# Toronto and Region Conservation Authority (TRCA)

# Manager User Guide – Dayforce Employee Movement Transaction Forms

September 2021

## Purpose of Manager User Guide

The purpose of this user guide is to describe the various forms that are set up in Dayforce for TRCA Employee Status and Movement transactions. The guide also describes related items such as:

- Approval workflows
- Messaging and notifications
- Process steps
- Data entry requirements.

# Contents

Purpose of Manager User Guide ........ 2
Dayforce Employee Status and Movement Forms ........ 4
Employee Status and Movement Forms: Process Step Outline ........ 5
Affected Employee ........ 6
New Manager ........ 8
Form View ........ 9
Approval Workflows ........ 11
File Attachments ........ 11
File Attachment Visibility ........ 11
Forms Submissions ........ 12
Approval Notifications - Forms ........ 14
Employee Letter ........ 15
Letter Received for Approval ........ 16
Pending Actions Notification ........ 16
Message Centre ........ 17
HRBP Notification ........ 22
Letter Received by Employee ........ 23
Notification of Employee Accept ........ 24
HR Profile: Letter ........ 25
ECM – Contract Extension ........ 26
ECM – Secondary Position (No Job Competition) ........ 28
ECM – Temporary Acting Assignment ........ 30
PTF – Contract Extension ........ 32
PTF – Request for Leave ........ 34
PTF – Request for Record of Employment ........ 36
PTR – Request for Termination ........ 37
PTF – Return to Work ........ 38
PTF – Secondary Position ........ 41
PTF – Temporary Acting Assignment ........ 43

## Dayforce Employee Status and Movement Forms

The following forms are set up in Dayforce:

Employee Complement (Financial Approval)

- ECM – Contract Extension
- ECM – Secondary Position (No Job Competition)
- ECM – Temporary Acting Assignment

Personnel Transaction Forms

- PTF – Contract Extension
- PTF – Request for Leave
- PTF – Request for Record of Employment
- PTF – Request for Termination
- PTF – Return to Work
- PTF – Secondary Position
- PTF – Temporary Acting Assignment

## Employee Status and Movement Forms: Process Step Outline

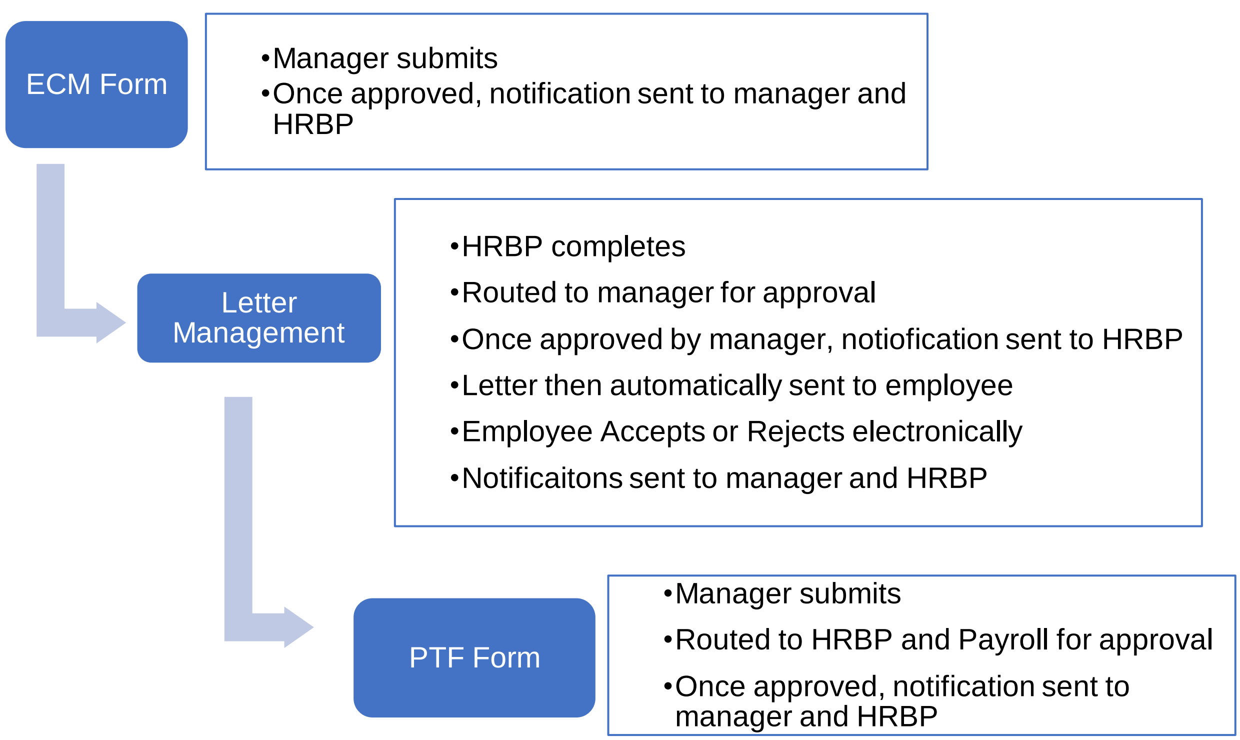
The following outlines the main steps that are completed in processing Employee Status and Movement forms in Dayforce for employees.

1. **Employee Complement Forms (ECM)**
    - These are processed to comply with applicable TRCA corporate polices to secure approval to commit to the transaction and to ensure appropriate complement and funding is available.

2. **Letter**
    - Standard TRCA employment related letters are completed and forwarded to employees for acceptance.

3. **Personnel Transaction Forms (PTF)**
    - These are processed to complete updates to employee profile.

Flow Chart




Some of the transactions rely only on Personnel Transaction Forms (PTF) being completed with no related Employee Complement form.



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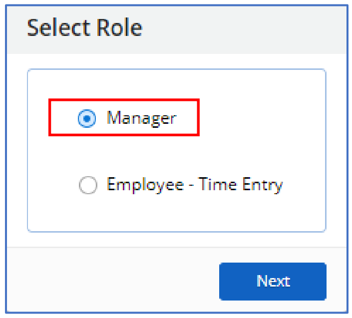
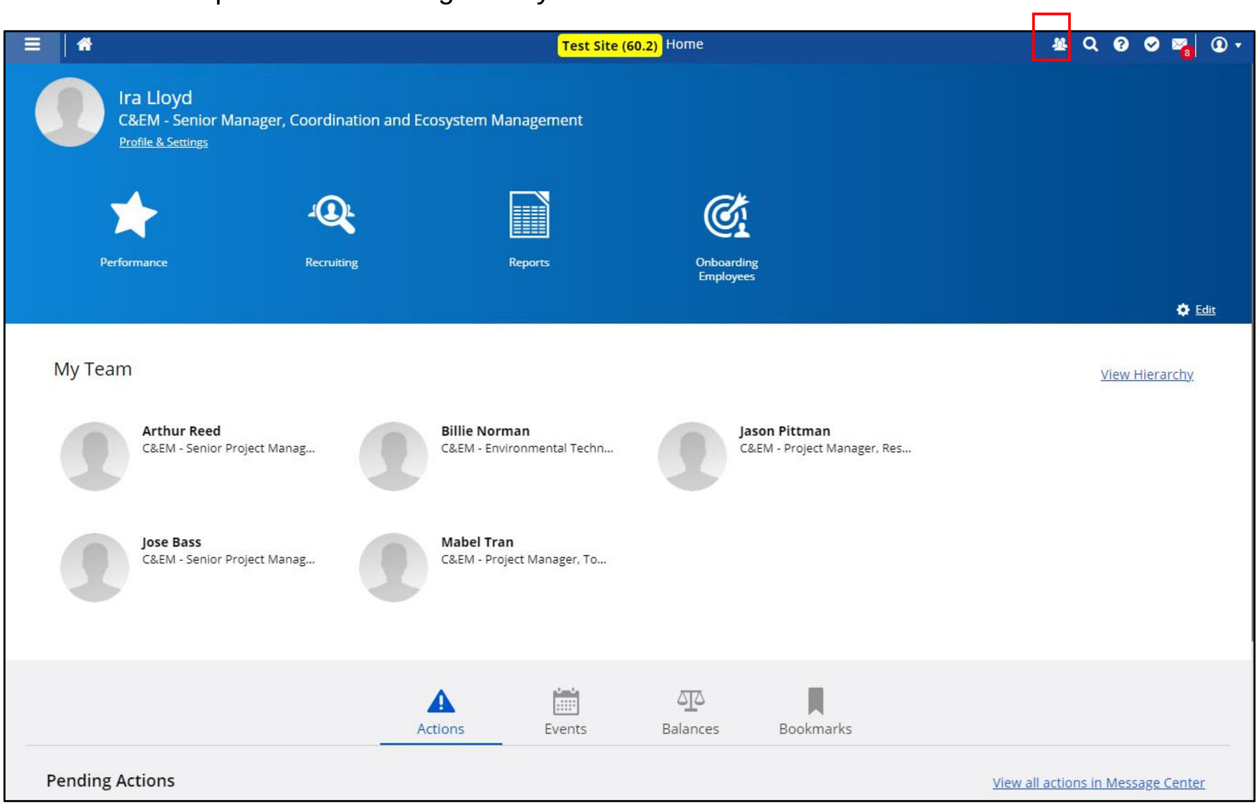
## Affected Employee

Manager initiates transactions by completing forms for the affected employee. This is facilitated by manager visibility to the employee through their **HR Profiles** list.

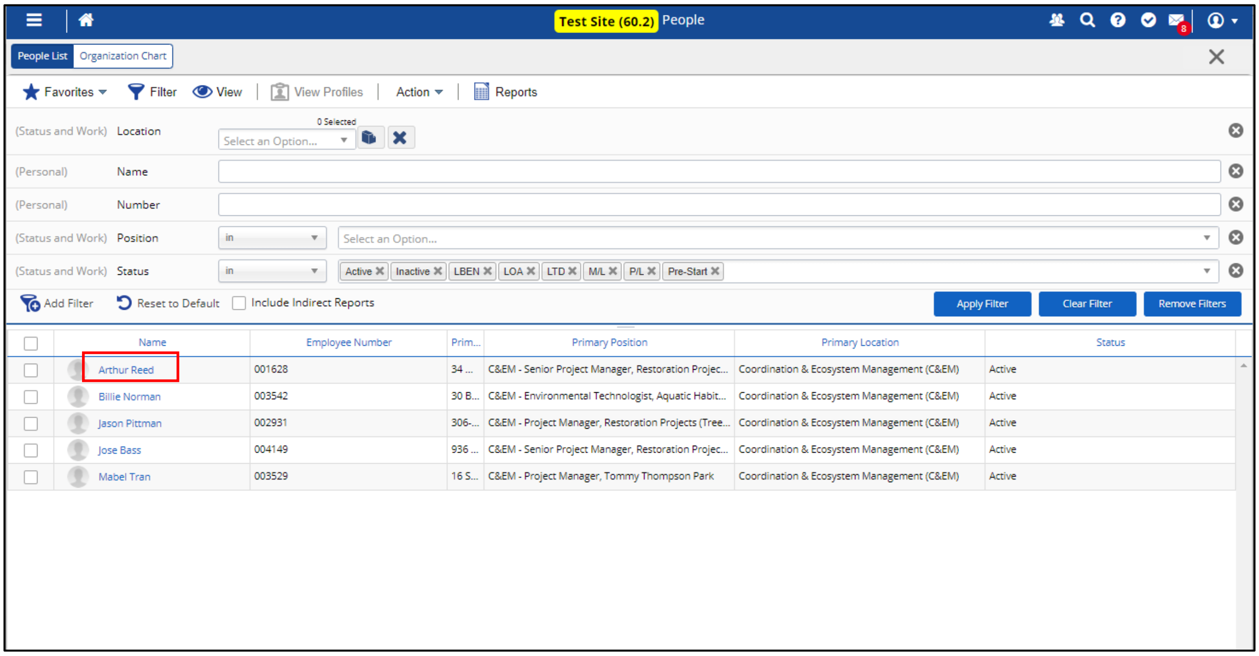
Access Dayforce under your **Manager** user role.



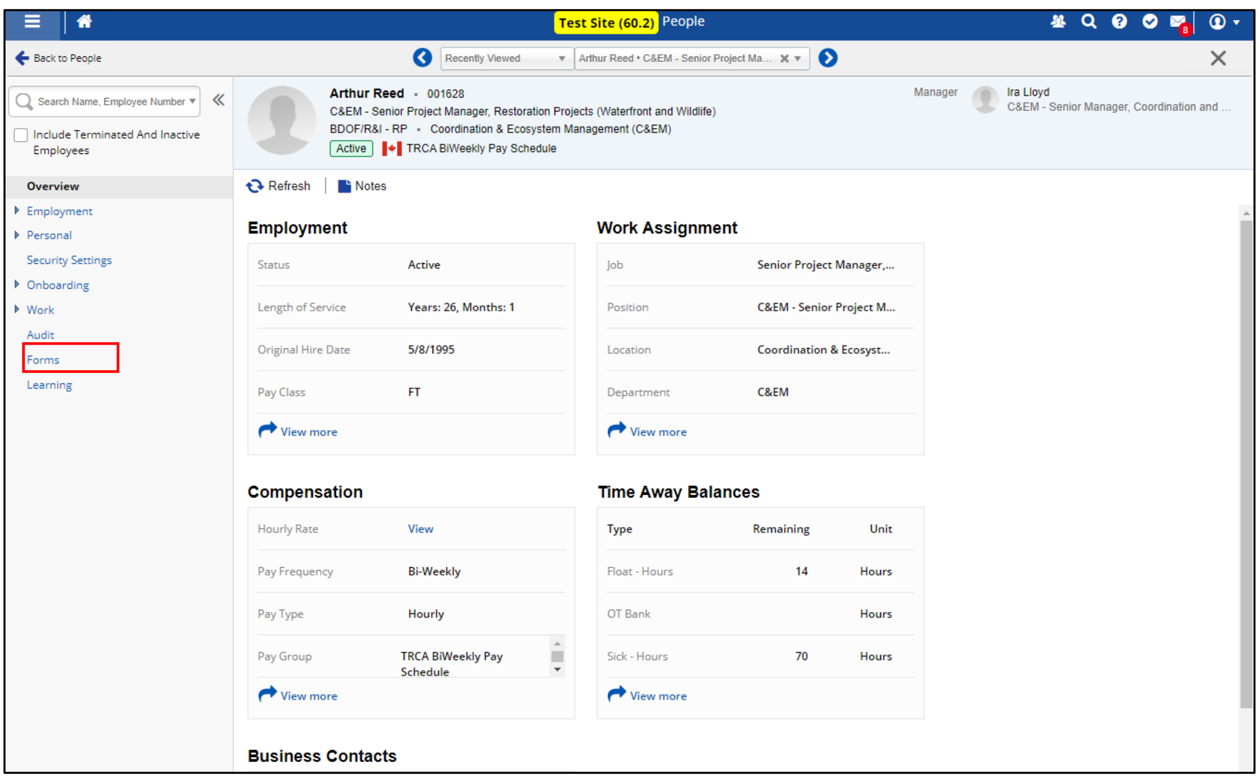

Click on the People button to navigate to your HR Profiles List.



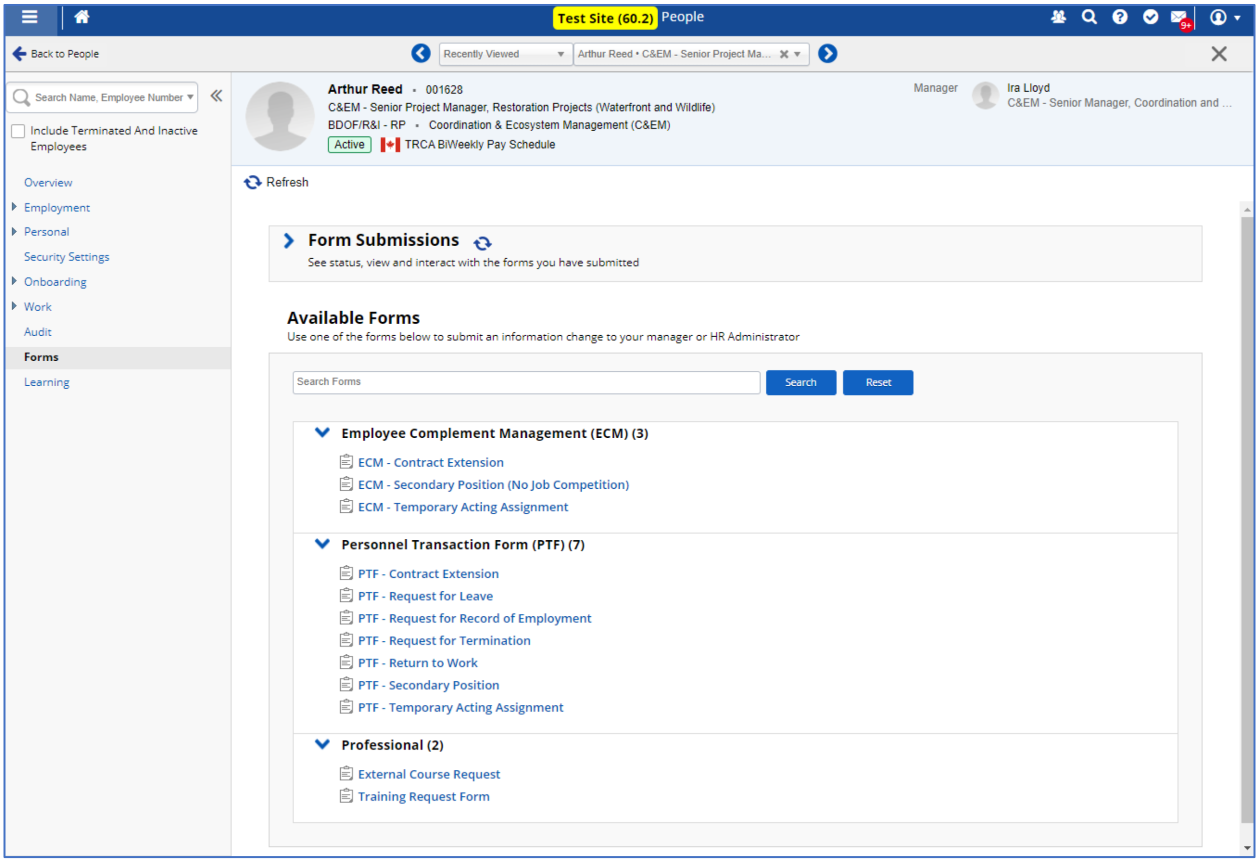
Click the name of the affected employee.



The **Overview** screen for the employee displays.



Click on **Forms**.




Any form that is clicked under **Available Forms** is displayed for the subject employee. The employee is the affected employee for the form.

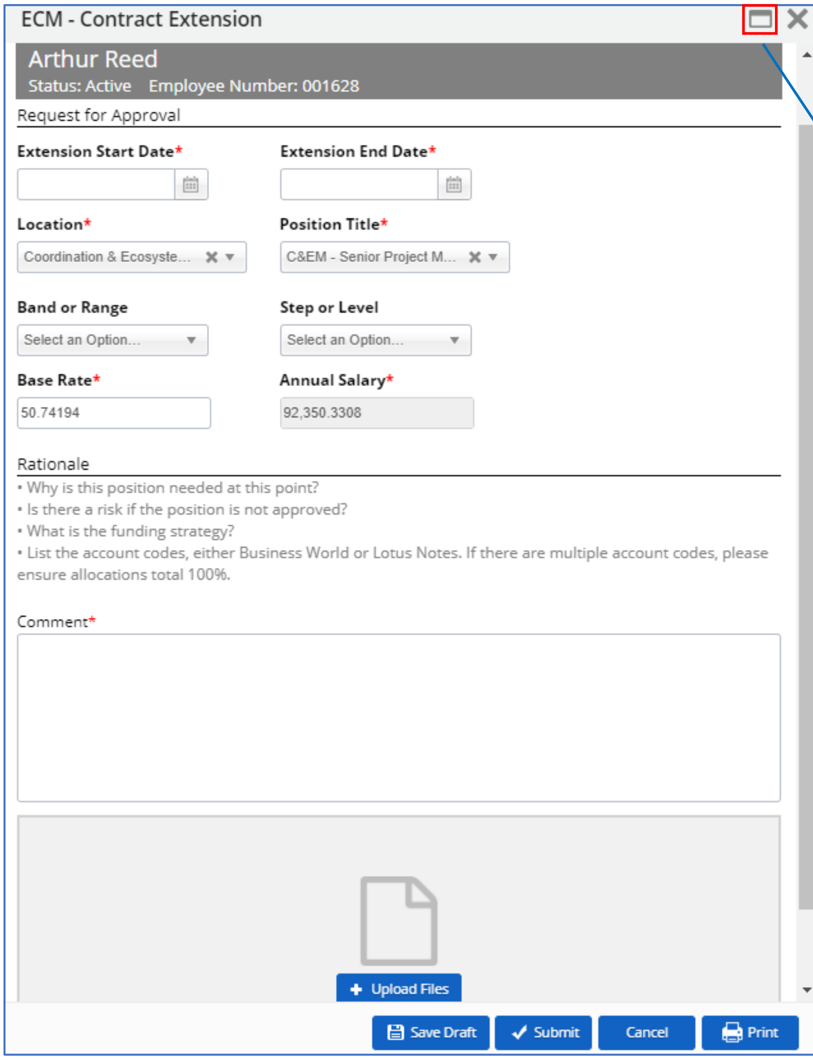
## New Manager

Please note – the **ECM – Temporary Acting Assignment** form is processed by the new manager, who might not be currently assigned to the affected employee. In this case, please forward email to HRBP requesting that you be assigned as an additional manager to the employee.

As well, **PTF - Return to Work** form might be processed by a new manager for the affected employee. If this is the case, like above please forward email to HRBP requesting that you be assigned as an additional manager to the employee

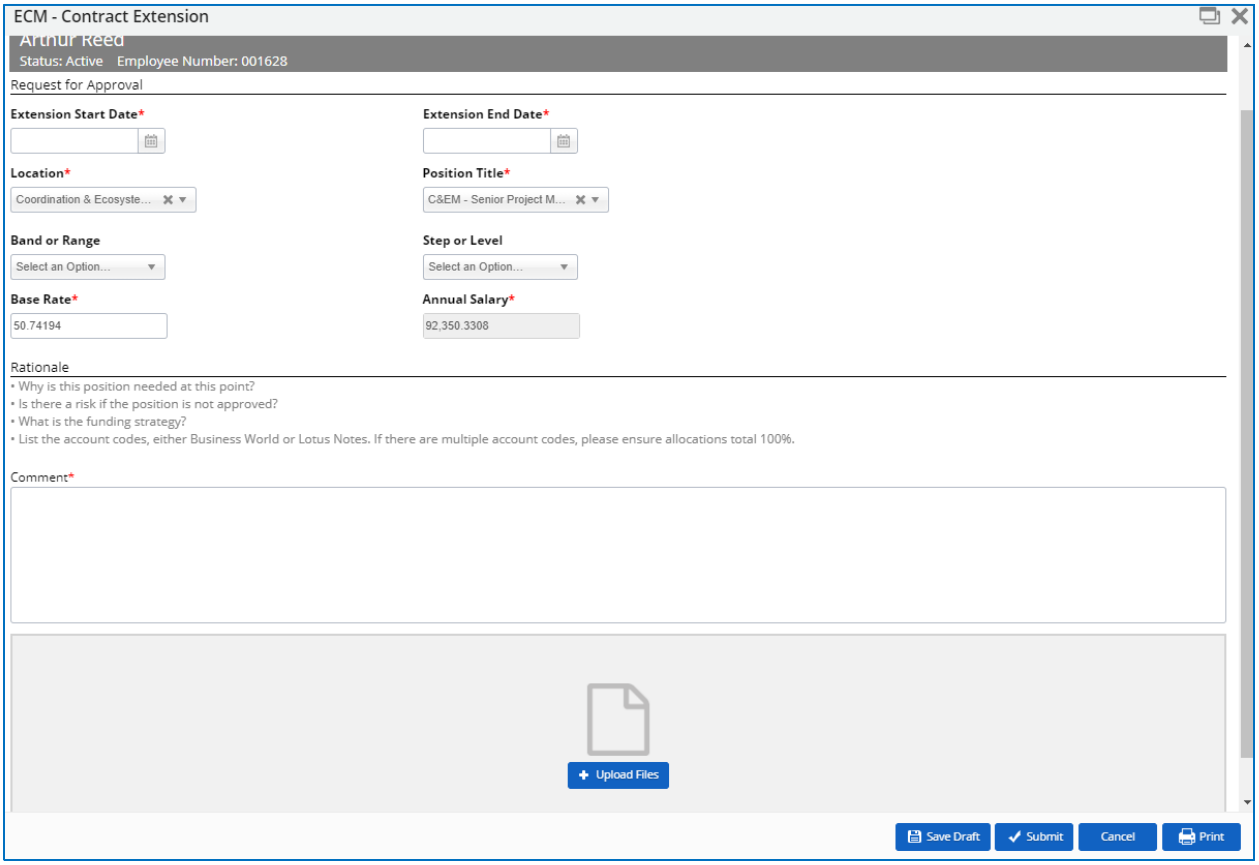
## Form View

Below is a sample form that is displayed for an employee.




You can click on the Maximize button to enlarge the form view

See next page for enlarged view.



ECM - Contract Extension

Arthur Reed

Status: Active Employee Number: 001628

Request for Approval

Extension Start Date*

Extension End Date*

Location*

Coordination & Ecosyste...

Position Title*

C&EM - Senior Project M...

Band or Range

Select an Option...

Step or Level

Select an Option...

Base Rate*

50.74194

Annual Salary*

92,350.3308

Rationale

- Why is this position needed at this point?
- Is there a risk if the position is not approved?
- What is the funding strategy?
- List the account codes, either Business World or Lotus Notes. If there are multiple account codes, please ensure allocations total 100%.

Comment*

Upload Files

Save Draft | Submit | Cancel | Print

## Approval Workflows

Below are the approvers for the type of forms.

Employee Complement Forms

- Manager
- Director
- Jenifer Moravek (Manager, Strategic Business Planning and Performance)
- HRBP

Letter

- Manager

Personnel Transaction Forms

- HRBP
- Payroll

Approvers have the option to **Accept** or **Reject** the form. If they reject the form, it is routed back to you and you can i) Update the form and Resubmit, and the form is submitted to first approver, or, ii) Withdraw.

## File Attachments

You can upload files as required when you submit a form. Supported formats include .XLSX, .DOCX, .PDF.

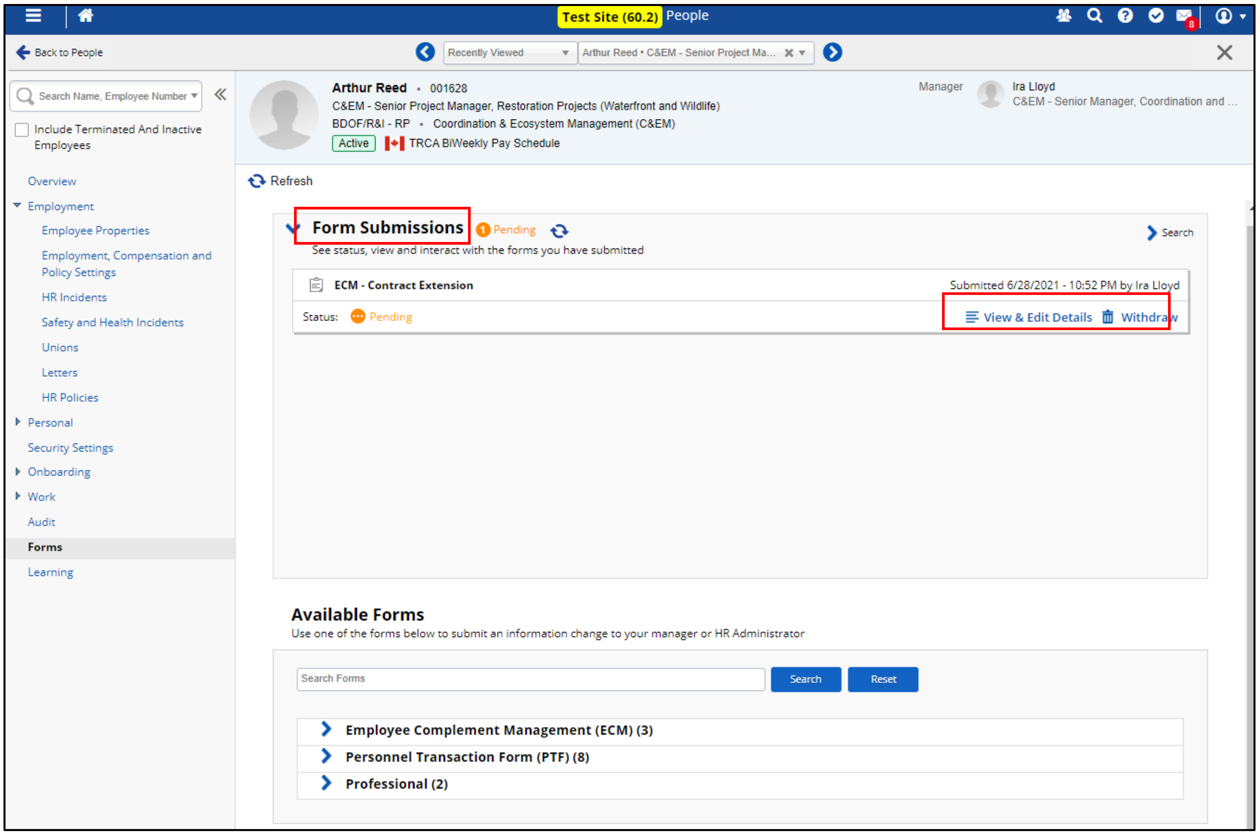
### File Attachment Visibility

During the workflow routing of the form, Manager, Director or Jennifer Moravek might not be able to view any attachments because of Dayforce security permission. HRBP and Payroll will always be able to view attachments.

If an approver other that HRBP and Payroll needs to view attachment, please email same accordingly.

## Forms Submissions

You can check the form's approval status by expanding **Form Submissions** and then clicking on the **View & Edit Details**. You can also **Withdraw.**



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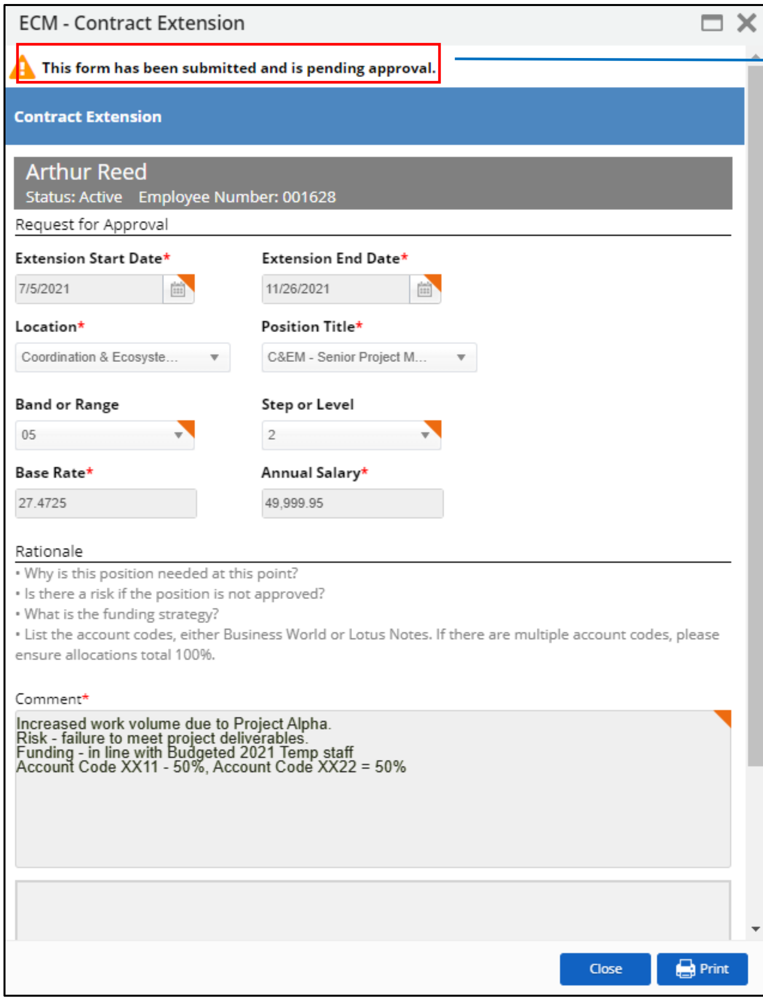

ECM - Contract Extension

This form has been submitted and is pending approval.

**Contract Extension**

Arthur Reed
Status: Active   Employee Number: 001628

Request for Approval

**Extension Start Date***
7/5/2021

**Extension End Date***
11/26/2021

**Location***
Coordination & Ecosyste...

**Position Title***
C&EM - Senior Project M...

**Band or Range**
05

**Step or Level**
2

**Base Rate***
27.4725

**Annual Salary***
49,999.95

Rationale

- Why is this position needed at this point?
- Is there a risk if the position is not approved?
- What is the funding strategy?
- List the account codes, either Business World or Lotus Notes. If there are multiple account codes, please ensure allocations total 100%.

Comment*

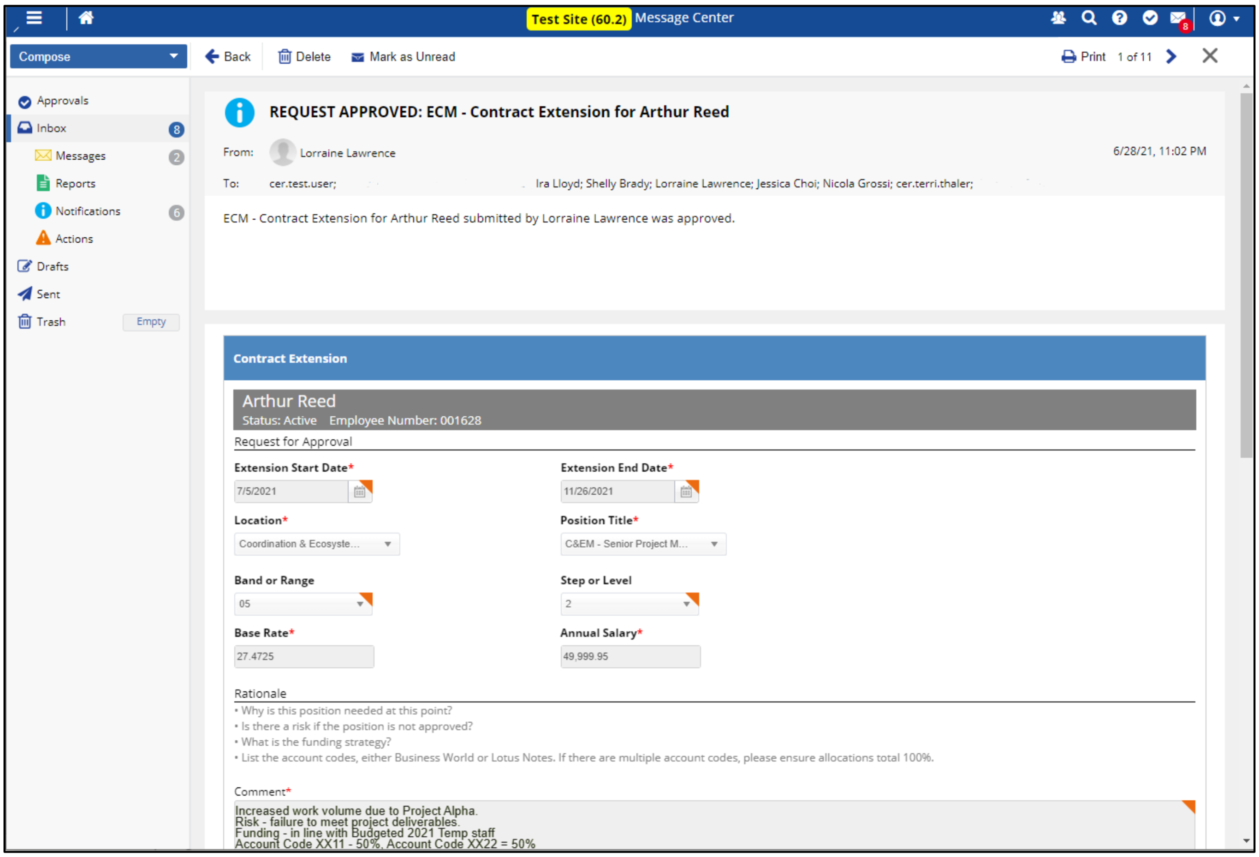
Increased work volume due to Project Alpha.
Risk - failure to meet project deliverables.
Funding - in line with Budgeted 2021 Temp staff
Account Code XX11 - 50%, Account Code XX22 = 50%

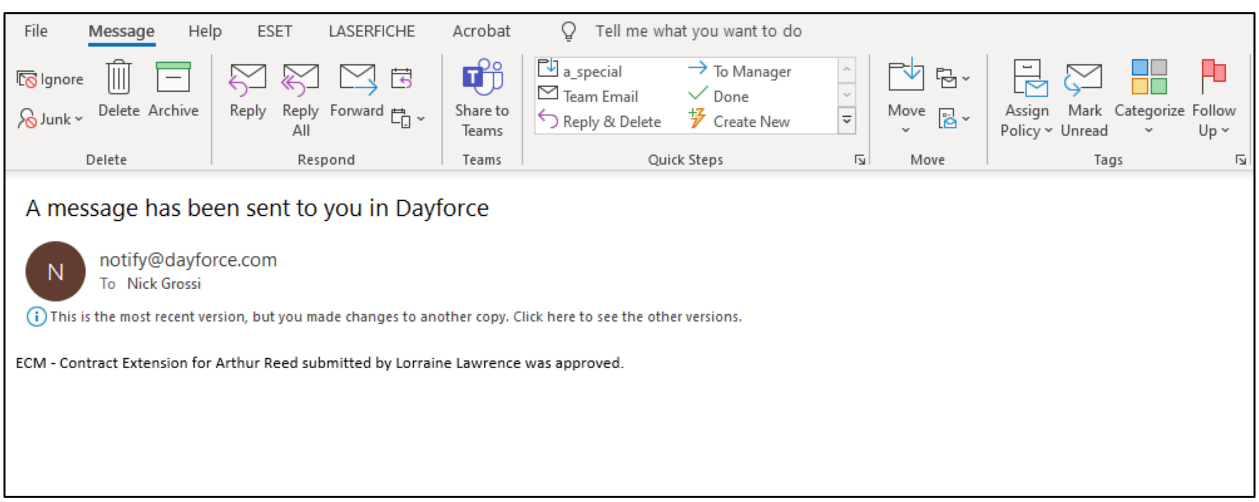
Close   Print

Form is in Pending Approval status

# Approval Notifications - Forms

When either an ECM form or a PTF form is approved (i.e., it is "approved" when the last user in the workflow approves the form), you will receive a notification to your Dayforce Message Centre, with a related notification to business email.



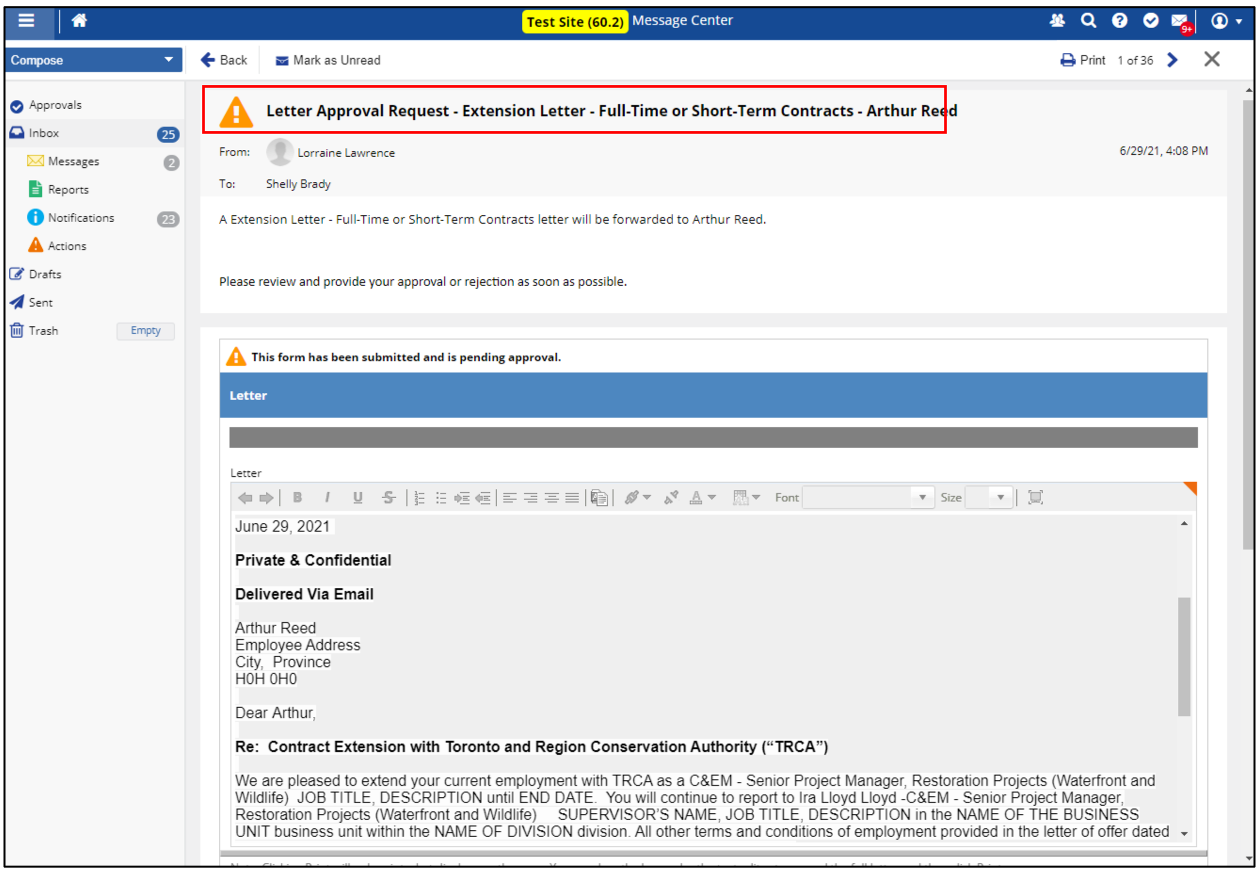



Other users such as HRBP, also receive appropriate notifications.  This ensures all users are aware of the approval status of the form and prompts them to take subsequent action so that the process flows in a timely fashion.

## Employee Letter

The HRBP completes the applicable letter for a transaction in Dayforce **Letter Management** module.  The HRBP submits the letter for your approval before it is forwarded to the employee.

You will receive the letter for approval in your Dayforce Message Centre, as well as a related notification to your business email.




**From:** notify@dayforce.com <notify@dayforce.com>
**Sent:** Tuesday, June 29, 2021 4:05 PM
**To:** Danielle Festa <Danielle.Festa@trca.ca>
**Subject:** A message has been sent to you in Dayforce

A decision request is pending your approval. Please log into Dayforce to view and process the request.

A Extension Letter - Full-Time or Short-Term Contracts letter will be forwarded to Arthur Reed.

Please review and provide your approval or rejection as soon as possible.

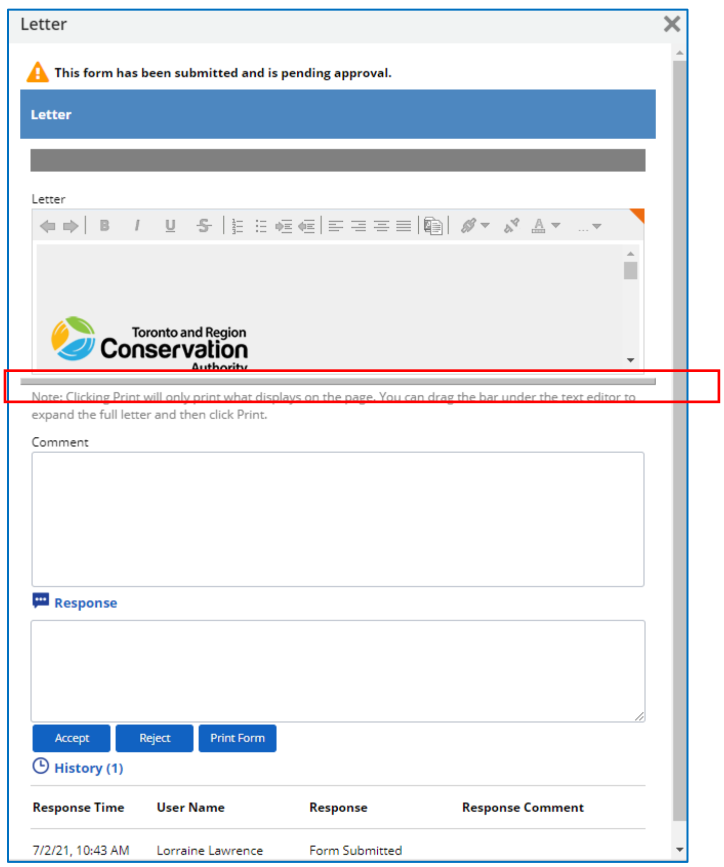
## Letter Received for Approval

To approve the letter, you can access it through:

- Pending Actions notification on the Home screen, or,
- Message Centre

### Pending Actions Notification

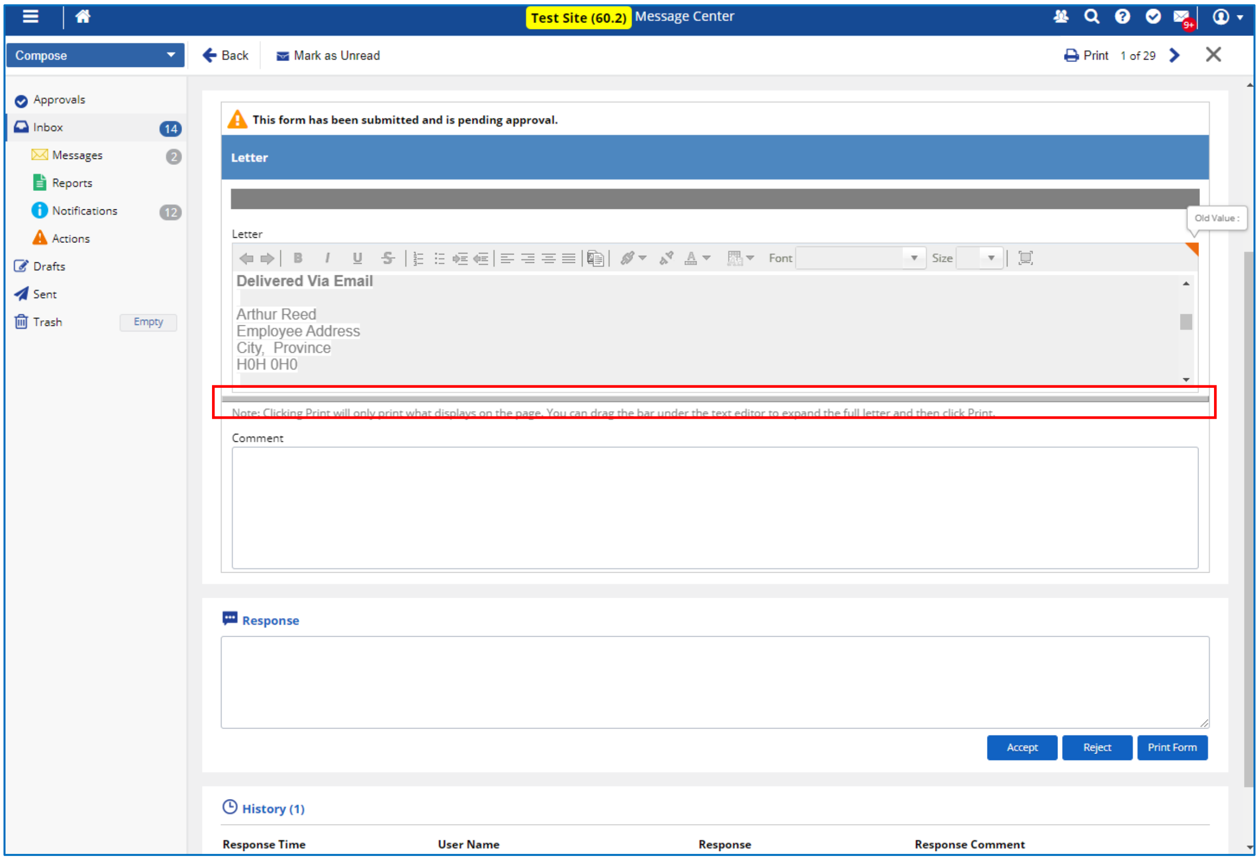

When you click on the notification on the Home screen, the **Letter** pop-up box appears, as per below. This view of the offer letter is constricted. The only way to view more of the letter is to drag the splitter bar downwards and scroll, but it is still constricted.



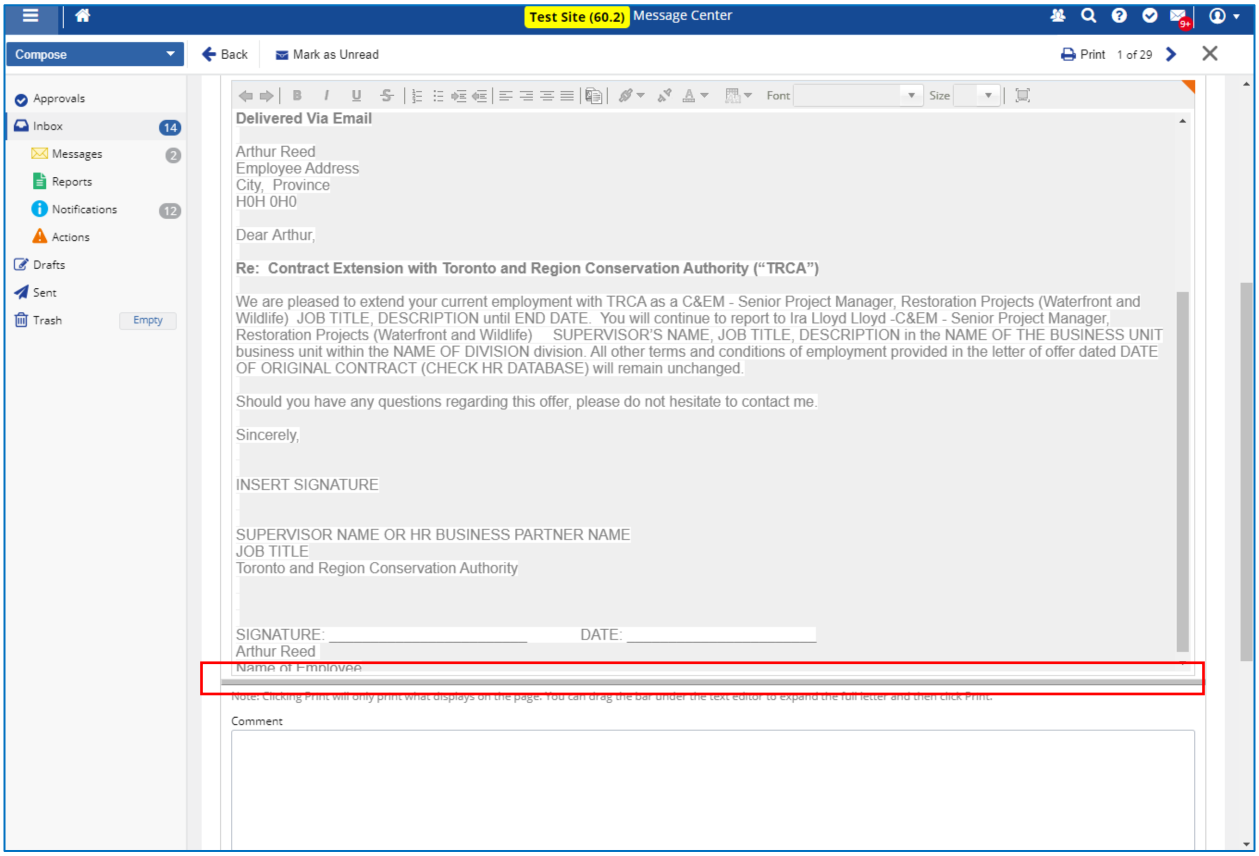
## Message Centre

You are better off accessing the letter through **Message Centre.** Here the layout of the letter is wider.

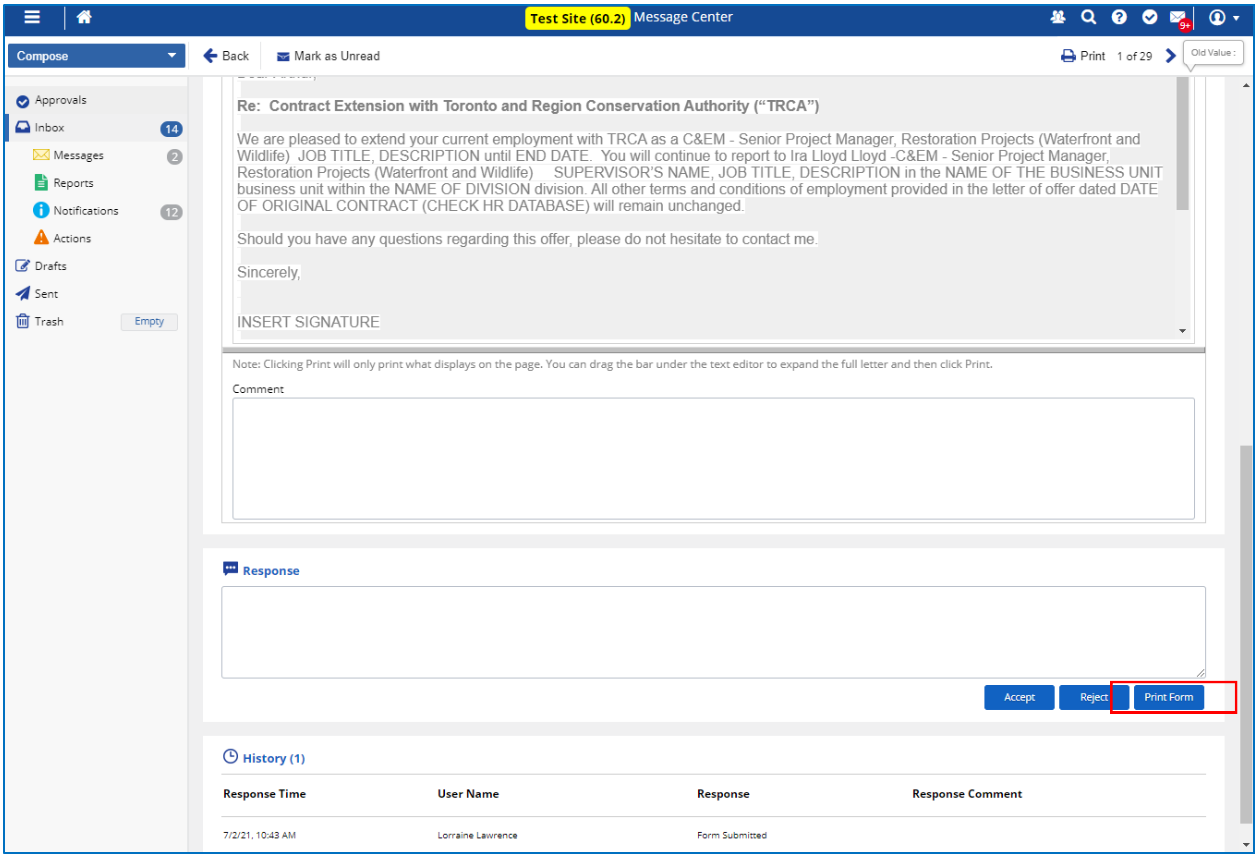
In this case as well, you still need to drag the splitter bar below the content window and scroll to see more.



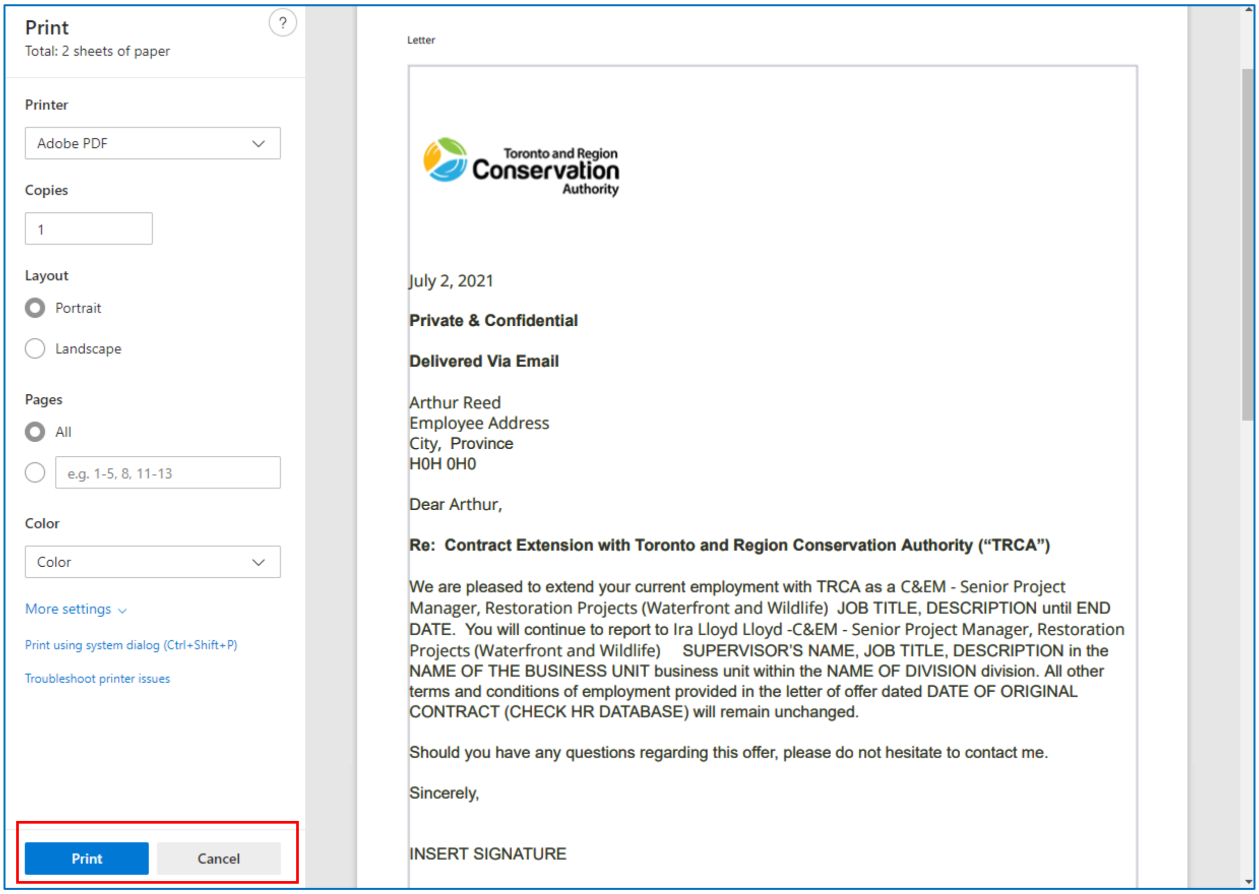
Here the splitter bar is dragged further down.



For a better viewing experience, you can scroll down to the bottom of the offer letter message and click Print Form - the standard **Print** window appears.



The letter can be printed manually or alternatively saved as a PDF file.




To exit the **Print** window the hiring manager needs to click **Cancel**.



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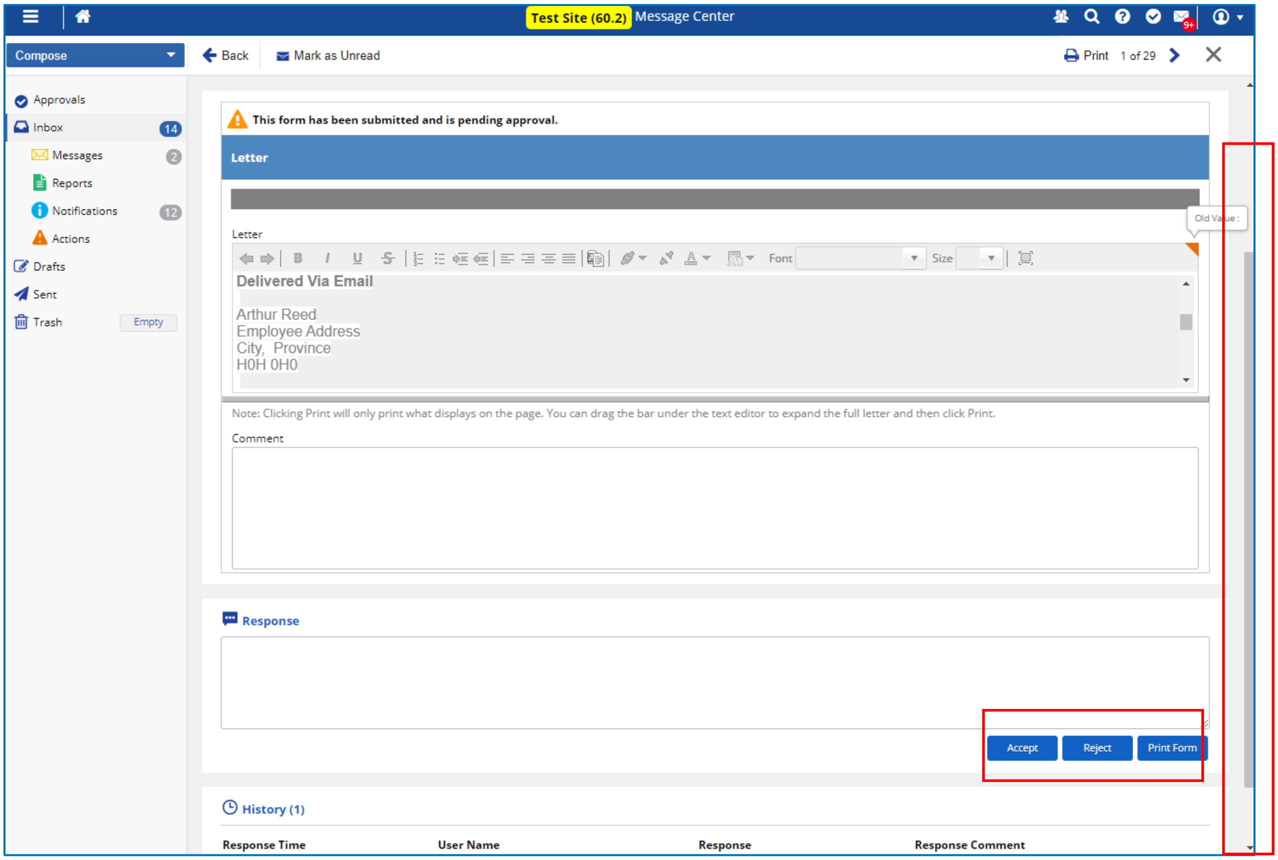
To view the **Accept** and **Reject** buttons, you need to scroll down using the outer vertical scroll bar.

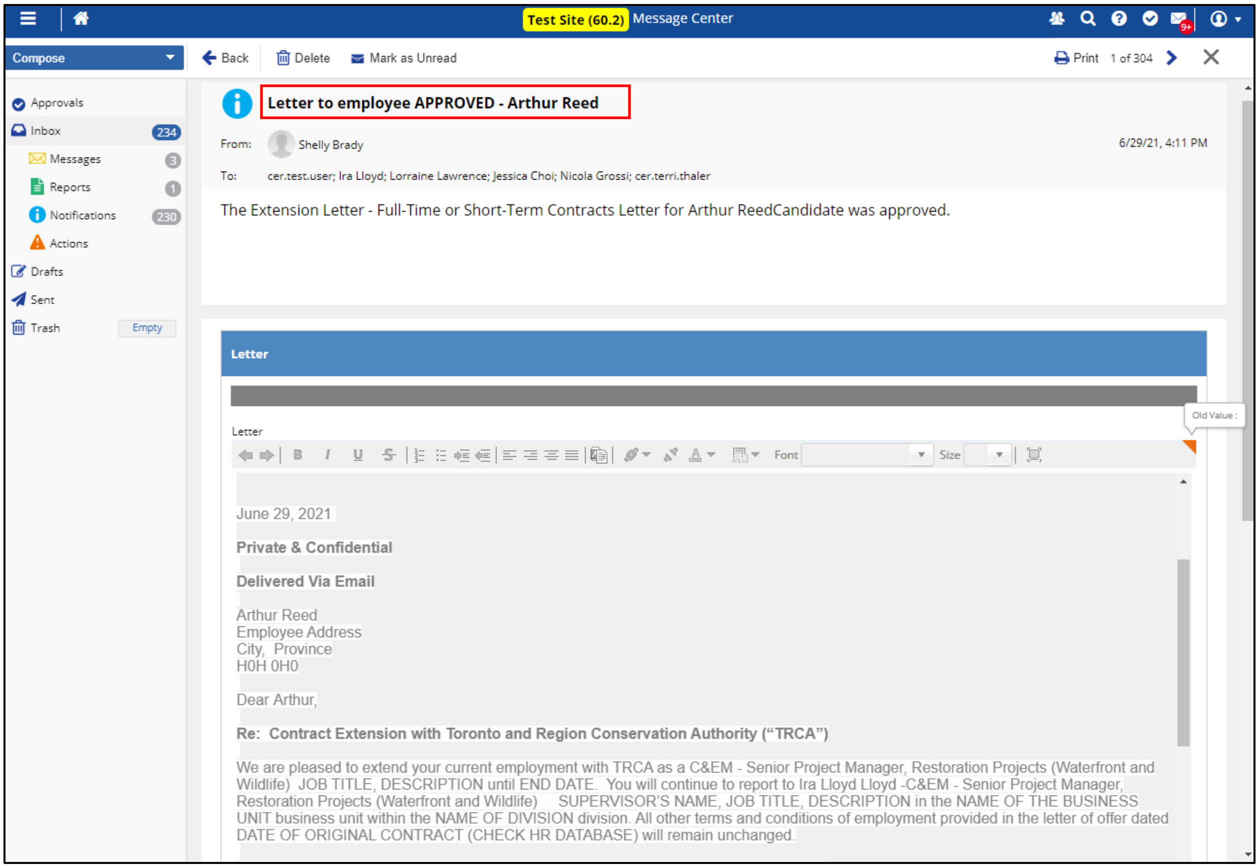
Once decided, click either **Accept** or **Reject**.

If **Accept** is chosen, the offer letter is then automatically sent to candidate using the email address in their profile.



## HRBP Notification

When you approve the letter, the HRBP will receive notification to their Dayforce Message Centre, as well as a related notification to their business email.

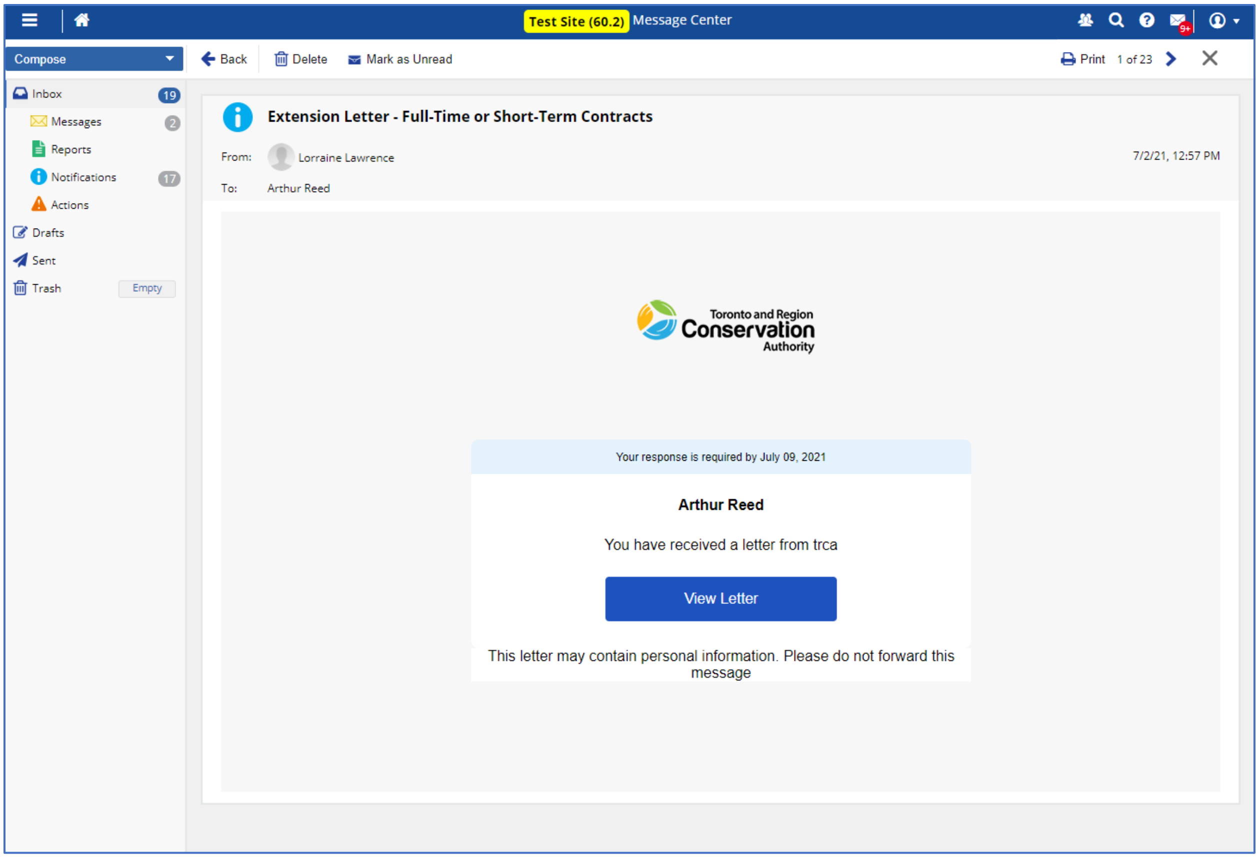


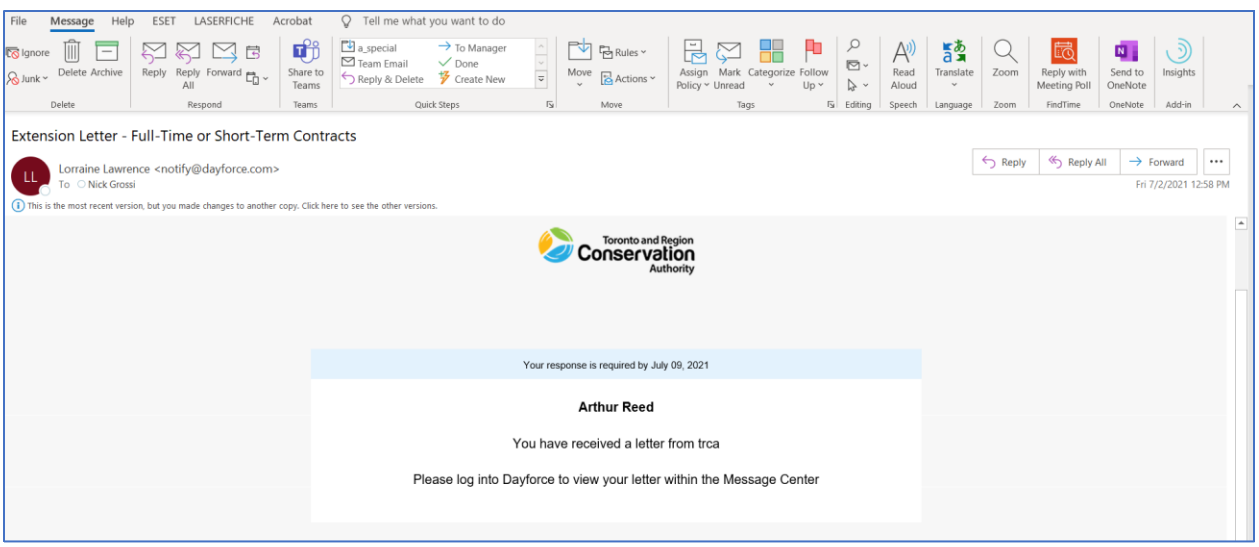

**From:** notify@dayforce.com <notify@dayforce.com>
**Sent:** Tuesday, June 29, 2021 4:12 PM
**To:** Carmen Lam <Carmen.Lam@trca.ca>
**Subject:** A message has been sent to you in Dayforce

The Extension Letter - Full-Time or Short-Term Contracts Letter for Arthur ReedCandidate was approved.

## Letter Received by Employee

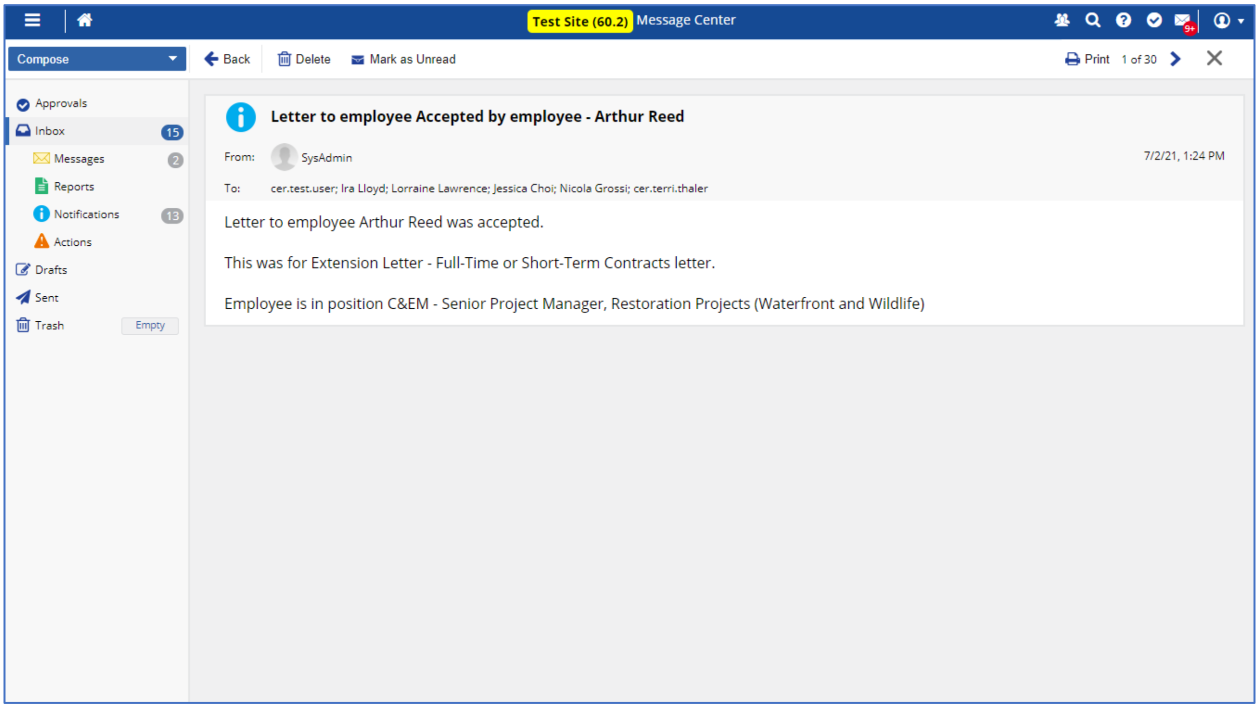
After your approval, the employee will automatically receive the letter to their Dayforce Message Centre, as well as a related notification to their business email.

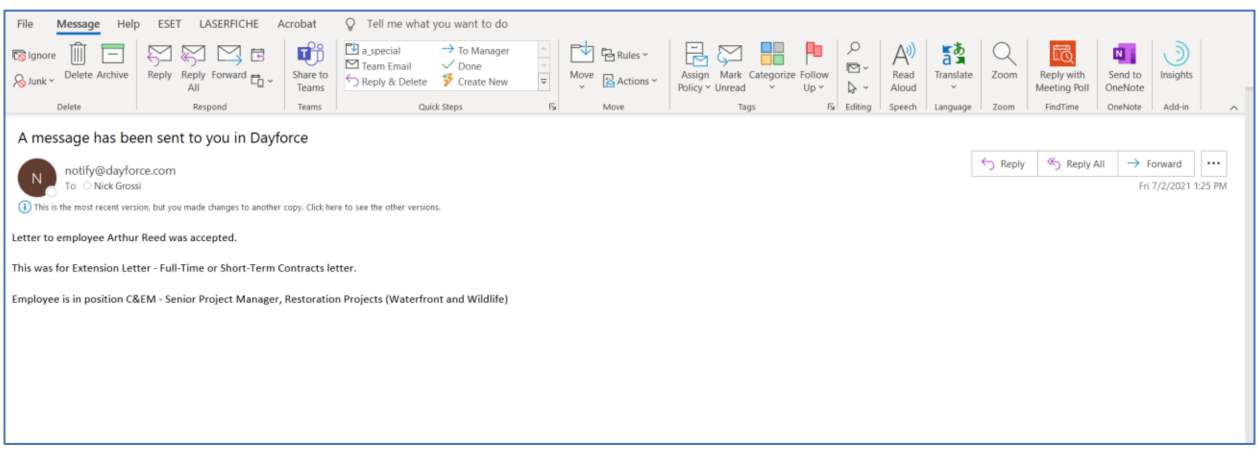


## Notification of Employee Accept

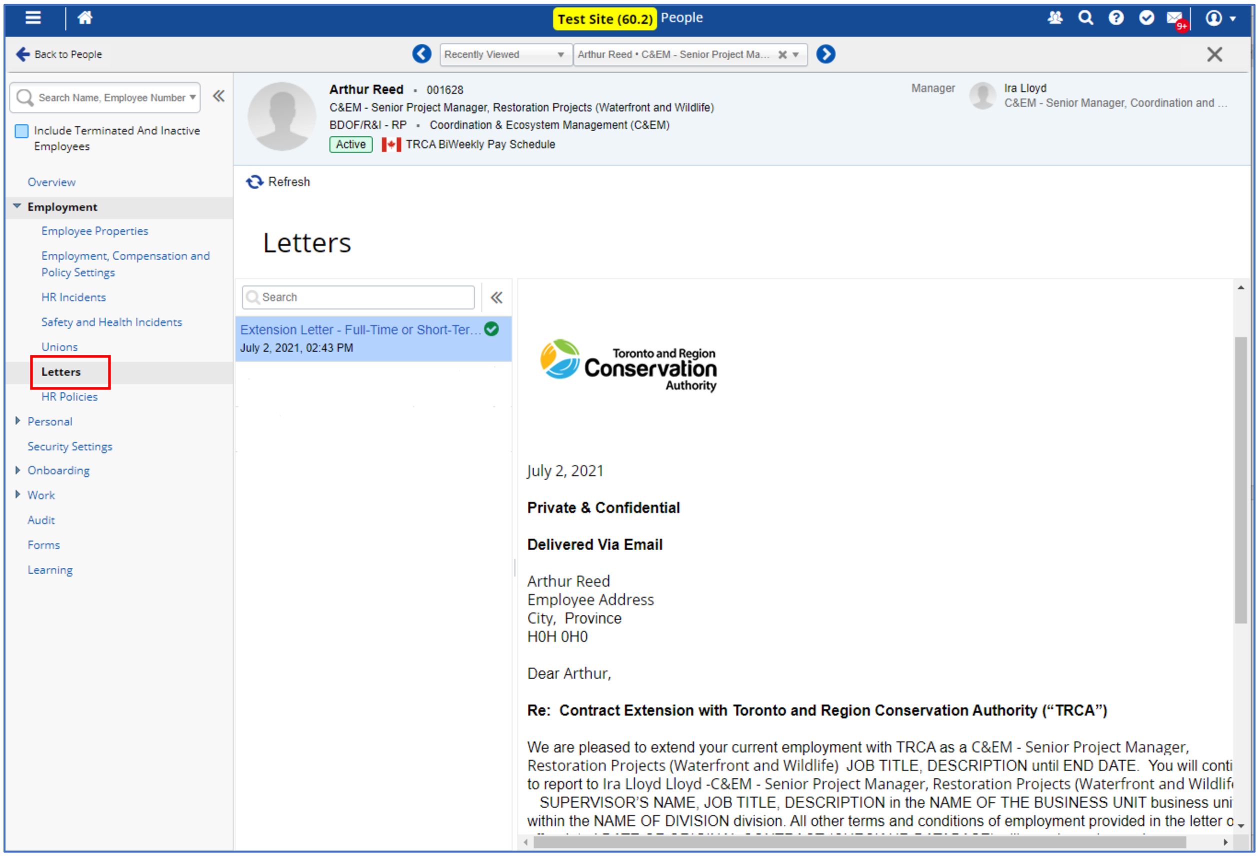
After the employee responds and accepts the letter, notification is sent to Dayforce Message Centre for both you and HRBP, with a related notification to business email.



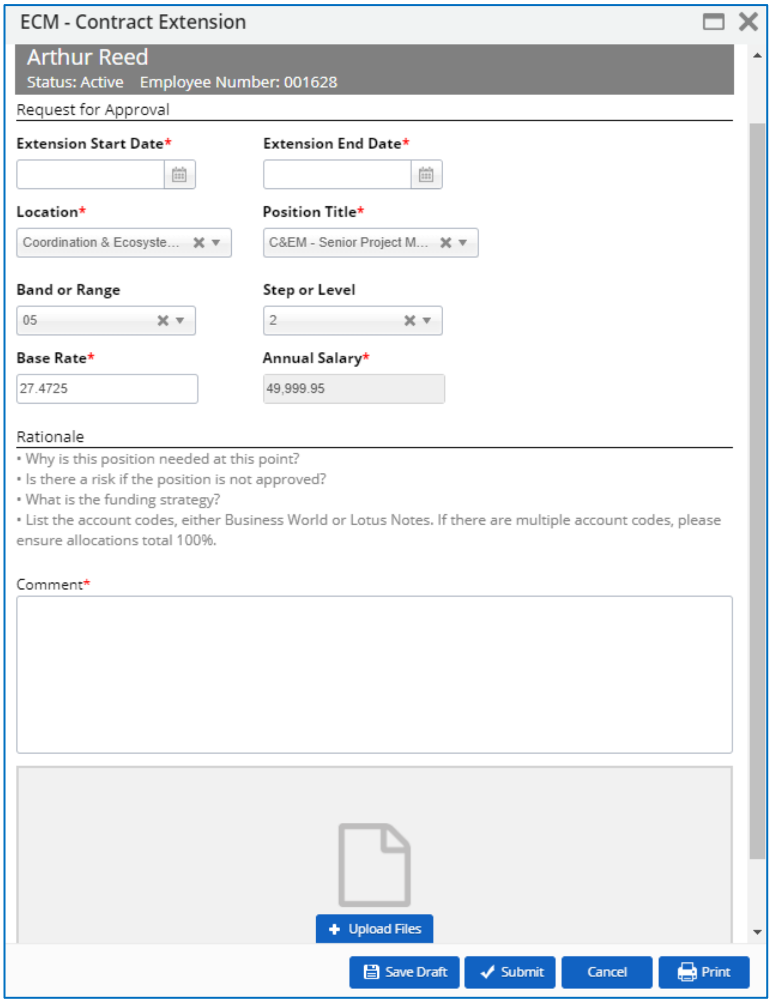
## HR Profile: Letter

In the employee's HR Profile list, the accepted letter is part of their profile under the **Letter** section and is always available for historical reference



# ECM – Contract Extension

Submit this form for approval to extend a temporary employee's contract.




1. **Extension Start Date**
    - Record as required.
2. **Extension End Date**
    - Record as required.
3. **Location / Position Title**
    - This drop-down list displays the current On-site Department(s) (sometimes referred to as the "Sub-unit" under Business Unit) and related position for the employee.
    - The field is locked. You do not record the position for a contract extension as the position remains the same

4. **Band or Range / Step or Level**
    - These will populate with values currently recorded in employee profile.
    - The fields are locked. You do not record these fields for a contract extension as they remain the same

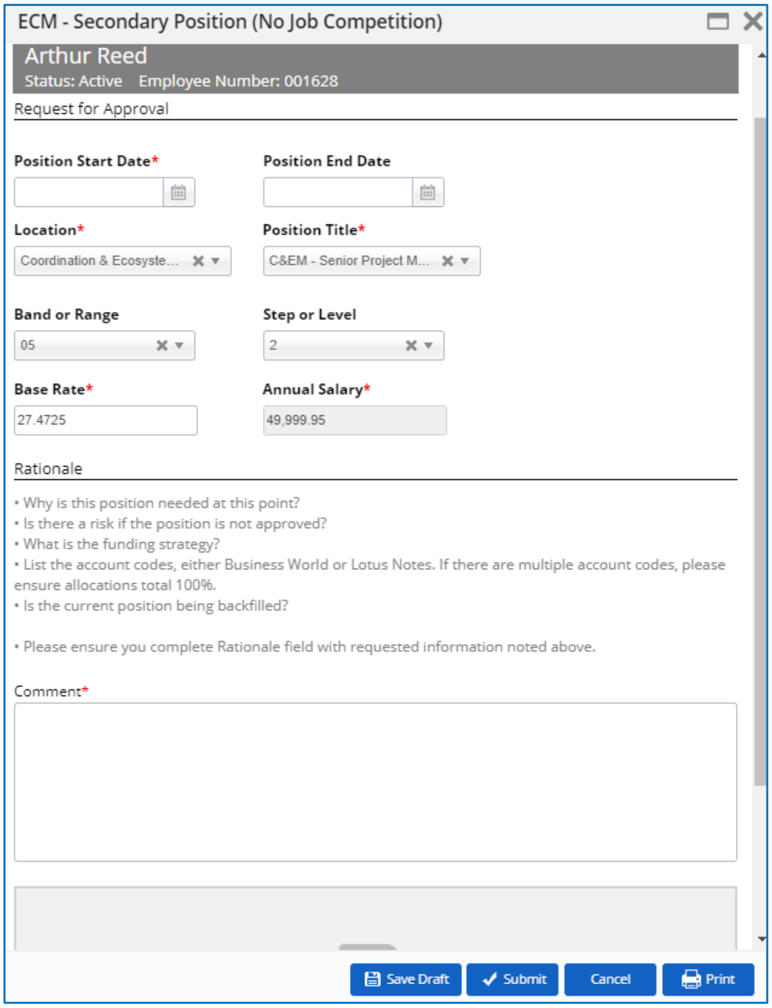
5. **Base Rate / Annual Salary**
    - These will populate with values currently recorded in employee profile.
    - The fields are locked. You do not record new Base Rate for a contract extension as it remains the same

6. **Job Rationale**
    - This field is a required field. If you leave this field blank Dayforce will prevent you from submitting the form.
    - As indicated in the panel instructions on the form, the field needs to be updated with:
        - Why is this position needed at this point?
        - Is there a risk if the position is not approved?
        - What is the funding strategy?
        - Please list the account codes.

7. **File Attachments**
    - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.

# ECM – Secondary Position (No Job Competition)

Submit this form for approval to assign a secondary position to an employee in addition to their primary position. The secondary position is 3 months or less in duration (i.e., is ***not*** going to be posted in Recruiting).


ECM - Secondary Position (No Job Competition)
Arthur Reed
Status: Active Employee Number: 001628
Request for Approval
Position Start Date*
Position End Date
Location*
Coordination & Ecosyste...
Position Title*
C&EM - Senior Project M...
Band or Range
05
Step or Level
2
Base Rate*
27.4725
Annual Salary*
49,999.95
Rationale
• Why is this position needed at this point?
• Is there a risk if the position is not approved?
• What is the funding strategy?
• List the account codes, either Business World or Lotus Notes. If there are multiple account codes, please ensure allocations total 100%.
• Is the current position being backfilled?
• Please ensure you complete Rationale field with requested information noted above.
Comment*
Save Draft
Submit
Cancel
Print

1. **<u>Position Start Date</u>**
   - Record as required.
2. **<u>Position End Date</u>**
   - Record as required.
3. **<u>Location / Position Title</u>**
   - This drop-down list displays the current On-site Department(s) (sometimes referred to as the “Sub-unit” under Business Unit) and related position for the employee.
   - First select the applicable Location (i.e., On-site) associated with your team.
   - Then select an associated position form the Position list.

4. **Band or Range / Step or Level**
    - These will populate with values currently recorded in employee profile. Record as required for secondary position.

5. **Base Rate / Annual Salary**
    - These will populate with values currently recorded in employee profile. Record Base Rate as required for secondary position. Annual Salary updates accordingly, based on employee's default "Daily Hours" value (i.e., 7 or 8 hours).

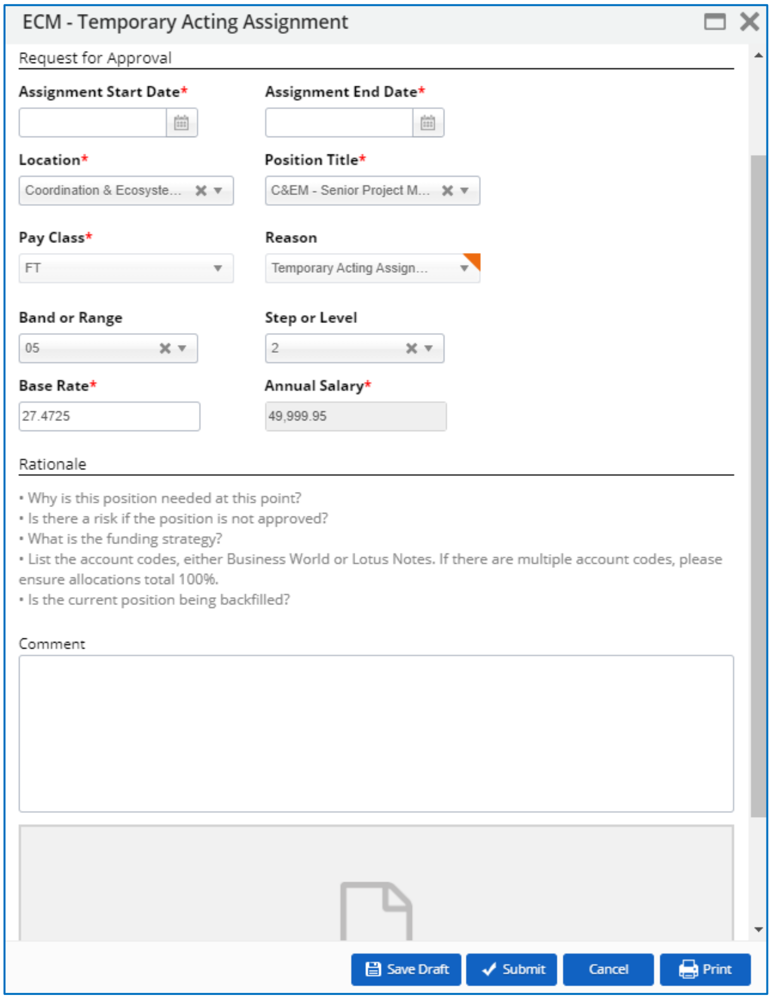
6. **Job Rationale**
    - This field is a required field. If you leave this field blank Dayforce will prevent you from submitting the job requisition.
    - As indicated in the panel instructions on the form, the field needs to be updated with:
        - Why is this position needed at this point?
        - Is there a risk if the position is not approved?
        - What is the funding strategy?
        - Please list the account codes.

7. **File Attachments**
    - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.

## ECM – Temporary Acting Assignment

Submit this form for approval to assign a temporary position of 3 months or less to an employee in place of current position.

Any temporary position of more than 3 months must be posted through Recruiting. For this you need submit related Job Requisition through Recruiting module. Please follow up with HRBP.




1. **<u>Assignment Start Date</u>**
    - Record as required.

2. **<u>Assignment End Date</u>**
    - Record as required.

3. **<u>Location / Position Title</u>**
    - This drop-down list displays the current On-site Department(s) (sometimes referred to as the “Sub-unit” under Business Unit) and related position for the employee.
    - First select the applicable Location (i.e., On-site) associated with your team.

- Then select an associated position form the Position list.

4. **Pay Class**
    - This value records the employee's employment status (e.g., Permanent, Full Time).
    - This will populate with value recorded in employee profile for current position. The field is locked. As Dayforce can only record a single employment status at a given time, this field will continue to record employment status as it relates to employee's *primary* position.

5. **Band or Range / Step or Level**
    - These will populate with values currently recorded in employee profile. Record as required for temporary acting assignment.

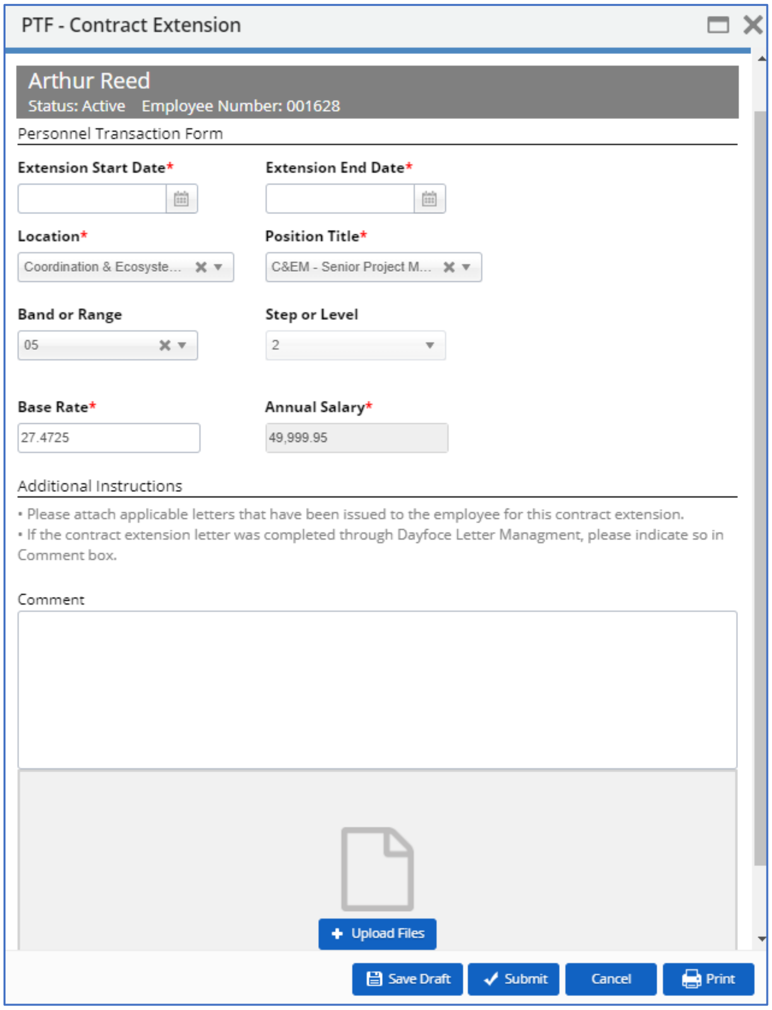
6. **Base Rate / Annual Salary**
    - These will populate with values currently recorded in employee profile. Record Base Rate as required for temporary acting assignment. Annual Salary updates accordingly, based on employee's default "Daily Hours" value (i.e., 7 or 8 hours).

7. **Job Rationale**
    - This field is a required field. If you leave this field blank Dayforce will prevent you from submitting the job requisition.
    - As indicated in the panel instructions on the form, the field needs to be updated with:
        - Why is this position needed at this point?
        - Is there a risk if the position is not approved?
        - What is the funding strategy?
        - Please list the account codes.

8. **File Attachments**
    - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.

## PTF – Contract Extension

Use this form to update an employee profile for a contract extension. This must be submitted after the related **ECM – Contract Extension** from for the employee has been approved.


PTF - Contract Extension

Arthur Reed
Status: Active Employee Number: 001628

Personnel Transaction Form

Extension Start Date*
Extension End Date*
Location*
Coordination & Ecosyste...
Position Title*
C&EM - Senior Project M...
Band or Range
05
Step or Level
2
Base Rate*
27.4725
Annual Salary*
49,999.95

Additional Instructions

• Please attach applicable letters that have been issued to the employee for this contract extension.
• If the contract extension letter was completed through Dayfoce Letter Managment, please indicate so in Comment box.

Comment

Upload Files

Save Draft Submit Cancel Print

Record the same values in this form as were recorded in the related **ECM – Contract Extension** from.

1. **Extension Start Date**
   - Record as required.
2. **Extension End Date**
   - Record as required.
3. **Location / Position Title**
   - This drop-down list displays the current On-site Department(s) (sometimes referred to as the “Sub-unit” under Business Unit) and related position for the employee.

- The field is locked. You do not record the position for a contract extension as the position remains the same

4. **Band or Range / Step or Level**
   - These will populate with values currently recorded in employee profile.
   - The fields are locked. You do not record these fields for a contract extension as they remain the same

5. **Base Rate / Annual Salary**
   - These will populate with values currently recorded in employee profile.
   - The fields are locked. You do not record a new Base Rate for a contract extension as it remains the same

6. **File Attachments**
   - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.

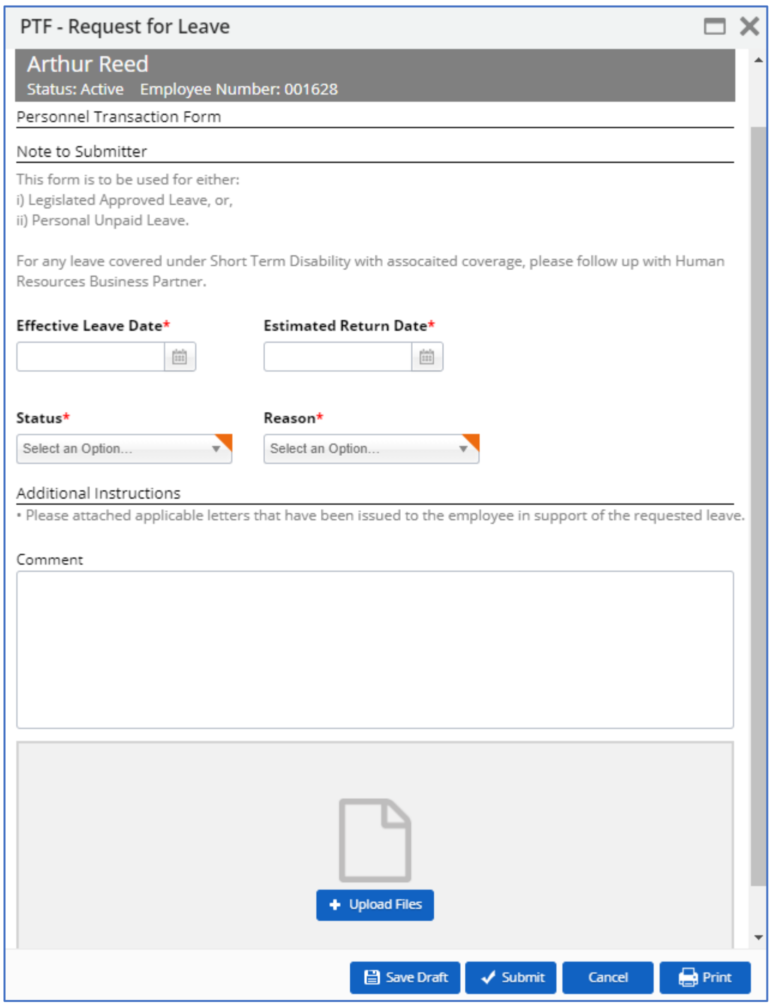
## PTF – Request for Leave

Use this form to update an employee's profile when they go on leave.

Note: This form is to be used only for Legislated Leaves under the Ontario Employment Standards Act, or, for Personal Leave.

This form is not to be used for any leave covered under Short Term Disability. If this is the case, please follow up with HRBP.

The TRCA Unpaid Personal Leave of Absence Form needs to be completed and approved by Human Resources before submitting the **PTF – Request for Leave.** This can be found on the TRCA Staff Hub. Please follow up with HRBP.




1. **Effective Leave Date**
   - Record as required.

2. **Estimated Return Date**
   - Record as required.

3. **Status**
   - Record one of following values, as applicable:
     - Legislated Leave
     - LOA
     - LTD

4. **Reason**
   - Record one of:
     - One of the thirteen (13) official Ontario ESA Leave values
     - Personal
     - Long Term Disability

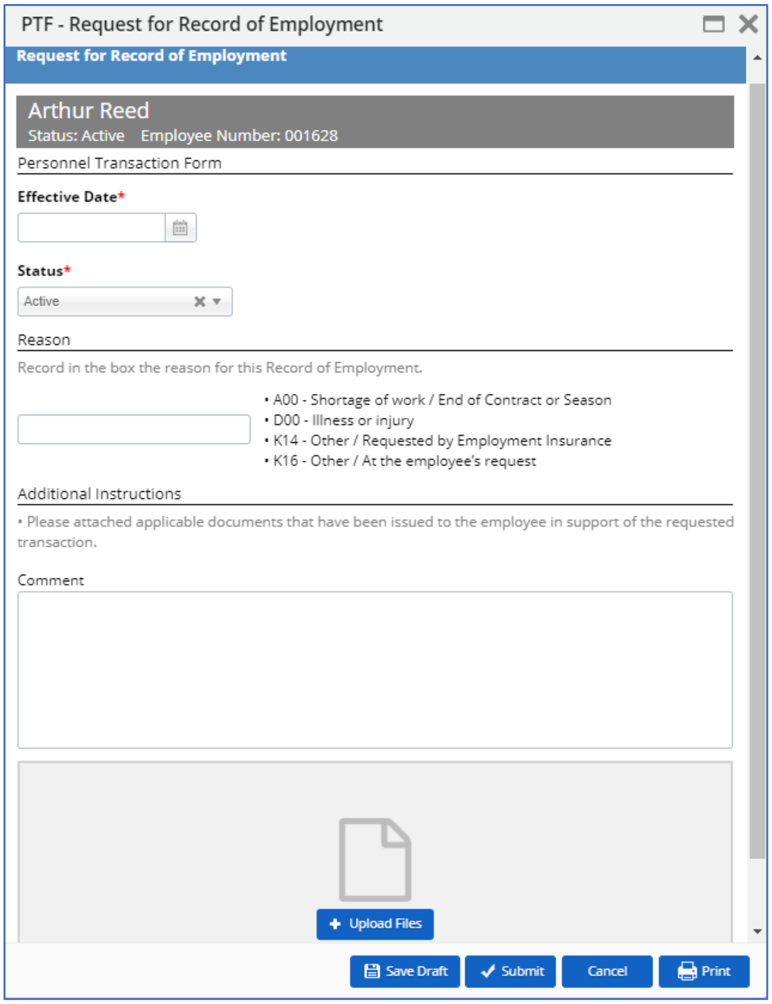
5. **File Attachments**
     - Attach the approved TRCA Unpaid Personal Leave of Absence Form.
     - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.



Toronto and Region Conservation Authority

## PTF – Request for Record of Employment

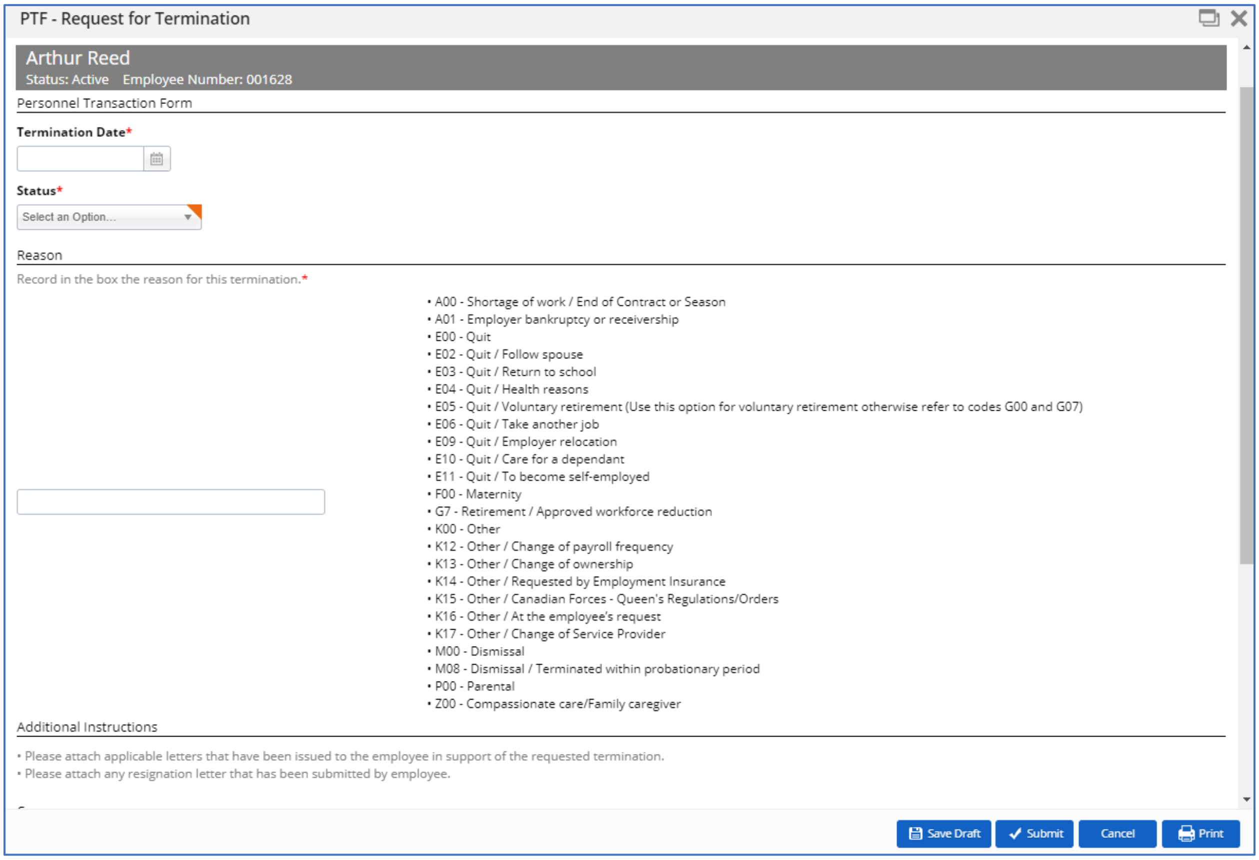
Use this form to request that a Record of Employment to be issued for an employee. In this case the employee remains active (e.g., = Seasonal employment - Shortage of hours).




1. **<u>Effective Date</u>**
    - Record as required.
2. **<u>Status</u>**
    - The field automatically populates with 'Active' and is locked. You do not need to update this field.
3. **<u>Reason</u>**
    - Record in the text box one of the listed values as required.
4. **<u>File Attachments</u>**
    - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.

# PTF – Request for Termination

Use this form to request a termination for an employee.



PTF - Request for Termination

Arthur Reed
Status: Active Employee Number: 001628

Personnel Transaction Form

Termination Date*

Status*
Select an Option...

Reason
Record in the box the reason for this termination.*

- A00 - Shortage of work / End of Contract or Season
- A01 - Employer bankruptcy or receivership
- E00 - Quit
- E02 - Quit / Follow spouse
- E03 - Quit / Return to school
- E04 - Quit / Health reasons
- E05 - Quit / Voluntary retirement (Use this option for voluntary retirement otherwise refer to codes G00 and G07)
- E06 - Quit / Take another job
- E09 - Quit / Employer relocation
- E10 - Quit / Care for a dependant
- E11 - Quit / To become self-employed
- F00 - Maternity
- G7 - Retirement / Approved workforce reduction
- K00 - Other
- K12 - Other / Change of payroll frequency
- K13 - Other / Change of ownership
- K14 - Other / Requested by Employment Insurance
- K15 - Other / Canadian Forces - Queen's Regulations/Orders
- K16 - Other / At the employee's request
- K17 - Other / Change of Service Provider
- M00 - Dismissal
- M08 - Dismissal / Terminated within probationary period
- P00 - Parental
- Z00 - Compassionate care/Family caregiver

Additional Instructions

- Please attach applicable letters that have been issued to the employee in support of the requested termination.
- Please attach any resignation letter that has been submitted by employee.

Save Draft | Submit | Cancel | Print

1. **<u>Termination Date</u>**
   - Record as required.
2. **<u>Status</u>**
   - The field automatically populates with "Terminated" and is locked. You do not need to update this field.
3. **<u>Reason</u>**
   - Record in the text box one of the listed values as required. These are standard Canada Revenue Agency required values.
4. **<u>File Attachments</u>**
   - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.

# PTF – Return to Work

Use this form to request approval for an employee to return to work. This form is to be used only when an employee is currently on a leave.

PTF - Return to Work

**Return to Work**

Arthur Reed
Status: Active Employee Number: 001628

Personnel Transaction Form

Note to Submitter

This form is NOT to be used for any Return to Work from Short Term Disability and associated Gradual Return to Work.

For any Return to Work from Short Term Disability, please follow up with Human Resources Business Partner.

**Return Date***

**Pay Class***
FT

**Status***
Active

**Reason***
Select an Option...

**Location***
Coordination & Ecosyste...

**Position Title***
C&EM - Senior Project M...

**Return to Band or Range**
05

**Return to Step or Level**
2

**Base Rate***
27.4725

**Annual Salary***
49,999.95

**If this is for a new position, please complete the following fields below. Otherwise leave blank.**

Default Labour - Account Code

Provide the default account code where 100% of the employee's wages and benefits will be charged to. If the employee is to be charged to different projects, that must be done on timesheets.

**Sub Project Number (Business World)**

Surcharge Account

If this employee works on capital projects, record in the box what surcharge account is to be assigned to the employee. Otherwise leave blank.

**Capital Surcharge (if applicable)**

- Cap. Staff – 901-97-777
- Plan Greensp Cons Division – 902-04-77
- Development and Engineering Services – 902-06-777
- Major contracts and Construction Staff – 902-07-777
- Corporate Sustainability and Community Transformation - 902-08-777
- Payroll Surcharge – Corporate Sustainability and Community Transformation - 902-08-777

Shift Schedule

For prepopulated timesheets, record in the box what timesheet schedule is to be assigned to the employee.

With a blank timesheet, all shifts manually created or prepopulated when employee clocks in and out.

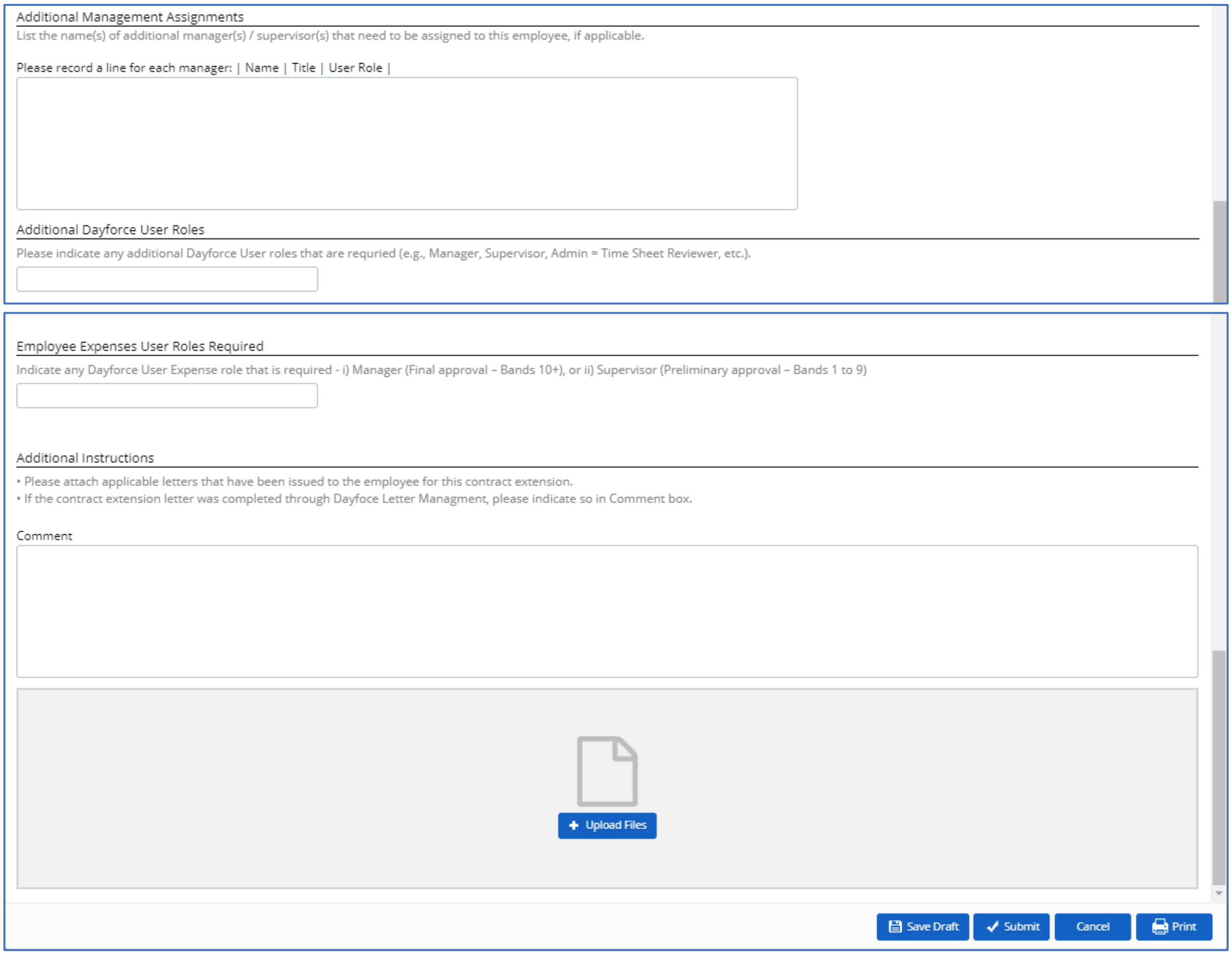
**Shift Schedule (if applicable)**

Day Shift, From, To

Monday to Friday – 7 Hours per Day
- 75on/2off 1 / 7:00 / 15:00
- 75on/2off 2 / 7:30 / 15:30
- 75on/2off 3 / 8:00 / 16:00
- 75on/2off 4 / 8:30 / 16:30
- 75on/2off 5 / 9:00 / 17:00
- 75on/2off 6 / 9:30 / 17:30
- 75on/2off 7 / 10:00 / 18:00

Monday to Friday – 8 Hours per Day
- 85on/2off 1 / 7:00 / 16:00
- 85on/2off 2 / 7:30 / 16:30
- 85on/2off 3 / 8:00 / 17:00
- 85on/2off 4 / 8:30 / 17:30
- 85on/2off 5 / 9:00 / 18:00
- 85on/2off 6 / 9:30 / 18:30
- 85on/2off 7 / 10:00 / 19:00

- Blank Timesheet



Additional Management Assignments

List the name(s) of additional manager(s) / supervisor(s) that need to be assigned to this employee, if applicable.

Please record a line for each manager: | Name | Title | User Role |

Additional Dayforce User Roles

Please indicate any additional Dayforce User roles that are requried (e.g., Manager, Supervisor, Admin = Time Sheet Reviewer, etc.).

Employee Expenses User Roles Required

Indicate any Dayforce User Expense role that is required - i) Manager (Final approval – Bands 10+), or ii) Supervisor (Preliminary approval – Bands 1 to 9)

Additional Instructions

• Please attach applicable letters that have been issued to the employee for this contract extension.
• If the contract extension letter was completed through Dayfoce Letter Managment, please indicate so in Comment box.

Comment

Upload Files

Save Draft | Submit | Cancel | Print

1. **<u>Return Date</u>**
   - Record as required.

2. **<u>Pay Class</u>**
   - This value records the employee's employment status (e.g., Permanent - Full Time).
   - This will populate with value recorded in employee profile for current position. In most cases the value recorded will be same as previous value. But in some cases, the value recorded can be different. For example, a previous Full-Time employee who returns from Parental Leave but on a Part-Time basis.

3. **<u>Status</u>**
   - The field automatically populates with 'Active' and is locked. You do not need to update this field.



Toronto and Region Conservation Authority

4. **Reason**
    - Record one of:
        - Return from Legislated Leave
        - Return from Leave of Absence
        - Return from LTD

5. **Location / Position Title**
    - This drop-down list displays the current On-site Department(s) (sometimes referred to as the "Sub-unit" under Business Unit) and related position for the employee.
    - First select the applicable Location (i.e., On-site) associated with your team.
    - Then select an associated position form the Position list.

6. **Band or Range / Step or Level**
    - These will populate with values currently recorded in employee profile. Record as required for return to work.

7. **Base Rate / Annual Salary**
    - These will populate with values currently recorded in employee profile. Record Base Rate as required for return to work. Annual Salary updates accordingly, based on employee's default "Daily Hours" value (i.e., 7 or 8 hours).

8. **Sub Project Number (Business World)**
    - Provide the Lotus Notes and Business World (Project + Sub Project) account codes.

9. **Capital Surcharge Account**
    - Record in text box a value listed to the right.

10. **Shift Schedule**
    - Record in text box a value listed to the right.

11. **Additional Management Assignments**
    - Record names of any additional managers that need to be assigned to new hire.

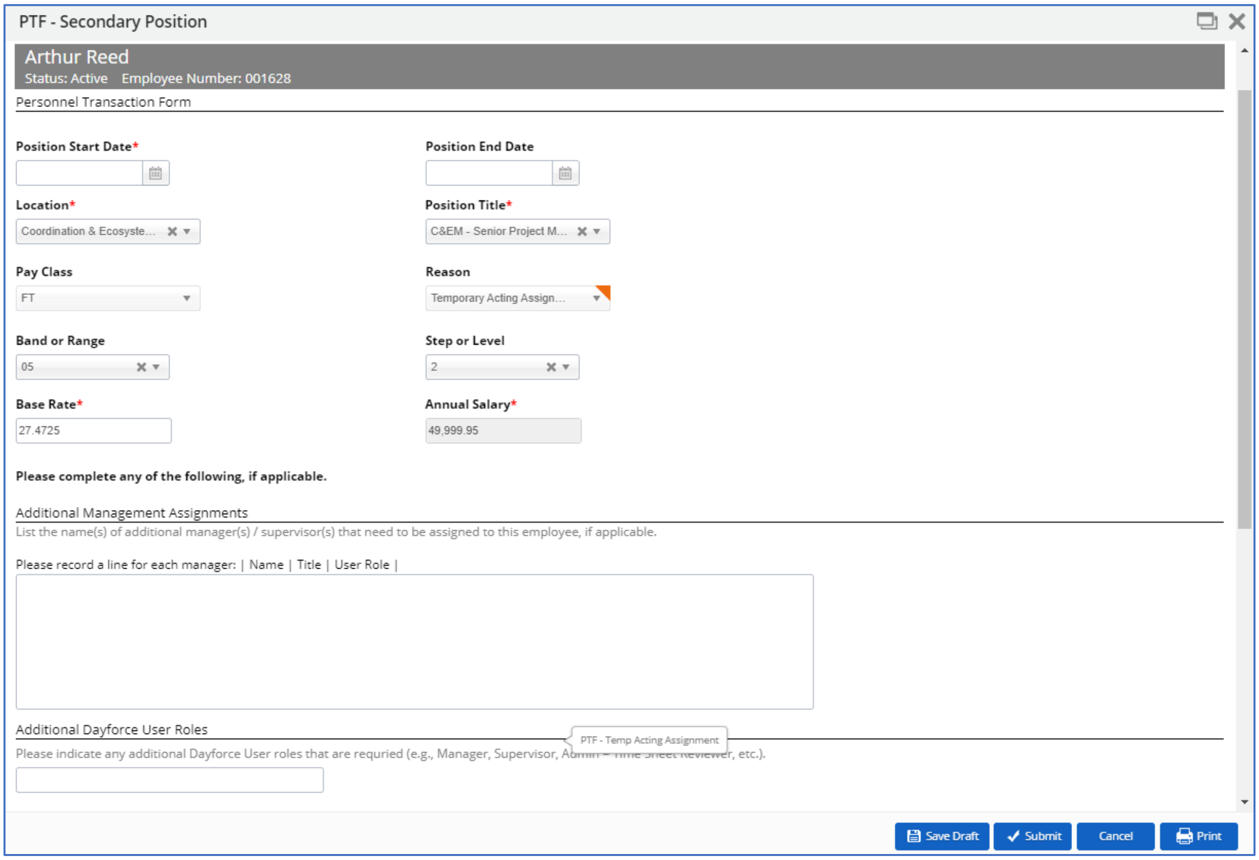
12. **Additional Dayfoce User Roles**
    - Record any additional roles that are required for the new hire (e.g., Manager).

13. **Employee Expense User Roles**
    - Record any additional expense roles that are required for the new hire (e.g., Manager).

14. **File Attachments**
    - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.

## PTF – Secondary Position

Use this form to update an employee's profile with a secondary position.


PTF - Secondary Position

Arthur Reed
Status: Active Employee Number: 001628

Personnel Transaction Form

Position Start Date*

Position End Date

Location*
Coordination & Ecosyste...

Position Title*
C&EM - Senior Project M...

Pay Class
FT

Reason
Temporary Acting Assign...

Band or Range
05

Step or Level
2

Base Rate*
27.4725

Annual Salary*
49,999.95

Please complete any of the following, if applicable.

Additional Management Assignments
List the name(s) of additional manager(s) / supervisor(s) that need to be assigned to this employee, if applicable.

Please record a line for each manager: | Name | Title | User Role |

Additional Dayforce User Roles
PTF - Temp Acting Assignment
Please indicate any additional Dayforce User roles that are requried (e.g., Manager, Supervisor, Admin – Time Sheet Reviewer, etc.).

Save Draft | Submit | Cancel | Print

1. **Position Start Date**
    - Record as required.
2. **Position End Date**
    - Record as required. Leave blank if position is permanent.
3. **Location / Position Title**
    - This drop-down list displays the current On-site Department(s) (sometimes referred to as the "Sub-unit" under Business Unit) and related position for the employee.
    - First select the applicable Location (i.e., On-site) associated with your team.
    - Then select an associated position form the Position list.
4. **Band or Range / Step or Level**
    - These will populate with values currently recorded in employee profile. Record as required for secondary position.

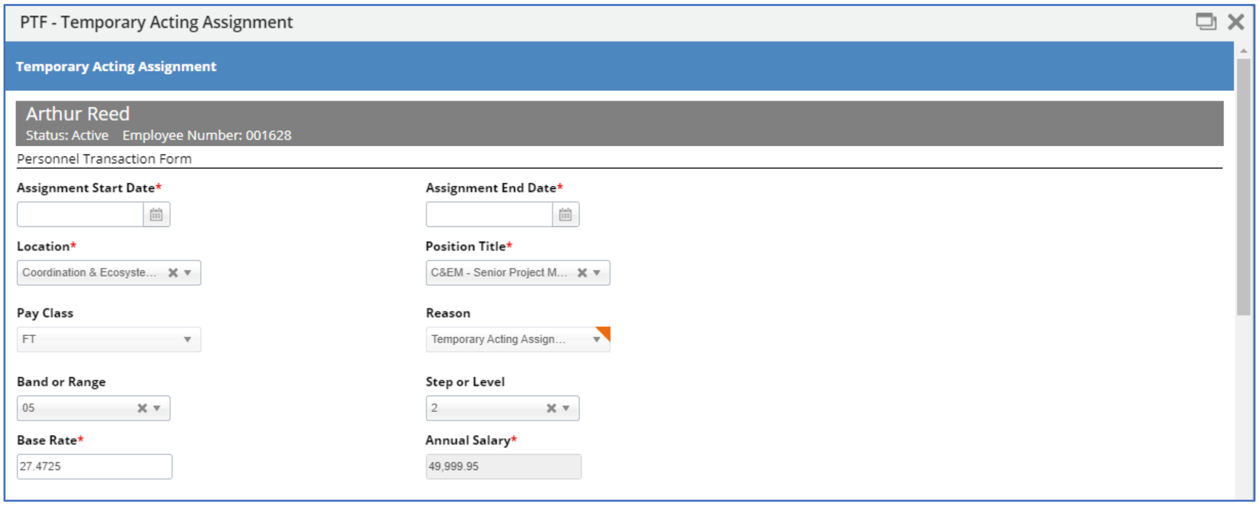
5. **Base Rate / Annual Salary**
    - These will populate with values currently recorded in employee profile. Record Base Rate as required for secondary position. Annual Salary updates accordingly based on employee's default "Daily Hours" value (i.e., 7 or 8 hours).

6. **Additional Management Assignments**
    - Record names of any additional managers that need to be assigned to new hire.

7. **Additional Dayfoce User Roles**
    - Record any additional roles that are required for the new hire (e.g., Manager).

## PTF – Temporary Acting Assignment

Use this form to update an employee profile for a contract extension.  This must be submitted after the related **ECM – Temporary Acting Assignment** form for the employee has been approved.



PTF - Temporary Acting Assignment

**Temporary Acting Assignment**

Arthur Reed
Status: Active   Employee Number: 001628

Personnel Transaction Form

**Assignment Start Date***

**Assignment End Date***

**Location***
Coordination & Ecosyste...

**Position Title***
C&EM - Senior Project M...

**Pay Class**
FT

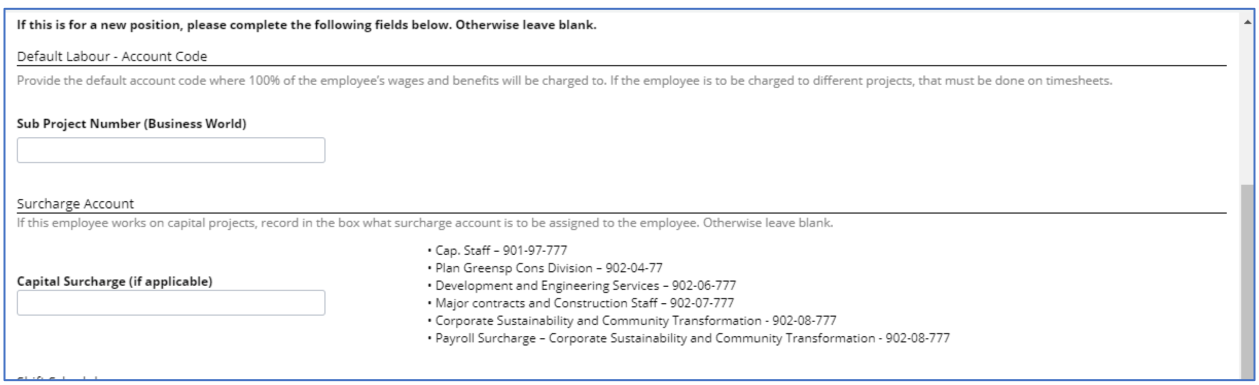
**Reason**
Temporary Acting Assign...

**Band or Range**
05

**Step or Level**
2

**Base Rate***
27.4725

**Annual Salary***
49,999.95



**If this is for a new position, please complete the following fields below. Otherwise leave blank.**

Default Labour - Account Code

Provide the default account code where 100% of the employee's wages and benefits will be charged to. If the employee is to be charged to different projects, that must be done on timesheets.

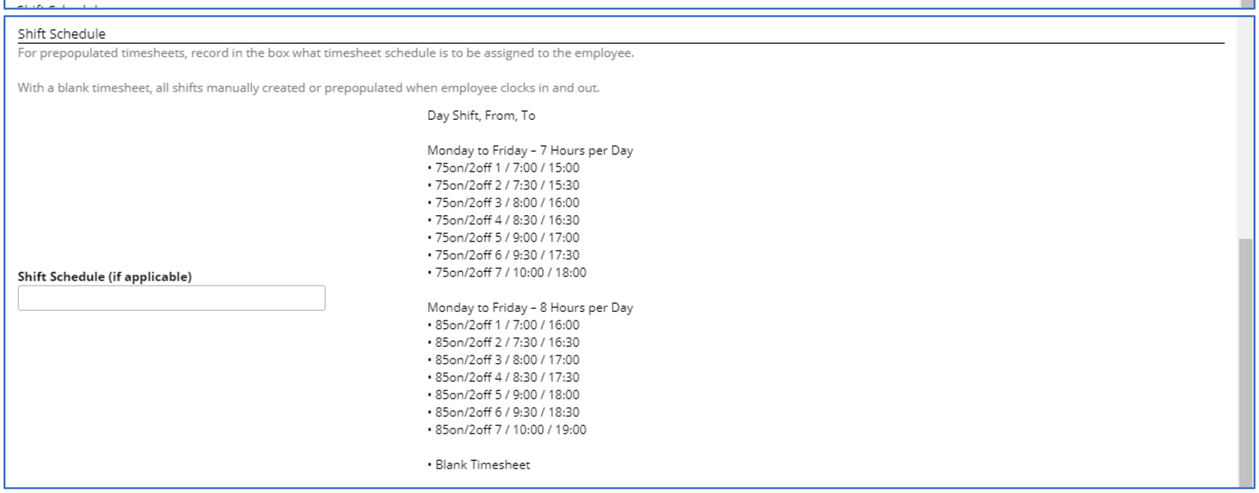
**Sub Project Number (Business World)**

Surcharge Account

If this employee works on capital projects, record in the box what surcharge account is to be assigned to the employee. Otherwise leave blank.

**Capital Surcharge (if applicable)**

- Cap. Staff – 901-97-777
- Plan Greensp Cons Division – 902-04-77
- Development and Engineering Services – 902-06-777
- Major contracts and Construction Staff – 902-07-777
- Corporate Sustainability and Community Transformation - 902-08-777
- Payroll Surcharge – Corporate Sustainability and Community Transformation - 902-08-777



Shift Schedule

For prepopulated timesheets, record in the box what timesheet schedule is to be assigned to the employee.

With a blank timesheet, all shifts manually created or prepopulated when employee clocks in and out.

**Shift Schedule (if applicable)**

Day Shift, From, To

Monday to Friday – 7 Hours per Day
- 75on/2off 1 / 7:00 / 15:00
- 75on/2off 2 / 7:30 / 15:30
- 75on/2off 3 / 8:00 / 16:00
- 75on/2off 4 / 8:30 / 16:30
- 75on/2off 5 / 9:00 / 17:00
- 75on/2off 6 / 9:30 / 17:30
- 75on/2off 7 / 10:00 / 18:00

Monday to Friday – 8 Hours per Day
- 85on/2off 1 / 7:00 / 16:00
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- 85on/2off 6 / 9:30 / 18:30
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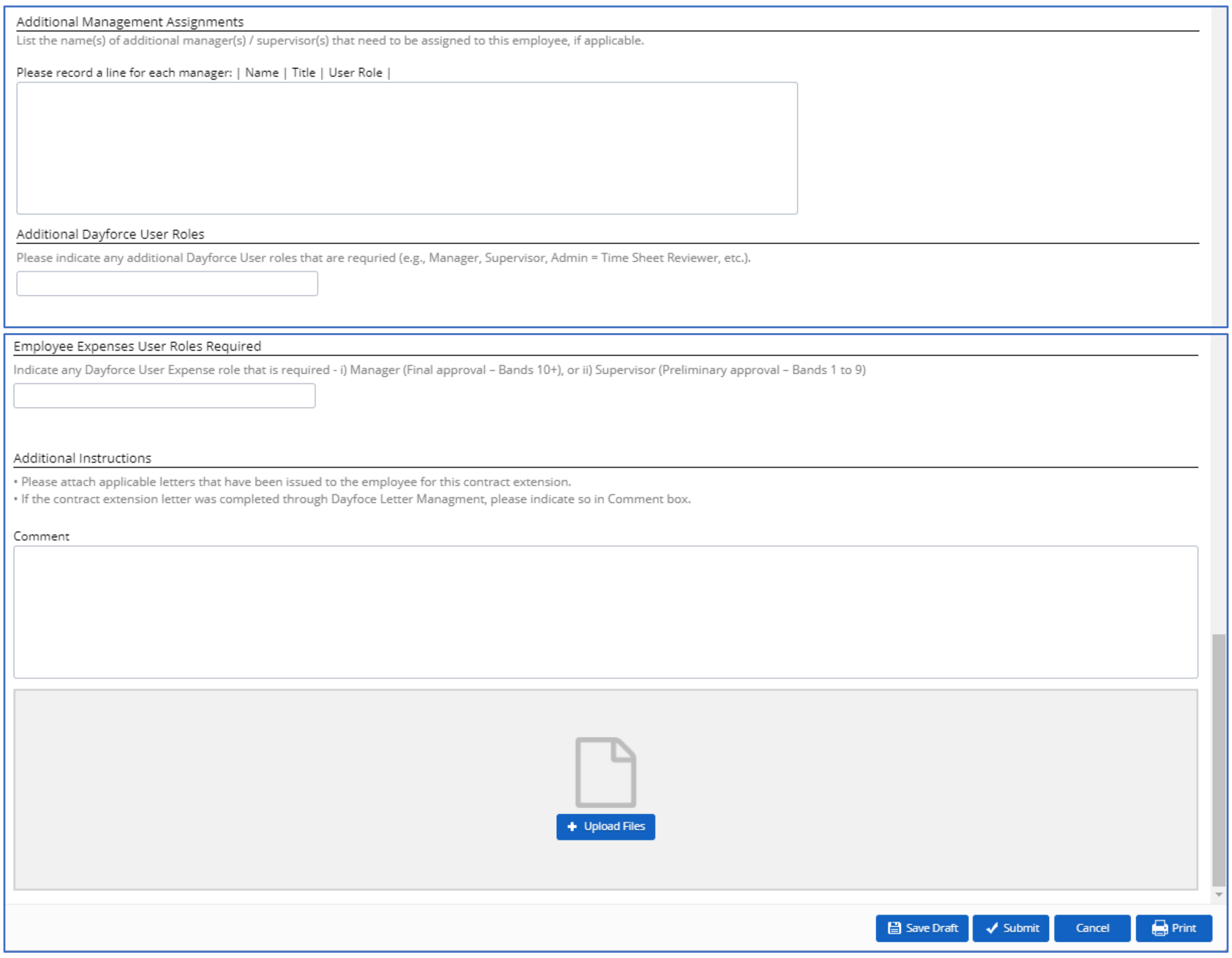
- Blank Timesheet


Additional Management Assignments

List the name(s) of additional manager(s) / supervisor(s) that need to be assigned to this employee, if applicable.

Please record a line for each manager: | Name | Title | User Role |

Additional Dayforce User Roles

Please indicate any additional Dayforce User roles that are requried (e.g., Manager, Supervisor, Admin = Time Sheet Reviewer, etc.).

Employee Expenses User Roles Required

Indicate any Dayforce User Expense role that is required - i) Manager (Final approval – Bands 10+), or ii) Supervisor (Preliminary approval – Bands 1 to 9)

Additional Instructions

• Please attach applicable letters that have been issued to the employee for this contract extension.
• If the contract extension letter was completed through Dayfoce Letter Managment, please indicate so in Comment box.

Comment

Upload Files

Save Draft | Submit | Cancel | Print

1. **<u>Assignment Start Date</u>**
   - Record as required.

2. **<u>Assignment End Date</u>**
   - Record as required.

3. **<u>Location / Position Title</u>**
   - This drop-down list displays the current On-site Department(s) (sometimes referred to as the “Sub-unit” under Business Unit) and related position for the employee.
   - First select the applicable Location (i.e., On-site) associated with your team.
   - Then select an associated position form the Position list.

4. **<u>Pay Class</u>**
   - This value records the employee’s employment status (e.g., Permanent - Full Time).
   - This will populate with value recorded in employee profile for current primary position. The field is locked. As Dayforce can only record a single employment status at a given time, this field will continue to record employment status as it relates to employee’s primary position.

5. **<u>Reason</u>**
   - The field automatically populates with ‘Temporary Acting Assignment’ and is locked. You do not need to update this field.

6. **<u>Band or Range / Step or Level</u>**
   - These will populate with values currently recorded in employee profile in Employee Properties screen.
   - Record as required for temporary acting assignment.

7. **Base Rate / Annual Salary**
    - These will populate with values currently recorded in employee profile. Record Base Rate as required for temporary acting assignment. Annual Salary field updates accordingly, based on employee's default "Daily Hours" value (i.e., 7 or 8 hours).

8. **Sub Project Number (Business World)**
    - Provide the Lotus Notes and Business World (Project + Sub Project) account code.

9. **Capital Surcharge Account**
    - Record in text box a value listed to the right.

10. **Shift Schedule**
    - Record in text box a value listed to the right.

11. **Additional Management Assignments**
    - Record names of any additional managers that need to be assigned to new hire.

12. **Additional Dayfoce User Roles**
    - Record any additional roles that are required for the new hire (e.g., Manager).

13. **Employee Expense User Roles**
    - Record any additional expense roles that are required for the new hire (e.g., Manager).

14. **File Attachments**
    - Upload files as required. Supported formats include .XLSX, .DOCX, .PDF.