

## Manager Self Service: Change Manager - Reassign Direct Reports

This guide will help you use Manager Self Service to move one employee or a group of staff from one manager to another.

### Selecting the current manager:

1. Click on 'Change Manager' from the Manager Self Service menu.
2. 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.
3. This will take you to the 'Changer Manager' screens.

Note. You can only reassign direct reports from managers who are currently within your reporting hierarchy.

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

### Enter an effective date:

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 employee 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 should display the same date as chosen on the previous page. This date will also be displayed in the 'Effective Transfer Date' against each employee.
3. If all employees will now be reporting to the same new manager, you can search for this manager using the 'New Manager' box. 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 finished select 'Next'.

## Review and Submit:

A review and submit page will be displayed. Review the information. Any changes 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.

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:

Your changes are automatically approved and will be effective from the chosen date. However, if you wish to add an additional approver who needs to approve the changes, you do this by selecting the '+' icon next to 'Add Adhoc Approver' on the 'Review and Submit' page. Search for the approver's name in the same way as the previous screen (Surname%Forename). Select 'Add'. This approver will now be added.

## Confirmation:

Upon selecting 'Submit' a confirmation screen will appear. If you have added an approver, it will go through to them to approve. If you have not added an approver, your change will be automatically approved and will be effective from the chosen date. You, the new line manager and the affected employee/s will receive a confirmation e-mail that the change has been made.

## Help and Support:

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

If you have any technical issue, log into Service Now and raise a call by selecting the 'ICT' Service on the left hand side of the screen or alternatively us the 'Chat' function. If you are not able to access Service Now, e-mail [ICTservicedesk@cantium.solutions](mailto:ICTservicedesk@cantium.solutions) and they will raise a request on your behalf.

If you have an HR related query, log into Service Now and raise a call by selecting the 'Human Resources' Service on the left hand side of the screen or alternatively us the 'Chat' function.

