Manager Self-Service Manual

Table of Contents

General Navigation

Navigation of HR Connect is much like navigation of any Internet site. To navigate, click on the available links, text headings, buttons, etc. There are, however, a few differences which must be clarified before using this tool.

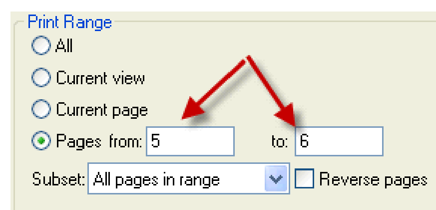
Learning Guide Table of Contents

The **Table of Contents** includes links enabling the user to click on the topic of interest and quickly jump to the instruction. To return to the Table of Contents, click the return arrow. The Table of Contents function menu is dependent on the version of Adobe Acrobat available. Below is one example of a menu bar.

Printing the Learning Guide

NOTE: Printing the Learning Guide in its entirety is not recommended. The intent of accessing an electronic version of this guide is so that users are always accessing the most up to date information. As new features are added to HR Connect, this guide will be built out and therefore instructions will change. Recommendations are to click the topic from the Table of Contents and then:

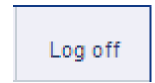
- Review the instructions online and complete the necessary action in HR Connect.
- Make note of the page numbers of the topic needed
  - Click the **print icon** in the Learning guide **menu bar**
  - In the **Print Range** section, input the **start and end page numbers** (see example at right)
  - Click **OK** button
  - Use the printed instruction to perform the task
  - Refer to the messaging in the document footer. Recycle the printed pages.



Back and Forward Links

The browser forward and back arrows (top left of the window) do not function within the application. Instead, navigate back and forward using the **Back and Forward links** (top left of the application).

Log Off Link



Never close your HR Connect session using the [X] button (top right corner). Always use the **Log off link** (top right of the application). If not done correctly, another manager or associate could potentially start another HR Connect session and view your information.
The **Log off** link ensures that your session is truly closed. If no action is taken within an open session of MSS, the application will prompt the user to keep the session windows* open or to log off after 12 minutes. If no action is taken MSS will automatically time out after 15 minutes.

***Session Windows**: Now in MSS, each time an associate profile or link is accessed, the information will display in a new session window. This can be helpful to review multiple windows of information for the same associate or comparing information from various associates.

Refresh Feature

If working with information within a table (Ex: Task or Alert lists, performance appraisal tables, etc.) sometimes the links remain in view after an action has been completed. Use the **Refresh** feature (or press the F5 key) to update the list or table. ***Do not*** use the general browser refresh button.

ESS & MSS Tabs

Managers with direct reports will have **two tabs** as illustrated below. Associates will only have one tab, the Employee Self-Service (PETM) tab.

Terminology Changes

Old	New
Quota Type	*Absence* Type or *Absence Days*
General Information	*Employee* Information
Employee *Search* screen	Employee *Information* screen
SSG/CSG/PRSG	Support Group

Employee Information

Associate Search Types

PURPOSE

Use this procedure to search for Associate information including, Organization, Job, and Position data within your Team.

LOCATION: All Locations

AUDIENCE: Managers with direct reports

PREREQUISITE: One or more direct reports.

MENU PATH: Manager Self Service > Team > Employee Information

PROCEDURE

1. Start the transaction using the **Menu Path**. The **Employee Information** screen displays in a new window.

2. To search for associate by:
   - **Direct Reports**, proceed to **Step 3**.
   - **Employees from Organizational Structure**, proceed to **Step 5**.
   - **Employees from Organizational Units**, proceed to **Step 9**.
   - **Employee Search**, proceed to **Step 14**.

Direct Reports

3. The **Employee Selection** drop-down list and the view defaults to **Direct Reports**. A listing of all Associates reporting directly to you displays.
   If you are a 1 up manger (mgr. w/direct reports) or greater, change the drop-down Direct Reports default setting to org. structure or org unit. The list updates showing all within your span of control.

   *The **Display** drop-down menu options allow the information to be viewed as:*
   - ***Organizational Information**; detailed view including:*
     - *name, personnel number(Assoc. #), manager, position, employee group, org unit, cost center, personnel area, and personnel subarea*
   - ***Employee Data**; minimal view including:*
     - *name, personnel number, associate status, LOA Type and Hourly rate or Salary.*

   To **sort columns,** hover the mouse cursor over the column heading and click. The column sorts in **Ascending** order. Click again to sort in **Descending** order.

4. To display the associate's detailed information, click the **left gray button** to highlight the row of the intended associate. Click the **Employee Profile** button at the top of the table.

5. The **Employee Profile: Name** screen opens in a new window. The information available is dependent on the work location. Refer to the table below.

Along the left side of the Employee Profile screen you will see:

- Communication Data (Work E-Mail)
- Personnel Structure (Full or part-time status and salaried or hourly)
- Salary Data which includes Date of Hire and Current Salary
- Current Status (Active, LOA w/reason)

Location	Tab	Performance	Organizational Assignment	Potential	Absent Days	Emergency Contact	Permanent Residence	Salary History
Support Group	Overview	X	X	X	X			
	Miscellaneous					X	X	
	Salary History							X
Stores	Overview	X	X		X			
	Miscellaneous					X	X	
	Salary History							X
Distribution Center	Overview	X	X	Salaried	X			
	Miscellaneous					X	X	
	Salary History							X

Heading Definitions

- **Performance** – Displays past performance ratings.
- **Organizational Assignment**
  - **Organizational Assignments: History** link – Displays the associate's historical job positions within PetSmart.
  - **Organization Unit:** Displays the associate's department title.
  - **Position:** Displays the associate's current job title.
- **Potential** – Displays a sliding scale rating based on the manager's recommendation.
  - **Talent Profile:** This link will only display at Support Group locations. For more information on the annual **Talent Assessment** process, refer to the **Steps to Create the Talent Assessment** job aid at on the **Succession Planning Resource Center** site on Fetch.
- **Absent Days** – Defaults to list current month Time Account usage. Refer to the Absent Days section for detailed instructions on using this function.
- **Emergency Contact** – Displays the associate's emergency contact name and phone number.
- **Permanent Residence** – Displays the associate's address and home phone number.

Employees from Organizational Structure

This view is best for Support Group and Distribution Center locations.

6. Click **Employee Selection** drop-down list and select **Employees from Organizational Structure**.
7. An **Organizational Structure** banner displays showing a *bulleted* listing of the **jobs (Org unit) within your organizational structure**.
8. Click the **job (Org Unit)** of the associate being searched. A table displays listing associates of only that job type.
9. **Refer to Steps 4 & 5** to display an associate's detailed information.

Employees from Organizational Units

This view is best for Store locations.

10. Click **Employee Selection** drop-down list and select **Employees from Organizational Unit**.
11. An **Organizational Structure** banner displays showing a listing of the **jobs (Org unit) within your organizational structure**.
12. Click the **job (Org Unit)** selection button to highlight the row. Click the Start button. A table displays listing associates of only that job type.
13. **Refer to Steps 4 & 5** to display an associate's detailed information.

Employee Search

14. Click **Employee Selection** drop-down list and select **Employee Search.** Enter search criteria (fields are case sensitive, Ex: Jones not jones), click **Start** button.
15. **Refer to Steps 4 & 5** to display an associate's detailed information.

View Associate Absence Days Detail

PURPOSE

Use this procedure to view available personal data on one of the Associates in your organization.

LOCATION:	All Locations
AUDIENCE:	Managers and above
PREREQUSITES:	One or more direct reports
MENU PATH:	Manager Self Service > Team > Employee Information

PROCEDURE

1. Complete **Steps 1-5** of **Associate Search Types**. Refer to the **Absent Days** panel.
2. MSS defaults the view to the **current month**. Make note of the **Period** dates displayed. This function defaults to 30 days back and 30 days forward from the current date. If an additional time period is required for view proceed to **Step 3**.
3. Click the **Filter** button. The filter criteria menus display.
    - Absence Type (Quota Type) defaults to All.
    - No. of Months Back defaults to 01 (*i.e. one month back*).
    - No. of Months Forward defaults to 01 (*i.e. one month forward*).
4. Make selections as necessary to the fields and click **Apply**.
   Note: *Currently both the Apply and Save as Default buttons perform the same function to save the selected criteria.*
5. The table updates to display **Period**, **Days** and **Description** based on selected **Filter** criteria.

   BEST PRACTICE: *If a specific Absence Type was selected and applied, this type will be the default view the next time Absence Types are reviewed. Before exiting the system, be sure to change the Absence Type drop-down to All.*

Team Calendar

Team Calendar

PURPOSE

Use this procedure to view a team calendar of associate absences*. The data populated in the view is as of the **most recent Monday** system refresh.

- Managers can use this tool to review **past history for both hourly and salaried** associates.
- Managers can use this tool to review **future history for salaried associates ONLY** when:
    - o The manager has approved the request in HR Connect

  AND

    - o The CATS system has refreshed at the regularly scheduled time.

Absence is a term used in HR Connect: MSS as being any of the Absence Type selections. Refer to the* **Enter Absence Request for an Associate *instruction for a detailed listing with definitions.*

LOCATION: All Locations

AUDIENCE: Managers and above

PREREQUSITES: One or more direct reports

MENU PATH: Manager Self Service > Team > Team Calendar

PROCEDURE

Direct Reports

1. Start the transaction using the **Menu Path**. The **Team Calendar** opens in a new window.
2. The **Employee Selection** drop-down menu defaults to **Direct Reports** view for the current month. *When viewing an "absence" on the Team Calendar, hovering the mouse cursor over a:*
   - *Blue box displays a dialog box notating one of the Absence Types recorded.*
     Ex: Vacation or Pet Discretionary Informed or etc.
   - *Gray box displays a dialog box notating* ***two or more*** *Absence Types recorded.*
     Ex: Sick Informed and Discretionary Informed
3. To change the view to a different month and year, from the **View** drop-downs select the **month** needing to be reviewed for the **applicable year**.

Status Change Forms

SCF Tracking

PURPOSE

Use this procedure to view the current status of an SCF request. If an SCF status is not yet completed ***do not*** create a duplicate request.

AUDIENCE: Managers with hourly direct reports

PREREQUISITES: SCF request has been created

MENU PATH: Manager Self Service > Universal Worklist > Tracking tab

PROCEDURE

1. Start the transaction using the **Menu Path**.
2. The **Tracking tab** displays. Refer to the **Status** column for the applicable SCF in question.
   - ***Do not*** create a duplicate request if the **Status** column displays anything other than **Complete**. The request is still actively being channeled through the workflow.
   - If the **Status** is **Completed** the request has been processed.

Badge Number Change

PURPOSE

Use this procedure to update a time badge number change for an hourly associate in the organization.

AUDIENCE: Managers with hourly direct reports

PREREQUISITES: New Badge Number

MENU PATH: Manager Self Service > Team > Status Change Form: Badge Number Change

PROCEDURE

1. Start the transaction using the **Menu Path**.
2. The **Status Change Form (SCF) – Badge Number Change** screen displays and the progress bar is in **Select Associate** status.
   If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.
3. Scroll through the list and find the **associate by name**. Click gray **Select** button at left of associate's row. Click **Next** button.
4. The progress bar is in **Fill Data** status. In the **Badge #** field, input **badge number** to be assigned to this Associate.
5. Under the **Date Information** banner, the **Effective Date** field defaults to the current date.
   If the default date does not reflect the true effective date, make the necessary date change.
   Click **Review** button.
6. The progress bar is at **Review SCF** status. Review and verify data.
   - If data is correct, click **Submit** button. Proceed to **Step 7**.
   - If data is incorrect, click **Back** button. Proceed to **Step 4** and update necessary data.
7. An SCF control number displays. The action is complete.

Request Associate Leave of Absence (LOA)

PURPOSE

Use this procedure to request a Leave of Absence for an Associate in your organization.

LOCATION: All Locations

AUDIENCE: Manager of the Associate
Approver: DC HR Managers only

<table>
<tr><th>Associate Personnel Area</th><th>Initiator</th><th>First Level Approver</th><th>Second Level Approver</th><th>HR Approver</th></tr>
<tr><td>Support Group & Field</td><td rowspan="3">Manager</td><td rowspan="3">N/A</td><td rowspan="3">N/A</td><td>N/A</td></tr>
<tr><td>Stores</td><td>N/A</td></tr>
<tr><td>DC</td><td>DC HR Manager</td></tr>
</table>

PREREQUISITE: The associate has communicated a Leave of Absence request date.

Effective Date = The first date the associate missed work. It is critical that effective dates are input correctly so that any pay or benefits impacts are handled correctly.

MENU PATH: Manager Self Service > Team > Status Change Form: Leave of Absence

PROCEDURE

Initiator

1. Start the transaction using **Menu Path**.
2. The **Status Change Form (SCF) – Leave of Absence** screen displays and the progress bar is in **Select Associate** status. *If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.*
3. Scroll through the list and find the **associate by name**. Click gray **Select** button at left of associate's row. Click **Next** button.
4. The progress bar is in **Fill Data** status. Under the:
   - **Associate Id and Reason** banner, **Reason** field, select the appropriate **LOA option**.
   - **Date Information** banner, click **Effective Date** field icon. Navigate the calendar tool and select the **effective date** (see Prerequisite for definition) the LOA is to take place.

   Click **Review** button.
5. The progress bar is at **Review SCF** status. Review and verify data.
   - If data is correct, click **Submit** button. Proceed to **Step 6**.
   - If data is incorrect, click **Back** button. Proceed to **Step 4** and update necessary data.
6. The progress bar is at **Submit** status. An SCF control number displays.
   If the SCF is for a DC associate, the request moves to the DC HR Manager for workflow approval.

Miscellaneous Change Request

PURPOSE

Use this procedure to submit a request to HR that is not covered by one of the other established SCF transactions.

LOCATION: All Locations

AUDIENCE: All Managers

Associate Personnel Area	Initiator	First Level Approver	Second Level Approver	HR Approver
Support Group & DC	Manager	1 up Manager	N/A	HRIS Administrator
Stores		N/A	N/A	HRIS Administrator
Field		1 up Manager	N/A	HRIS Administrator

PREREQUISITES: User access to HR Connect and the Manager Self Service tab.

MENU PATH: Manager Self Service > Team > Status Change Form: Miscellaneous

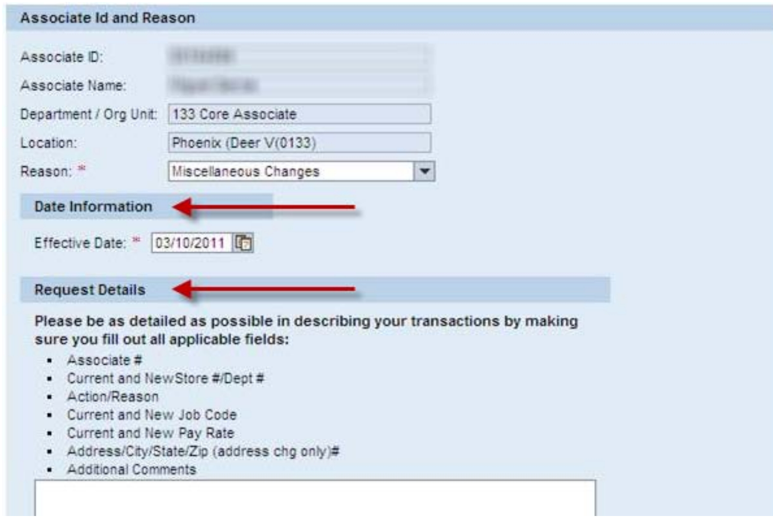
PROCEDURE

Initiator

1. Start the transaction using the **Menu Path**.
2. The **Miscellaneous** screen displays. The **progress bar** is at **Select Associate** status. The default list of **Direct Reports** displays.
   If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.
3. Search through the list for the **applicable associate**. Click the **associate's name**. Click **Next** button.

4. The **progress bar** is at **Fill Data** status. The **Associate Id and Reason** and **Request Details** sections display.

   Input the **necessary information** regarding the miscellaneous request in the **Request Details** field. Be as detailed as possible. Click **Review** button.



5. The **progress bar** is at **Review SCF** status. Click **Submit** button.
6. The **Misc SCF Form** displays. The **progress bar** is at **Submit** status. The **SCF confirmation** number displays. The request is placed into workflow following the chart above.
7. Use the confirmation number to track the status of the SCF request from the Universal Worklist screen.

First Level Approver

1. The 1 Up Manager receives an automated email reminder of the SCF and logs into HR Connect.
2. Click **Manager Self-Service** tab. The **Universal Worklist** displays. From the **Task** tab, **Subject** column, click the applicable **Miscellaneous request** link to be approved.
3. The **SCF Miscellaneous** form memo displays.
4. If the form is:
   - In order, click **Approve** button. Proceed to **Step 5**.
   - Not in order, click **Reject** button. Proceed to **Step 6**.
5. An **Approved** message displays. The request continues through the workflow following the chart above.
6. Input comments as to why the SCF was rejected. The original SCF request is sent back to the originating manager and is negated from further workflow.

Change within My Team

PURPOSE

Use this procedure to transfer an Associate from one organizational unit to another organizational unit within the Manager's existing team or department.

LOCATION: Stores, Field, and DCs

Support Group locations will not use HR Connect to complete this type of SCF. Continue the current SCF procedure.

AUDIENCE: Manager of Associate transferring within the team/department
Approver: Receiving Manager, 1 Up Manager or HR Manager

Associate Personnel Area	Initiator	First Level Approver	Second Level Approver	HR Approver
Field	Manager	1 up Manager	N/A	HR Manager
Stores		N/A		HRIS Administrator
DC		1 up Manager		DC HR Manager

PREREQUISITES: Job title, FT/PT status, wage information, and effective date of the organizational change. This information is gained through preliminary discussions with your HR Manager prior to initiating the transaction in HR Connect.

MENU PATH: Manager Self Service > Team > Change (within my team)

PROCEDURE

Initiator

1. Start the transaction using the **Menu Path**.
2. The **Status Change Form (SCF) – Organizational Change** screen displays and the progress bar is in **Select Associate** status.
   If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.
3. Scroll through the list and find the **associate by name**. Click **associate's name**. Click **Next** button.
4. The progress bar is in **Fill Data** status. Under the:
   - **New Data** banner, select **job title, FT/PT status,** and **wage*** information.
   - **Date Information** banner, click **Effective Date** field icon. All pay changes must be effective on a Monday. Navigate calendar tool to select **effective Monday date** pay change is to take place.

   Click **Review** button.
   Refer to **Pay Change Only Steps 5 & 10 if pay change creates a warning message.
   Do not complete step 10 if at a Field or DC location.*

5. The progress bar is at **Review SCF** status. Review and verify data.
   - If data is correct, click **Submit** button. Proceed to **Step 6**.
   - If data is incorrect, click **Back** button. Proceed to **Step 4** and update necessary data.
6. The progress bar is at **Submit** status. An SCF control number displays. The request moves to the receiving manager on for approval.

First Level Approver

1. The 1 Up Manger receives an automated email reminder of the SCF and logs into HR Connect. *NOTE: This manager has 7 days to approve or reject. If no action is taken, the SCF will then route to the next approver in the workflow.*
2. Click **Manager Self-Service** tab. The **Universal Worklist** displays. From the **Task** tab, **Subject** column, click the applicable **Organizational Change** link to be processed.
3. The **Organizational Change** screen displays. If the Organizational Change is:
   - In order, click **Approve** button. Proceed to **Step 4**.
   - Not in order, click **Reject** button. Proceed to **Step 5**.
4. An **Approved** message displays. The request continues through the workflow following the chart above.
5. Input comments as to why the SCF was rejected. The original SCF request is sent back to the originating manager and is negated from further workflow.

Pay Change Only

PURPOSE

Use this procedure to request a special pay change for an Associate in your organization.

LOCATION: All Locations

AUDIENCE: Manager of the Associate

Associate Personnel Area	Initiator	First Level Approver	Second Level Approver	HR Approver
Support Group & Field	Manager	1 up Manager	N/A	HR Manager
Stores		N/A		HRIS Administrator
DC		1 up Manager		DC HR Manager

PREREQUISITE: Wage information and effective date of the pay change (must be a Monday date).

Support Group & DC: This information is gained through discussions with your HR Manager prior to initiating transactions in HR Connect.

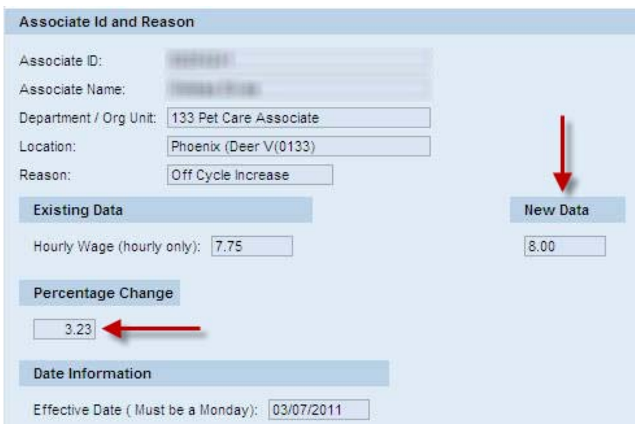
NOTE: *DC Shift Differentials can be added through this SCF and will automatically update the record. However, to remove or change a shift differential, a Miscellaneous SCF needs to be submitted.*

MENU PATH: Manager Self Service > Team > Status Change Form: Pay Change Only

PROCEDURE

Initiator

1. Start the transaction using the **Menu Path**.
2. The **Status Change Form (SCF) – Pay Change** screen displays and the progress bar is in **Select Associate** status.
3. Scroll through the list and find the **associate by name**. Click associate's name. Click **Next** button. *If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.*
4. The progress bar is in **Fill Data** status. Under the:
   - **Associate Id and Reason** banner, **Reason** field, select the appropriate **pay change option**.
     - Off Cycle Increase, proceed to **Step 5**.
     - Forklift *(Store and DC locations only)*, proceed to **Step 6**.
     - Pay Decrease, proceed to **Step 5**.
5. Under the **New Data** banner, input **new wage**. The **Percentage Change** field updates.
   NOTE: If the pay rate is below minimum (<5%) or above maximum (>5%) a warning message displays. Either:



   - Change the wage to fall within the min/max levels without initiating the warning message and proceed to **Step 6** and stop at **Step 9**.
   - **Stores**: Keep the wage, proceed with **Steps 6-9**, and complete the additional **Step 10**.
   - **Support Group/Field/DC**: Keep the wage and proceed with **Steps 6-9**. 1 up Manager and HR approvals will continue as designed through HR Connect workflow.
6. Under the **Date Information** banner, click **Effective Date** calendar icon. All pay changes must be effective on a Monday. Navigate the calendar tool and select the **effective Monday date** the pay change is to take place. Click **Review** button.

7. The progress bar is at **Review SCF** status. Review and verify data.
   - If data is correct, click **Submit** button. Proceed to **Step 8**.
   - If data is incorrect, click **Back** button. Proceed to **Step 4** and update necessary data.
8. The progress bar is at **Submit** status. An **SCF control number** displays. The request is placed into workflow following the chart above.
9. Use the confirmation number to track the status of the SCF request from the Universal Worklist screen.
10. **Stores Only**: Complete this step ***if the new wage initiated a*** below min or above max ***warning message***. The Store Manager needs to create and send an email to his/her DM using the following text. Input the appropriate information within the < >.

To:	*Your District Manager*
Subject:	*Pay Change Approval Requested for SCF* ***<Confirmation No.>***
Message:	***<DM's Name>*** *this is a request for you to approve an off cycle pay change for* ***<Associate Name>***.
	Please approve/decline this email request by forwarding to your HRIS Processor and copying me with your reply. Doing so will help to expedite the pay change for the associate's next pay check.

First Level Approver

1. The 1 Up Manger receives an automated email reminder of the SCF and logs into HR Connect.
2. Click **Manager Self-Service** tab. The **Universal Worklist** displays. From the **Task** tab, **Subject** column, click the applicable **Pay Change** link to be processed.
3. The **Pay Change** screen displays. If the pay change is:
   - In order, click **Approve** button. Proceed to **Step 4**.
   - Not in order, click **Reject** button. Proceed to **Step 5**.
4. An **Approved** message displays. The request continues through workflow following chart above.
5. Input comments as to why the SCF was rejected. The original SCF request is sent back to the originating manager and is negated from further workflow.

Return Associate from Leave of Absence (LOA)

PURPOSE

Use this procedure to request the Return from of a Leave of Absence for an Associate in your organization.

LOCATION: All Locations

AUDIENCE: Manager of the Associate
Approver: DC HR Managers at DC locations only

<table>
<tr><th>Associate Personnel Area</th><th>Initiator</th><th>First Level Approver</th><th>Second Level Approver</th><th>HR Approver</th></tr>
<tr><td>Stores/Field/ Support Group</td><td rowspan="2">Manager</td><td rowspan="2">N/A</td><td rowspan="2">N/A</td><td>N/A</td></tr>
<tr><td>DC</td><td>DC HR Manager</td></tr>
</table>

PREREQUISITE: The associate is on a Leave of Absence and has communicated a return to work date.

Effective Date = The first date the associate will be returning to work. It is critical that effective dates are input correctly so that any pay or benefits impacts are handled correctly.

MENU PATH: Manager Self Service > Team > Status Change Form: Return from Leave

PROCEDURE

Initiator

1. Start the transaction using the **Menu Path**.
2. The **Status Change Form (SCF) – Return from Leave** screen displays and the progress bar is in **Select Associate** status.
   If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.
3. Scroll through the list and find the **associate by name**. Click **associate's name**. Click **Next** button.
4. The progress bar is in **Fill Data** status. Under the:
   - **Associate Id and Reason** banner, **Reason** field, defaults to **Return from Leave** option.
   - **Date Information** banner, click **Effective Date** field icon. Navigate the calendar tool and select the **effective date** the Return from Leave is to take place.

   Click **Review** button.
5. The progress bar is at **Review SCF** status. Review and verify data.
   - If data is correct, click **Submit** button. Proceed to **Step 6**.

- If data is incorrect, click **Back** button. Proceed to **Step 4** and update necessary data.

6. The progress bar is at **Submit** status. An SCF control number displays.
   - If you are not a manager at a DC location, the action is complete.
   - If you are a manager at a DC location, the request moves to the DC HR Manager for approval.

Approver

1. The **DC HR Manager Approver** receives an automated email reminder of the SCF and logs into HR Connect.
2. Click Manager Self-Service tab. The Universal Worklist displays. From the **Task** tab, **Subject** column, click the applicable **Return from LOA** link to be processed.
3. The **Return from Leave** screen displays. If the Return from Leave is:
   - In order, click **Approve** button. Proceed to **Step 4**.
   - Not in order, click **Reject** button. Proceed to **Step 5**.
4. An **Approved** message displays. The transaction has been recorded and is now complete.
5. Input comments as to why the SCF was rejected and remind the initiating manager that a new request needs to be created and submitted again. The original SCF request is negated from further workflow.

Termination

PURPOSE

Use this procedure to submit a termination request when an Associate is terminated voluntarily or otherwise.

LOCATION: All Locations

AUDIENCE: Manager terminating Associate

Approver(s): DC HR Manager, Benefits Administrator and/or HRIS

Associate Personnel Area	Initiator	Assoc. on Leave (Except Back to School)	First Level Approver	Second Level Approver	HR Approver
Support Group & Field	Manager	No	N/A	N/A	N/A
		Yes	N/A	N/A	Benefits Administrator
Stores	Manager	No	N/A	N/A	HRIS (For Reason Disability)
		Yes	N/A	N/A	Benefits Administrator
DC	Manager	No	N/A	N/A	DC HR Manager
		Yes	DC HR Manager	Benefits Administrator	HRIS (For Reason Disability)

PREREQUISITE: Refer to Termination Matrix to identify the appropriate HR Connect termination reason/rehire action.

Effective Date = The first day the status goes into effect. It is critical that effective dates are input correctly so that any pay or benefits impacts are handled correctly.

Last Day Worked is the last day the associate physically worked on-site, and will not always be the same as the Effective Date

Stores: Store Managers only will have the ability to perform terminations.

MENU PATH: Manager Self Service > Team > Status Change Form: Termination

TERMINATION MATRIX

REASON	HR CONNECT OPTION(S)	REASON	HR CONNECT OPTION(S)
Dissatisfied w/Job	Resignation – Rehire Y Resignation – Rehire N	Relocation	Resignation – Rehire Y Resignation – Rehire N
Elimination of Position	Job Elimination – Rehire Y	Resignation	Resignation – Rehire Y Resignation – Rehire N
Emp. Failed Probation Period	Unsatisfactory Performance – Rehire N	Resignation Other Postion	Resignation – Rehire Y Resignation – Rehire N
End Temporary Employment	Temporary Assignment – Rehire Y	Retirement	Retirement – Rehire Y
Fail Pre-Employ Requirement	Violation of Co. Policy – Rehire N	Severance	Resignation – Rehire Y Resignation – Rehire N
Failure to Return from Leave	Fail to Return frm Lve – Rehire Y Fail to Return frm Lve – Rehire N	Staff Reduction	Job Elimination – Rehire Y
Falsification on Application	Violation of Co. Policy – Rehire N	Transfer to Affiliate	Transfer to Affiliate – Rehire Y
Insubordination	Violation of Co. Policy – Rehire N	Unsatisfactory Performance	Unsatisfactory Performance – Rehire N
Job Abandonment	Job Abandonment – Rehire N	Vio-Falsification Company Doc	Violation of Co. Policy – Rehire N
Location Closed	Job Elimination – Rehire Y	Violation of Company Policy	Violation of Co. Policy – Rehire N
New Hire No Show	Job Abandonment – Rehire N	Violation-Attendance	Violation Attendance – Rehire N
Partial/Total Disability	Disability – Rehire Y	Violation-Loss Prevention	Violation of Co. Policy – Rehire N
Personal Reasons	Resignation – Rehire Y Resignation – Rehire N	Violation-Safety	Violation of Co. Policy – Rehire N

PROCEDURE

Initiator

1. Start the transaction using the **Menu Path**.
2. The **Status Change Form (SCF) – Termination** screen displays and the progress bar is in **Select Associate** status.
3. Scroll through the list and find the **associate by name**. Click **associate's name**. Click **Next** button. *If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.*

4. The progress bar is in **Fill Data** status. Under the:
    - **Associate Id and Reason** banner, **Reason** field, select the appropriate **termination reason**.

    NOTE: *Termination reasons incorporate the rehire status as part of the reason description. It is important to select the appropriate reason with the appropriate rehire status.*
    - **Date Information** banner:
        - Click **Effective Date** field icon. The effective date is the first day the associate no longer works for PetSmart.
        - Click **Last Day Worked** field icon. The last day worked is the last day the associate reported to work.
        - ***Example****: An associate could have an effective date termination date of 3/1/2011 but has been on a LOA. Therefore, their last day worked could have been 1/5/2011.*

    Click **Review** button.
5. The progress bar is at **Review SCF** status. Review and verify data.
    - If data is correct, click **Submit** button. Proceed to **Step 6**.
    - If data is incorrect, click **Back** button. Proceed to **Step 4** and update necessary data.
6. The progress bar is at **Submit** status. An SCF control number displays.

First & Second Level Approvers (if applicable)

1. The Approver receives an automated email reminder of the SCF and logs into HR Connect.
2. Click **Manager Self-Service** tab. The **Universal Worklist** displays. From the **Task** tab, **Subject** column, click the applicable **SCF Termination** link to be approved.
3. The **SCF Termination** form memo displays. If the termination is:
    - In order, click Approve button. Proceed to **Step 4**.
    - Not in order, click Reject button. Proceed to **Step 5**.
4. An **Approved** message displays. The transaction continues through the workflow following the chart above.
5. Input comments as to why the SCF was rejected and remind the initiating manager that a new request needs to be created and submitted again. The original SCF form is negated from further workflow.

Transfer Outside of My Team

PURPOSE

Use this procedure to transfer an Associate from your team/department to another Manager's team/department.

LOCATION: Stores, Field, and DCs

Support Group locations will not use HR Connect to complete this type of SCF. Continue the current SCF procedure.

AUDIENCE: Sending Manager: Current Manager of the Associate being transferred
Receiving Manager: Manager receiving the Associate
Approvers: First Level, Second Level, and Human Resources

<table>
<tr><th>Associate Personnel Area</th><th>Initiator</th><th>First Level Approver</th><th>Second Level Approver</th><th>HR Approver</th></tr>
<tr><td>Field</td><td rowspan="3">Sending Manager</td><td rowspan="3">Receiving Manager</td><td>N/A</td><td>HRIS Administrator</td></tr>
<tr><td>Stores</td><td>N/A</td><td>HRIS Administrator</td></tr>
<tr><td>DC</td><td>1 up Manager</td><td>DC HR Manager</td></tr>
</table>

PREREQUISITE: Job title, FT/PT status, wage information, and effective date of the transfer. This information is gained through preliminary discussions between the sending and receiving managers and applicable HR Manager prior to initiating the transaction in HR Connect.

Sending Manager: Requires the Manager User ID of the Receiving Manager to initiate the transaction to begin the workflow.

Receiving Manager: Job title, FT/PT status, wage information, and effective date of the transfer.

Attn Store Management: *If an associate is being transferred within the store from one department to another, it is a suggested best practice that the Store Manager completes an* **Organizational Change within Team** *SCF transaction.*

MENU PATH: Manager Self Service > Detailed Navigation: Team > Transfer (outside of my team)

PROCEDURE

Initiator (Sending Mgr.)

1. Start the transaction using the **Menu Path**.
2. The **Status Change From (SCF) – Transfer** screen displays and the progress bar is in **Select Associate** status.
3. Scroll through the list and find the **associate by name**. Click **associate's name**. Click **Next** button.

If the 1 up manager is creating the SCF on behalf of a direct report manager, select Show All from the drop-down to view additional associates.

4. The progress bar is in **Fill Data** status. All fields, except Manager User ID, pre-populate with data.
5. Under the **Receiving Manager** banner, input the **Receiving Manager's User ID**.
    - Receiving Manager's User ID
    - **Stores** = Contact the receiving manager and request their Associate ID
    - **Field** = Contact the receiving manager and request their Network ID
    - **DCs** = Contact the receiving manager and request the applicable Network ID.

   Click **Review** button.
6. The progress bar is in **Review SCF** status. Review and verify data.
    - If data is correct, click **Submit** button. Proceed to Step 7.
    - If data is incorrect, click Back button. Proceed to Step 4 and update necessary data.

   Once submitted, a SCF ID number displays as confirmation. The Manager of the Associate being transferred has completed their portion of this task.
7. The progress bar is at **Submit** status. An SCF control number displays. The request move to the receiving manager for approval.

First Level Approver (Receiving Mgr.)

1. The receiving manager logs into HR Connect.
2. Click **Manager Self-Service** tab. The **Universal Worklist** displays. From the **Task** tab, **Subject** column, click the applicable **Transfer** link to be approved.
3. The **Transfer** screen displays and the progress bar is at **Fill Data** status.
4. Under the **New Data** banner:
    - Click **Job** drop-down menu and **select job**.
    - The **Employee Group** status carries over from the sending manager. The receiving manager can override the status at this time if applicable.
    - Input **Wage** information.
    - Click **Effective Date** field icon. Navigate the calendar tool and select the **Effective Date** the transfer is to take place.
    - Click **Review** button.

   NOTE: *During this step the receiving manager can make Organizational Changes if applicable. Making the changes here negates the need to create an additional Org Change SCF.*
5. The progress bar is at **Review SCF** status. Review and verify data.
    - If data is correct, click **Submit** button. An **Approved** message displays. The request continues through the workflow following the chart above.

- If data is incorrect, click **Back** button. Proceed to **Step 4** and update necessary data.

Second Level Approver (1 Up Manager)

1. The approver receives an automated email reminder of the SCF and logs into HR Connect.
2. Click **Manager Self-Service** tab. The **Universal Worklist** displays. From the **Task** tab, **Subject** column, click **Transfer** link to be approved.
3. The **Transfer** screen displays. If the Transfer is:
   - In order, click **Approve** button. Proceed to **Step 4**.
   - Not in order, click **Reject** button. Proceed to **Step 5**.
4. An **Approved** message displays. The request continues through the workflow following the chart above.
5. Input comments as to why SCF was rejected and remind **sending manager** that a new request needs to be created and submitted again. The original SCF request is negated from further workflow.

Performance Management

View Performance Review Documents (PRDs)

PURPOSE

Use this procedure to review the status of all Performance Review Documents for Associates within your organization.

LOCATION:	Stores Only
AUDIENCE:	Store Managers
PREREQUISITES:	One or more Direct Reports
	Please note that performance reviews must be accessed and completed within the store and are inaccessible from home computers.
MENU PATH:	Manager Self Service > Talent Management > Performance Management

PROCEDURE

1. Start the transaction using the **Menu Path**.
2. The **Employee Documents** screen displays. The screen defaults to **Status Overview** tab. From the **View** drop-down menu, select **Standard View**.

3. Navigation of the Tabs:
    - **Status Overview**: Displays a complete listing of all performance review documents (PRDs) regardless of their status.
    - **In Preparation**: The Store Non-Management (Hourly) Merit Plan will not be visible. This tab is not utilized at the Store level.
    - **In Planning**: Displays all the PRDs for the Store Non-Management Hourly Plan.
    - **In Process**: Displays PRDs that are still in the process of being completed.
    - **Completed**: Displays PRDs that have been completed.
    - **Approved**: Displays PRDs that have been reviewed and approved by the appraising manager.
    - **Closed Approved**: Displays PRDs that have been reviewed, approved, and closed by the final approving manager.
    - **Rejected**: To be used at a later date.
4. *At the bottom right of the tabbed list is a Refresh link. Use this link to reset the PRDs into their proper tab. It is especially useful when you have recently completed or changed the status of a document and the system refresh has not yet taken place.*

Store Non-Management Hourly Appraisal

PURPOSE

Store management will receive an email reminder titled, *<name of associate> - Upcoming Performance Review*, when an Appraisal Due item is in the Universal Worklist in HR Connect: MSS. Use this process to complete a Store Non-Management (Hourly) performance review for the applicable associate.

LOCATION: All Stores

AUDIENCE: Store Managers

PREREQUISITES: Please note that performance reviews must be accessed and completed with the store and are inaccessible from home computers.

Store Managers will receive automated email notifications and Universal Worklist Alerts.

Appraisal document(s) in the *In Planning* status.

3 month, 6 month, and annual performance reviews for hourly non-management associates will be completed electronically through HR Connect. *Additionally, merit increases will be processed automatically through this process as well.*

If applicable, merit increase prepared for applicable associates.

MENU PATH: Manager Self Service > Universal Worklist: Tasks tab

PROCEDURE

1. Start the transaction using the **Menu Path**.
2. The Universal Worklist screen displays. Click **Tasks** tab to view assigned work.
3. Click **Appraisal Document Notification <Assoc. Name>** link to view assigned work item.
   For the Store Non-Management (Hourly) this occurs four weeks prior to the Associate's 3 and 6 month anniversaries and each year on their yearly anniversary.
4. The **Appraisal Document Notification** displays. The message displays information:
   - Who sent the notification, the priority level, and the status.
   - Date the review needs to be completed before so payroll changes can be processed, if applicable.
   - Below the table, the Appraisal Notification Document displays showing the associate requiring the appraisal.
5. Click **OK** button.
   By pressing OK button, the manager is acknowledging the work will be done and clears the notification from the Universal Worklist.
6. Click **Close** button. Click the **Menu Tray** icon . Click **Refresh** to remove (refresh view) the task from the manager's list.
7. In the **Work Overview** navigation bar, click **Talent Management** link.
8. The **Services** tray displays. Click **Performance Management** link.
9. The **Employee Documents** screen displays. Click **In Planning** tab to view pending appraisal documents.
   The Employee documents page is where Managers maintain upcoming performance appraisal documents. The various tabs represent various stages a performance document is in at any given point in time. The number in the parenthesis indicates the number of documents currently in status.
10. Select the **link** related to the associate receiving the review in the **Appraisal Document Name** column.
11. The **Appraisal Document for <Assoc. Name>** screen displays. Click **Maximize** button.
    - *A progress bar provides a summary of steps to be completed as the manager moves through the appraisal process.*
    - *Each step provides instructions on how to proceed through each step.*

12. Rate each of the statements (*start with 1.1 and work down page*) for the particular associate by **selecting the performance rating** from the drop-down menu. Ratings are:
    1. Unsatisfactory
    2. Borderline
    3. Acceptable
    4. Commendable
    5. Distinctive

    N/A – Not Applicable

    (Use N/A rating when you have inadequate opportunity for observations to warrant a score. For example, a hotel associate who works all night may not have opportunity to display Unleashed Behaviors).
13. As required, input/review the following fields:
    - **Additional Comments**: Use this section to provide comments to expand on the ratings applied above or to include comments and examples about other areas of their work.
    - **Development Suggestions**: Use this section to provide ways the associate can improve his/her knowledge, skills and behaviors. Provide suggestions for specific tasks, activities or opportunities that will support development.
14. Use the scroll bar at the right, scroll back to the top of the page. Under the **How would you like to continue?** banner, click **Step 1 of 2 – Finalize Ratings** radio button. Click **Continue** button.
    The document has been moved to the next status. One more status change is needed to move it to complete.
15. Under the **How would you like to continue?** banner, click **Step 2 of 2 - Submit for Payroll Process** radio button. Click **Continue** button.
    The document has been moved to the last status on the progress bar.
16. Above the **Process Description** banner, click **Print** button to view the appraisal document.
    Use both vertical scroll bars to fully view the document.
17. Click **OK** button to print. Once printed, meet with the associate to discuss the performance review. Both you and the associate sign the form. Provide the associate a copy of the review. The form should then be forwarded to the SSG File room to be included in the associate records.
18. To exit the appraisal document for the associate, click the **Close** [X] button in the top right corner of the **Appraisal Document** screen.
19. The Employee Documents screen displays. Click **Completed** tab. If needed, click **Refresh** link to see the newly completed document.

Talent Management

Create Talent Assessment

PURPOSE

Use this procedure to create a Talent Assessment for Associates within your reporting structure.

LOCATION: Support Group & DC Exempt

AUDIENCE: All Managers

PREREQUISITES: One or more Direct Reports

As a best practice, document the below in Word and then cut and paste into the talent assessment.

- Potential Rating: Reasons why the associate is or is not promotable at this time.
- Development Goals: Description of career movement options you have identified for the associate. Identify three development goals related to any area of development and link them to Success Factors. The goals may be unique to succession planning or overlap with the associate's IDP or performance reviews.
- Risks: Description of why the associate rating was selected.

MENU PATH: Manager Self Service > Talent Management > Assessment

PROCEDURE

1. Start the transaction using the **Menu Path**.
2. This process is completed on an annual basis. Navigate the path below to access the current year **Steps to Create the Talent Assessment** job aid for detailed instructions.
   - Fetch Home Page > Departments: Human Resources > Talent Management > Succession Planning Resource Center > I Have Direct Reports button
   - Scroll down to the **Tool/Description table** and access the **Steps to Create the Talent Assessment** job aid.

Salaried Work Time Approval

Approve Associate Requested Absence

PURPOSE

Use this procedure when an email notification is received to approve a salaried associate's requested absence. Access the request from the Universal Worklist, Tasks tab.

LOCATION:	All Locations
AUDIENCE:	Manager of a Salaried Associate
PREREQUISITES:	The salaried associate should first have a conversation with their immediate manager regarding the nature of the absence request. ***Note**: The working time logged through a workflow request is refreshed weekly. At the end of the payroll period, if the manager has not approved the request, Payroll approves so that the associate can be paid. If the manager clicks the Approval of Working Time in CATS task link after this has been approved by Payroll, the manager will receive a message that the request is no longer available.*
MENU PATH:	Manager Self Service > Universal Worklist > Task List

PROCEDURE

1. Start the transaction using the **Menu Path**.
2. From the **Tasks** tab list, click **Approval of Working Time in CATS** link.
3. The **Approve Time Sheets** screen displays and lists all current individual time-off requests from salaried direct reports. Click the **Recorded Time** link to review the **Absence Type** being requested. Click the **Save and Back** button to return to the **Approve Time Sheets** screen.
4. Select the appropriate approval response from the **Approval** column per the descriptions below.
   - **Approve All** – Approves the time off request for *that individual request* for that associate.
   - **Reject All** – Rejects the time off request for *that individual request* for that associate.
5. Click the **Save** button.
6. Verify the selection as prompted. Continue **Steps 3-6** for each request. Once completed, no requests should display in the table.
7. Click **Close** [X] button on the **Approval Time Sheets** screen.

Enter Absence Request for an Associate

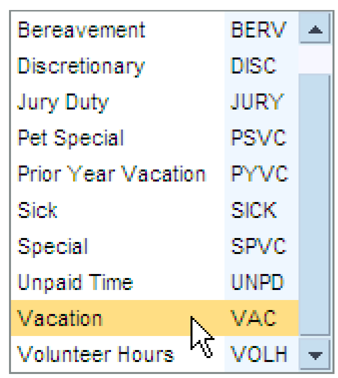
PURPOSE

This procedure should be used only when the salaried associate has no means of accessing HR Connect to record requested time off. Use this procedure to record and approve an absence request for an Associate in your organization unit.

LOCATION:	All Locations
AUDIENCE:	Managers of salaried associates
PREREQUISITES:	Absence hours must be reflected for each individual day as applicable.
MENU PATH:	Manager Self Service > Team > Employee Information

PROCEDURE

1. Complete **Steps 1-5** of **Associate Search Types**.
2. With the **Employee Profile** open for the salaried associate, click the **Paid Time Off and other Links** link and select the **Paid Time Off (on Behalf of EE)** option.
3. The **Paid Time Off** window displays. The top portion of the screen displays the **Time Accounts** and **Calendar** tabs for the associate. The bottom portion of the screen displays the **Timesheet** to enter the absence request for the salaried associate.
4. In the Timesheet section, click the **Week from** calendar icon and navigate to applicable week for the request. Click the **Apply** button to the right of the field. This sets the field to the **appropriate week** when the absence will be recorded.
5. Within the **Timesheet** table, click the drop-down field below the **Att./abs. type** heading. Select the requested **absence type** from the drop down menu.



Bereavement: Full-time associates who have completed 90 days of employment are eligible for up to three days of paid time off following the death of an immediate family member.

Discretionary: Each year, PetSmart provides up to two discretionary days that give associates time off for any reason they choose. Discretionary days are provided to full-time associates.

Jury Duty: If a full-time associate is called upon to serve on a jury or is subpoenaed to be a judicial witness they are eligible to receive their normal pay for up to five days per year, unless state law requires otherwise.

Pet Special: Vacation for Groomers and Trainers are paid at the associate's average hourly rate of pay. Stores enter the vacation hours in PetsTime (PS[2]) as Pet Vacation. Pet Special is special vacation for Groomers and Trainers.

Prior Year Vacation: An exception to use vacation time from a prior year that is available to use before March 31st or for new hires starting September or later.

Sick: Available to use for the associates own illness. In addition, associates are able to use a maximum of 48 hours per year for an ill family member as defined by our health plan unless otherwise required by state law.

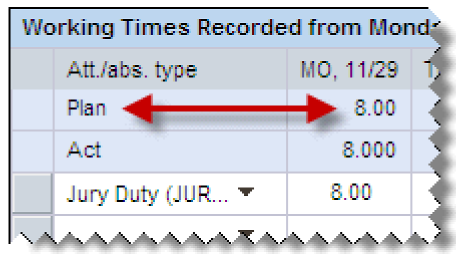
Special: Time that has been granted under special circumstances that is available to use before December 31st.

Unpaid Time: This is used to designate a day off as unpaid.

Vacation: All full-time associates will be provided potential vacation hours at the beginning of the calendar year based on the continuous years of service that they will complete on their anniversary date for that year.

Volunteer Hours: The program provides our SSG associates up to eight hours of accumulated paid time (per calendar year) to volunteer for an event/activity affiliated with the United Way or PetSmart Charities. This is a team event (at least two associates) or company sponsored event.

6. Enter the **number of hours** the Associate will be away from work **for each individual day** the associate will be absent. When completed, click **Save** button located below the **Paid Time Off** heading.



Note: *Absence hours cannot exceed the Plan time shown for the associate.*

7. Once saved, a message displays below the Save button, *Your data has been saved.*

8. Complete the **Approve Associate Requested Absence** task instruction.