TEXAS WOMAN'S UNIVERSITY™

MANAGER SELF-SERVICE

PERSONNEL TRANSACTION FORMS

HIRES ✓

REHIRES ✓

CREATE ADDITIONAL ASSIGNMENTS ✓

UPDATE ASSIGNMENTS ✓

TASK PAYMENT ✓

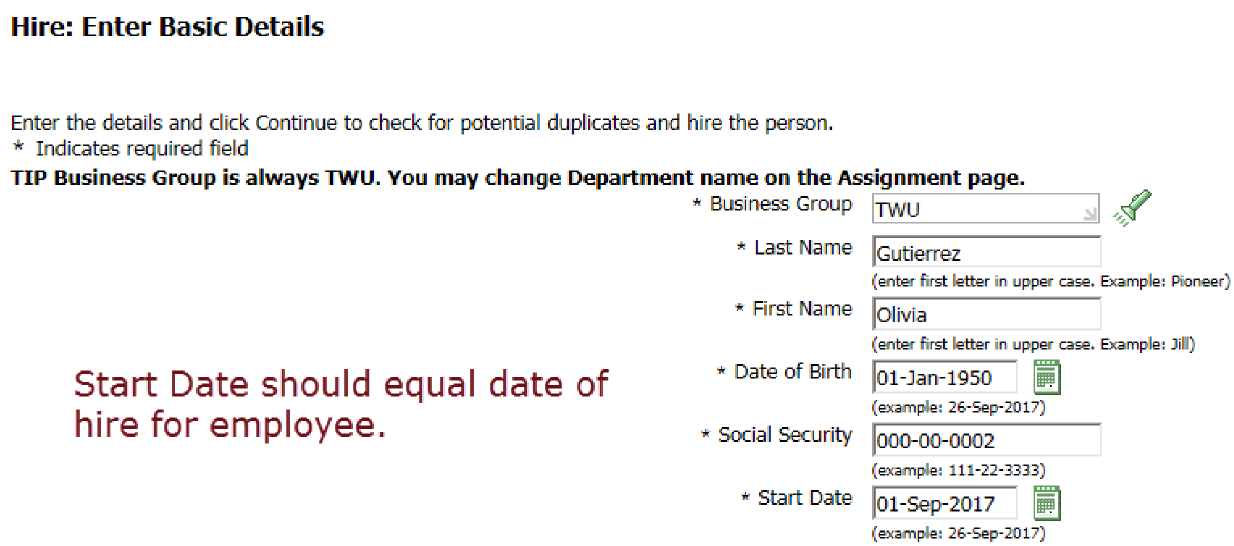
TERMINATION ✓

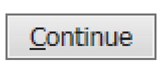
CHANGE MANAGER ✓

QUICK REFERENCE GUIDE ✓

ENTER A NEW HIRE PTF:

1. **Log-in to Phoenix**
2. **Choose Manager Self-Service**
3. **Choose Hire**
4. **If the employee has never worked for TWU, but it shows duplicate, choose No Match.**



5. **Enter the Last name, First name, Date of Birth, Social Security, and Start Date of the new employee. (If this information is entered incorrectly, it will cause a delay in the employee being able to create a Pioneer Portal account.)**
6. **Choose Continue** 

7. **Provide the person Details for the new employee (all fields with an * are required fields):**

Hire: Person Details

Enter person details.
* Indicates required field

Hire Details

Start Date	**01-Sep-2017**
Business Group	**TWU**
* Person Type	Employee

Name

Title	Dr.
* First Name	Olivia
Middle Name	
* Last Name	Gutierrez
Prefix	
Suffix	
Preferred Name	Liv
Previous Last Name	

Other

Social Security	000-00-0002
* Date of Birth	01-Jan-1950 (example: 26-Sep-2017)
* Gender	Female

8. **Choose Next** Next
9. **Hire: Assignment – Enter the Assignment Details**

   Remove “TWU” from “Department Name” and enter the employee’s department (All fields with an * are required fields):

* Department Name: Dean Arts and Sci

Address Line 1: **P O Box 425739**
City: **Denton**
State: **TX**
Texas
Zip Code: **76204**
County: **Denton**
Denton
Country: **United States**

Position

* Position Name: Dean Arts and Sci.Sr Secretary.N.1

Job

Job Title: STA.Sr Secretary

Assignment Status

* Status: Active Assignment
* Appointment Reason: 010-Newly or rehired employee

Payroll

* Hourly or Salaried:

***People Group (Required)**

TIP *IMPORTANT: ALL fields for People Group **must** be completed or your transaction will be rejected.
You must update **Appointment Start and **Appointment End** fields with the correct effective dates for Appointment, or your transaction will be rejected.*

(Use this format 01-JAN-2011 when entering Appointment Start & End Dates)

Appointment Start: 01-SEP-2017
Appointment End: 31-AUG-2018
Pay Class: S12
PTO Eligibility Type: COVS
Timecard Type: N

Statutory Information

* Government Reporting Entity: Texas Woman's University
Timecard Approver:
Timecard Required: No

IMPORTANT: Hourly/Student - Timecard Required = **YES**

Other Assignment Information

***TIP** Total Per Cent Costing entered must add up to 100%. FTE entered must not exceed 1*

* Assignment Category: Regular Full-Time
FTE: 1
1 Per Cent Costing: 100
1 Account: 10.100.05.0402.00000000
2 Per Cent Costing:
2 Account:
3 Per Cent Costing:
3 Account:
4 Percent Costing:
4 Account:
Course Information:
Assignment Information:
Comments:
Admin Stipend Amt:

***TIP** If you are not entering assignment information for the Academic division, you may leave Course Information, Assignment Information and Admin Stipend Amt fields blank.*

Salary Information

* Salary Basis: Non Exempt Salary 7015

***TIP** Use **Student HLY** when entering Student information*

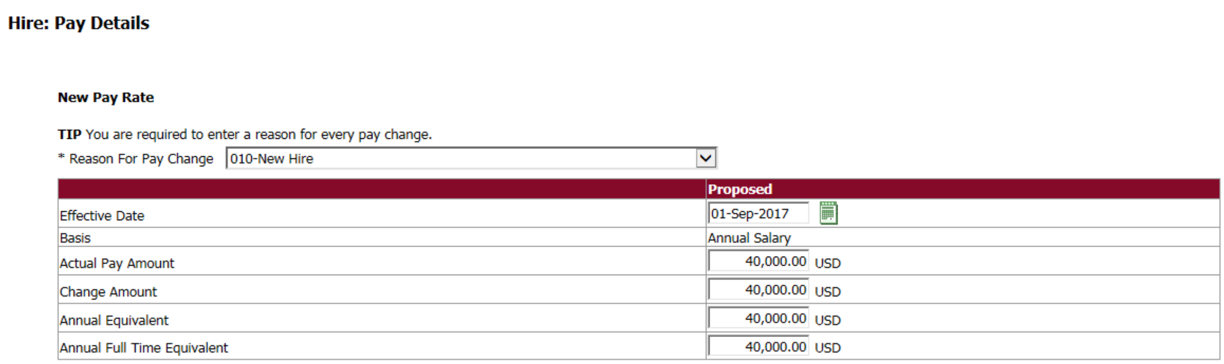
*Notes – **Timecard Approver** field should only be used for staff employees who complete a timecard when the timecard approver and supervisor are not the same person. The Budget Office has asked when we move someone into a budgeted line, we put in the **comments** who this person will be replacing; so they know what line is being filled. "Replacement for __________."*

10. **Choose Next** 

11. **Choose the Add or Change Salary button:** 

12. **Choose the “Reason For Pay Change” in the drop down menu: (i.e. 010 New Hire)**

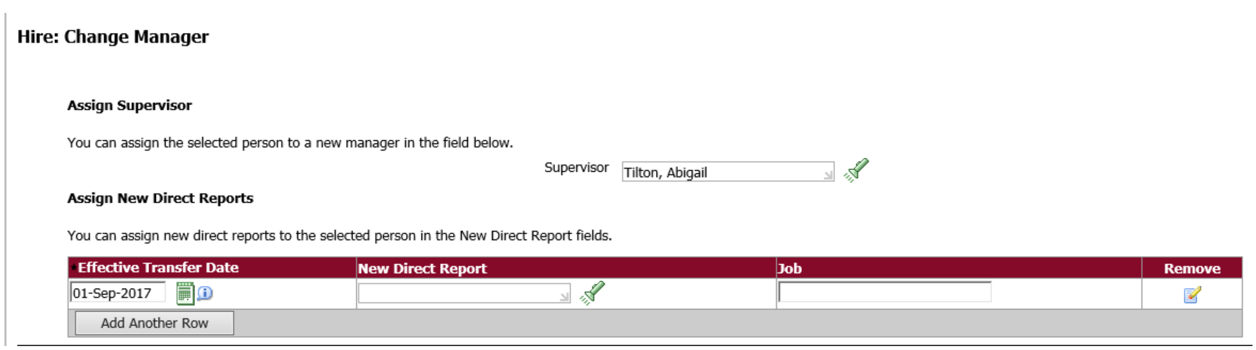
13. **Enter the annual salary in the “Actual Pay Amount” field and TAB. It will fill in the other boxes for you.**

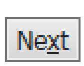


14. **Choose Apply** 

15. **Review the salary information and choose next** 

16. **Assign a supervisor to the employee in the Supervisor field. (This person will be the one that supervises the employee and completes performance evaluations).**



17. **Choose Next** 

18. **Extra Information – Add Tenure Status for all faculty, adjuncts, and GTAs. Adjunct Faculty and GTAs are "Not Eligible for Tenure".**

Hire: Extra Information

Click Update or Add to make changes to the sections below. Click Next to continue this action, click Back to return to the previous page, click Cancel to cancel this action, or click Save for Later to finish this action later.

Tenure Status Details

Add

Select	Status	Tenure Status	Date Determined	Projected Tenure Date	Adjusted Tenure Date	Reason for Adjustment	Subject to Tenure Quota
	No results found.						

19. **Choose Next.** Next
20. **Special Information – Enter TWU Qualifications for all faculty, adjunct faculty, and graduate assistants. (If other position, please choose Next)**

Hire: Special Information

TWU Qualifications

Add

Select	Status	Other School	School or College	Degree Designation	Start Date	End Date
	No results found.					

21. **Choose Next** Next
22. **Review Page – Review your information for accuracy. If you find an error, click the Back button to correct.**
23. **After Review, click on the Printable Page button to print a copy of your PTF** Printable Page **.**
24. **Click the Submit Button to submit your PTF for approval.**

    Submit

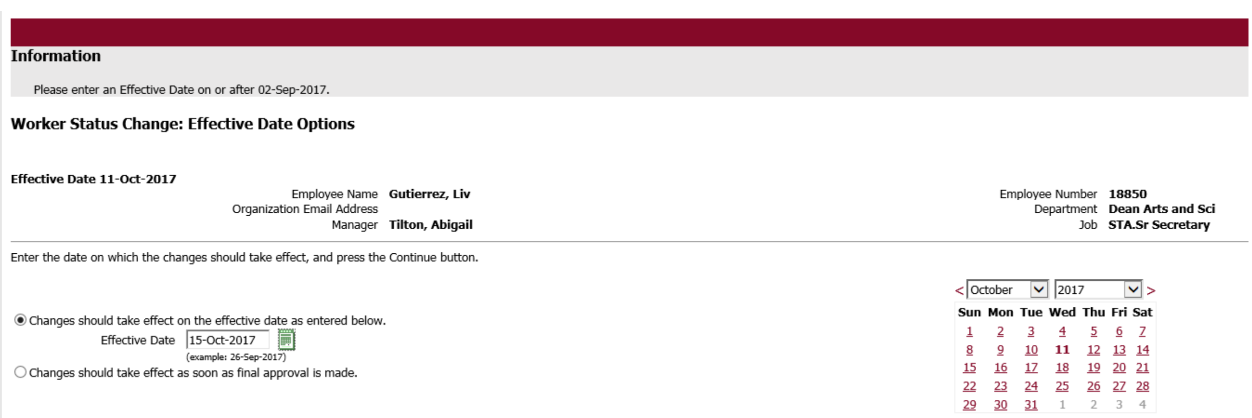
    NOTES: You can track your PTF status through Pioneer Portal, SQL Reports, Manager Self-Service folder, Pending New Hires.

ENTER AN UPDATE ASSIGNMENT PTF

Update assignment PTFs are used to update data on an employee's current assignment such as – fiscal year dates, salary, FTE, costing, or terminate an assignment if an employee has multiple positions.

1. **Log in to Phoenix**
2. **Choose Manager Self-Service**
3. **Choose Update Assignment**
4. **In the "Name" field, type the last name of the employee you want to update and choose "Go"**
5. **Choose the assignment number you want to update and click on the "Action" icon** 

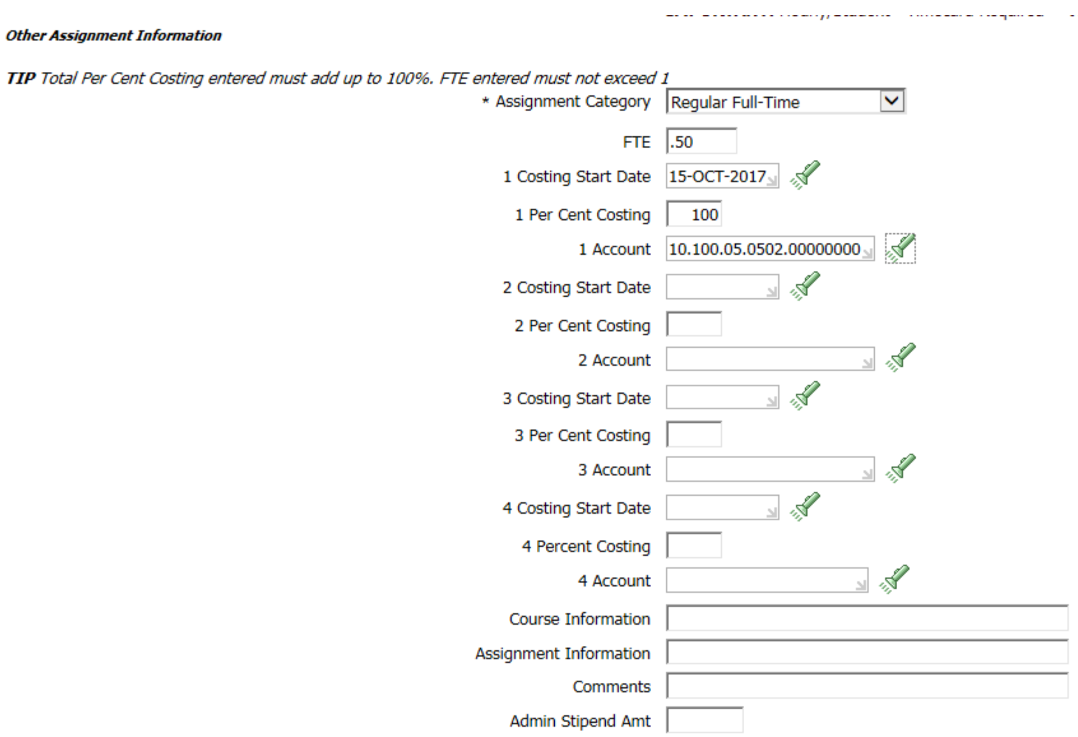
6. **Choose an effective date. This is the date the update will take place. You can change this date to be retroactive or in the future.**

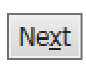


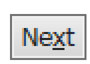
7. **Choose Continue** 

For this example, we will update FTE, salary, and costing for the employee.

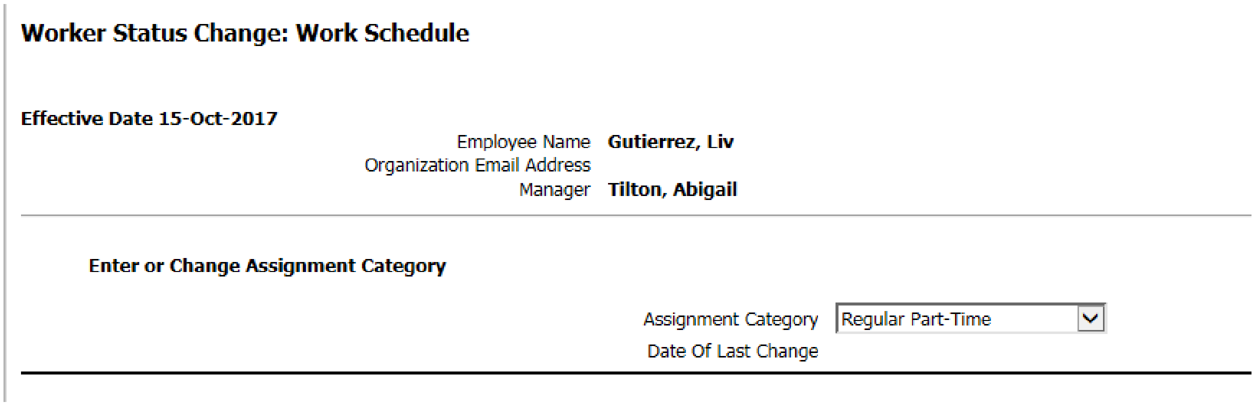
8. Scroll down to the FTE area and change the FTE to the new FTE for employee.
9. Type the effective date from the previous page as the "Costing Start Date" field
10. Change the costing/account number.



11. Choose Next 

12. Chose Next past the Change Location area 

13. Change the assignment category from Regular Full-time to Regular part-time (since our example is dropping FTE from 1.0 to .50)



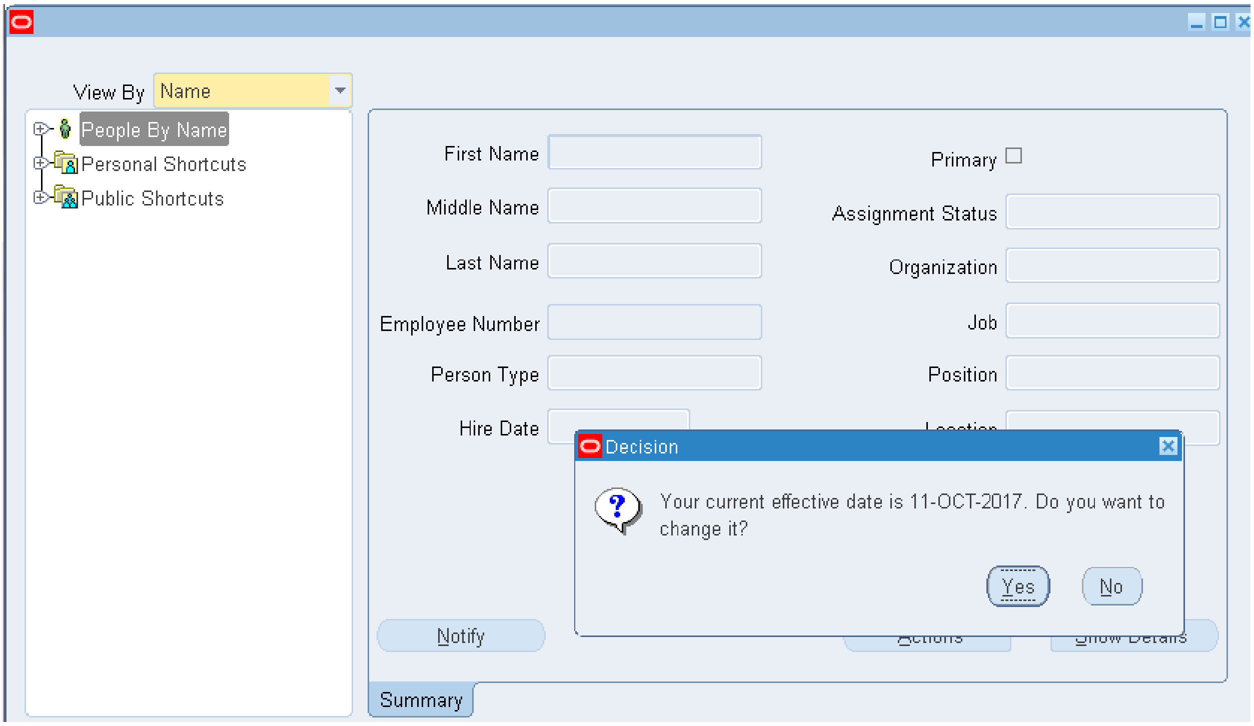
14. Choose Next Next
15. Click on the Add or Change Salary button Add or Change Salary
16. Choose a Reason For Pay Change from the drop down menu Type in the new salary under "Actual Pay Amount" field and TAB. It will fill in the rest of the fields for you.
17. Choose Apply Apply
18. Review the salary and choose Next Next
19. If you want to change the supervisor, clear out the current supervisor in the supervisor field and add the new supervisor.
20. Choose Next Next until you get to the Review Page
21. Review your changes. Everything with a blue dot next to it is an update you will be submitting for approval.
22. Choose the Printable Page button to print the PTF prior to approval. Printable Page
23. Choose Submit to send the PTF for approvals. Submit

Note: You may use the "Comments to Approver" box at the bottom of the PTF on the Review page to note information for approvers, such as "salary retro to 9/1/17", etc.

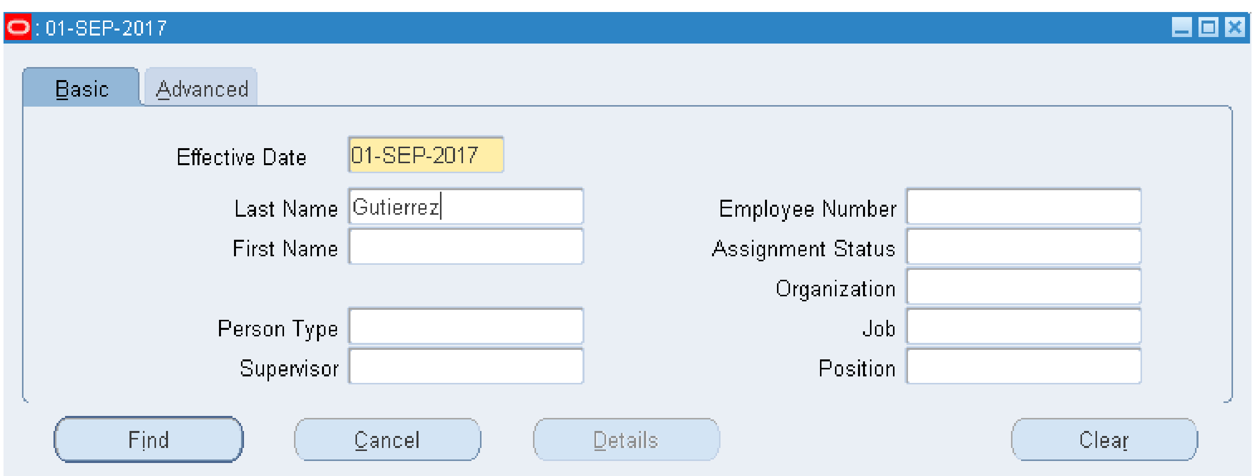
CREATE AN ADDITIONAL ASSIGNMENT

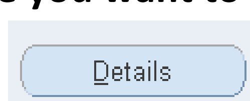
Sometimes, it is necessary to create an additional assignment for an employee. For example, a graduate assistant with more than one position, or a regular employee with an adjunct faculty assignment

1. **Log in to Phoenix**
2. **Choose Manager Self-Service**
3. **Choose Create Additional Assignment**
4. **A box will pop up stating Your Current effective date is XX-XXX-XXXX. Do you want to change it?**
   a. **If your additional assignment starts in the future, use the current date (today's date) to create your additional assignment.**
   b. **If your additional assignment starts with the current date or a past date, use those dates as your effective date. (i.e. 9/1/17)**



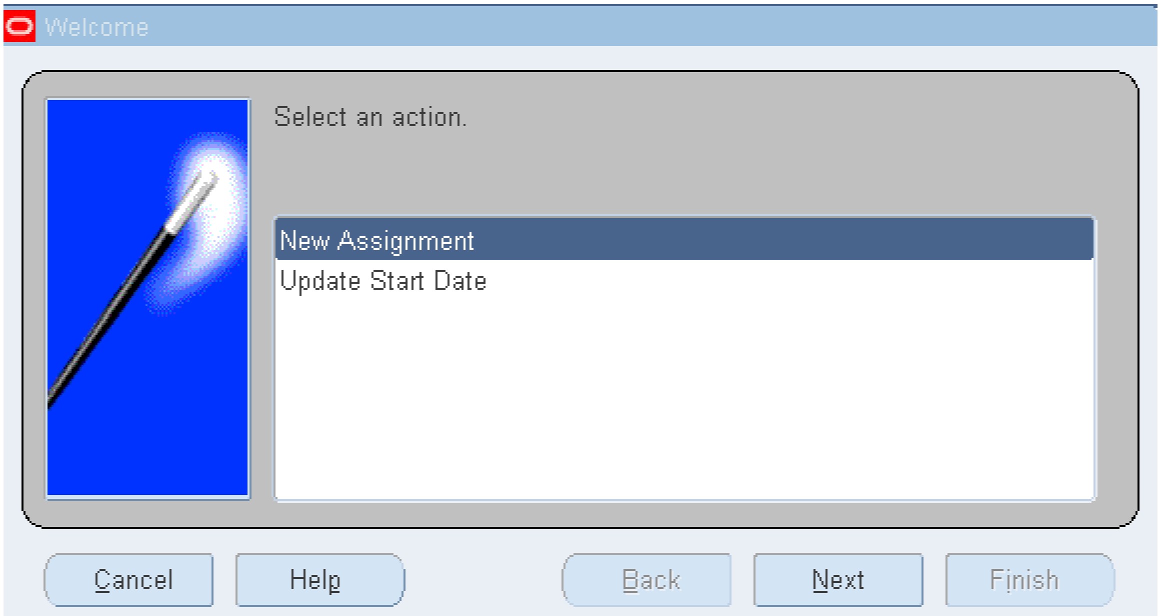
5. Click on the Flashlight icon in the upper left corner 
6. Type in the Last Name of the employee you want to create an additional assignment for and choose the Find button.



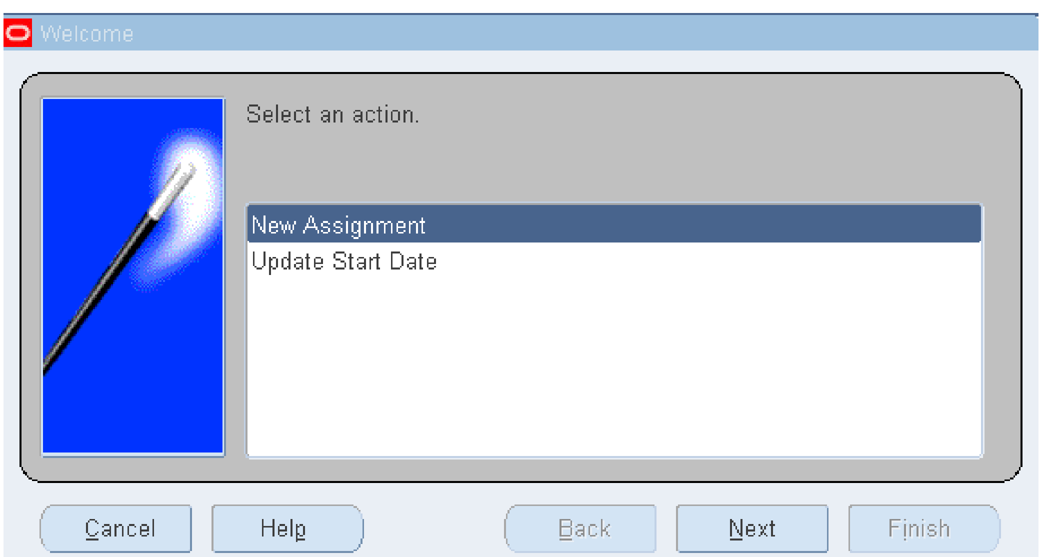
7. Click on the employee's name you want to add the assignment
8. Choose the "Details" button. 

9. **Click on the “Actions” button.** 

10. **Choose “New Assignment”**
11. **Choose the Next Button**



12. **Choose the Finish Button. You have now created an additional assignment for the employee and may exit this area and go to Manager Self-Service, Update Assignment to create an update assignment PTF to update your new blank assignment.**



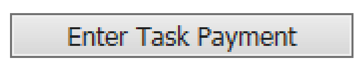
ENTER A TASK PAYMENT PTF:

NOTE: A supplemental task payment form is required prior to entering a task payment PTF for regular faculty and staff employees only. To access the STP form for approvals, please follow this link and the form is within the policy:

https://servicecenter.twu.edu/TDClient/1956/Portal/Shared/FileOpen?AttachmentID=b88a02bf-75af-408c-8e35-f2844788057d&ItemID=33205&ItemComponent=26&IsInline=0

Log in to Phoenix

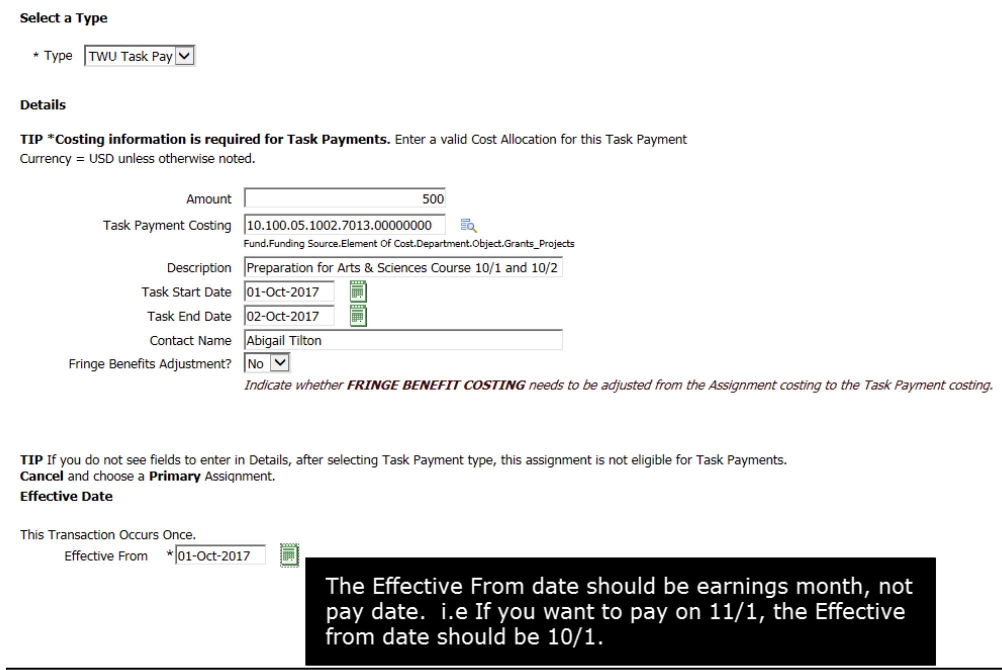
1. **Choose Manager Self-Service**
2. **Choose Task Payment**
3. **In the Name field, type in the last name of the employee who will receive the task payment.**
4. **Click the "Go" button.**
5. **Click the select radio button next to the assignment number and choose the Action icon.** 

(Note: If the employee does not have a current position, you will need to create a program staff assignment. – See Program Staff Assignment creation at end of task payment instructions)
6. **Click on the Enter Task Payment button** 

7. **Form Type drop down menu, choose TWU Task Pay, which opens up the task payment PTF form:**
8. **Enter the details for your task payment:**
    a. **Amount = Total Dollar Amount for task**
    b. **Task Payment Costing – Account number with 7013 object code (i.e. 10.100.05.1002.7013.00000000)**
    c. **Enter Description of the work performed**

d. **Enter Task start date – date work started**
e. **Enter Task end date – date work completed (NOTE: The payment will not be processed prior to end date. I.e. – If the end date is November 30, it will not be available for payment until 12/1)**
f. **Contact Name – Who may we contact with questions about the PTF**
g. **Fringe Benefits Adjustment – Choose no. this field is no longer used.**

9. **Effective From: IMPORTANT: This date determines when payment processes.**
   a. **Effective date is the earnings month to load the task payment PTF into. For example, if you want to pay the task payment on 11/1, then your effective date will be 10/1. If you want to pay your task payment on 12/1 then your effective from date will be 11/1.**
   b. **Be aware of payroll deadlines. If the payroll deadline has already passed for the month of October, your Effective from date will be 11/1.**



Select a Type

* Type: TWU Task Pay

Details

TIP *Costing information is required for Task Payments. Enter a valid Cost Allocation for this Task Payment
Currency = USD unless otherwise noted.

Amount: 500
Task Payment Costing: 10.100.05.1002.7013.00000000
Fund.Funding Source.Element Of Cost.Department.Object.Grants_Projects
Description: Preparation for Arts & Sciences Course 10/1 and 10/2
Task Start Date: 01-Oct-2017
Task End Date: 02-Oct-2017
Contact Name: Abigail Tilton
Fringe Benefits Adjustment?: No
*Indicate whether **FRINGE BENEFIT COSTING** needs to be adjusted from the Assignment costing to the Task Payment costing.*

TIP If you do not see fields to enter in Details, after selecting Task Payment type, this assignment is not eligible for Task Payments.
Cancel and choose a **Primary** Assignment.

Effective Date

This Transaction Occurs Once.
Effective From: *01-Oct-2017

The Effective From date should be earnings month, not pay date. i.e If you want to pay on 11/1, the Effective from date should be 10/1.

10. Choose the Apply Button.

11. Choose Next

12. Review your task payment PTF

13. Choose the Printable Page button to print the PTF prior to Choose Submit to send the PTF for approval. **

****NOTE: BEFORE CLICKING SUBMIT:**

Make sure that all appropriate approvers are listed.

- Approver of account being used for payment
- Dean's Assistant (if originator is in a specific College)
- Versinia Gooden (if originator's department is within the Provost hierarchy)
- Robin Bayer (if task payment is being paid from grant)
- Estela Long (if payment is being made to a regular budgeted employee)
- Amanda Noday

PROGRAM STAFF ASSIGNMENT CREATION:

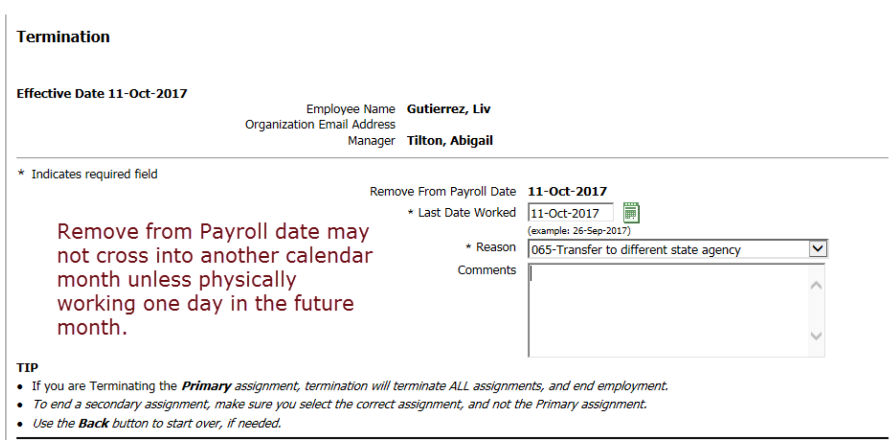
- Create an additional assignment.
- Position = Program Staff
- Payroll = Salaried
- Salary Basis = Hourly 7013
- People Group Dates: Start = Date of beginning of work; End = End of fiscal year.
- Payclass = TSK
- PTO = NONE
- Timecard type = N
- Salary = $7.25 (to comply with TRS guidelines).
- Approvers comments = Base assignment needed for task payment.

ENTER A TERMINATION PTF

NOTE: Termination PTFs will terminate the employee from the University completely. If you want to terminate an assignment, use Update Assignment PTF.

1. **Log in to Phoenix**
2. **Choose Manager Self-Service**
3. **Choose Termination**
4. **In the Name field, type the last name of the employee you want to terminate from the University and click Go.**
5. **Click on the assignment next to the name of the employee you want to terminate (if more than one, just pick one) and choose the Action icon.** 

6. **Effective date: Type the date of termination. The date the employee should be paid through.**
7. **Choose the Continue Button**
8. **In the Last Date Worked field – type the date the employee last worked**
9. **Reason: Choose the reason code for termination. If transferring to a different state agency, use code 065**


Termination

Effective Date 11-Oct-2017

Employee Name Gutierrez, Liv
Organization Email Address
Manager Tilton, Abigail

* Indicates required field

Remove From Payroll Date 11-Oct-2017
* Last Date Worked 11-Oct-2017
(example: 26-Sep-2017)
* Reason 065-Transfer to different state agency
Comments

Remove from Payroll date may not cross into another calendar month unless physically working one day in the future month.

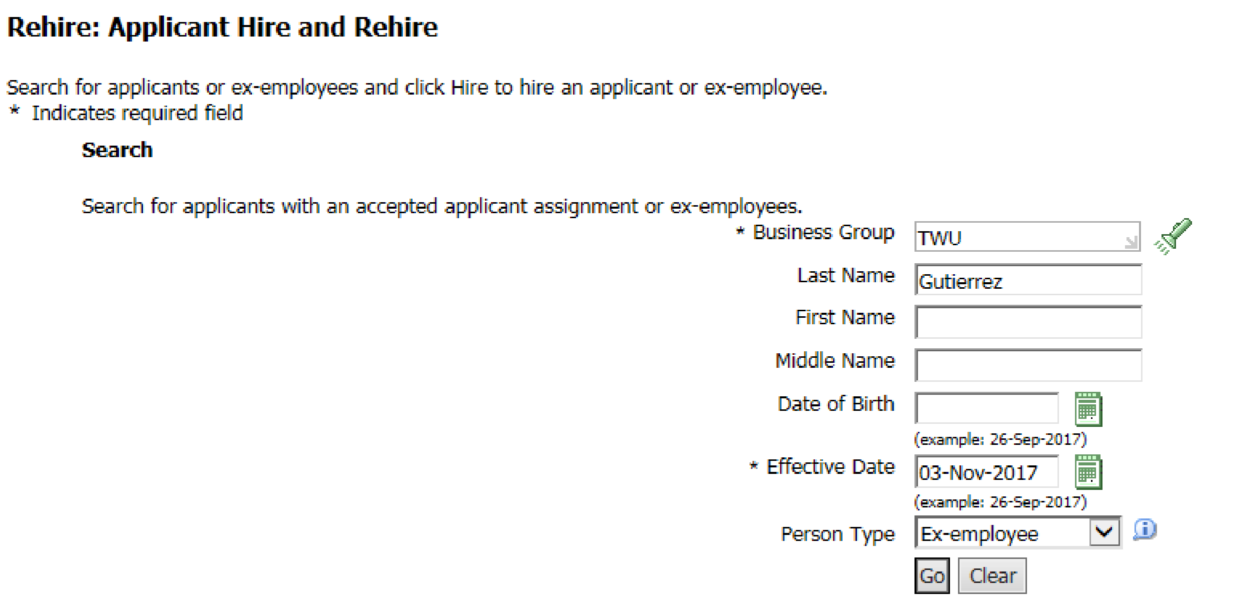
TIP
- If you are Terminating the ***Primary*** *assignment, termination will terminate ALL assignments, and end employment.*
- *To end a secondary assignment, make sure you select the correct assignment, and not the Primary assignment.*
- *Use the* ***Back*** *button to start over, if needed.*

10. **Choose the Next Button**
11. **Review the Termination PTF**
12. **Choose the Printable Page Button to print the PTF prior to approval.**
13. **Choose Submit to send the PTF for approvals.**

ENTER A REHIRE PTF

NOTE: Rehire PTFs must be completed in one transaction. It will not allow a save for later when completing rehire PTFs.

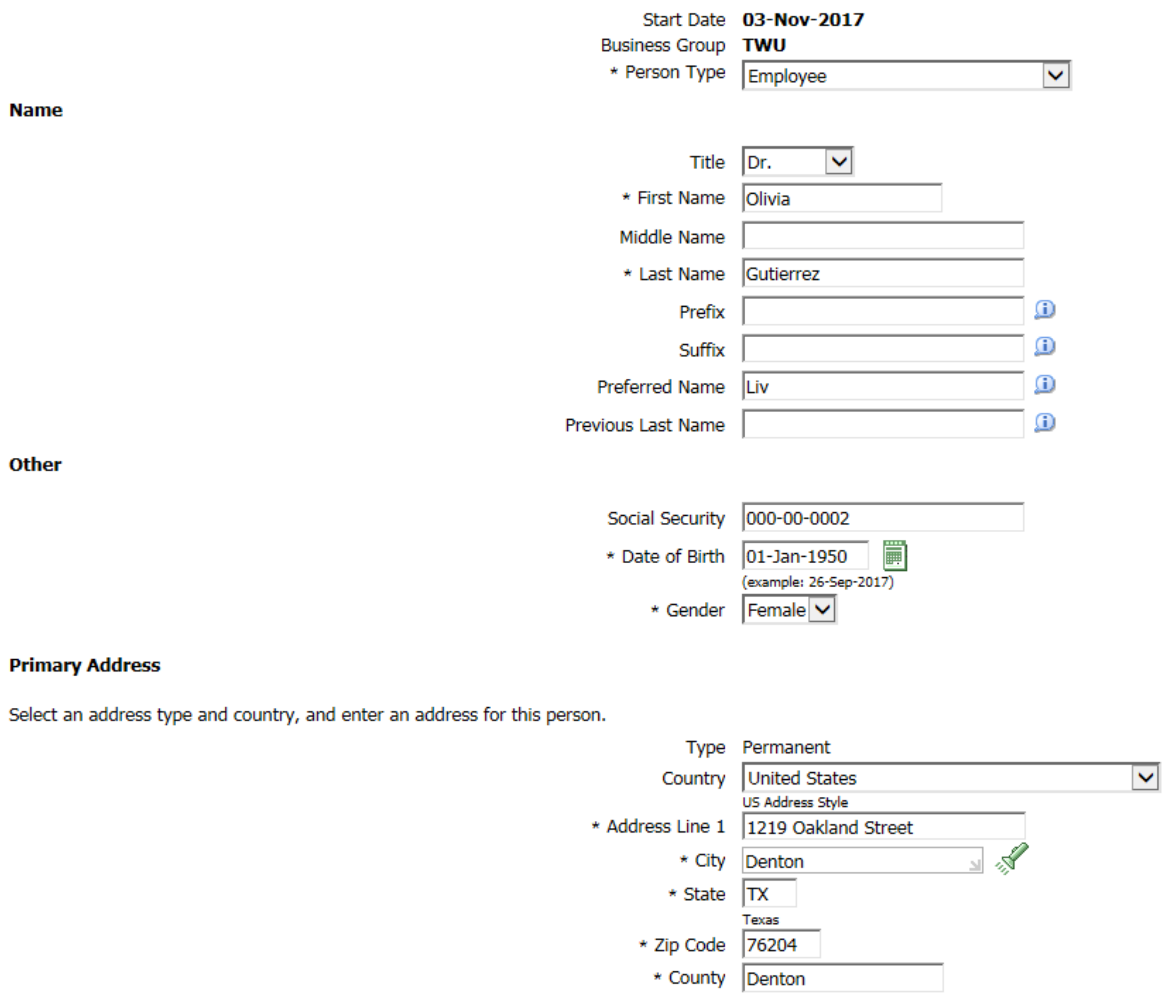
1. **Log in to Phoenix**
2. **Choose Manager Self-Service**
3. **Choose Rehire**
4. **Type the Last name of the employee in the Last Name field**
5. **Effective Date = Rehire date**
6. **Person Type = Ex-employee since the employee is currently listed as ex-employee.**
7. **Click Go**



8. **Select the Employee to Rehire**
9. **Choose the Hire Button** 

10. **Person Type – Choose employee or Retired Employee**

11. The biographical information will already be populated for the employee. If any information has changed, please update it on this screen.



12. Choose the Next button
13. Remove “TWU” from the Department Name field and replace with current department name.

TIP Enter the appropriate department before searching for the Position

* Department Name: Library

Address Line 1: **P O Box 425739**

City: **Denton**

State: **TX**
Texas

Zip Code: **76204**

County: **Denton**
Denton

Country: **United States**

Position

* Position Name: Library.Admin Asst.N.T.1

Job

Job Title: STA.Admin Asst

Assignment Status

* Status: Active Assignment

* Appointment Reason: 010-Newly or rehired employee

Payroll

* Hourly or Salaried: Salaried

***People Group (Required)**

TIP *IMPORTANT: ALL fields for People Group **must** be completed or your transaction will be rejected.
You must update **Appointment Start and **Appointment End** fields with the correct effective dates for Appointment, or your transaction will be rejected.*

(Use this format 01-JAN-2011 when entering Appointment Start & End Dates)

Appointment Start: 03-NOV-2017

Appointment End: 31-AUG-2018

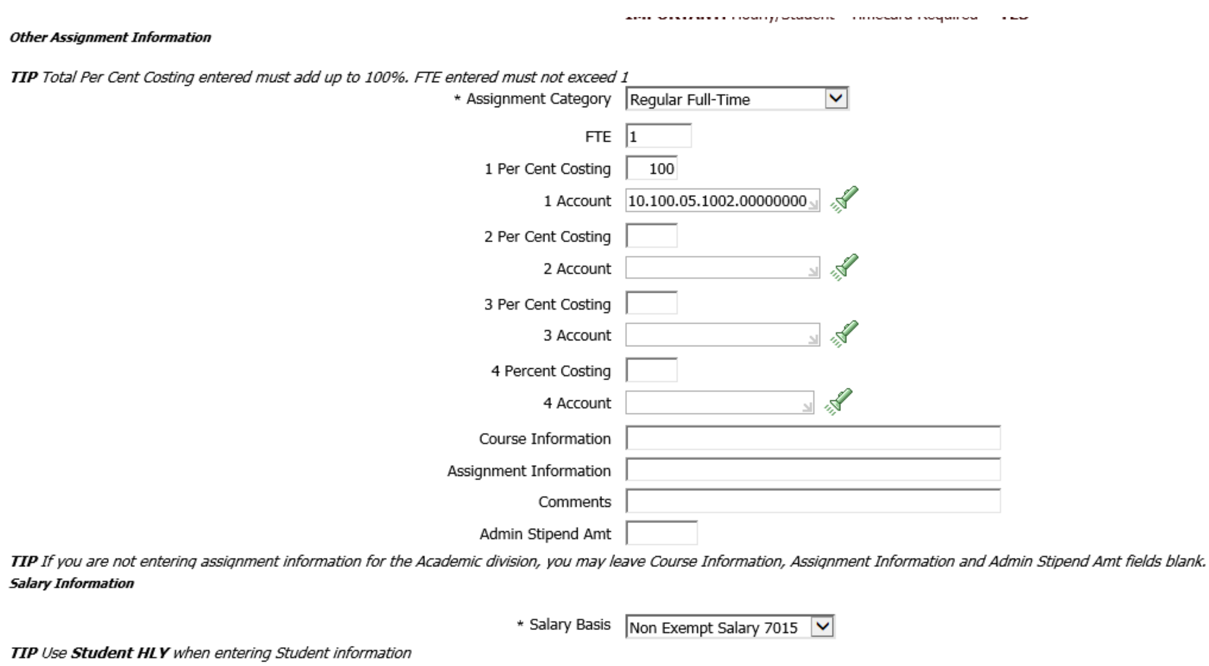
Pay Class: S12

PTO Eligibility Type: COVS

Timecard Type: N

14. **Input the Position Name, it will populate the Job Title**
15. **Appointment Start Date will be the Rehire Date**
16. **Appointment End date will be:**
    a. **Staff position – 8/31**
    b. **Full-time Faculty – 5/31**
    c. **Adjunct Faculty:**
        i. **Fall – 01/15**
        ii. **Spring – 5/31**
        iii. **Summer – 8/31**
    d. **Graduate Assistants –**
        i. **Fall – 1/15**
        ii. **Spring – 5/31**
        iii. **Summer – 8/31**
17. **Enter Pay Class (*See Reference Guide in back for details*)**

18. Enter PTO Eligibility Type (See Reference Guide in back for details)
19. Enter Timecard Type (See Reference Guide in back for details)
20. Timecard Required? Select NO unless student assistant or hourly assignment. This field will create the portal timecard only. (Does not pertain to faculty and staff)
21. Enter Assignment Category
22. Enter FTE
23. Enter Percent Costing
24. Enter Account Number


Other Assignment Information

TIP *Total Per Cent Costing entered must add up to 100%. FTE entered must not exceed 1*

* Assignment Category: Regular Full-Time

FTE: 1

1 Per Cent Costing: 100

1 Account: 10.100.05.1002.00000000

2 Per Cent Costing:

2 Account:

3 Per Cent Costing:

3 Account:

4 Percent Costing:

4 Account:

Course Information:

Assignment Information:

Comments:

Admin Stipend Amt:

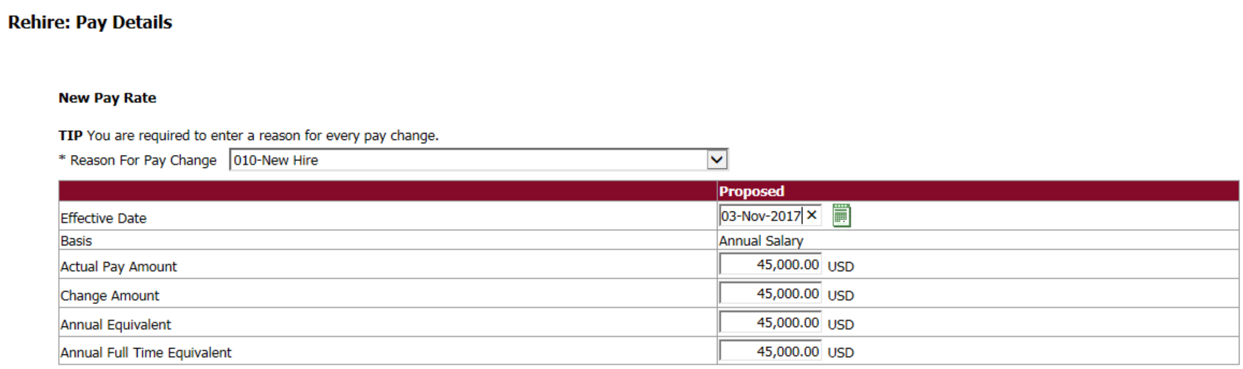
TIP *If you are not entering assignment information for the Academic division, you may leave Course Information, Assignment Information and Admin Stipend Amt fields blank.*

Salary Information

* Salary Basis: Non Exempt Salary 7015

TIP *Use* ***Student HLY*** *when entering Student information*

25. Choose Next
26. Click on the Add or Change Salary Button
27. Choose a Reason for Pay Change from the drop down menu. (i.e. 010 for new hire or rehire)
28. Type the salary amount in the Actual Pay Amount Field



Rehire: Pay Details

New Pay Rate

TIP You are required to enter a reason for every pay change.

* Reason For Pay Change: 010-New Hire

	Proposed
Effective Date	03-Nov-2017
Basis	Annual Salary
Actual Pay Amount	45,000.00 USD
Change Amount	45,000.00 USD
Annual Equivalent	45,000.00 USD
Annual Full Time Equivalent	45,000.00 USD

29. Choose Apply
30. Review the salary information
31. Choose the Next button
32. Assign a supervisor
33. Choose the Next button
34. Rehire: Extra Information – enter Tenure information if applicable
35. Choose Next
36. Rehire: Special Information – Add TWU Qualifications if applicable
37. Choose Next
38. Review Page – Review your PTF for accuracy.
39. Choose the Printable Page button to print your PTF prior to sending for approvals.
40. Choose the Submit button to submit the PTF

CHANGE MANAGER

Change manager is used to change the supervisor for an employee. This will be the person that completes the performance evaluations for the employee.

1. **Log in to Phoenix**
2. **Choose Manager Self-Service**
3. **Choose Change Manager**
4. **In the Name field, type the last name of the employee needing a supervisor change.**
5. **Choose an effective date for the change of supervisor. (NOTE: Student assistants will need the effective date for the entire pay period 16th of month in order for new supervisor to approve all of the portal timecard)**
6. **Clear the current supervisor from the Supervisor field**
7. **Type the last name of the new supervisor**
8. **Click the Next Button**
9. **Review your change and choose the submit button**

NOTE: There are no approvals required for a supervisor change. In a scenario where there is a supervisor (performance evaluations) and another person listed as the timecard approver (only approves timecards), an update assignment PTF should be used to change the timecard approver for the employee.

MANAGER SELF-SERVICE - QUICK REFERENCE GUIDE

	Payroll	Pay Class	PTO Eligibility	Timecard Type
Full-time Faculty	Salaried	F9 or F12	SICK	E (exempt)
Full-Time Staff	Salaried	S12	COVS or VCS	N or E (Nonexempt/exempt)
Adjunct Faculty	Salaried	F4.5 (F3 in Summer)	NONE	E (Exempt)
Grad Assistant Wages	Salaried	F9 (F3 in Summer)	NONE	N (nonexempt)
Grad Assistant Salary	Salaried	F9 (F3 in Summer)	NONE	E (exempt)
Student Assistants	Hourly	HRLY	NONE	S (Student)
Temporary Employees	Hourly	HRLY	NONE	H (Hourly)
Task Payments	Salaried	TSK	NONE	N (Nonexempt)

PAY CLASS	MEANING
B12	Faculty - 12 month budgeted
F12	Faculty - 9 month with pay spread over 12 months
F3	Summer Faculty & Graduate Assistants
F4.5	Adjunct Faculty
F9	Faculty and Graduate Assistants - 9 month
HRLY	Hourly Employees (not student assistants)
S10	Staff 10 month
S12	Staff 12 month

	COVS	VCS	SICK	NONE
PTO ELIGIBILITY	Compensatory, Overtime, Vacation, Sick (Nonexempt Staff)	Vacation, Comp, Sick (Exempt Staff)	Sick only – (Regular Faculty)	Does not accrue PTO (Paid time off)

	B	E	H	N	S
TIMECARD TYPE	Badge Swipe DO NOT USE	Exempt Employee	Hourly Employee Not Student Assistants	Non-exempt employee	Student assistants and/or work study

EMPLOYMENT TYPE	START DATE	END DATE
Regular Faculty Fall/Spring	September 1	May 31
Regular Faculty - Fall Only	September 1	January 15
Regular Faculty – Spring Only	January 16	May 31
Adjunct Faculty – Fall	September 1	January 15
Adjunct Faculty – Summer	June 1	August 31
Adjunct Faculty – Spring	January 16	May 31
Staff	September 1	August 31
Graduate Assistants – Fall	September 1	January 15
Graduate Assistants – Summer	June 1	August 31
Graduate Assistants – Spring	January 16	May 31
Gradute Assistants Fall/Spring	September 1	May 31