personally observed the incident, select Manager Observation”.

   File Name

   Attach documents.

   URL

   Specify the URL for information related to the note.

6. Click **Save**. Additional tabs become active.
7. On the **Resources** tab, identify any additional resources that are related to this coaching. For example, a union representative may be required at this coaching session.
   Click **Create** to add a resource who is also an employee or click **Create Non-Employee** to add a resource who is not an employee. You must select a role for the resource and can specify contact information (for non-employees) and comments. If the resource is an employee, his or her email address and telephone number is filled in upon saving.
8. On the **Documents** tab, you can create a new document that contains information relevant to the discipline. A document created here can obtain comments, have a file attached, or have a URL associated. In addition to documents or notes created from this list, any documents created through the Create Document action are listed here. Documents created through this action are merged with the coaching data.
9. On the **Notes** tab, you can create or associate notes to the coaching. You can either associate an existing note using the Associate action or create a note on this tab that will be associated with the coaching. Also, if you entered information for a note at the same time you created the coaching, those notes will be listed here.
10. On the **Correspondence** tab, you can create email messages that are related to the coaching. By clicking Create, you can select an email template form as the starting point for the email. Click Next to view the email and update as needed.

Creating a meeting

After creating a coaching, the manager can create a meeting using the **Create Meeting** action. This action sends a meeting invitation to the employee, the manager and any identified resources. If the meeting subsequently needs to be canceled, the manager can use the **Cancel Meeting** action. A meeting can be rescheduled again later by using the **Create Meeting** action.

Presenting the coaching

After a meeting occurs and the manager updates the coaching information, the **Presented** action can be used to let the HR business partner team know that the employee has been notified about the coaching. Once a coaching has been presented, none of the detail information can be changed. If a coaching is presented in error, the **Revert to Draft** action can be used to correct it.

Creating a discipline from a coaching

If a coaching has been presented and the undesirable behavior continues, a manager can create a discipline from the coaching. A discipline created from a coaching contains all the same information as the coaching, except that the **Group** can be changed. The manager must select the **Step** for the discipline, the time for the discipline meeting and the consequence of the behavior. A discipline created this way has a draft status and is linked to the coaching. Any notes associated with the coaching will also be associated with the discipline. A new **Discipline** tab is enabled after a discipline is created.

Create a grievance from a coaching
The HR business partner team can create a grievance from a coaching on behalf of an employee. Like creating a discipline, the grievance contains information from the coaching and any notes associated with the coaching are associated with the grievance.

Canceling a coaching
If a manager starts a coaching but later decides not to proceed, they can use the **Cancel** action. If a coaching is canceled in error, it can be reinstated by using the **Revert to Draft** action.

Discipline
Discipline is a formal process that organizations use when an employee's behavior requires corrective action. Discipline usually occurs after one or more coaching sessions. A manager can use **Employee Relations** to prepare for and document a discipline that is being issued to an employee. Creating a discipline includes these tasks:

- Identifying the resource involved
- Creating or attaching any relevant documentation and notes
- Identifying a related coaching
- Tracking correspondence

Discipline differences for the HR business partner team:

The HR business partner team can also create or access a discipline. The HR business partner team can view some information that the manager cannot view and can perform additional actions.

- The HR business partner team can view all **Employee Relation** items, such as notes, coaching, disciplines and grievances for each employee from the **Resources** list.
- The HR business partner team has access to fields used for reporting. When a discipline is created by a manager, employee's primary work assignment, manager and human resources contact information are saved on the discipline and cannot be changed by a manager. The HR business partner team can change these fields.
- The HR business partner team has access to grievances and can create one as a result of a discipline, if needed.

Creating a discipline

1. Select **Manager Space > My Staff > My Staff**.
2. Open the resource for which you are creating the discipline and click the **Employee Relations** tab.
3. In the Discipline section, click **Create**.
4. Specify this information:

   Group

   Select the group related to the employee.

Step

Select the level of discipline severity for this discipline.

Type

Select the type of behavior for which you are creating the discipline.

Incident

Specify the date of the incident resulting in this discipline.

Meeting

Select the date if the meeting for this discipline.

Follow Up

If there is an additional follow-up meeting scheduled, select the date. You can also select this date later.

Behavior

Describe the behavior that is the topic of the meeting.

Desired Behavior

Describe the desired behavior for the employee should implement.

Consequences

Describe the consequence to the employee if the desired behavior is not achieved.

Days Away

If the discipline included suspension, specify the number of days the employee will be away from work.

5. Optionally, specify note information. This note will be available on the **Notes** tab. A note can also be added later.

Date/Time

If you do not specify a date and time, the current date and time are used.

Note

Specify note information.

Type

Select the type of incident for which this note is being taken. For example, select Attendance if the employee was unexpectedly absent.

Public

When selected, the note is visible to the employee. Public and private notes are visible to the HR business partner team.

Source

Select the source for the note. For example, if a manager personally observed the incident, select Manager Observation.

File Name

Attach a document.

URL

Specify the URL for any information related to the note.

6. Click **Save**.

7. On the **Resources** tab, identify any additional resources that are related to the discipline. For example, a union representative may be required at this discipline session.
   Click **Create** to add a resource that is also an employee or click **Create Non-Employee** to add a resource that is not an employee. You must select a role for the resource and can specify contact information and comments. If the resource is an employee, their email address and telephone number is filled in after being saved.
8. On the **Documents** tab, you can create a new document that contains information relevant to the discipline. A document created here can contain comments, have a file attached or have a URL associated. Documents created through the Create Document action are also listed here. Documents created through this action are merged with the discipline data.
9. On the **Notes** tab, you can create or associate notes to the discipline. You can either associate an existing note using the Associate action or create a note on this tab that will be associated with the discipline.
10. On the **Coaching** tab, you can associate a coaching with the discipline. Associating a coaching will also associate all of its notes to the discipline. If a coaching associated in error, it can be disassociated from the discipline using the **Disassociate** action. The coaching will still exist for the resource but will not be associated with the discipline. If a coaching is disassociated, any notes that were associated through the coaching are not automatically disassociated. Those notes need to be reviewed manually because the notes may still apply.
11. On the **Correspondence** tab, you can create email messages that are related to the discipline. Click **Create** to select an email template form which you can create an email message to notify the resources about the discipline.

Creating a meeting

After creating a discipline, the manager can create a meeting using the **Create Meeting** action. This action sends a meeting invitation to the employee, the manager and any identified resources. If the meeting subsequently needs to be canceled, the manager can use the **Cancel Meeting** action. A meeting can be rescheduled again later by using the **Create Meeting** action.

Reviewing a discipline

After a manager has completed a discipline, he or she sends the discipline for review. The appropriate HR business partner team will review the discipline. Once a discipline has been sent for review, the details can’t be changed except for the meeting date. If a discipline is sent for review in error, or if there is an error in the review, the **Revert to Draft** action can be used to correct it.

Once the discipline has been reviewed, the manager will see the **Issued** action. Selecting this action declared that the discipline has been issued to the employee.

Canceling a discipline

If a manager created a discipline but later decides not to proceed, they can use the Cancel action if the discipline has not yet been issued (status = issued). If a discipline is canceled in error, it can be reinstated by using the Revert to Draft action.

My Positions

My Positions will display any positions that report up to the manager. This will also show the salary range for each position.

It will also summarize the manager position.

Conditions of Employment – Health Components and Credentials Upcoming and Overdue items

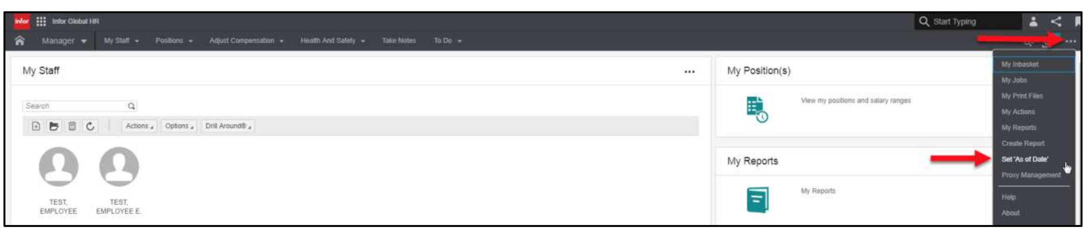
Between Conditions of Employment – Health components and Credential, all items that fall under Aspirus Conditions of Employments that are coming due (within 60 days) or are over-due. Over-due items will have a red flag next to them.

As of Date

GHR offers the ability to change the date to an "As of Date" which will give you a view of what the system looked like as of that date.

NOTE: If you are looking for a future hire date employee, you will need to change your system date as it will only pull employees hired up to what the current system date is.

1. Select Manager Space, click the ellipses in the upper, right corner and select Set **"As of Date"**.



2. Select the date you would like to view information as of
3. Once the system updates to that date, you will be able to view Manager space information as of that day or you can generate reports or lists as of that date.
4. When you want to go back to today's date, click the ellipses and click **"Clear As Of Date".**

If you have questions about this process or would like more information, please contact your Human Resources Business Partner.