KRONOS ESP SYSTEM

MANAGER SELF SERVICE
QUICK REFERENCE

Capital Health | Cumberland Health Authority — *Healthy Communities for a Healthy Future* | IWK Health Centre

Manager Home Page

When a manager logs in to Workforce ESP Self Service, the first page displayed is the Manager Home Page, which provides:

• An overview of scheduling-related information
• Easy access to **Credentials, Messages** and **Employee Requests**

Sample Manager Home Page

Manager Home Page Components

Alerts

- Provides hyperlinks to items requiring a manager's attention regarding credentials, messages, requests
  - **Credentials** contains information on credential warnings (credentials that will expire soon) and expired credentials (for information only)
  - **Messages** (not used by our organization)
  - **Requests** displays the number of requests awaiting response and provides a direct link to the Requests Page
  - Pending: The number of employee requests that are new or incomplete
  - Expired: The number of employee requests deemed incomplete that are within five (5) days prior to the requested shift date
  - Ignored: The number of new employee requests that are now five (5) days after the request submission
  - Last week: The number of employee requests received in the past week

Credentials	
Warnings:	1
Expired:	14

Messages	
Urgent:	3
New:	3

Requests	
Pending:	8
Expired:	1
Ignored:	4
Last Week:	3

Unit Selection

- Specifies the unit for which **Coverage and Hours Summary Graphs** are displayed.
  Note: When the user logs in to Workforce ESP Self Service, the Coverage and Hours Summary Graphs displayed on the Manager Home Page are for the unit that was selected when the user last logged out of Workforce ESP Self Service. To change this, select a different unit from the drop down menu.

Coverage Graphs

- Display the coverage by shift class and occupation class for the unit specified in the Unit Selection List. *Note:* In each graph, Workforce ESP Self Service displays the number of shifts or portions of shifts worked, by occupation class, for the current 24-hour period.

Hours Summary Graphs

- Display the number of hours worked on the previous day (yesterday graph) and the number of hours worked since the start of the calendar year (year to date graph). *Note:* Kronos ESP Self Service updates the graphs daily.

Graph Descriptions

Hours Summary – Yesterday	• Displays the number of hours worked on the previous day, by pay code or pay category, for the selected unit.
Hours Summary – since the start of the calendar year, by Year to Date	• Displays the number of hours worked

Credentials Page

Managers can display employee credentials on the **Credentials Page,** accessed from the **Staff Menu.**

Sample Manager Home Page

About Requests

Kronos Employee Self Service allows employees to submit schedule requests to managers for consideration. The requests have to be entered into the system five (5) days prior to the shift date. Requests within five (5) days of the shift must be submitted in writing to the manager.

On existing schedules, employees can:
- Submit an off request, to request time off the current schedule
- Submit a relief request, to work an extra shift which is currently open on the unit
- Submit a swap request, to swap shifts with another employee

Accessing Request Information

There are six areas in ESP Manager Self Service where information about employee requests can be accessed.

- Requests Alerts
- Requests Page
- Incomplete Relief Requests Page
- Employee Schedule Page
- Request by Unit Report
- Work Plan Page

The table below summarizes these areas and describes how a manager can work with requests in each area.

Request Information Area	How Managers Can Work With Requests	Location in Workforce ESP Self Service
Requests Alerts The Requests Alerts section displays the number of requests sent to the manager that are awaiting response. The data includes pending, expired and ignored requests and the number of requests made during the previous week.	View Requests Alerts Link to Requests Page	Manager Home Page
Requests Page Managers can view all requests, including their statuses, details, comments and audit information. Once viewed, managers can action all requests.	View requests and process all off requests, relief requests, swap requests and work requests.	Manager Menu > Requests
Incomplete Relief Requests Page Displays pending relief requests from the current date through seven days past the current date. Requests are displayed by shift rather than by employee. Managers can view all employee relief requests plus any associated bids relating to an individual shift. Once viewed, managers can action relief requests.	View Relief Requests in shift-focused format View all bids made by employees for an individual shift Process relief requests only	Manager Menu > Incomplete Relief Requests
Employee Schedule Page When viewing an individual employee's schedule, managers can also display the employee's requests on the schedule.	View all employee's requests on the schedule	Staff Menu > Schedules > Select Employee > Select Show Requests option
Request by Unit Report Provides details of off requests, relief requests, swap requests and work requests that employees have made during a specific date range.	View all employees' requests for a unit	Reports menu > Request By Unit
Work Plan Page Managers can view.	View only	Manager Menu > Work Plans

Requests Page

On the Requests Page, managers can view details of off requests, relief requests, swap requests and work requests. Each type of request is displayed in a separate spreadsheet. After viewing the details of the request, a manager can process or complete the request by approving, denying or postponing the request.

The Requests Page contains four tabs: Off Requests, Relief Requests, Swap Requests and Work Requests. The two request tabs which are important to you are Off Requests and Swap Requests. Off Requests are requests to book off a scheduled shift. Swap Requests are requests to swap shifts between two employees.

Workforce ESP Self Service displays new and incomplete requests within each request section. The requests on each tab are sorted as follows: expired requests first, followed by all other requests in ascending order by ID. In this manner, requests are displayed chronologically according to when they were submitted, with the earliest submitted requests listed at the top of each spreadsheet.

If there are multiple pages of a single request type Workforce ESP Self Service displays each page number as a hyperlink at the base of the request table. Click the required page number in order to view the selected page.

Filter the Request Display

Workforce ESP Self Service displays all new and incomplete requests that have been submitted to the manager or to units for which the manager has approval authority. Managers can change which requests are displayed by selecting different View Request Settings.

View Request Setting Descriptions

Status	• From the drop-down list, select the completion status of the requests to be viewed: a. All: all requests b. New: requests that have not yet been viewed by a manager c. Incomplete: requests that have been viewed by a manager but are not yet completed d. New and Incomplete: new and incomplete requests e. Complete: requests that have been completed by a manager (approved or denied)
Shifts on Unit	• To view requests associated with a particular unit, select the unit from the drop-down list. The list contains only units to which manager has access

View Request Setting Descriptions

Start Date and End Date	• Request submission dates • Specify the start date or end date or both of the date range to be viewed
Shifts on Date	• To view off or relief requests for shifts on a particular date, specify the date in this field
Request Type	• To view requests of a particular type, select the appropriate option from the drop-down list • The request types that appear in this list are defined by the Administrator
Employee	• The name of the employee who made the request. Select the employees name from the Employee drop-down list. • The list displays all employees with active positions on units to which the manager has access.
Other Manager Request	• To view requests submitted to another manager, select the manager from the drop-down list • The list contains only other managers who have request approval authority for at least one of the units for which the viewing manager has approval authority

Request Status and Details

When reviewing requests, the request status changes as the request is processed.

Request Status Descriptions

New	• The request has not yet been viewed by a manager
Incomplete	• The request has been viewed by a manager but not yet completed
Complete	• The request has been completed by a manager • A completed request is either approved or denied

Managers can view further information about requests including:
- Whether the completed request was approved or denied
- Who last viewed the request and when it was viewed
- All comments between the manager and the employee that are attached to the request

Request Detail Descriptions

Shift Date	• The date the shift is to be worked
Description	• The shift's unit, occupation type, icon, start time and end time
Request Start (Off Requests Only)	• The Request Start field defaults to the time the shift is scheduled to start • To accommodate employee requests for part of a shift, Workforce ESP Self Service allows the employee to enter the time the requested portion is to start (if the employee requests the entire shift off, the employee would not change the Request Start or Request End fields)
Request End (Off Requests Only)	• The Request End field defaults to the time the shift is scheduled to finish • To accommodate employee requests for part of a shift, Workforce ESP Self Service allows the employee to enter the time the requested portion is to end (if the employee requests the entire shift off, the employee would not change the Request Start or Request End fields)
Off Reason	• The reason for requesting the shift off
Status	• Whether the request is pending, approved or denied
Last Viewed By	• User Name of the manager who last viewed the request

View Audit Details

Workforce ESP Self Service allows managers to view audit details associated with a selected request, displaying a history of all actions taken by managers regarding a request. The audit details include two tables of information: Request ID Summary and Detail History.

Request ID Summary: In the left column, all of the managers who have viewed the request are displayed, and in the right column, the date and time of viewing are displayed

Detail History: Displays a list of the modifications which have been made to the approval states of the request, including Shift Date, Approver, Change Date, Approval State

Sample View Audit Details

Off Requests

Kronos Employee Self Service allows employees to submit off requests to a manager for approval. The off reasons from which employees may select when requesting a shift or part of a shift off are defined by the Workforce ESP Self Service Administrator. Each off reason is associated with an off pay code or category, as defined in Workforce ESP.

Managers can view the details of off requests and can process or complete the requests by approving, denying or postponing the requests. Depending on the configuration of Workforce ESP Self Service at the organization, off requests can be automatically actioned in Workforce ESP once approved in Workforce ESP Self Service.

Managing Off Requests

Employees submit off requests to a manager or to a unit for approval. If submitted to a unit, the request can be approved by any manager who has approval authority for the unit. A manager can complete the request by approving or denying it, or postponing the request by taking no action.

Workforce ESP Self Service can be configured so that an approved request can be automatically actioned in Workforce ESP. This occurs if the selected approval status is "Approved to schedule." The employee will be automatically booked off the shift, and the manager has the option of adding the relief task to the Workforce ESP Workbook or specifying that relief is not needed. *Note:* Check with the Workforce ESP Self Service Administrator in your organization regarding the configuration of Workforce ESP Self Service.

Off Request Process

	Step One	Step Two	Step Three	Step Four
Manager		Approves or denies the off request, and decides whether relief is required or not	Where configured, request processed immediately in Workforce ESP. Otherwise, request to be manually entered in Workforce ESP.	
Employee	Submits an off request to maager or unit. An off request may include: single shift, multiple shifts, a portion of a shift or portions of multiple shifts.			Reviews the status of submitted requests.

Approve Off Requests

Individual off requests will appear with different colored backgrounds.

If the row color is…	Then…
⚪ White	The row is available for processing.
🟠 Yellow	The user is not authorized to approve requests on the unit.
⚪ Gray (dimmed)	The row has already been actioned in Workforce ESP.

Approve Off Request To Workforce ESP Dialog Component Descriptions

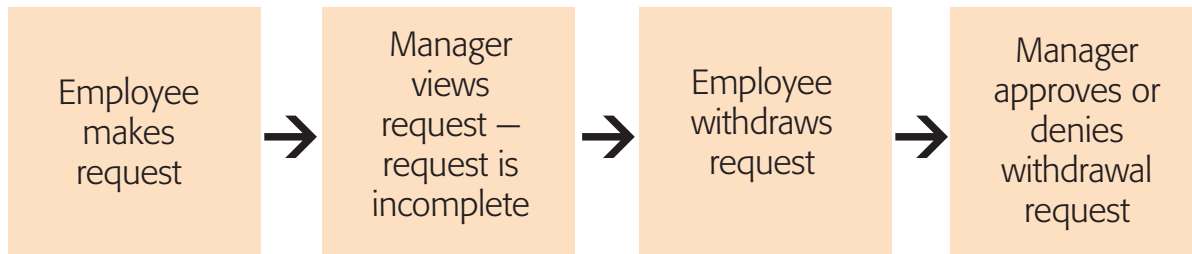|	
Schedule Task and Deadline	• If relief will be required for the shift, schedule the relief task on the Workforce ESP Workbook by entering a Workbook date and time on the left • The task deadline is shown on the right. The relief task cannot be scheduled on the Workforce ESP Workbook for a time later than this deadline
New Approver Comments	• Type comments related to the approval in this field
Date	• Shift Date
Details	• Shift details, including unit, occupation type, shift icon, start time and end time
Request Start and Request End	• Kronos Employee Self Service allows employees to submit off requests for a portion of their scheduled shifts • The Request Start and Request End fields displays the times the employee has requested off from the shift • If the employee has requested more than one portion of the shift, a second row will be displayed without data in the Date and Detail columns
Paid Hours	• The calculated paid hours associated with the time requested off • The paid hours can be updated to reflect changes to break times • The paid hours can be set from zero hours up to the length of the off portion
Off Reason	• The Workforce ESP off reason. When employees submit an off request, they select from a list of request reasons defined in Kronos Employee Self Service, usually a simpler and shorter list than Workforce ESP's list of off reason. The manager can then elect the appropriate Workforce ESP off reason from the drop-down list
Relief Not Needed	• If relief is not needed for the shift, select this option
Request Reason	• Reason for requesting the shift off, as specified by the employee
Approval Status	• The approval status selected by the manager in the Request Off dialog
Back	• Click this button to go back to the Request Off dialog
Update Request	• Click this button to complete the request approval. Workforce ESP Self Service displays a message to confirm that the changes were successfully saved
Cancel	• Click this button to cancel the request approval and close the dialog without saving changes

Deny Off Requests

There may be situations where the manager is unable to grant an employee's off request due to workload on the unit.
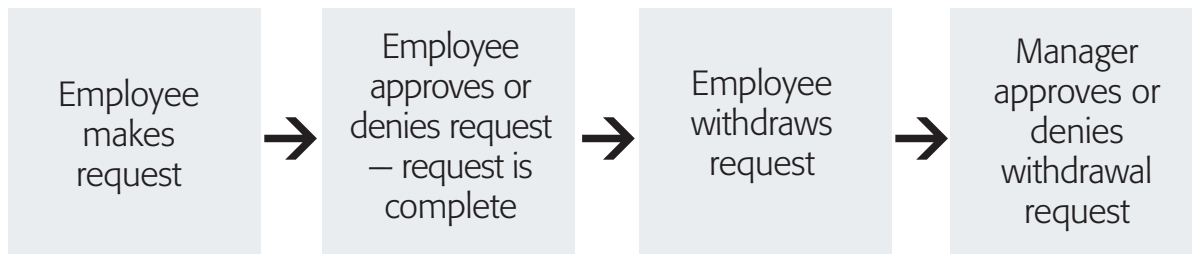
Withdrawal Requests

Kronos Employee Self Service allows employees to withdraw any type of request when the status is incomplete, and also withdraw work requests when the status is complete. For example, employees may withdraw requests when:

• The request has been only viewed by the manager

| Employee makes request | → | Manager views request — request is incomplete | → | Employee withdraws request | → | Manager approves or denies withdrawal request |

• The request has been approved or denied by the manager (work requests only)

| Employee makes request | → | Employee approves or denies request — request is complete | → | Employee withdraws request | → | Manager approves or denies withdrawal request |

When an employee withdraws a request, the status of the request will change to "Withdraw Request." In response, managers can approve or deny the withdraw request or select any other approval status. *Note:* The employee can withdrawal the request but the only way for the employee to request the same day again is for you to use the approval option "Request No Longer Valid". It is best to always use **"Request No Longer Valid"** so that the employee has the option to request the same day off in the future.

Edit Completed Requests (for Off Requests and Shift Swaps)

Even after a manager has approved or denied an employee's off request, the manager can edit the status of the request. For example, a manager denies an employee's request then later decides to grant the employee's request, changing the approval status from "Denied" to "Approved to schedule" or "Approved to plan."

If a manager changes the status of an off request to "Approved to schedule", the manager will then have to select an appropriate off code to associate with the request in order to complete the transaction in Workforce ESP.

In another example, a manager approves an employee's request but workload on the unit forces the manager to retract the approval, the manager then changes the approval status from "Approved to schedule" or "Approved to plan" to "Denied." *Note:* If the request had originally been approved using "Approved to schedule", changing the approval status to "Denied" does not affect the transaction already performed in Workforce ESP. The "book off" or "book on" transaction that was processed in Workforce ESP will need to be reversed in Workforce ESP, in a separate process. In this instance you would have to book on or book off the shift in *Schedules.*

In another example, a manager approves an employee's request but workload on the unit forces the manager to retract the approval, the manager then changes the approval status from "Approved to schedule" or "Approved to plan" to "Denied." *Note:* If the request had originally been approved using "Approved to schedule", changing the approval status to "Denied" does not affect the transaction already performed in Workforce ESP. The "book off" or "book on" transaction that was processed in Workforce ESP will need to be reversed in Workforce ESP, in a separate process. In this instance you would have to book on or book off the shift in Schedules.

Workforce ESP Self Service records all changes to approval statuses. Managers can view these changes in the audit details of the request.

If the approval status is "Withdrawal Approved", the manager is no longer able to edit the approval status. As noted above, it is always best to use "Request No Longer Valid" when approving a withdrawal request so that the employee has the option to request the same day off in the future.

If the approval status of the completed request is…	The manager can change the approval status to…	The manager can also…	Note
Denied	• Approved to plan • Approved to schedule • Pending • Postponed	Add a comment to the request	If the approval status is changed to "Approved to schedule", Workforce ESP – Self Service prompts the manager to proceed with the transaction by selecting an appropriate off or on code to attach to the processed request in Workforce ESP.
Approved to plan (Workforce ESP – Self Service only)	• Denied • Approved to schedule • Pending • Postponed	Add a comment to the request	Refer to the above note.
Approved to scheduled (action in Workforce ESP)	• Denied • Approved to plan • Postponed	Add a comment to the request	The transaction that was processed in Workforce ESP as a result of the request originally being approved will need to be edited in a separate process, in Workforce ESP.
Withdrawal Approved	• The manager cannot edit the request	Add a comment to the request	

Swap Requests

Kronos Employee Self Service allows employees to submit swap requests (requests to exchange shifts with another employee) to a manager for approval. Managers can view and approve or decline all swap requests made by employees for a specific shift.

Managing Swap Requests

Swap Request Process

To swap shifts through Workforce ESP Self Service, the system requires two employees, each with a shift to exchange. Workforce ESP Self Service will not allow employees to submit swap requests that will cause a double-booking for any portion of a shift. The system also warns the employees if the shifts they are agreeing to swap are of different lengths (and possibly different paid hours).

While each organization may have slightly different work practices, in general the swap request process looks like this:

	Step One	Step Two	Step Three	Step Four	Step Five
Manager & SRC			Reviews the request. Approves or denies the off request. tered in Workforce ESP.	Where configured, request processed immediately in Workforce ESP. If not, request to be manually entered in Workforce ESP.	
Employee 1	Submits a swap request to an employee.				Reviews the status of submitted request.
Employee 2		Reviews the request. Approves or denies the swap request.			Reviews the status of submitted request.

Step one: An employee reviews his or her schedule and that of the secondary employee. The employee identifies one shift from each employee's schedule and submits the request to the second employee. The employee will not be able to submit a request that would cause a double booking on either employee's schedule and will be warned if the shifts are of different length.

Step two: The secondary employee receives and reviews the request. If agreeing to the exchange, the employee submits the request to either a manager or the unit for approval. If submitted to a unit, the request can be approved by any manager who has authority for the unit. If the employee does not agree to the exchange, he or she can decline the request. The declined request does not move forward for approval.

Step three: The manager reviews the swap request submitted by the employees for the specific shifts, along with any associated comments and the employee schedule and unit schedule, if needed. Once reviewed, the manager approves the shift swap.

Step four: Workforce ESP Self Service can be configured so that when the swap request is approved, the request is automatically actioned in Workforce ESP. This occurs if the approval status is set to "Approved to schedule". *Note:* Check with the Workforce ESP Self Service Administrator in your organization regarding the configuration of Workforce ESP Self Service.

Step five: Each employee can view the Requests Page to determine whether the request was approved or denied.

Display Swap Requests

Managers can view and action swap requests on the Requests Page, which is accessed from the Manager Menu.

Approve Swap Requests

Workforce ESP Self Service can be configured so that when a swap request is approved, the employees are automatically swapped in Workforce ESP with no further processing required. *Note:* Check with the Workforce ESP Self Service Administrator in your organization regarding the configuration of Workforce ESP Self Service.

Deny Swap Requests

When a swap request is denied, both employees will see the status as denied when they review the details of the request.

Edit Completed Requests

Even after a manager has approved or denied an employee's request, the manager can edit the status of the request. The process and options for editing completed Shift Swap Requests is the same as with editing completed Off Requests. See above (page 15) under "Off Requests" for examples, options and process.