Personnel Transaction Forms (PTF)

**What is TWU Manager Self-Service (MSS)?**

TWU Manager Self-Service is a responsibility within Phoenix that allows departments to submit personnel transaction forms (PTF) electronically for approval.  It provides the tools needed to efficiently perform routine employment transactions and view employee information.

**TWU Manager Self-Service Transactions:**

**Hire (PTF)**

Use the Hire link to hire a new employee.  If an employee has worked at Texas Woman’s University before, please use the rehire link to add them to Payroll.  **All new hire employees must complete a new hire packet by the first day of employment**.  This includes the I-9, W-4 and direct deposit form.

**Rehire (PTF)**

The Rehire PTF rehires a TWU ex-employee.  **All rehired employees must complete a new hire packet by the first day of employment.** This includes the I-9, W-4 and direct deposit form.

**Create Additional Assignment**

Create Additional Assignment link allows you to create a blank assignment within Phoenix to add an additional position for an employee.  When creating an additional assignment, always use the current date or a prior date as your effective dates.  Future dates will prevent you from updating the assignment until that date is reached.  Once you create the additional assignment, please use Update Assignment to add the position details.

**Update Assignment (PTF)**

Update Assignment allows departments to change salary, costing, FTE, title, location, department, etc.  It is used for current TWU employees to update assignment information.  Be sure to your effective date matches the effective date of change requested.

**Task Payment (PTF)**

Task Payment PTFs allow departments to submit a lump sum payment for a current employee.  Note:  the employee must have an assignment with current active dates prior to Task Payment PTF submission.  If no current assignment is found, please use Create Additional Assignment and Update Assignment PTF to add a position for the employee prior to Task Payment PTF submission.  If a [Supplemental Task Payment Form](http://www.twu.edu/policy/PolicyDocs/Policy%203.21%20Supplemental%20Task%20Payment.pdf) is required, the department must submit the paper form requesting approval of the task payment prior to the employee performing the additional task and prior to submitting the task payment PTF within Phoenix.

**Termination (PTF)**

Termination allows departments to terminate an employee from the University.  Note:  If an employee has more than one position and is only leaving the position within your department, please use update assignment to end the position as termination ends all assignments and terminates the employee from the University.

**Change Manager**

Change Manager allows departments to update supervisors for employees  using an effective date.  Unlike PTFs, this process does not require approval and is immediate upon submission.

**Maintain Qualifications**

Maintain qualifications allows departments to enter a degree for a current employee without having to use Update Assignment PTF as this is the only change needed.  (PhD, Masters)

**Maintain Tenure**

Maintain Tenure allows departments to change a current employee from non-tenure to tenure status.

**Employee Information Inquiry**

View the hire date, job title, salary, years of service, and total absences for any employee you supervise.

**Timecard Status Dashboard**

Displays timecard status summaries for employees you supervise.  Approved, rejected, working, not created, and timecards in error.

**All Actions Awaiting Your Attention**

Links you to your Worklist area for any transactions awaiting your review/approval. (PTFs, Timecards)  NOTE:  You will also receive an email for each of these transactions. You can turn this option on/off at any time.

NOTE:  To turn off approval workflow emails:  Go TWU Manager Self-Service, Workflow Notifications, Preferences, and under Notifications choose “Do not send me mail”.

**Employee Record View Only**

View basic employee record details for employees you supervise.  Assignment details, termination history, salary/costing information.

**\*\*\*New Hire Paperwork\*\*\***

**Must be completed by all new hire and rehire employees.**

Faculty/Staff – turn in to Office of Human Resources
Students – turn in to Career Services

**The I-9 in the new hire packet must be completed by first day of employment**

Faculty/Staff New Hire Packets can also be printed online from the [HR Forms](http://www.twu.edu/humanresources/5983.asp) page

**What is UPK?**

**User Productivity Kit - Training documents that allow you to “try” a TWU Manager Self-Service PTF transaction from start to finish outside of Oracle.**

 Note: Self-Service Human Resources (SSHR) features are only available from on-campus computers