



Authorizing Employee Additions and Changes

Overview

Employee Administrators can add new employees and change the status, shift pattern, job, salary, and personal information of existing employees. When these employee changes are made and submitted some of them require authorization from designated approvers before the change will take effect. Designated approvers will receive the request for authorization in their UltiPro Inbox. The authorizer reviews the authorization request, decides to approve or deny the change. The Employee Administrator receives notice of the approve/deny action in their UltiPro Inbox.

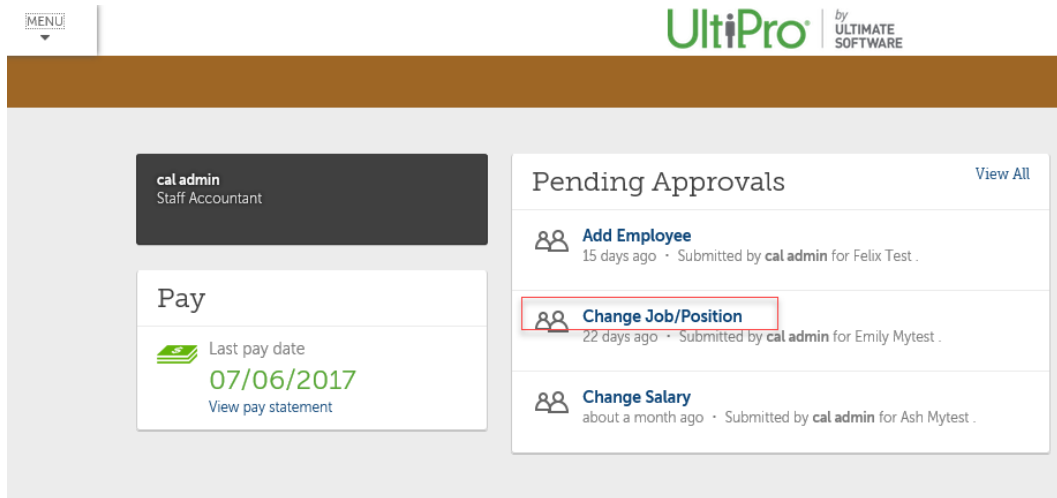
Time Frame - Employee Administrator Creates Change Request

- Employee Relations cutoff for employee record changes is the end of the first Thursday of the pay period.
- **Add new employee:** The best time to add employees is the first week of a pay period. After approval, new employee shows in Time and Attendance by the following day. **Note:** Employee access to UltiPro may take a few days. (IT needs to set up employee profile)
- **Time related edits:** e.g. Shift Pattern change - will display in Time and Attendance within 15 minutes.
- **PTO balance edit:** updates are made to Time and Attendance every two weeks (after payroll is closed and submitted to bank). (**NOTE:** during system implementation payroll will do daily updates)
- **Addition of secondary job:** will display in Time and Attendance within 15 minutes.
- **Changes to security role in UltiPro:** change the role then submit email request (for manager, Timekeeper role) to UltiPro team; expect up to 24 hours to display in Time and Attendance.
- **Changes to personal, job or pay information:** requires Employee Relations, Payroll approval - Best time to make employees changes is the first week of a pay period. **Note:** Employee Relations cutoff for employee record changes is the end of the first Thursday of the pay period.
- Some change requests require manager approval and/or payroll, ER and DHQ approval. Always allow time for authorizers to review and approve changes made.

Employee Administrator - Change Request Submitted

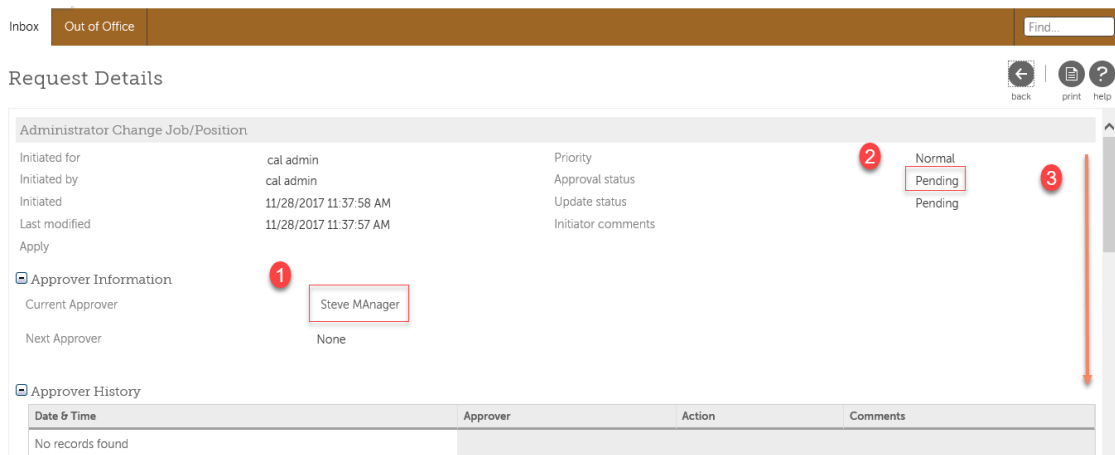
The example below will show the exchange between an Employee Administrator and a ministry unit manager.

1. A short list of submitted change requests that are pending approval display on the Employee Administrator main screen of UltiPro.



2. To see more of the listing click on View All, or click on a change request to view the details of that request. Clicking on the **Change Job/Position** pending approval request above displays the Request Details screen.
 1. The name of the approver displays.
 2. The status of the change request displays. In this case Pending.
 3. Scroll down to see the details of the change request.

The Pending status indicates it has been automatically sent to the named approver's UltiPro InBox and is awaiting authorization.



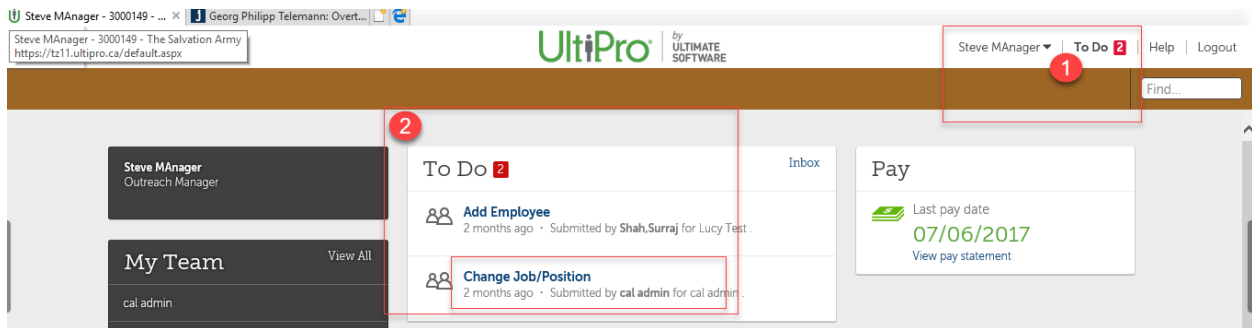
NOTE: If the displayed approver is not correct, or if the intended approver did not receive the request, please send an explanatory ticket to the Service Desk email requesting UltiPro assistance.

Manager Receives and Acts on Change Request

The pending approval change request is now in the Manager's UltiPro InBox. The manager's main screen shows as below:

The number of **ToDo** items - Requests pending approval – display in the upper right of the screen.

1. Indicates there are 2 requests pending approval.
2. A short display of the inbox items is shown.



3. Click on a change request to view the details.

The request details show below. Use scroll bar on the right to scroll down and see the details of the change request.

Inbox
Out of Office

Request Details

save reset cancel print help

Action: Approve

Comments:

Administrator Change Job/Position

Initiated for	cal admin	Priority	Normal
Initiated by	cal admin	Approval status	Pending
Initiated	10/16/2017 12:09:51 PM	Update status	Pending
Last modified	10/16/2017 12:09:51 PM	Initiator comments	
Apply	10/28/2017		

Approver Information

Next Approver: None

- The details of the change request displays. On the left shows the job information before the change. The details on the right show the change request information submitted for review. Review the information and ensure it is correct.

Request Information		Show	All fields
Change Job			
	Before		Submitted
Effective			11/01/2017
Reason	200 - Merit increase		501 - Reorganization
Job group	JG006 - Finance		JG006 - Finance
New job	61000005 - Bookkeeper		61000006 - Staff Accountant
Alternate title			
Supervisor	Steve MAnager		Steve MAnager
Hire source			
Div/District	THQ - Territorial Headquarters		THQ - Territorial Headquarters
Resp/Site	110301 - BUC Current Fund		110301 - BUC Current Fund
Department	1023 - SP On Line Warehouse		1023 - SP On Line Warehouse
Local union	Non Union		Non Union

- When the review is done it is time to make a decision. Click on the **action** box to display the selections:

- Approve – change request approved
- Cancel – cancel change request
- Comments – add comments to comment area
- Deny – refuse the change request
- Own – keep the change request for later review

- Click on desired **action**.

- Click **Save** on the top right of screen.

Request Details

save reset cancel print help

Action	<ul style="list-style-type: none"> Approve Cancel Comments Deny Own
Comments	

Administrator Change Job/Position

Initiated for	cal admin	Priority	Normal
Initiated by	cal admin	Approval status	Pending
Initiated	10/16/2017 12:09:51 PM	Update status	Pending
Last modified	10/16/2017 12:09:51 PM	Initiator comments	
Apply	10/28/2017		

Approver Information

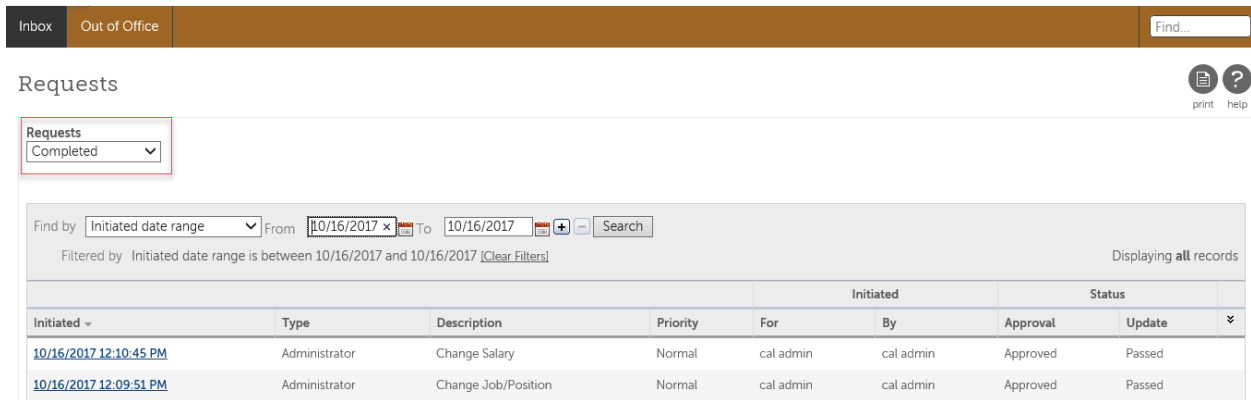
Next Approver: None

Employee Administrator - Receives notice of Approved/Denied Change Request

- The Employee Administrator receives the approved or denied change request in their InBox under the **Completed Request** directory.

The Employee Administrator can click on the **Initiated date** to view details of the request and any comments that may have been added by the approver. The requested change will take effect once all approvals have been given.

Note: some requests may require multiple approvers, and final approval may take time. Only once all approvers have responded will the change request show in the **Completed** directory.



The screenshot shows the 'Requests' section of the UltiPro interface. At the top, there are navigation tabs for 'Inbox' and 'Out of Office', and a search bar. Below this, the 'Requests' title is displayed with 'print' and 'help' icons. A dropdown menu labeled 'Requests' is set to 'Completed'. A search filter is applied: 'Initiated date range' from '10/16/2017' to '10/16/2017'. The results table shows two records:

Initiated	Type	Description	Priority	Initiated		Status		
				For	By	Approval	Update	
10/16/2017 12:10:45 PM	Administrator	Change Salary	Normal	cal admin	cal admin	Approved	Passed	
10/16/2017 12:09:51 PM	Administrator	Change Job/Position	Normal	cal admin	cal admin	Approved	Passed	

IMPORTANT: if an **add a new employee** request is denied, the request data is wiped out. The Employee Administrator will have to begin the **Add Employee** process again and resubmit for approval.