

## Manager Self Service Delegated Access: Change Manager - Assign New Direct Reports

This guide will help you use Manager Self Service Delegated Access to change line management arrangements for multiple employees, so that they report to a single manager. You will be doing this on behalf of a delegating manager.

### Selecting the manager:

1. Click on 'Change Manager' from the Manager Self Service Delegated Access menu.
2. The 'Change Manager: People in Hierarchy' screen will be displayed and the manager/s you have delegated access for will be shown.
3. Click on the '+' icon to the left of the relevant manager to expand the list of staff that report to them. The list is displayed in alphabetical order by surname. A maximum of 10 rows will be displayed, so you may need to click on the 'Next' button, at the bottom left of the table, to display more rows.
4. You need to select the manager who you need to add new direct reports to. Against that person, select 'Action' on the far right hand side of the screen.
5. This will take you to the 'Change Manager' screens.

Note. You can only assign new direct reports where the manager and the affected employees are already within the delegated manager's reporting hierarchy.

Note. Some employees have multiple assignments. Please be sure to select the correct assignment on this screen.

### Enter an effective date:

You will be taken to the 'Effective date options' screen. A summary of the employee's assignment details will be displayed.

It is important to enter the correct effective date that the change takes effect from.

1. Check the 'Information' box at the top of the screen. This will tell you when the last change was made to the employee's assignment. This will be the earliest date that your change can be made from.
2. In the effective date box insert the date you wish the change to take effect (this can be selected from the calendar to the right).

Note. You are able to make back and future dated changes.

3. Select 'Continue' on the far right hand side of the screen.

## Assign New Direct Reports:

Note: Line management information for the person you have selected will be displayed in the Assign a New Manager section. You should not amend this unless you also need to change their manager.

1. Within the 'Assign New Direct Reports' section, ensure the 'Effective transfer date' is correct. This will display the same date as chosen on the previous page. If you need to amend the date, you can change the details in the 'Effective Transfer Date' field or click on the 'Back' button and start the process again.
2. In the 'New Direct Report' box, search for an employee that needs to report to this manager. Search by inserting the employee's surname followed by % and their forename.
3. Click on the 'magnifying glass' icon.
4. Select the employee from the 'Search and Select list of values' screen that appears by clicking 'Quick Select'.

Note. Some employees have multiple assignments. Please be sure to select the correct assignment.

5. The employee's details will appear in the 'New Direct Report' section.
6. To add more direct reports, select 'Add another row'. If you need to remove a row, click on the 'Remove' icon for the relevant row.
7. When you have listed all of the new direct reports, select 'Next'.

## Review and Submit:

A review and submit page will display the information you have entered. The change/s you have proposed will be indicated by a blue dot. If you need to make any amendments, select 'Back' to return to the 'Change Manager' screen.

Approval will be required by the manager that has delegated access to you. Please note that if the current manager of the employee is not the delegating manager, they will not be sent a notification of the change.

At this point, if required, you can add an 'Ad Hoc Approver'. See the guidance below on how to do this.

If you are happy with the changes, select 'Submit'.

## Adding an Adhoc Approver:

If you require someone in addition to the delegating manager, such as the new manager, to approve this change, you need to add them as an additional approver. You do this by selecting the '+' icon next to 'Add Adhoc Approver' on the 'Review and Submit' page. Search for their name in the same way as the previous screen (Surname%Forename). Select 'Add'. This approver will now be added.

Note. Adding an adhoc approver will not replace the need for the delegating manager to approve the change you have proposed.

## Confirmation:

Upon selecting 'Submit' a confirmation screen will appear. The changes will be submitted to the delegating manager for approval. You will receive a confirmation e-mail when it has been approved and the change will then be effective from the chosen date.

The day after the change is approved, the new line manager and the affected member/s of staff will receive a confirmation e-mail that the change has been made.

Changes that are returned for correction:

If the change manager transaction you submit contains an error, the delegating manager does not have the facility to return it to you for correction. They will need to reject the changes you have proposed and you will be sent a notification that this has happened. You will need to start a new change manager process to submit the correct details.

## Other Changes:

If the employee has any other changes to their contract (e.g. change of location), these changes will need to be submitted using Manager Self Service or Manager Self Service Delegated Access where possible. If Self Service can't be used to submit the change the line manager will need to complete the relevant form and send to HR Connect.

If your team or service is going through a restructure, we advise that you avoid using the Change Manager tool. This is because any changes to the system, including line management changes will be collated and made by HR.

## Help and Support:

Further information and guidance on the 'Change Manager' tool is available on the Change line manager KNet page.