Project UltiPro

Guidelines and Tips for Employee Administrator Role

UltiPro Function	Guidelines and Tips
General information	The manager will need to approve all entries. All pertinent documents will need to be provided to them for this approval review. Ensure that when the manager is away that they have set up a designate, otherwise there is a chance an employee gets paid incorrectly or not at all See **Employee Relations Procedure Manual**.
Add Employee (Hire/Rehire) Use this function to add new employee or to rehire terminated employees. Click *Menu* (top left of screen) Click *Administration* Click *My Employees* Click *Add Employee(Hire/Rehire)* **View Quick Tours and Tips** View the training tour highlighted below to acquaint yourself with the function. Quick Tours and Tips ⊙ Human Resources – Resources for Managers UltiPro Navigation Overview Search with Filters Tour Modify Search Results Tour Hire/Rehire an Employee in the U.S. Tour Hiring/Rehiring an Employee in Canada Tour	**Required resources:** Employee Personnel File with Offer letter, TD1, valid SIN (proof required –photocopy of card), voided cheque, completed federal and provincial TD1 (completed by employee) For further information see *Section 21: Employee Personnel File – Contents in Employee Relations Procedure Manual* Have this information available as you input. The system times out after an hour of inactivity and you will lose your data. You can only save the data once you have completed the entry of all information. If the job name and # is not already in the system then a request needs to go to the compensation manager at THQ (you cannot go further without this) If it is a rehire at the same ministry unit the SIN # will pop up and the employee's information is prepopulated. This information must be overridden with any new information manually by the E.A. The employee # will be assigned after the employee is entered into UltiPro. **Tips:** *Auto paid/hourly field* –if employee is manager, admin, non-union with set hours choose autopaid; for hourly employees choose hourly.

	Security group field– this determines what UltiPro functions they have access to: if the employe has direct reports pick supervisor; if they have a role as a timekeeper for their team, choose timekeeper; otherwise select employee.

Direct deposit **–** enter banking information provided by employee (should be in empoloyee file); a document scan is not necsary since evidence is on file.

PTO/Leave **–** select plan based on offer letter. Add each plan separately – medical, sick, vacation. **See page 7 of this job aid for explanation of codes.**

Summary -

Before clicking *Save* review all entered information against personnel file; use back/next buttons to go through information.

Click *Save,* **click S**ubmit - email notification is sent to the manager – manager goes to their UltiPro to do box – displays summary screen, chooses show all fields; manager reviews information comparing to personnel file; can approve, cancel. comment, deny, own; if deny or cancel then all data is deleted and Employee Admin has to begin the hiring process again. |
| **Add Canadian Employee (Hire/Rehire/Multi-Company Hire)**
Use this function to hire/rehire across companies – between NRO, GCC, Officers.

Click *Menu* (top left of screen)
Click *Administration*
Click *My Employees*
Click **Add Canadian Employee (Hire/Rehire/Multi-Company Hire)**

View Quick Tours and Tips
View the training tour highlighted above. | Complete required fields – refer to tips above. |

ProjectUltiPro

Mass Updates

Mass Updates provide the ability to make changes to multiple employees at the same time. At this point a mass update can be done to change supervisor of a group of employees.

Click **Mass Updates**
Click **OK**

Actions	Supervisor Change ∨	OK

- Click **Add Employees** to select employees for which changes will apply.
- Click the box beside each required employee name.
- When selections completed click **OK** button

✓
ok

- Click **Next** button
- Search for and select **new supervisor**
- Input **effective date**
- Select **change reason**

Type Of Change	Supervisor Change
Current Supervisor	Saada Abbawaji
New Supervisor	* [ ] 🔍 ✕
Effective Date	* MM/DD/YYYY 📅
Change Reason	* [ ]

- Select **Next**
- Review **Summary**
- Select **Submit**

View, Print Employee Contract

Click **Menu** (top left of screen)
Click **Administration**
Click **Employee Contracts**
Input search criteria for desired employee
Or click **Search** to display a list of all employees
Click on **Employee name**
View or **print** contract

The contract/offer letters are scanned into the system.

Viewing and Editing Employee Information
Click **Menu** (top left of screen)
Click **Administration**
Click **My Employees**
Input search criteria for desired employee
Or click **Search** to display a list of all employees
Click on employee name to select

Personal Information
In this tab set you can edit employee personal information:

- Change National ID (SSN/SIN)
- Change Name, Address, or Telephone
- Add Alternate Phone Number
- View Status History
- Change Status
- Add Contact
- Change Private Information
- Terminate Employee
- Transfer Employee

Change National ID (SSN/SIN)	When changing from a temporary # (which generally starts with 9) there is an expiry date. The employee will provide the new # which the EA will enter into UltiPro.
Change Name, Address, or Telephone	The employee should be entering this into the system unless it is for a new hire.
Add Alternate Phone Number	Same as above
View Status History	This is a view of the employee's existing status and previous statuses
Change Status	When you change the employee's status do NOT check off Issue Record of Employment.
Add Contact	Add dependents or emergency contacts. Until benefits are completely centralized, beneficiaries will not be in UltiPro
Change Private Information	Benefits is normally in charge of changing this information The employee would need to provide proof of a change to a DOB, gender – only edit if error

Terminate Employee	1. Voluntary Termination Workflow:
	   • Employee Admin at MU enters data into termination screen
	   • Notification to MU Manager to approve
	   • Manager at MU approves termination
	   • Notification of termination to: DHQ ER/THQ Benefits/THQ Payroll
	
	2. Involuntary Termination Workflow
	   • Employee Admin enters data into termination screen
	   • Notification to Manager at MU to approve
	   • Manager at MU approves
	   • Notification to DHQ ER to approve
	   • DHQ ER arranges severance package outside of UltiPro as per existing practice
	   • DHQ ER approves termination in UltiPro
	   • DHQ ER advises THQ Benefits and THQ Payroll of termination and severance package. This will be done outside UltiPro for the time being, until we develop a way for the system to handle it in a confidential manner.

Transfer Employee	Not an eAdmin task. Transfers with in MU should be done by DHQ; if transfer is between divisions then THQ will do them.

Job

In this tab set you can edit employee job information:
- Change Job
- Change Job and Salary
- Add Secondary Jobs
- For This Tab Set
- Change Salary
- Change Organization
- Add Work Location (CAN)
- Add Employee Job History
- Add Employee Labour Allocations
- Change Other

Change Job	If an employee is changing into an existing job then the manager can approve. If an employee is changing into a new position it needs to be approved by DHQ and created by THQ.
	
	If an employee is changing into another job then the manager will have approved.
	
	   • Enter effective date
	   • Choose reason (in the letter)

	• Choose Job group (in the letter) • Make any changes applicable based on data in letter
Change Job and Salary	The salary must align with the compensation model.
Add Secondary Jobs	This is for someone is working two part time jobs (called multiple incumbencies). Information is provided by the MU hiring manager. The EA can do this if the job is at the same MU (resp centre) – • Add date in job – start date • Select active • Enter pay rate DHQ will do if it is within 2 MU's. THQ will do if it is between 2 divisions
Change Salary	This change is based on information provided to you.
Change Organization	Organization change would occur in conjunction with an employee change.
Add Work Location (CAN)	Same as above
Add Employee Job History	
Add Employee Labor Allocations	This is for employee's that have their pay split by percentage between different departments. They have the same pay. Information provided by hiring manager.
Change Other Company Information	Do not use

Edit time and attendance
This would only change if a job has changed.

Pay
In this tab set you can:

• Add direct deposit

Add Direct Deposit	Use only if the employee requires your assistance. Employees can complete this on their own.

Benefits

Add PTO Benefit Plans	For Phase 2 and Phase 3 implementation of UltiPro- insured benefits and Group RRSP will be centralized - UltiPro benefit transactions be processed at THQ. The only exception to this rule will be those benefit plans currently administered locally - for these ministry units although THQ benefits will be setting up benefit deductions in the system, the current process will remain in place for enrolment with the providers. (for example, Golden and Dinsdale will continue to provide enrolment/change forms to HEB and HEP and those MU's in BC on BCGEU benefits will continue to provide enrolment/change forms to local providers)

Taxes

Add Work Location (CAN)	The employee administrator should contact payroll for any tax additions.

Document
If the employee needs assistance inputting a document.

Add Document	• Choose browse (goes to your files) once in the document tab. • Choose the file and name it • Check ***Viewable by Employee*** the box if you want the employee to see it. • You can save PEAC reviews here as well

PTO Code	PTO Description	Comments
VACAT	TSAVacaSalaryFT	Full Time employees who follow TSA Accrual Vacation Policy
VACPPC	VacPTCon6%to12%	Part Time Contract employees who progress based on service date from 6% to 12% vacation pay
SICKFT	TSA Sick FT	Full Time employees who follow the TSA Sick plan
SICKPT	TSA Sick PT	Part Time employees who follow the TSA Sick plan
MEDFT	Med/Per FT	Full Time employees who follow the TSA Medical/Personal plan
MEDPT	Med/Per PT	Part Time employees who follow the TSA Medical/Personal plan
VACCAS	Vacat Casual 6%	Casual employees who receive 6% fixed vacation pay
VACQC	Vacation QC 6%	Quebec Employees who receive 6% vacation pay
VACCO6	Vaca Cntrct 6%	Contract employees who receive 6% fixed vacation pay
VACPT	TSA Vaca PT Acr	Part Time employees who follow TSA Accrual Vacation Policy
VACO10	Vaca Cntrct 10%	Contract employees who receive 10% fixed vacation pay
VACC08	Vaca Cntrct 8%	Contract employees who receive 8% fixed vacation pay
VACADD	Vaca Additnl %	Anyone who is attached to a accrual vacation plan (non vacation payout plan) must also be attached to this plan
VACF01	Vac MNU86 FT	Vacation plan for Full Time employees belonging to Union MNU Local 86
VACP01	Vacat MNU86 PT	Vacation plan for Part Time employees belonging to Union MNU Local 86
VACF02	Vaca CUPE3242FT	Vacation plan for Full Time employees belonging to Union CUPE Local 3242
VACP02	Vaca CUPE3242PT	Vacation plan for Part Time employees belonging to Union CUPE Local 3242
VACF03	Vaca MNU91 FT	Vacation plan for Full Time employees belonging to Union MNU Local 91
VACP03	Vaca MNU91 PT	Vacation plan for Part Time employees belonging to Union MNU Local 91
VACF04	Vaca CUPE3050FT	Vacation plan for Full Time employees belonging to Union CUPE Local 3050
VACP04	Vaca CUPE3050PT	Vacation plan for Part Time employees belonging to Union CUPE Local 3050
VACF05	Vaca NAPE FT	Vacation plan for Full Time employees belonging to Union NAPE
VACF06	Vaca CUPE2348FT	Vacation plan for Full Time employees belonging to Union CUPE Local 2348
SICK01	SickCUPE3050FNC	Sick plan for Full Time employees belonging to Union CUPE Local 3050
SICK02	SickCUPE3242FNC	Sick plan for Full Time employees belonging to Union CUPE Local 3242
SICK03	Sick MNU91 FT	Sick plan for Full Time employees belonging to Union MNU Local 91
SICK04	Sick UFCW1400FT	Sick plan for Full Time employees belonging to Union UFCW Local 1400
SICK05	Sick CUPE2348FT	Sick plan for Full Time employees belonging to Union CUPE Local 2348

SICK06	Sick NAPE FT	Sick plan for Full Time employees belonging to Union NAPE
SICK07	Sick NAPE PT	Sick plan for Part Time employees belonging to Union NAPE
SICK08	Sick UFCW1400PT	Sick plan for Part Time employees belonging to Union UFCW Local 1400
SICK10	Sick CUPE3050PT	Sick plan for Part Time employees belonging to Union CUPE Local 3050
SICK11	Sick CUPE3242PT	Sick plan for Part Time employees belonging to Union CUPE Local 3242
SICK12	Sick MNU91 PT	Sick plan for Part Time employees belonging to Union MNU Local 91
VATEMP	VacTempPayout6%	Temporary employees who receive 6% fixed vacation pay
VACSEA	Vacat Seasnl 4%	Seasonal employees who receive 6% fixed vacation pay
STATPY	StatCas PT 4.62	Specifically for Dinsdale and Goldenwest casual employees in addition to their vacation plan
CUPEDG	VacCUPE DINGW6%	Vacation plan for employees at Dinsdale and Goldenwest belonging to Union CUPE who receive 6% fixed vacation pay
VACP05	Vaca CUPE2348PT	Vacation plan for Part Time employees belonging to Union CUPE Local 2348
FAMILY	Family Leave	Family Leave Plan (This is a bucket to hold and display a balance in Core Ultipro)
MNUDGW	VacMNU DINSGW6%	Vacation plan for employees at Dinsdale and Goldenwest belonging to Union MNU who receive 6% fixed vacation pay
OTLIEU	OT LIEU	OT LIEU (This is a bucket to hold and display a balance in Core Ultipro)
MENTAL	Mental Health	Mental Health (only applicable to some unions, this is a bucket to hold and display a balance in Core Ultipro)