



# **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.

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## 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 policies to secure approval to commit to the transaction and to ensure appropriate complement and funding is available.

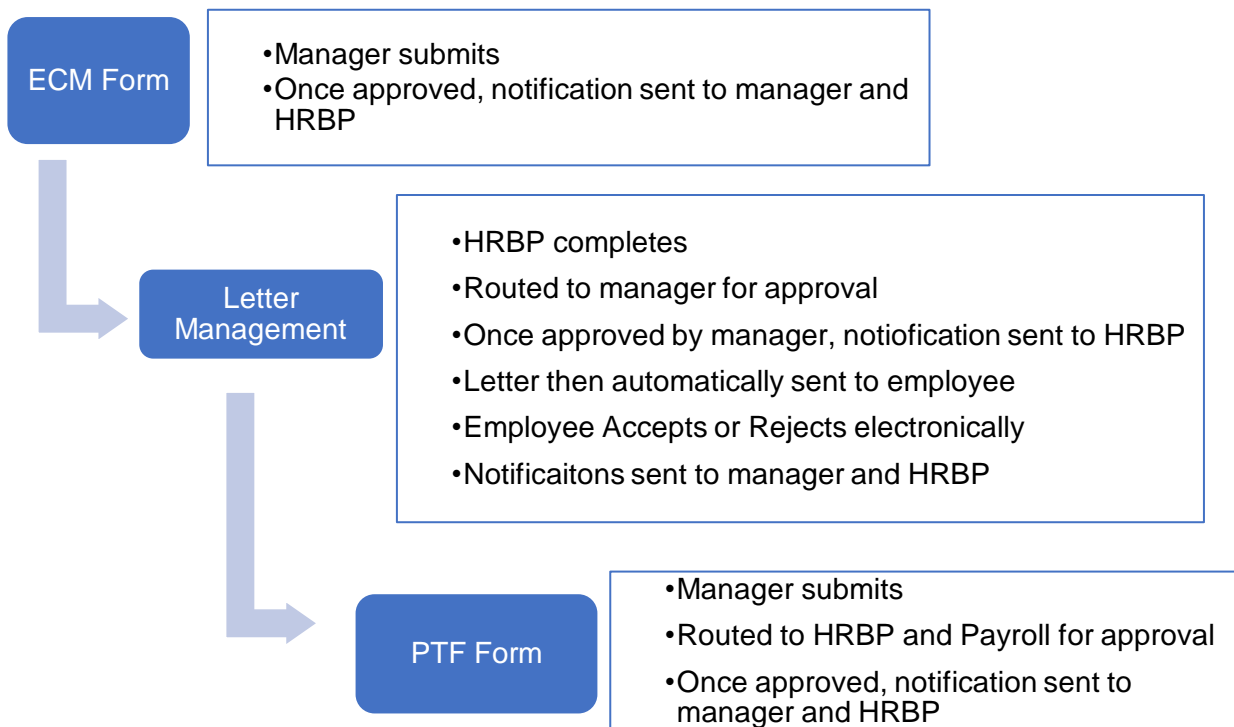
### 2. Letter

- 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

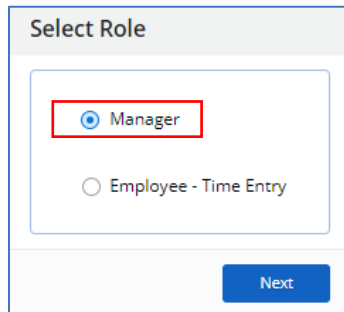


Some of the transactions rely only on Personnel Transaction Forms (PTF) being completed with no related Employee Complement form.

## Affected Employee

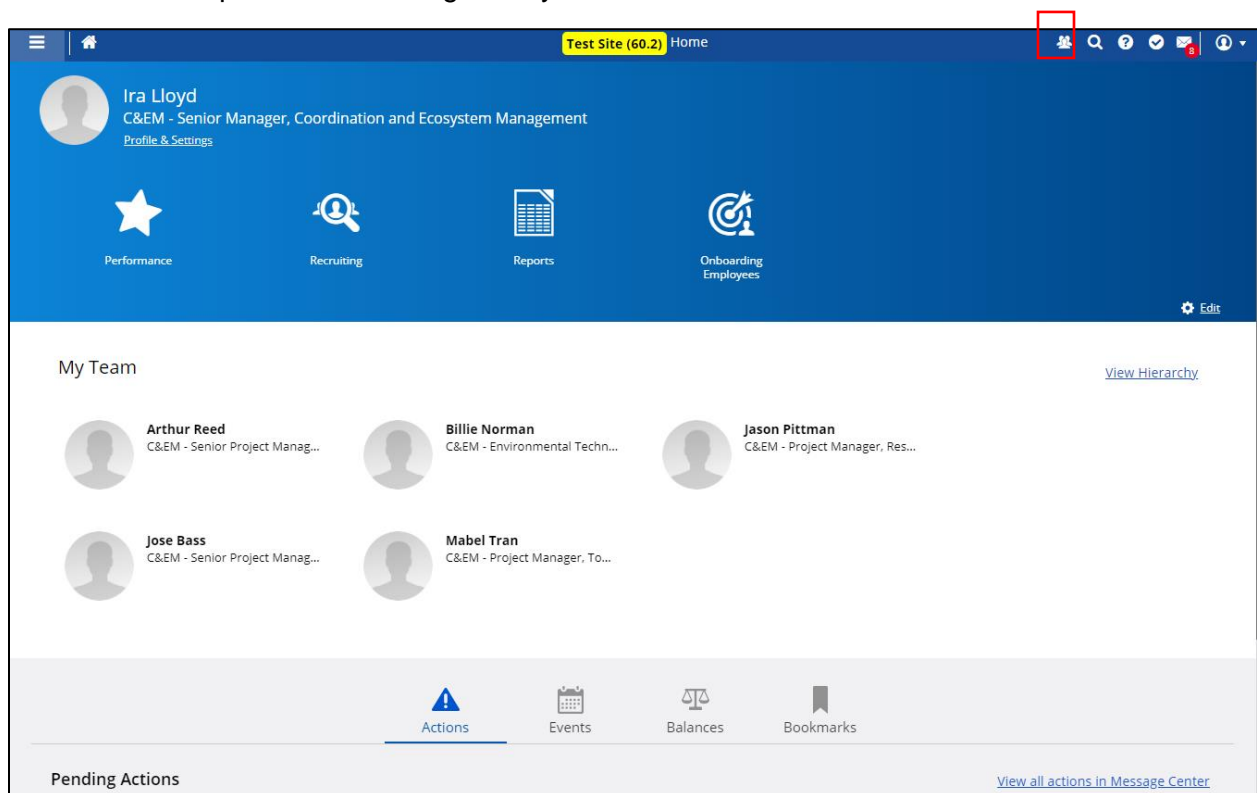
Manager initiates transactions by completing forms for the affected employee. This is facilitated by manager visibility to the employee through their **HR Profiles** list.

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



A dialog box titled "Select Role" with a light gray background. It contains two radio button options: "Manager" (selected, indicated by a blue dot and a red rectangular highlight) and "Employee - Time Entry". At the bottom right, there is a blue button labeled "Next".

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



A screenshot of the Dayforce HR dashboard. The top navigation bar is dark blue with a home icon, a "Test Site (60.2)" label, and a "Home" link. A red box highlights the "People" icon in the top right corner. Below the navigation bar, the user profile for "Ira Lloyd" (C&EM - Senior Manager, Coordination and Ecosystem Management) is displayed. The main dashboard area features four icons: "Performance", "Recruiting", "Reports", and "Onboarding Employees". Below this, the "My Team" section shows five employee profiles: Arthur Reed, Billie Norman, Jason Pittman, Jose Bass, and Mabel Tran. At the bottom, there is a "Pending Actions" section with icons for "Actions", "Events", "Balances", and "Bookmarks". A link "View all actions in Message Center" is visible in the bottom right corner.

## TRCA PerformanceEmployee Status and Movement Forms

Click the name of the affected employee.

The screenshot shows the 'People' list interface. At the top, there's a header with 'Test Site (60.2)' and 'People'. Below the header, there's a search bar and a list of filters. The main table lists employees with columns: Name, Employee Number, Primary Position, Primary Location, and Status. The name 'Arthur Reed' is highlighted with a red box.

Name	Employee Number	Primary Position	Primary Location	Status
Arthur Reed	001628	C&EM - Senior Project Manager, Restoration Proj...	Coordination & Ecosystem Management (C&EM)	Active
Billie Norman	003542	C&EM - Environmental Technologist, Aquatic Habit...	Coordination & Ecosystem Management (C&EM)	Active
Jason Pittman	002931	C&EM - Project Manager, Restoration Projects (Tree...	Coordination & Ecosystem Management (C&EM)	Active
Jose Bass	004149	C&EM - Senior Project Manager, Restoration Projec...	Coordination & Ecosystem Management (C&EM)	Active
Mabel Tran	003529	C&EM - Project Manager, Tommy Thompson Park	Coordination & Ecosystem Management (C&EM)	Active

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

The screenshot shows the 'Overview' screen for the employee Arthur Reed. The left sidebar contains a search bar and a list of links: Overview, Employment, Personal, Security Settings, Onboarding, Work, Audit, Forms (highlighted with a red box), and Learning. The main content area displays the employee's profile and various sections: Employment, Work Assignment, Compensation, Time Away Balances, and Business Contacts.

**Employment**

Field	Value
Status	Active
Length of Service	Years: 26, Months: 1
Original Hire Date	5/8/1995
Pay Class	FT

[View more](#)

**Work Assignment**

Field	Value
Job	Senior Project Manager,...
Position	C&EM - Senior Project M...
Location	Coordination & Ecosyst...
Department	C&EM

[View more](#)

**Compensation**

Field	Value
Hourly Rate	<a href="#">View</a>
Pay Frequency	Bi-Weekly
Pay Type	Hourly
Pay Group	TRCA BiWeekly Pay Schedule

[View more](#)

**Time Away Balances**

Type	Remaining	Unit
Float - Hours	14	Hours
OT Bank		Hours
Sick - Hours	70	Hours

[View more](#)

**Business Contacts**

Click on **Forms**.

## TRCA PerformanceEmployee Status and Movement Forms

The screenshot displays the 'People' section of the TRCA Performance system. The header shows 'Test Site (60.2)' and 'People'. The left sidebar contains navigation links: Overview, Employment, Personal, Security Settings, Onboarding, Work, Audit, Forms, and Learning. The main content area shows the profile of Arthur Reed (Employee ID 001628) with his title 'C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife)' and 'BDOF/R&I - RP - Coordination & Ecosystem Management (C&EM)'. Below the profile, there is a 'Form Submissions' section and an 'Available Forms' section. The 'Available Forms' section lists three categories of forms: Employee Complement Management (ECM) (3), Personnel Transaction Form (PTF) (7), and Professional (2). Each category lists specific forms with document icons.

**Available Forms**

Use one of the forms below to submit an information change to your manager or HR Administrator.

Search Forms [Search] [Reset]

- Employee Complement Management (ECM) (3)**
  - ECM - Contract Extension
  - ECM - Secondary Position (No Job Competition)
  - ECM - Temporary Acting Assignment
- Personnel Transaction Form (PTF) (7)**
  - 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
- Professional (2)**
  - External Course Request
  - Training Request Form

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.

ECM - Contract Extension

**Arthur Reed**  
Status: Active Employee Number: 001628

Request for Approval

**Extension Start Date\***

**Extension End Date\***

**Location\***

**Position Title\***

**Band or Range**

**Step or Level**

**Base Rate\***

**Annual Salary\***

**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](#)

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

See next page for enlarged view.

## TRCA PerformanceEmployee Status and Movement Forms

ECM - Contract Extension

Arthur Reed  
Status: Active Employee Number: 001628


Request for Approval

<b>Extension Start Date*</b>	<b>Extension End Date*</b>
<input type="text"/>	<input type="text"/>
<b>Location*</b>	<b>Position Title*</b>
Coordination & Ecosyste... X	C&EM - Senior Project M... X
<b>Band or Range</b>	<b>Step or Level</b>
Select an Option...	Select an Option...
<b>Base Rate*</b>	<b>Annual Salary*</b>
50,741.94	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 than 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**.

The screenshot displays the 'People' page for Arthur Reed (Employee ID: 001628). The left sidebar shows navigation options: Overview, Employment (with sub-items like Employee Properties, Policy Settings, etc.), Personal, Security Settings, Onboarding, Work, Audit, **Forms**, and Learning. The main content area shows the 'Form Submissions' section, which is currently expanded. It lists a submission for 'ECM - Contract Extension' with a status of 'Pending'. The submission was made on 6/28/2021 at 10:52 PM by Ira Lloyd. Below this, the 'Available Forms' section lists three categories: Employee Complement Management (ECM) (3), Personnel Transaction Form (PTF) (8), and Professional (2). The 'View & Edit Details' and 'Withdraw' buttons for the pending submission are highlighted with red boxes.

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.

The screenshot shows a web interface for a 'Message Center'. The top navigation bar includes 'Test Site (60.2)' and 'Message Center'. A left sidebar lists navigation options: Approvals, Inbox (8), Messages (2), Reports, Notifications (6), Actions, Drafts, Sent, and Trash (Empty). The main content area displays a notification titled 'REQUEST APPROVED: ECM - Contract Extension for Arthur Reed'. The notification is from 'Lorraine Lawrence' and dated '6/28/21, 11:02 PM'. The message states: 'ECM - Contract Extension for Arthur Reed submitted by Lorraine Lawrence was approved.' Below the message is a detailed form for 'Contract Extension' for 'Arthur Reed' (Status: Active, Employee Number: 001628). The form includes fields for '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), and 'Annual Salary' (49,999.95). A 'Rationale' section lists bullet points: 'Why is this position needed at this point?', 'Is there a risk if the position is not approved?', 'What is the funding strategy?', and 'List the account codes, either Business World or Lotus Notes. If there are multiple account codes, please ensure allocations total 100%.' A 'Comment' section contains the text: '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%'.

The screenshot shows a Microsoft Outlook message window. The top ribbon includes 'File', 'Message', 'Help', 'ESET', 'LASERFICHE', and 'Acrobat'. The 'Message' tab is active, showing a toolbar with icons for 'Ignore', 'Delete', 'Archive', 'Junk', 'Reply', 'Reply All', 'Forward', 'Share to Teams', 'Quick Steps', 'Move', 'Assign Policy', 'Mark Unread', 'Categorize', and 'Follow Up'. The message body contains the text: 'A message has been sent to you in Dayforce'. Below this is a profile picture of 'N' and the email address 'notify@dayforce.com' with 'To: Nick Grossi'. A blue information icon indicates: 'This is the most recent version, but you made changes to another copy. Click here to see the other versions.' The message content is: 'ECM - Contract Extension for Arthur Reed submitted by Lorraine Lawrence was approved.'

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.

The screenshot shows the Dayforce Message Center interface. On the left is a navigation pane with links to Compose, Approvals, Inbox (25), Messages (2), Reports, Notifications (23), Actions, Drafts, Sent, and Trash. The main area displays a message titled "Letter Approval Request - Extension Letter - Full-Time or Short-Term Contracts - Arthur Reed". The message is from Lorraine Lawrence to Shelly Brady, dated 6/29/21, 4:08 PM. The body of the message states: "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." Below the message is a preview of the letter. The letter is dated June 29, 2021, and is marked "Private & Confidential". It is titled "Delivered Via Email" and is addressed to Arthur Reed. The subject line is "Re: Contract Extension with Toronto and Region Conservation Authority (\"TRCA\")". The letter content mentions extending employment as a C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) until the end date, and reports to Ira Lloyd Lloyd - C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife).

**From:** [notify@dayforce.com](mailto:notify@dayforce.com) <[notify@dayforce.com](mailto:notify@dayforce.com)>

**Sent:** Tuesday, June 29, 2021 4:05 PM

**To:** Danielle Festa <[Danielle.Festa@trca.ca](mailto: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

The screenshot shows a web application interface with a top navigation bar containing icons for Actions, Events, Balances, and Bookmarks. Below the navigation bar, there is a section titled "Pending Actions" with a link "View all actions in Message Center". A notification is displayed, highlighted by a red box, showing a warning icon, the name "Lorraine Lawrence", the subject "Letter Approval Request - Extension Letter - Full-Time or Short-Term Contracts - Arthur Reed", the date "7/2/2021 10:43 AM", and two buttons: "Accept" and "Reject".

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.

The screenshot shows a "Letter" pop-up box. At the top, there is a message: "This form has been submitted and is pending approval." Below this is a blue header with the word "Letter". The main content area shows a document with the "Toronto and Region Conservation Authority" logo. A red box highlights a note at the bottom of the document: "Note: Clicking Print will only print what displays on the page. You can drag the bar under the text editor to expand the full letter and then click Print." Below the document is a "Comment" field, a "Response" field, and three buttons: "Accept", "Reject", and "Print Form". At the bottom, there is a "History (1)" section with a table showing the submission history.

Response Time	User Name	Response	Response Comment
7/2/21, 10:43 AM	Lorraine Lawrence	Form Submitted	



## 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.

The screenshot displays the 'Message Centre' interface. At the top, a blue header bar contains the text 'Test Site (60.2)' and 'Message Center'. Below this, a navigation pane on the left lists various functions: Approvals, Inbox (14), Messages (2), Reports, Notifications (12), Actions, Drafts, Sent, and Trash (Empty). The main content area is titled 'Letter' and contains a text editor with the following text: 'Delivered Via Email', 'Arthur Reed', 'Employee Address', 'City, Province', and 'H0H 0H0'. A red box highlights a note below the text editor: 'Note: Clicking Print will only print what displays on the page. You can drag the bar under the text editor to expand the full letter and then click Print.' Below the text editor is a 'Comment' field. At the bottom of the form, there are three buttons: 'Accept', 'Reject', and 'Print Form'. A 'History (1)' section is visible at the very bottom, showing a table with columns: 'Response Time', 'User Name', 'Response', and 'Response Comment'.

## TRCA PerformanceEmployee Status and Movement Forms

Here the splitter bar is dragged further down.

Test Site (60.2) Message Center

Compose

Back Mark as Unread

Print 1 of 29

Delivered Via Email

Arthur Reed  
Employee Address  
City, Province  
H0H 0H0

Dear Arthur,

**Re: Contract Extension with Toronto and Region Conservation Authority ("TRCA")**

We are pleased to extend your current employment with TRCA as a C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) JOB TITLE, DESCRIPTION until END DATE. You will continue to report to Ira Lloyd Lloyd -C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) SUPERVISOR'S NAME, JOB TITLE, DESCRIPTION in the NAME OF THE BUSINESS UNIT business unit within the NAME OF DIVISION division. All other terms and conditions of employment provided in the letter of offer dated DATE OF ORIGINAL CONTRACT (CHECK HR DATABASE) will remain unchanged.

Should you have any questions regarding this offer, please do not hesitate to contact me.

Sincerely,

INSERT SIGNATURE

SUPERVISOR NAME OR HR BUSINESS PARTNER NAME  
JOB TITLE  
Toronto and Region Conservation Authority

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

Name of Employee

Note: Clicking Print will only print what displays on the page. You can drag the bar under the text editor to expand the full letter and then click Print.

Comment

## TRCA PerformanceEmployee Status and Movement Forms

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 screenshot displays the TRCA Message Center interface. The top navigation bar includes a 'Test Site (60.2)' label and a 'Message Center' title. The left sidebar contains navigation links: Approvals, Inbox (14), Messages (2), Reports, Notifications (12), Actions, Drafts, Sent, and Trash (Empty). The main content area shows an email titled 'Re: Contract Extension with Toronto and Region Conservation Authority ("TRCA")'. The email body contains a contract extension offer and a signature line. Below the email, there is a 'Response' section with a text input field and three buttons: 'Accept', 'Reject', and 'Print Form' (highlighted with a red box). A 'History' table at the bottom shows a single entry for a form submitted by Lorraine Lawrence.

**Re: Contract Extension with Toronto and Region Conservation Authority ("TRCA")**

We are pleased to extend your current employment with TRCA as a C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) JOB TITLE, DESCRIPTION until END DATE. You will continue to report to Ira Lloyd Lloyd -C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) SUPERVISOR'S NAME, JOB TITLE, DESCRIPTION in the NAME OF THE BUSINESS UNIT business unit within the NAME OF DIVISION division. All other terms and conditions of employment provided in the letter of offer dated DATE OF ORIGINAL CONTRACT (CHECK HR DATABASE) will remain unchanged.

Should you have any questions regarding this offer, please do not hesitate to contact me.

Sincerely,

INSERT SIGNATURE

Note: Clicking Print will only print what displays on the page. You can drag the bar under the text editor to expand the full letter and then click Print.

Comment

**Response**

Accept Reject **Print Form**

**History (1)**

Response Time	User Name	Response	Response Comment
7/2/21, 10:43 AM	Lorraine Lawrence	Form Submitted	

## TRCA PerformanceEmployee Status and Movement Forms

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

**Print**  
Total: 2 sheets of paper

**Printer**  
Adobe PDF

**Copies**  
1

**Layout**  
☒ Portrait  
☐ Landscape


**Pages**  
☒ All  
☐ e.g. 1-5, 8, 11-13

**Color**  
Color

[More settings](#)  
[Print using system dialog \(Ctrl+Shift+P\)](#)  
[Troubleshoot printer issues](#)

**Print** **Cancel**

Letter



July 2, 2021

**Private & Confidential**

**Delivered Via Email**

Arthur Reed  
Employee Address  
City, Province  
H0H 0H0

Dear Arthur,

**Re: Contract Extension with Toronto and Region Conservation Authority ("TRCA")**

We are pleased to extend your current employment with TRCA as a C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) JOB TITLE, DESCRIPTION until END DATE. You will continue to report to Ira Lloyd Lloyd -C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) SUPERVISOR'S NAME, JOB TITLE, DESCRIPTION in the NAME OF THE BUSINESS UNIT business unit within the NAME OF DIVISION division. All other terms and conditions of employment provided in the letter of offer dated DATE OF ORIGINAL CONTRACT (CHECK HR DATABASE) will remain unchanged.

Should you have any questions regarding this offer, please do not hesitate to contact me.

Sincerely,

INSERT SIGNATURE

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

## TRCA PerformanceEmployee Status and Movement Forms

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.

The screenshot displays the TRCA Message Center interface. At the top, a blue header bar contains the text "Test Site (60.2) Message Center". Below the header, a navigation pane on the left lists various sections: Approvals, Inbox (14), Messages (2), Reports, Notifications (12), Actions, Drafts, Sent, and Trash (Empty). The main content area shows a message titled "Letter" with a status message: "This form has been submitted and is pending approval." Below this, the letter content is displayed, including the recipient's name "Arthur Reed" and address "Employee Address, City, Province, H0H 0H0". A "Comment" field is provided for input. At the bottom of the form, three buttons are visible: "Accept", "Reject", and "Print Form". A red box highlights these buttons, and another red box highlights the outer vertical scroll bar on the right side of the interface.

Compose ▾ Back Mark as Unread Print 1 of 29 X

Approvals  
Inbox 14  
Messages 2  
Reports  
Notifications 12  
Actions  
Drafts  
Sent  
Trash Empty

⚠ This form has been submitted and is pending approval.

Letter

Letter

Delivered Via Email

Arthur Reed  
Employee Address  
City, Province  
H0H 0H0

Note: Clicking Print will only print what displays on the page. You can drag the bar under the text editor to expand the full letter and then click Print.

Comment

Response

Accept Reject Print Form

History (1)

Response Time	User Name	Response	Response Comment
---------------	-----------	----------	------------------

## 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.

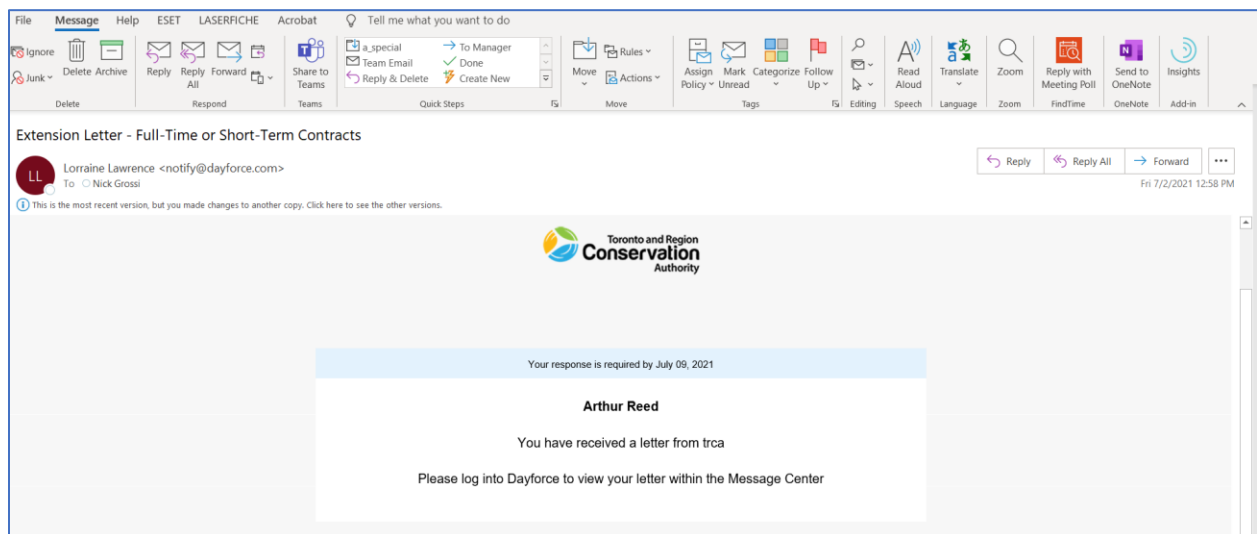
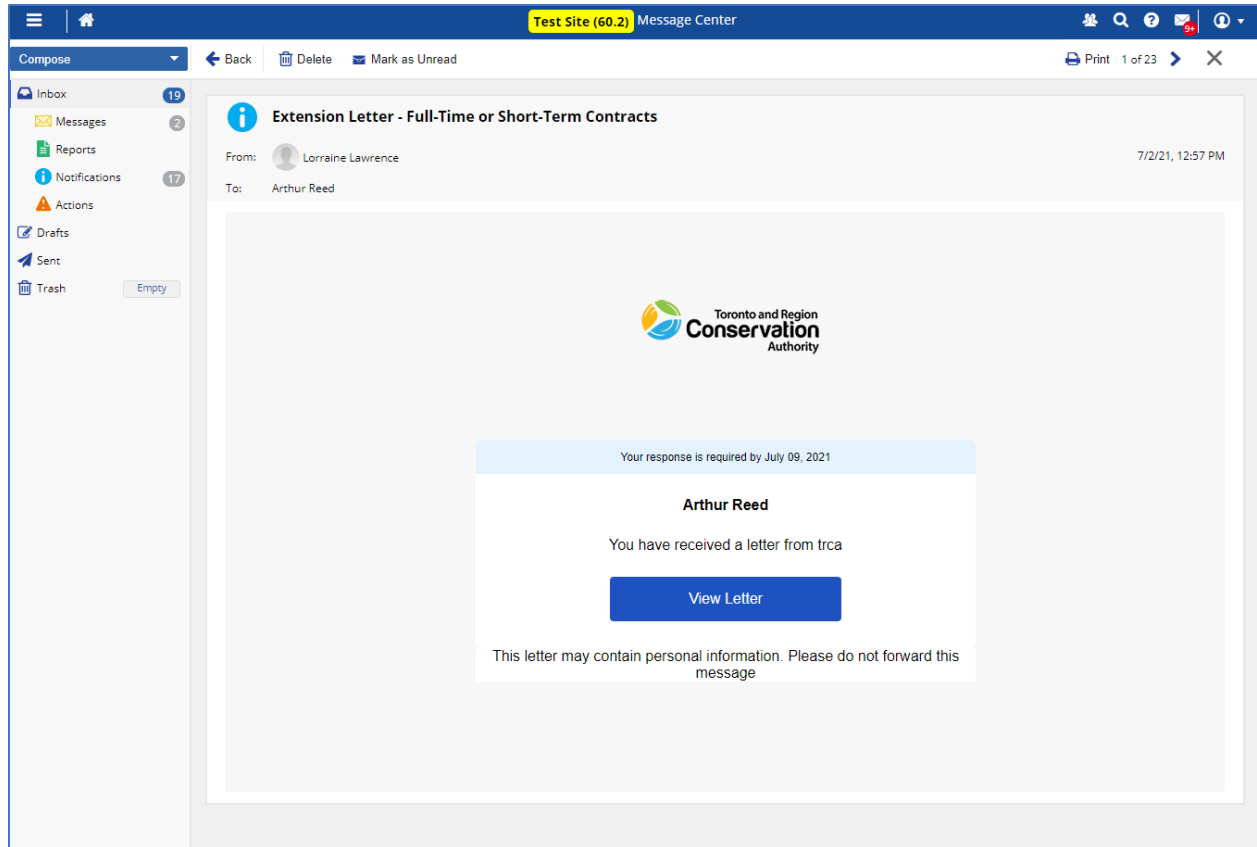
The screenshot displays the Dayforce Message Center interface. At the top, a yellow banner reads "Test Site (60.2) Message Center". The left sidebar contains navigation links: Compose, Approvals, Inbox (234), Messages (3), Reports (1), Notifications (230), Actions, Drafts, Sent, and Trash (Empty). The main content area shows an email titled "Letter to employee APPROVED - Arthur Reed" from Shelly Brady, dated 6/29/21, 4:11 PM. The email body states: "The Extension Letter - Full-Time or Short-Term Contracts Letter for Arthur ReedCandidate was approved." Below the email, a preview of the letter is shown. The letter is dated June 29, 2021, and is marked "Private & Confidential" and "Delivered Via Email". It is addressed to Arthur Reed at an employee address in H0H 0H0. The subject is "Re: Contract Extension with Toronto and Region Conservation Authority ("TRCA")". The letter text reads: "We are pleased to extend your current employment with TRCA as a C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) JOB TITLE, DESCRIPTION until END DATE. You will continue to report to Ira Lloyd Lloyd -C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) SUPERVISOR'S NAME, JOB TITLE, DESCRIPTION in the NAME OF THE BUSINESS UNIT business unit within the NAME OF DIVISION division. All other terms and conditions of employment provided in the letter of offer dated DATE OF ORIGINAL CONTRACT (CHECK HR DATABASE) will remain unchanged."

**From:** [notify@dayforce.com](mailto:notify@dayforce.com) <[notify@dayforce.com](mailto:notify@dayforce.com)>  
**Sent:** Tuesday, June 29, 2021 4:12 PM  
**To:** Carmen Lam <[Carmen.Lam@trca.ca](mailto: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.

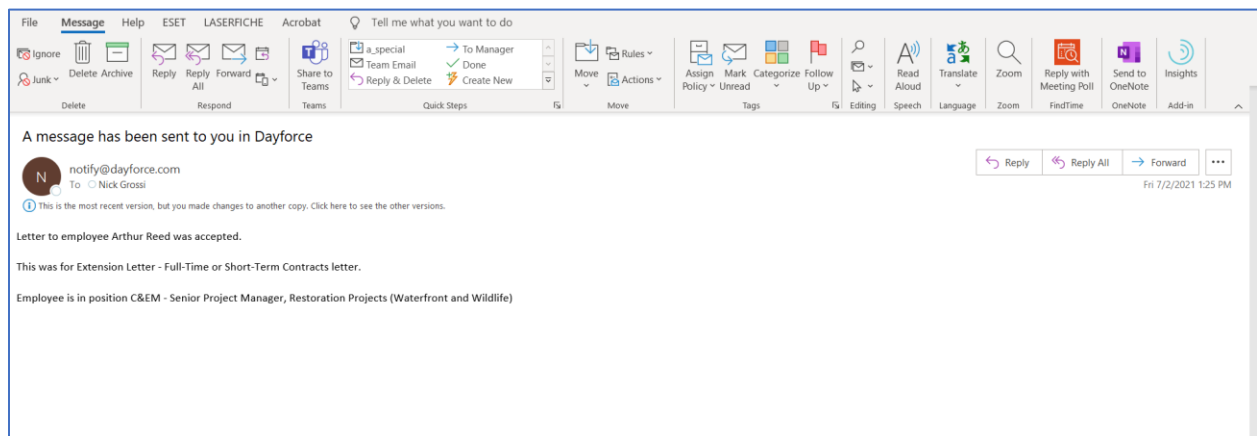
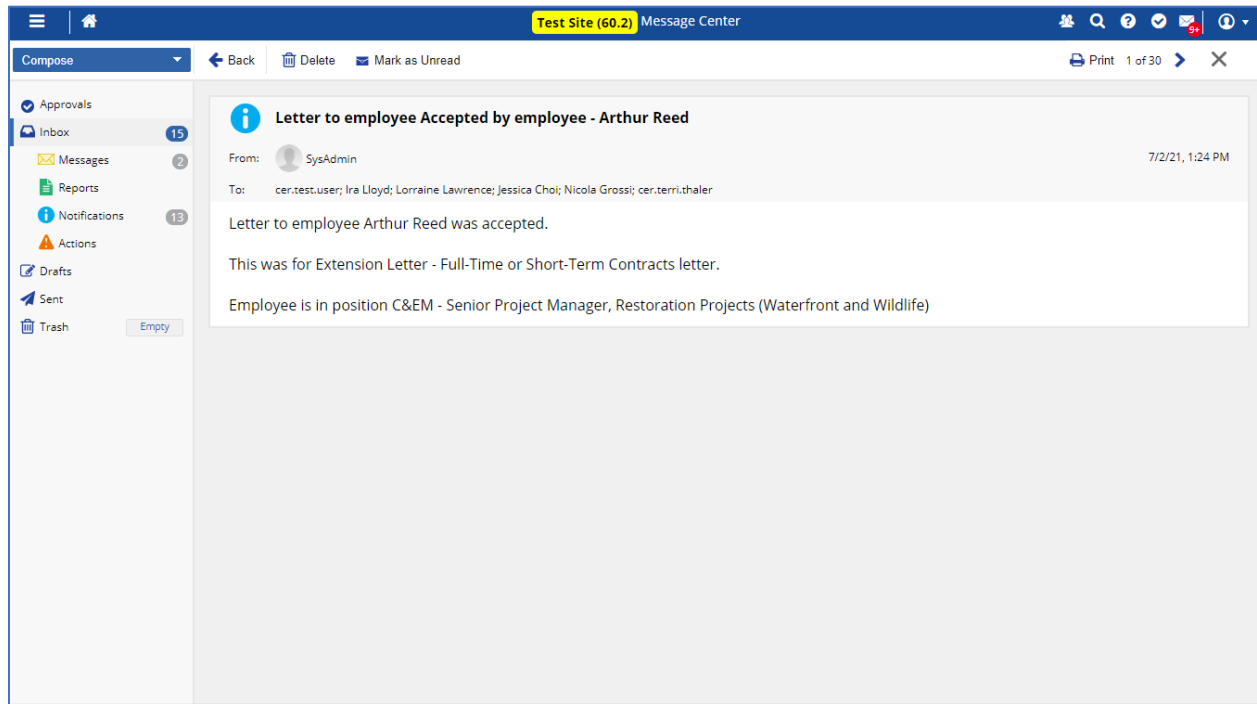
## Letter Received by Employee

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

The screenshot displays the HR Profile interface for an employee named Arthur Reed. The page is titled "Test Site (60.2) People" and shows the employee's details, including their name, employee number (001628), and current status (Active). The "Letters" section is highlighted in the left sidebar, and a red box is drawn around the "Letters" link. The main content area shows a list of letters, with the most recent one titled "Extension Letter - Full-Time or Short-Ter..." dated July 2, 2021, 02:43 PM. The letter content is displayed on the right, starting with "July 2, 2021" and "Private & Confidential". The letter is addressed to Arthur Reed and is from the Toronto and Region Conservation Authority. The subject line is "Re: Contract Extension with Toronto and Region Conservation Authority ('TRCA')". The body of the letter states: "We are pleased to extend your current employment with TRCA as a C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife) JOB TITLE, DESCRIPTION until END DATE. You will conti to report to Ira Lloyd Lloyd -C&EM - Senior Project Manager, Restoration Projects (Waterfront and Wildlife SUPERVISOR'S NAME, JOB TITLE, DESCRIPTION in the NAME OF THE BUSINESS UNIT business unit within the NAME OF DIVISION division. All other terms and conditions of employment provided in the letter o".

## E

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Downloaded from <https://www.cambridge.org/core>. University of Cambridge, on 02 Jun 2020 at 10:00:00, subject to the Cambridge Core terms of use, available at <https://www.cambridge.org/core/terms>. <https://doi.org/10.1017/S0022278X20000539>

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- :

**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\***

**Position Title\***

**Band or Range**

**Step or Level**

**Base Rate\***

**Annual Salary\***

**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\***

### 1. Position Start Date

- Record as required.

### 2. Position 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.
- 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. Assignment Start Date

- Record as required.

### 2. Assignment 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.
- 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\***  **Position Title\***

**Band or Range**  **Step or Level**

**Base Rate\***  **Annual Salary\***

**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 Dayforce Letter Management, please indicate so in Comment box.

**Comment**

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.

The screenshot shows a web form titled "PTF - Request for Leave" for employee Arthur Reed (Status: Active, Employee Number: 001628). The form includes a "Note to Submitter" section with instructions on its use for Legislated Approved Leave or Personal Unpaid Leave, and a warning about Short Term Disability. It features input fields for "Effective Leave Date\*" and "Estimated Return Date\*", dropdown menus for "Status\*" and "Reason\*", an "Additional Instructions" section with a note about attaching letters, a "Comment" text area, and a file upload section with an "Upload Files" button. At the bottom are buttons for "Save Draft", "Submit", "Cancel", and "Print".

### 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.

## 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).

PTF - Request for Record of Employment

**Request for Record of Employment**

Arthur Reed  
Status: Active Employee Number: 001628

Personnel Transaction Form

**Effective Date\***

**Status\***

Active

**Reason**

Record in the box the reason for this Record of Employment.

- A00 - Shortage of work / End of Contract or Season
- D00 - Illness or injury
- K14 - Other / Requested by Employment Insurance
- K16 - Other / At the employee's request

**Additional Instructions**

\* Please attached applicable documents that have been issued to the employee in support of the requested transaction.

**Comment**

### 1. Effective Date

- Record as required.

### 2. Status

- The field automatically populates with 'Active' and is locked. You do not need to update this field.

### 3. Reason

- Record in the text box one of the listed values as required.

### 4. File Attachments

- 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. Termination Date

- Record as required.

### 2. Status

- The field automatically populates with “Terminated” and is locked. You do not need to update this field.

### 3. Reason

- Record in the text box one of the listed values as required. These are standard Canada Revenue Agency required values.

### 4. File Attachments

- 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

Location\*

Coordination & Ecosyste...

Return to Band or Range

05

Base Rate\*

27.4725

Reason\*

Select an Option...

Position Title\*

C&EM - Senior Project M...

Return to Step or Level

2

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.

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

## TRCA PerformanceEmployee Status and Movement Forms

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 required (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 Dayforce Letter Management, please indicate so in Comment box.

Comment



+ Upload Files

Save Draft

Submit

Cancel

Print

### 1. Return Date

- Record as required.

### 2. 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. 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. Status

- The field automatically populates with 'Active' and is locked. You do not need to update this field.

**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 from 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

<b>Position Start Date*</b>	<b>Position End Date</b>
<input type="text"/>	<input type="text"/>
<b>Location*</b>	<b>Position Title*</b>
Coordination & Ecosyste... ▾	C&EM - Senior Project M... ▾
<b>Pay Class</b>	<b>Reason</b>
FT ▾	Temporary Acting Assign... ▾
<b>Band or Range</b>	<b>Step or Level</b>
05 ▾	2 ▾
<b>Base Rate*</b>	<b>Annual Salary*</b>
27,4725	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**  
Please indicate any additional Dayforce User roles that are required (e.g., Manager, Supervisor, Admin, Time Sheet Reviewer, etc.).

PTF - Temp Acting Assignment

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 from 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\*

Position Title\*

Pay Class

Reason

Band or Range

Step or Level

Base Rate\*

Annual Salary\*

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.

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

Shift Schedule (if applicable)

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 required (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 Dayforce Letter Management, please indicate so in Comment box.

Comment

Upload Files

Save Draft

Submit

Cancel

Print

1. **Assignment Start Date**
  - Record as required.
2. **Assignment 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.
  - 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 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. **Reason**
  - The field automatically populates with ‘Temporary Acting Assignment’ and is locked. You do not need to update this field.
6. **Band or Range / Step or Level**
  - 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.