

Manager Self Service Delegated Access: Change Manager - Reassign Direct Reports

This guide will help you use Manager Self Service Delegated Access to move one employee or a group of staff from one manager to another, on behalf of a delegating manager.

Selecting the current 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 that the employees are currently reporting to. Against that person, select 'Action' on the far right hand side of the screen.
5. This will take you to the 'Changer Manager' screens.

Note. You can only reassign direct reports from managers who are 1-3 levels down within the supervisor hierarchy of the manager you have delegated access for.

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. 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.

Reassign Direct Reports to a New Manager:

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 'Reassign Direct Reports to a New Manager' section, you will see all of the employees currently reporting to the manager you have selected.
2. Ensure the 'Transfer date' is correct. This will display the same date as chosen on the previous page. This date will also be displayed in the 'Effective Transfer Date' against each employee. If you need to amend the date, you can change the details in the 'Transfer Date' or 'Effective Transfer Date' fields or click on the 'Back' button and start the process again.
3. If all employees will now be reporting to the same new manager, you can search for this manager using the 'New Manager' box. Ensure that the correct date is displayed in the 'Transfer Date' field. You then need to select 'Assign to all' and this will populate each of the 'Direct Report's Manager' boxes.
4. Alternatively, individual employees can be assigned a new manager by completing the 'Direct Report's Manager' box against each employee.

Note. When searching for the new manager, use the format 'Surname%Forename' and click the magnifying glass to retrieve results. Select the manager 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. When you have finished 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 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.