

# EMPLOYEE SELF SERVICE USER GUIDE

brought to you by  
**HR Services**

## Overview

Employee Self Service (ESS) allows you to view payslips, leave balances and payroll information. You can also edit your personal and emergency contact details and access payslips from the Friday morning before payday.

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## General Information

Every employee at UWA is allocated a unique, 8 digit **employee number** on the University's Human Resource Information System (Alesco). This remains the same; no matter how many times the employee leaves and returns to the University.

However, each instance of employment at the University is allocated a **job number**. Different job numbers are allocated when the jobs are under different awards (i.e. academic, general, casual, etc), different classifications (i.e. different rate of pay) or in different departments.

## Computer Requirements

ESS can be accessed from your work or home computer; you need access to the internet and a web browser. HR Systems supports Internet Explorer 7.0, HR Systems acknowledges the use of other browser software with the University, however, it only supports (and again, recommends) Internet Explorer.

## Helpful Hints

**Employee Self Service Page:** The URL below will take you to the Human Resources Employee Self Service page, which includes a help site providing further instructions and frequently asked questions (FAQs).

<http://www.hr.uwa.edu.au/ess/>

## Passwords

It is important to not share your password with others, and, if prompted, **do not save your password into your password list.**

**\*\*\*\*\* ALWAYS CLOSE YOUR INTERNET BROWSER AFTER USING THE ESS \*\*\*\*\***

Closing the browser removes temporary cookies which could be used to gain access your account (this would have to be done from your computer).

**Please note: Your ESS password is not the same as your PHEME password.**

## Navigation

Menu options are highlighted as the cursor moves over them. A **yellow folder** indicates the option will display another menu, a **blue highlight** indicates the option will display an information page.



To print, click on the print icon in the top right-hand corner of each screen.

## Job Number - IMPORTANT

It is important to choose your correct job number where your employee information is specific to each particular job – i.e. your leave entitlements and leave bookings. See the help information around Select Job within the **Leave Details** section of this guide.

## On-Screen ESS Help Links

Each ESS screen now has some additional links to further help.

Person: 00012345, John Doe  
Job: 01, Administrative Assistant

[HELP - ESS User Guide \(PDF, 3.1Mb\)](#)

[Select Active Job](#)

Firstly – the ESS User Guide has been added to all ESS Screens (as above).

Person: 00012345, John Doe  
Job: 01, Administrative Assistant

[HELP - ESS User Guide \(PDF, 3.1Mb\)](#)

[Select Active Job](#)

Secondly – a link has been made to the current Leave Policy (web page) for all ESS screens related to leave.

Into the future, further links, including flash tutorials will be added, aimed at providing as much simple user-help as possible.

## Contacts

If you still have difficulties using or getting in to the ESS after reading the Help information and following the directions in the user guide, please contact your Personnel Faculty Team.

Please refer technical difficulties to the HR Systems Helpdesk on 6488 7896 or email [hrshelp-hr@uwa.edu.au](mailto:hrshelp-hr@uwa.edu.au)

## 1.0 Log On to Employee Self Service

**Step 1:** Enter at <http://www.hr.uwa.edu.au/ess/>

**Step 2:** Click on **Log on to ESS**

**Step 3:** Enter your 8 digit Staff/Employee ID in the “Staff Number (8 digits)” Id box and your password in the Password box.

Your password is based (initially) on your date of birth using the format ddmmyy (e.g. if you were born on 9 July 1965 your password will be 090765). Note it is a 6 digit number, padded with zeros where applicable. When you have successfully accessed the ESS for the first time, you will be forced to change your password.

**Step 4:** Click OK.

**Please note:** Your ESS password is not the same as your PHEME password.

## 2.0 Log Out

At any stage you may log out of the Employee Self Service by clicking on **Log Out** in the top right corner. **REMEMBER TO CLOSE YOUR BROWSER WHEN YOU HAVE FINISHED.**

## 3.0 Password

### Setting new password

The screenshot shows a web form titled "Change Password/Secret Question". At the top, it displays user information: "Person: 00012345, John Doe" and "Job: 01, Administrative Assistant". The form contains several input fields: "Old Password", "New Password", and "Confirm New Password", each with a text box. Below these is a "Secret Question" dropdown menu currently set to "User defined secret question". Underneath the dropdown is a "Secret Question [hint]" field with the text "First pet" and a "Secret Question Answer" field with the text "Dog". At the bottom of the form are "OK" and "Cancel" buttons.

**Step 1:** Go to the Change ESS Password the Employee Self Service. In the left hand column click on **Change ESS Password**

**Step 2:** Enter your old password, new password and confirm the new password

**Step 3:** In the drop down menu select “User defined secret question.” Enter a secret question that will be asked should you forget your password, and enter the answer to the secret question. A correctly answered secret question allows your password to be emailed to you. (See **Forgotten Password** section below) For this function to work you must have your email address stored in the ESS. Your email address is maintained through the PHEME system at <http://www.pHEME.uwa.edu.au>

### Forgotten Password

Staff Number (8 digits)

Password

OK

Cancel

[Forgot Your Password?](#)

**Step 1:** Click on the “**Forgot Your Password?**” link which will prompt you to enter your 8 digit Staff ID. Click OK.

**Step 2:** Answer the ‘secret question’. If the answer provided is correct then a message displays showing the email address that your password has been sent to. Please refresh or reload this screen.

The ESS will prompt you to change your password the next time you log in (this only occurs when you use the ‘secret question’ facility).

## 4.0 PERSONAL DETAILS

### Personal Contact Details

Select **Personal Details** and then **Personal Contact Details**. The following will display:

Personal Contacts					
Contact Details	Home Phone	Work Phone	Mobile Phone	Street Address 1	Post Code
<a href="#">Contact Details</a>	(08) 1234 5678	6488 1515		12 Sunny St	6009

To update your details, place the cursor over **Contact Details** and click. Make the changes required and press 'update' at the bottom of the page. You will receive a message that the changes have been successfully updated.

### Emergency Contacts

Select **Personal Details** and then **Emergency Contacts**. The following will display:

Emergency Contacts						
Contact Name	Priority	Relationship	Work Phone	Home Phone	Mobile Phone	Email
MRS Jane Doe	1	Wife		(08) 1234 5678	0412345678	

[Add new Emergency Contact record](#)

**Change:** Place the cursor over the **contact name** and click. Make the changes required and press 'Update' at the bottom of the page. You will receive a message that the changes have been successfully updated.

**Delete:** Place the cursor over the **contact name** and click. Press 'Delete' at the bottom of the page. You will receive a message that the changes have been successfully updated.

**Add:** Place the cursor over **Add new Emergency Contact record** and click. Complete the details as required. Press insert at the bottom of the page. You will receive a message that the record was been successfully updated.

### E-mail Address Maintenance

Your email address is maintained through the Pheme system at <http://www.pheme.uwa.edu.au>

Please contact the IS Service Desk on 6488 1515 if you have any issues.

### EEO Demographics (UWA)

Select **Personal Details** and then **EEO Demographics (UWA)**.

The University is required to forward demographic data to DEST on an annual basis. Simply make the relevant selection for your Primary Language Spoken at Home and your Country of Birth, and click on the update button.

EEO Demographics (UWA)	
<small>The University collects various demographic data at individual staff level to monitor its performance in relation to recruiting and retaining high quality staff, and to meet its statutory reporting requirements including the <a href="#">Department of Education, Science and Training's</a> annual Staff Statistical Collection and the State Government EEO Survey. All data is held in the strictest confidence and will only be used to produce aggregated statistics.</small>	
Language spoken at home:	English <input type="button" value="(Explain)"/>
Country of Birth:	Australia
<b>Symbol Legend:</b> * = There may be a more appropriate language/region in the listing, if not, use this code # = This language/region is not broken down further in the listing	
<input type="button" value="Update"/>	<input type="button" value="Cancel"/>

## Preferred Name Maint.

The Preferred Name Maintenance screen in ESS allows you to do the following:

- \* enter an alternative first (given) name (e.g Dave instead of David)
- \* if you have an additional surname in the HR system, select your current surname or your previous surname.

Your Preferred First Name and Preferred Surname will be used to construct your official UWA email address and be displayed in the Email and Calendaring Service (ECS) address lists. Changes made in the ESS may take up to two hours to process through PHEME and into related systems such as the ECS.

If you do make a change and you wish this to be reflected in your email address, you should log in to PHEME where you can select your alternative email address.

Changing your names(s) only affects PHEME and associated systems; it does not change your official name as held by HR.

Your preferred surname **can only be maintained by you through this screen and not by Human Resources staff**. When contacting Human Resources please continue to use your '*official*' surname.

### Preferred Name Maintenance for PHEME

Use this screen to set your name preferences.

Please note:

- The Preferred First Name should be set to the given name by which you are generally known. The default is your official given name.
- The Preferred Surname field is populated with your official surname by default. If you have another surname in the system (e.g. through marriage etc.), the drop-down menu will show both your current surname and your previous surname. Select your preferred surname.
- Your Preferred First Name and Preferred Surname will be used to construct your official UWA email address and be displayed in Email and Calendaring Service (ECS) address lists. Changes made in the ESS may take up to two hours to process through PHEME and into related systems such as the ECS.
- Preferred surname will only be used by PHEME and systems which source information from PHEME such as the Email and Calendar System (ECS). **Your preferred surname can only be maintained by you through this screen, and not by Human Resources staff**. When contacting Human Resources, please continue to use your '*official*' surname as displayed at the top of this page.

Preferred First Name:	<input type="text" value="Wile E"/>
Preferred Surname:	<input type="text" value="Coyote"/>
	<input type="button" value="Update"/>

## 5.0 PAYROLL DETAILS

### Current Payslip

Select **Payroll Details** and then **Current Payslip**. This will display your most recent payslip.

Job	Duty	Award	Class	Clevel	Location	Salary PAs	Hourly Rate		
01	SUB	GEN	L06	UNXA32137312000	2130 Facilities Managemen	\$13,345.60	\$34.1102		
<b>Paycode</b>		<b>Date From</b>	<b>Date To</b>	<b>Duty</b>	<b>Job</b>	<b>Type</b>	<b>Units</b>	<b>Rate</b>	<b>Amount</b>
SAL Normal Earnings		15-AUG-2011	28-AUG-2011	SUB	01		15.00	\$34.1102	\$511.65
<b>Gross</b>									<b>\$511.65</b>
<b>Pre-tax Deductions/Super</b>		<b>Date From</b>	<b>Date To</b>	<b>Job</b>	<b>Amount</b>				
<b>Total Pre-tax Deductions/Super</b>									<b>\$0.00</b>
<b>Taxable Gross</b>									<b>\$511.65</b>
<b>Deduction</b>		<b>Date From</b>	<b>Date To</b>	<b>Job</b>	<b>Amount</b>				
PAYE Tax		15-AUG-2011	28-AUG-2011		\$4.00				
<b>Total Deductions</b>									<b>\$4.00</b>
<b>Net Pay</b>									<b>\$507.65</b>
Pay Disbursement Details:									
<b>Method</b>	<b>Institution</b>	<b>Details</b>					<b>Amount</b>		
Bank	BWA Bank of Western Australia Limited	0000000 DOE J & J					\$507.65		
<b>Subsidy</b>							<b>Amount</b>		
UniSuper-OB/Ac2							\$71.63		
UniSuper-Accum							\$15.35		
<b>Leave Code</b>	<b>Type</b>	<b>Unit</b>	<b>Actual</b>	<b>Pro-rata</b>	<b>Total</b>				
REC	Annual Recreation Le	Hours	37.531	0	37.531				
LSL	Long Service Leave	Hours	0	128.062	128.062				
SICK	Personal Leave (Sick)	Hours	16.636	.158	16.794				

Messages:  
 Salary packaging items are now displayed under Pre-tax deductions/super and deducted from gross earnings before tax.  
 This payslip has been issued by HR Services, The University of Western Australia, 35 Stirling Highway, CRAWLEY, WA 6009  
 Payments have been remitted to UniSuper (tel: 03 9691 4100) for all superannuation reported on previous payslips

### Historical Payslips

Select **Payroll Details** and then **Historical Payslips**. This will display previous payslips.

Payslip History													
Period End	Pay Date	Company	Gross	Pre-tax Deductions	Pre-tax Super	Taxable Gross	Tax	Super	Deductions	Employer Super	Net	Disburse	
Year to Date	-	-	17187.55	215.70	2000.00	14971.85	3530.00	0.00	305.75	2921.90	11136.10	-	
<a href="#">28-AUG-2011</a>	<a href="#">26-AUG-2011</a>	UWA	3437.51	43.14	400.00	2994.37	706.00	0.00	61.15	584.38	2227.22	<a href="#">2029</a>	
<a href="#">14-AUG-2011</a>	<a href="#">12-AUG-2011</a>	UWA	3437.51	43.14	400.00	2994.37	706.00	0.00	61.15	584.38	2227.22	<a href="#">2024</a>	
<a href="#">31-JUL-2011</a>	<a href="#">29-JUL-2011</a>	UWA	3437.51	43.14	400.00	2994.37	706.00	0.00	61.15	584.38	2227.22	<a href="#">2020</a>	
<a href="#">17-JUL-2011</a>	<a href="#">15-JUL-2011</a>	UWA	3437.51	43.14	400.00	2994.37	706.00	0.00	61.15	584.38	2227.22	<a href="#">2014</a>	
<a href="#">03-JUL-2011</a>	<a href="#">01-JUL-2011</a>	UWA	3437.51	43.14	400.00	2994.37	706.00	0.00	61.15	584.38	2227.22	<a href="#">2009</a>	
<a href="#">19-JUN-2011</a>	<a href="#">17-JUN-2011</a>	UWA	3437.51	43.14	400.00	2994.37	700.00	0.00	61.15	584.38	2233.22	<a href="#">2003</a>	
<a href="#">05-JUN-2011</a>	<a href="#">03-JUN-2011</a>	UWA	3437.51	43.14	400.00	2994.37	700.00	0.00	61.15	584.38	2233.22	<a href="#">1998</a>	
<a href="#">22-MAY-2011</a>	<a href="#">20-MAY-2011</a>	UWA	3437.51	43.14	400.00	2994.37	700.00	0.00	61.15	584.38	2233.22	<a href="#">1994</a>	

Move your cursor over the date of the payslip required (cursor will turn into a hand) and click. The screen will display the payslip.

Any enquiries related to the details within the payslip can be discussed with your Faculty Employment & Recruitment personnel.

### Banking

Maintain Banking

Select **Payroll Details** and then **Banking**. The following screen will display:

### Maintain Banking

Action	Pay Method	Bank	Account Name	Account#	BSB#	Percent	Fixed Amt	Reference
<a href="#">1. Edit</a>	Bank	CBA	JANE DOE	12345678	006155		500.00	
<a href="#">2. Edit</a>	Bank	ANZ	DOE, J & J	987654321	012006			
<a href="#">3. Edit</a>	Bank	BWA	JOHN DOE	7777777	302967		50.00	

[Add new record](#)

- The Action column allows you to select the account you wish to change/delete.
- The Pay Method column is always “B” which signifies a bank deposit.
- The Bank column represents the Alesco abbreviation used for the institution you currently use.
- The account name column displays the account name you have specified for the account
- The account number column display the account number for the account
- The BSB column displays the BSB for that particular account/institution
- The Percentage column displays (if relevant) an employee who has requested that a certain percentage of the employees fortnightly pay is deposited into this account.
- The Fixed amount column displays the amount to be deposited into this particular account each fortnight.

### Important Information: Timing

#### Pay Fortnight = Monday to Sunday

Non-pay week	Mon 5/4	Tues 6/4	Wed 7/4	Thurs 8/4	Fri 9/4	Sat 10/4	Sun 11/4
Pay week	Mon 12/4	Tues 13/4	Wed 14/4	Thurs 15/4	<b>Pay Day</b>	Sat 17/4	Sun 18/4

If you make an account addition, change or deletion during the

- white timeframe: changes **WILL** be effective for the current pay day, i.e. Friday 16/4.
- black timeframe: changes **WILL NOT** be effective for the current pay day, i.e. Friday 16/4.

This means if you change your bank account on Tuesday 13/4, **your pay will be transferred to your old bank account.** If this account is closed then there will be a delay in you receiving your pay.

**We recommend that you do not close your old bank account until you have confirmed that your pay is in your new bank account.**

<http://dates.publishing.uwa.edu.au/> displays the principal date's calendar so you can determine the pay period dates.

### Adding a New Bank Account Details

Select **Payroll Details** then **Banking**.

Click on “Add New Record” to display the following:

**Maintain Banking**

Pay Method: B - Bank

BSB#: 012055

Account#: 111222333

Account Name: Doe, Jo

Reference:

Fixed Amount:

Percent Amount:

NB: The account name must be the same as the account name recorded with your Financial Institution

Insert Clear

To select the BSB number, click the drop-down icon at the end of the BSB field. A search screen will pop up, type in the name of your bank and press enter to find the BSB. Alternatively just use '%' to view all BSBs.

Type in the account number (without any alpha characters). Account numbers must be less than 10 digits. **No visa accounts can be maintained.** If your account number is greater than 9 digits, please exit this screen and contact HR as per the current notification process.

The account name must match the account name at your financial institution.

You can have your pay sent to 6 different bank accounts. **An amount must be specified for each account except one which must be left blank.** This blank account receives the money remaining after payments to accounts with specified amounts.

Click on the "Insert" button to action the request.

**Please see "Important Note: Dates" section on the previous page.**

### Deductions

Select **Payroll Details** and then **Deductions**.

The following screen will be displayed -

Deductions										
Action	Job No.	Start Date	End Date	Paycode	Description	Type	Amount	Balance	Reference	
<a href="#">View</a>	02	28-FEB-2011		SPFUP	SalPack - Fee (Parking)	A	.4			
<a href="#">Edit</a> <a href="#">Cease</a> <a href="#">Copy</a>	02	11-APR-2011		145C	Medical - Hospital Benefits Fund C	A	58.85			
<a href="#">View</a>	02	28-FEB-2011		SPUNI	SalPack - Unipark	A	16.15			

This screen displays the current deductions being deducted from your fortnightly pay.

- The "Action" column allows you to select a deduction to view/change/copy.
- The "Job No." column identifies the Job number that the deduction is set up against.
- The "Start Date" columns identifies the start date for this particular deduction – typically the beginning of a pay period.
- The "Type" column specifies whether that deduction is deducted as a percentage (P) or as an amount (A).
- The "Balance" column is used where you may have a deduction setup to deduct each fortnight to the total of a particular value, i.e. deduct \$10 per pay until you reach \$100, and then cease the deduction. In this scenario, that balance will adjust itself each fortnight until the limit value is reached. This scenario is not relevant for staff at UWA at this stage as the deductions allowed to be maintained are not suited to this scenario.

### Important Note: Timing

## Pay Fortnight = Monday to Sunday

Non-pay week	Mon 5/4	Tues 6/4	Wed 7/4	Thurs 8/4	Fri 9/4	Sat 10/4	Sun 11/4
Pay week	Mon 12/4	Tues 13/4	Wed 14/4	Thurs 15/4	<b>Pay Day</b>	Sat 17/4	Sun 18/4

If you make changes to deductions during the:

- white timeframe: changes **WILL** be effective for the current pay day, i.e. Friday 16/4.
- black timeframe: changes **WILL NOT** be effective for the current pay day, i.e. Friday 16/4.

### Important Note: Dates

#### Dates: Creating Deductions

When you create a new deduction, the start date **must** equal the beginning of a pay period (Monday).

<http://dates.publishing.uwa.edu.au/> displays the principal date's calendar so you can determine the appropriate pay period start date.

#### Dates: Changing Deductions

To **change** a deduction, first end the current deduction and then create a new deduction.

For example, to increase a health insurance payment from \$300 to \$350

- end the current deduction with a date equal to the pay period end date (Sunday)
- create a new deduction for the same health insurance company with the new amount

#### Remember:

- the "start date" must equal to the beginning of a pay period (Monday)
- Keep in mind the timing (see **Important Note: Timing** above) when adjusting start and end dates.

Do not change the dollar value on any of your existing deductions. You must end the current deduction, and create a new one.

**Please follow these steps otherwise you could risk paying the deduction twice within the pay fortnight.**

**Note:** Insurance companies inform UWA of bulk premium increases and HR updates all affected deductions.

### Creating Deductions

Click on "Add New Deduction Record" to display the following page:

**Deductions**

Job Number: 02 - Administrative Assistant

Deduction [Info]

Payrate Type: A - Amount

Dedn. Amount [Info]

Total Amount [Info]

Start Date (DD-MON-YYYY)   Use Pay Period Start

End Date (DD-MON-YYYY)   Please ensure that the end date is the last payday you want the deduction taken from your pay.

Reference

Enter the deduction by clicking on the drop-down icon in the deduction field, this will display available deductions.

Specify the deduction amount in the amount field.

If you wish the deduction to end after a certain amount then specify this value in the 'Expires after total' field. Your deduction will process each fortnight until the total amount deducted equals the value in this field.

Specify the start date of the deduction. **Note: this must be equal to a pay period start date (Monday). See "Important Note: Dates" on the previous page.**

Specify an end date to the deduction if applicable, deductions do not need an end date. **Note: this must be equal to a pay period end date (Sunday). See "Important Note: Dates" on the previous page.**

Click the 'Insert' button to action the creation of the deduction.

### Payment Summary (previously known as Group Certificates)

ESS provides your payment summary electronically. HR Services also provide you with the ability to choose to only receive your payment summary electronically – which is seen by HR Services and the University as a great alternative to the historical manual and hardcopy process of distribution.

Select **Payroll Details** and then **Payment Summary**

You will initially see a summary view of your current and historical payment summaries.

**Payment Summary**

Serial#	Tax Year	Period Start	Period End	Gross Amount	Tax Amount	Date Issued	ATO Income Type	Payment Summary Type
1420718	2011	01-JUL-2010	30-JUN-2011	\$11,900	\$140	17-JUN-2011	Salary or wage income	Normal
1143394	2010	01-JUL-2009	30-JUN-2010	\$11,521	\$188	22-JUN-2010	Salary or wage income	Normal
891605	2009	01-JUL-2008	30-JUN-2009	\$11,088	\$184	19-JUN-2009	Salary or wage income	Normal
632642	2008	01-JUL-2007	30-JUN-2008	\$13,018	\$1,246	04-JUL-2008	Salary or wage income	Normal
385651	2007	01-JUL-2006	30-JUN-2007	\$13,476	\$1,356	26-JUN-2007	Salary or wage income	Normal
326630	2006	01-JUL-2005	30-JUN-2006	\$45,786	\$10,699	28-JUN-2006	Salary or wage income	Normal
268513	2005	01-JUL-2004	30-JUN-2005	\$50,208	\$12,022	22-JUN-2005	Salary or wage income	Normal
232301	2004	01-JUL-2003	30-JUN-2004	\$46,950	\$11,002	24-JUN-2004	Salary or wage income	Normal

Records 1 to 8 of 8

**Historical Payment Summaries**

Serial#	Tax Year	Period Start	Period End	Gross Amount	Tax Amount	Date Issued	ATO Income Type	Payment Summary Type
188374	2003	01-JUL-2002	30-JUN-2003	\$43,729	\$10,192	27-JUN-2003	Salary or wage income	Normal
162250	2002	01-JUL-2001	30-JUN-2002	\$44,186	\$10,544	27-JUN-2002	Salary or wage income	Normal
60415	2001	01-JUL-2000	30-JUN-2001	\$41,266	\$9,416	04-JUL-2001	Salary or wage income	Normal
20452	2000	01-JUL-1999	30-JUN-2000	\$41,829	\$11,098	27-JUN-2000		Normal
7348	1999	01-JUL-1998	30-JUN-1999	\$38,311	\$9,746	29-JUN-1999		Normal

Click on the “**Serial #**” (which is a link) to view the actual details of the payment summary.

### Payment Summary Delivery

Select **Payroll Details** and then **Payment Summary Delivery**.

This will show what your Payment Summary Delivery Method is set to.

#### Payment Summary Delivery

Your Payment Summary delivery method is set to **Web Only**

### Salary Packaging (Current & Historical)

Select **Payroll Details** and then **Salary Packaging (Current & Historical)**.

This will show what items you are currently packaging and what items you have package previously. The Amount shown is the fortnightly amount.

If you have questions regarding your Salary Packaging please contact the Salary Packaging section on 6488 3566, 6488 7186 or via email [salarypackaging-hr@uwa.edu.au](mailto:salarypackaging-hr@uwa.edu.au)

#### Salary Packaging Report

##### Current:

Packaging Paycode & Desc	Amount	%	Start Date	End Date	HR Related Comments
SPFUP - SalPack - Fee (Parking)	0.40		28-FEB-11		
SPUNI - SalPack - Unipark	16.15		28-FEB-11		

##### Historical:

Packaging Paycode & Desc	Amount	%	Start Date	End Date	HR Related Comments
SPCFM - Salpack - Corporate Fitness Membership	38.00		15-MAR-10	30-JAN-11	Mship 240210 - 230211
SPFEE - SalPack - Fee (Amount)	1.14		15-MAR-10	30-JAN-11	Fee for SPCFM
SPFUP - SalPack - Fee (Parking)	0.39		02-MAR-09	27-FEB-11	
SPUNI - SalPack - Unipark	15.60		02-MAR-09	27-FEB-11	

## 6.0 EMPLOYMENT DETAILS

### Select Job

Select **Employment Details** and then **Select Job**.

Select Active Job				
Job No.	Last Occupancy Change	Occupancy End Date	Current Position Title	Organisational Unit
<a href="#">01</a>	17-MAR-2007	07-MAY-2007	CASUAL APPOINTMENT	Faculty Office - UWA Business School
<a href="#">02</a>	01-AUG-2011	31-DEC-2049	Administrative Assistant	Information Technology Services (ITS)

Click on the job number you wish to view the specific details for. It is extremely important to ensure that the right job is selected.

### Appointment Details

Select **Employment Details** and then **Appointment Details**.

Occupancy is the term used within Human Resources to describe your employee collective history. This Appointment Details screen simply represents for the selected Job, the employee history during that job/appointment.

Initially you will be asked to select a date range within which you wish to view the results.

Appointment Details			
Start Date	<input type="text" value="01-JAN-1900"/>		to <input type="text" value="31-DEC-2049"/>
<input type="button" value="Show Occupancy"/>			

And, after clicking on the 'Show Occupancy' button, the results are displayed –

Appointment Details							
OCC	Active From	Active To	Classification	Step	Commence Reason	Position#	Title
SUB	<a href="#">1. 01-AUG-2011</a>	31-DEC-2049	Level 5	03	Transfer	105270	Information Systems Officer
HDA	<a href="#">2. 01-JUL-2011</a>	31-JUL-2011	Level 5	03	Re-appointment	105270	Information Systems Officer
HDA	<a href="#">3. 13-MAY-2011</a>	30-JUN-2011	Level 5	03	Step Increment	105270	Information Systems Officer
HDA	<a href="#">4. 01-JAN-2011</a>	12-MAY-2011	Level 5	02	Commencement of Appointment	105270	Information Systems Officer
HDA	<a href="#">5. 11-OCT-2010</a>	31-DEC-2010	Level 5	02	Enterprise Bargaining Salary Increase	308541	Administrative Assistant
HDA	<a href="#">6. 13-SEP-2010</a>	10-OCT-2010	Level 5	02	Change Reporting Relationships	308541	Administrative Assistant
HDA	<a href="#">7. 19-MAY-2010</a>	12-SEP-2010	Level 5	02	Commencement of Appointment	308541	Administrative Assistant
SUB	<a href="#">8. 13-MAY-2010</a>	18-MAY-2010	Level 5	02	Step Increment	308541	Administrative Assistant
SUB	<a href="#">9. 01-MAR-2010</a>	12-MAY-2010	Level 5	01	Re-appointment	308541	Administrative Assistant
SUB	<a href="#">10. 01-JAN-2010</a>	28-FEB-2010	Level 5	01	Re-appointment	308541	Administrative Assistant
SUB	<a href="#">11. 16-NOV-2009</a>	31-DEC-2009	Level 5	01	On-Cost Pattern Change	308541	Administrative Assistant
SUB	<a href="#">12. 09-NOV-2009</a>	15-NOV-2009	Level 5	01	Enterprise Bargaining Salary Increase	308541	Administrative Assistant
SUB	<a href="#">13. 06-JUL-2009</a>	08-NOV-2009	Level 5	01	Enterprise Bargaining Salary Increase	308541	Administrative Assistant

OCC – relates to the occupancy type.

SUB - is substantive occupancy – generally considered your appointed position

CON - is concurrent occupancy – generally considered an appointment that occurs during your ownership of your original appointed position

HDA - is higher duties occupancy – used where you act in a role classified at a higher level than your original appointment

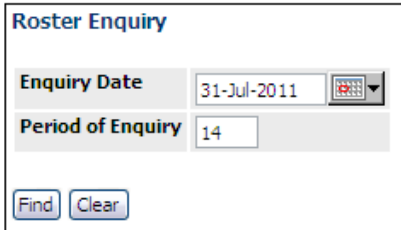
Active From and Active To just represent the effective dates to that "layer" of your occupancy.

## Roster Enquiry

Select **Employment Details** and then **Roster Enquiry**.

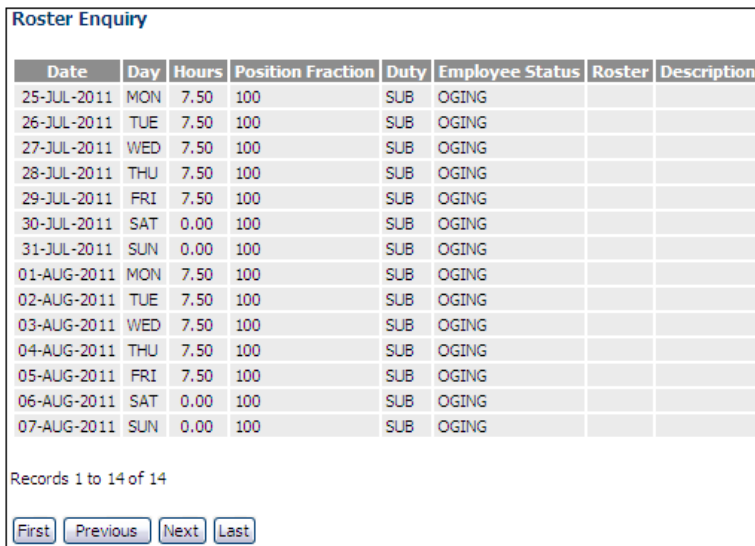
This menu item is specifically designed for part-time employees. It is use to allow part-time employees to check their roster pattern is accurate for the duration of their intended period of leave. This is important as it's the roster pattern that controls the value of the leave entitlement to deduct. Simply nominate a date and a number of days and click 'Find', and the roster pattern held within the HR System will be displayed.

You will initially be provided with a small selection screen



The screenshot shows a 'Roster Enquiry' form with two input fields: 'Enquiry Date' set to '31-Jul-2011' and 'Period of Enquiry' set to '14'. There are 'Find' and 'Clear' buttons at the bottom.

The date you select in the above selection screen will be a 'middle-date' where the value of days you also identify on this selection screen will be halved and then project equally (prior and future) of the 'middle-date'.



The screenshot shows a 'Roster Enquiry' result table with 14 rows of data. The table has columns for Date, Day, Hours, Position Fraction, Duty, Employee Status, Roster, and Description. The data shows a consistent pattern of 7.50 hours per day from Monday to Friday, and 0.00 hours on weekends. The employee status is 'SUB' and the roster is 'OGING'.

Date	Day	Hours	Position Fraction	Duty	Employee Status	Roster	Description
25-JUL-2011	MON	7.50	100	SUB	OGING		
26-JUL-2011	TUE	7.50	100	SUB	OGING		
27-JUL-2011	WED	7.50	100	SUB	OGING		
28-JUL-2011	THU	7.50	100	SUB	OGING		
29-JUL-2011	FRI	7.50	100	SUB	OGING		
30-JUL-2011	SAT	0.00	100	SUB	OGING		
31-JUL-2011	SUN	0.00	100	SUB	OGING		
01-AUG-2011	MON	7.50	100	SUB	OGING		
02-AUG-2011	TUE	7.50	100	SUB	OGING		
03-AUG-2011	WED	7.50	100	SUB	OGING		
04-AUG-2011	THU	7.50	100	SUB	OGING		
05-AUG-2011	FRI	7.50	100	SUB	OGING		
06-AUG-2011	SAT	0.00	100	SUB	OGING		
07-AUG-2011	SUN	0.00	100	SUB	OGING		

Records 1 to 14 of 14

Buttons: First, Previous, Next, Last

This viewable roster result will allow you to check your work pattern for accuracy prior to booking your leave.

## MBDP Maintenance

Select **Employment Details** and then **MBDP Maintenance**.

The mailbag maintenance screen allows you to maintain a specific mailbag delivery point for you single or multiple jobs, here at UWA. Simply click on the drop-down field to select your mailbag value and then click on the update button. Into the future, the mailbag information will be passed through to the contact directory for automatic publishing.

Person: 00012278, Hansel And Gretel  
 Job: 01, Senior HRIS Coordinator

**MBDP Maintenance**

Effective	Job No.	Occupancy	Job Title	School/Centre/Department	Mail Bag Delivery Point
05-Mar-2007	01	Substantive	Payroll Coordinator	Human Resources	M350: Human Resources
01-Jan-2007	01	Concurrent	Senior HRIS Coordinator	Human Resources	M350: Human Resources
01-Apr-2007 (future)	01	Concurrent	Senior HRIS Coordinator	Human Resources	M350: Human Resources

[Mail Bag Delivery Point Directory](#)

**Notes:**

- The Effective Date is the date that the occupancy record became / becomes effective. The date will remain unchanged after you modify your Mail Bag Delivery Point (MBDP).
- You should select the MBDP that is the most convenient for the delivery of your mail. A list of MBDPs is available in the drop-down box above. Further details of the exact location of each MBDP are available by clicking on the link to the MBDP Directory above. If still in doubt about your MBDP number, enquire at the administrative office nearest to you.

Update Cancel

## Historical PDRs - Individual

Select **Employment Details** and then **Historical PDRs - Individual**.

The Professional Development Review (PDR) is the University's performance management process.

This screen will show you all of the PDRs that you have done in the previous PDR format.

**Past Reviews**

Job#	Review Date	Status
01	<a href="#">30-JAN-06</a>	Completed (by Reviewee)
	<a href="#">26-NOV-07</a>	Completed (by Reviewee)

To create a new PDR you will need to select **Staff Performance** and then **Professional Development Review**.

Usage tips and an overview of the current PDR process is available in the PDR User Guide (<https://www.his.admin.uwa.edu.au/his/PDRUserGuideStd01.asp>)

## 7.0 LEAVE DETAILS

### Select Job

Select **Employment Details** and then **Select Job**.

Select Active Job				
Job No.	Last Occupancy Change	Occupancy End Date	Current Position Title	Organisational Unit
01	17-MAR-2007	07-MAY-2007	CASUAL APPOINTMENT	Faculty Office - UWA Business School
02	01-AUG-2011	31-DEC-2049	Administrative Assistant	Information Technology Services (ITS)

Click on the job number you wish to view the specific details for.

It is extremely important to ensure that the right job is selected, especially when booking leave. If the wrong job is selected, based on a roster existing across both jobs, your leave will potentially 1) go to the wrong person for approval or 2) have an incorrect amount of leave deducted from your entitlement.

### Leave Balances Enquiry

Select **Leave Details** and then **Leave Balances Enquiry**. The following will display:

Leave Balances							
Enquiry Date	<input type="text" value=""/>		<input type="button" value="Calculate Balances"/>				
Balances at enquiry date							
Leave Type	Job	Calculation Date	Next Accrual Date	Actual Balance	Pro-rata Balance	Total Balance	Unit
Annual Recreation Leave	03	28-AUG-2011	29-AUG-2011	51.736	0	51.736	Hours
Long Service Leave	03	28-AUG-2011	22-MAR-2014	0	162.62	162.62	Hours
Personal Leave (Sick/Carer's)	03	28-AUG-2011	22-MAR-2012	70.5	.257	70.757	Hours
Time Off In Lieu of Overtime	03	28-AUG-2011	29-AUG-2011	2	0	2	Hours

The balance is shown in hours. You can calculate your leave balances at a date by entering the desired date in the box (i.e. 31-Dec-2006) and pressing 'Calculate Balances'. You can also select a date using the calendar function by pressing this button:

Please note that this screen displays only one job at a time.

**Balance on another job:** Select 'Select Active Job' from the menu options on the left. Click on the alternate job number required. Return to 'Leave Balances Enquiry' to view the balance.

Please note that leave balances are also displayed (as a collective entitlement) at the bottom of the payslip.

### Leave Booking Enquiry

Select **Leave Details** and then **Leave Booking Enquiry**. The following will display:

The leave bookings enquiry menu item allows you to view the approved leave bookings within a given period of time. On the selection screen, make some selections based on the period of time and the leave types you wish to search for, and click on the 'Find' button –

Leave History	
Enter query criteria	
Start Date	<input type="text" value="29-AUG-2011"/> to <input type="text" value="11-SEP-2011"/>
Leave Code	<input type="text" value=""/>
Description	<input type="text" value=""/>
<input type="button" value="Find"/>	<input type="button" value="Clear"/>

Clicking back on the menu item will reset your search screen for you to be able to re-search using different parameters.

## Roster Enquiry

Select **Leave Details** and then **Roster Enquiry**. The following will display:

This menu item is specifically designed for part-time employees. It is used to allow part-time employees to check their roster pattern is accurate for the duration of their intended period of leave. This is important as it's the roster pattern that controls the value of the leave entitlement to deduct. Simply nominate a date and a number of days and click 'Find', and the roster pattern held within the HR System will be displayed.

You will initially be provided with a small selection screen



The date you select in the above selection screen will be a 'middle-date' where the value of days you also identify on this selection screen will be halved and then project equally (prior and future) of the 'middle-date'.

This viewable roster result will allow you to check your work pattern for accuracy prior to booking your leave.

This menu item is specifically designed for part-time employees. It is used to allow part-time employees to check their roster pattern is accurate for the duration of their intended period of leave. This is important as it's the roster pattern that controls the value of the leave entitlement to deduct. Simply nominate a date and a number of days and click 'Find', and the roster pattern held within the HR System will be displayed.



Date	Day	Hours	Position Fraction	Duty	Employee Status	Roster	Description
25-JUL-2011	MON	7.50	100	SUB	OGING		
26-JUL-2011	TUE	7.50	100	SUB	OGING		
27-JUL-2011	WED	7.50	100	SUB	OGING		
28-JUL-2011	THU	7.50	100	SUB	OGING		
29-JUL-2011	FRI	7.50	100	SUB	OGING		
30-JUL-2011	SAT	0.00	100	SUB	OGING		
31-JUL-2011	SUN	0.00	100	SUB	OGING		
01-AUG-2011	MON	7.50	100	SUB	OGING		
02-AUG-2011	TUE	7.50	100	SUB	OGING		
03-AUG-2011	WED	7.50	100	SUB	OGING		
04-AUG-2011	THU	7.50	100	SUB	OGING		
05-AUG-2011	FRI	7.50	100	SUB	OGING		
06-AUG-2011	SAT	0.00	100	SUB	OGING		
07-AUG-2011	SUN	0.00	100	SUB	OGING		

## Submit Leave Request

**Step1:** Select **Leave Details** and then **Submit Leave Request**.

**Leave Requests**

Leave Code	Job	Start Date	End Date	Amount	Leave Unit	Adv Pay	Salary %	Status
1. REC - Annual Recreation Leave	03	10-OCT-2011	27-OCT-2011	105.00	Hours	N		Submitted

[Whole Day Leave Booking](#) | [Part Day Leave Booking](#)

**Leave Balances**

Leave Type	Job	Calculation Date	Next Accrual Date	Actual Balance	Pro-rata Balance	Total Balance	Unit
Annual Recreation Leave	03	28-AUG-2011	29-AUG-2011	51.736	0	51.736	Hours
Long Service Leave	03	28-AUG-2011	22-MAR-2014	0	162.62	162.62	Hours
Personal Leave (Sick/Carer's)	03	28-AUG-2011	22-MAR-2012	70.5	.257	70.757	Hours
Time Off In Lieu of Overtime	03	28-AUG-2011	29-AUG-2011	2	0	2	Hours

**Future Leave Bookings**

Action	Job	Start Date	End Date	Leave Code	Amount	Unit	Medical Cert	Adv Pay	Salary %	Booking ID	Comment	Leave Reason
1. Reverse	03	29-AUG-2011	30-AUG-2011	REC - Annual Recreation Leave	15.00	Hours		N		404887		

**Step 2:** Select **Whole Day Leave Booking** or **Part Day Leave Booking** as required. The appropriate booking form will then be displayed.

**Note:** There are differences between the forms, e.g. there is no End Date on the Part Day form, and there is not an Hours field on the Whole Day form.

**Whole Day Leave Request**

Job Number: 02

Leave Code: [Dropdown]

Start Date: 26-AUG-2011 [Calendar]

End Date: [Calendar]

Unit: [Dropdown]

Advance Pay: [Dropdown]

Medical Cert.: [Dropdown]

Other Doc.: [Dropdown]

Reason: [Dropdown]

Comment: [Text Area]

[Submit Request] [Clear]

**Step 3:** Enter the details as required:

**Leave Code:** Pull down the drop down list and select the appropriate code.

**Start Date:** Enter the date the leave is to commence.

**End Date:** Enter the date the leave is to finish.

**Unit:** Enter the unit of the leave. E.g. Hours.

**Advance Pay:** Enter a Yes or No as to whether you require pay in advance.

**Please Note:** Only a whole pay fortnight (14 days) can be paid in advance. Ensure that the leave end date is the last **SUNDAY** of a pay fortnight (not a Friday). It must be **approved** a month prior to the leave commencing. It will be your responsibility to submit applications that meet this 14 day minimum. It will also be your supervisor's responsibility to approve the application in time for the payroll processing.

**Medical Cert:** Enter 'Y' if you have a medical certificate for Sick Leave or 'N' if you do not. This is a mandatory field for Sick Leave. **The medical certificate must be forwarded to the Supervisor for auditing purposes.**

**Other Doc:** This field is not relevant

**Reason:** This field will generate options based on the leave type selected above

**Comment:** Comments can be added if required.

**The leave types able to be selected within ESS are -**

- Annual Recreational (General & Academic)
- Bereavement / Compassionate
- Ceremonial/Cultural
- Conference (Academic Staff Only)
- Emergency Services
- English Training
- International Sporting Events
- Personal (Sick/Carer's) - medical certificates to be sent to HR Services
- Purchased (Employee Funded)
- Short Leave (covers Indigenous/Urgent Private Business)
- TOIL (Time off in Lieu)

**Step 4:** Click **Submit Request** to submit your leave booking. You will receive a confirmation message that the leave booking was successfully updated.

**Note:** If leave booking exceeds the available leave balance the leave booking will be accepted but a Warning message **“The amount of leave requested exceeds available balance”** will be displayed. At this time the employee can reverse the entry or let it escalate to their Supervisor to Approve or Reject.

Leave Warning Messages

**Warning - Amount requested exceeds rostered hours.**

**Please note:** Once you have entered your leave application you may come across the ‘Warning Message’ below. The reason this message appears is because ESS determines your leave entitlement to that leave type as at the current pay period. You may not have a sufficient amount of leave as at this current pay period but if you do a leave projection to the end of the year, you will have the sufficient amount.

Check your available leave entitlement at the end of the year – through the “Leave Balances” menu item. If, after projecting to the end of the year, you do not have enough entitlement to cover the application you should not proceed with the application. If you do have enough entitlement by the end of the year, continue with your application, ignoring the warning message

**Warning!**

**The Leave Request was successful, however, the following issue(s) were identified with the request:**

**Warning - The amount of leave requested exceeds available balance.**

**Reversing or Cancelling Leave**

**- If Leave has been approved**

Go to Leave Booking Enquiry and enter the required date or date range and click **‘Find’**

Leave History

Enter query criteria

Start Date 29-AUG-2011 to 11-SEP-2011

Leave Code

Description

Find Clear

**Leave History**

Action	Job	Start Date	End Date	Leave Code	Amount	Unit	Medical Cert	Adv Pay	Salary %	Booking ID	Comment	Leave Reason
<a href="#">1. Reverse</a>	03	29-AUG-2011	30-AUG-2011	REC - Annual Recreation Leave	15.00	Hours		N		404887		

When the results are returned, and the leave application you wish to reverse is available, click on the reverse button on the Action column. It will ask you to confirm, once confirmed an email will be sent to your Supervisor. Once approved a return email will be sent to you as confirmation.

**Leave Reversal**

<b>Leave Code</b>	REC - Annual Recreation Leave
<b>Start Date</b>	29-AUG-2011
<b>End Date</b>	30-AUG-2011
<b>Amount</b>	15
<b>Unit</b>	H - Hours
<b>Advance Pay</b>	N - No
<b>Medical Cert.</b>	
<b>Other Doc.</b>	
<b>Reason</b>	
<b>Comment</b>	

**- If Leave has not been approved yet**

Click on the ‘Your Pending Transactions’ menu item for ESS to show you your pending leave applications.

**Pending Transactions**

**Whole Day Leave Request**

Delete	Record Details	Name	Leave Code	Start Date	End Date	Units	App. Level	Escalated To You By	Created Date	To Be Actioned By	Warning Exists	Comments
<input type="checkbox"/>	<a href="#">482177</a>	Doe, John	Annual Recreation Leave	17-OCT-2011	03-NOV-2011	105	2	<a href="#">Winthrop Professor</a>	25-AUG-2011	03-SEP-2011		

Click on the ‘Delete box’ and then the Delete button.

Clicking on the “Delete” button will have ESS prompt you to confirm this action and clicking OK on the confirmation message will delete that leave application and send a corresponding deletion email to your leave approver.

**Your Pending Transactions**

To view leave booking transactions, click on “Your Pending Transactions.”

The Pending Transactions screen shows all leave requests pending. This screen allows you to view all leave applications that you have requested that have either not been approved or have been rejected by your supervisor. Once leave applications have been approved you will not see the record.

If an application has been rejected, you can view the mandatory comment your supervisor has provided for the rejection. You can then remove the rejected leave application from you list, click on “Record Description” and click on the “Delete” button and the record will no longer appear.

If you would like to see who the supervisor is approving your leave application, click on the “Approval Person” record for the application.

Pending Transactions

Whole Day Leave Request

Delete	Record Details	Name	Leave Code	Start Date	End Date	Units	App. Level	Escalated To You By	Created Date	To Be Actioned By	Warning Exists	Comments
<input type="checkbox"/>	482177	Doe, John	Annual Recreation Leave	17-OCT-2011	03-NOV-2011	105	2	Winthrop Professor	25-AUG-2011	03-SEP-2011		

## Important Additional Information relating to leave application

### - What do I do with my Medical Certificate?

The University of Western Australia sick leave policy remains unchanged by the implementation of on-line leave processing. This means that you will still be required to provide evidence of your illness, or of your family member's illness for sick leave requests of three consecutive days or more.

In this case, please send your Medical Certificate to your Supervisor. You will need to include your name on the certificate, and the dates of the leave to which the certificate relates. Once the medical certificate has been sighted by your Supervisor, forward the medical certificate to Human Resources for storing.

### - Will I still receive confirmation that my leave has been approved?

Yes. Your application for leave will trigger an automatic email to your current supervisor, which informs him or her that there is a transaction in the Employee Self Service needing approval.

As soon as your supervisor has approved or rejected your leave application, you will receive an email to let you know the status of your request.

If your current supervisor does not attend to your leave application within 10 working days, the ESS will automatically escalate your application to your supervisor's manager for approval.

### - Can my leave application be rejected?

Yes. Depending on operational requirements, supervisors may not be able to approve all leave requests. If this is the case, you will receive an email from your supervisor informing you that your leave has been rejected. Your supervisor is required to add any reasons or comments to the rejected application and the email will direct you to the Employee Self Service to view these comments.

You are encouraged to discuss any rejected leave applications with your supervisor or manager. If new leave dates can be negotiated, you will need to delete the rejected application from the list displayed in your "View Transactions" and submit a new Leave Request on the Employee Self Service facility.

### - How do I change the dates of my leave application?

If you notice a mistake before it is approved by your supervisor, you can delete the request from the "Your Pending Transactions" menu. You will then need to re-apply for your leave.

However, if you need to change the dates or have noticed an error in an approved booking, you should follow the procedures for reversing a leave booking as outlined in the Leave section of this guide.

## 8.0 SKILLS & DEVELOPMENT DETAILS

### Qualifications

The University wishes to capture and keep an accurate academic profile of its staff. Upon navigating to the Qualifications screen, you will be presented with both a summary of those qualifications we currently hold for you, and an update screen that allows you to create and forward new qualifications for approval and storage.

This screen appears for qualification already existing. If you wish to create a new record enter 'Add new record.'

Qualification			
Qualification	Type	Institution	Country
1. Bachelor of Commerce (BCom)	Bachelors (incl pass, hons, bachelor's grad entry)	University of Western Australia (W.Aust.)	Australia
2. Master of Information Management & Systems (MIMS)	Masters by Coursework	University of Western Australia (W.Aust.)	Australia

[Add new record](#)

Qualification	
Qualification [Info]	ACERT
Major	0001
Qual Title [Info]	sdjaomfae
Qualification Type/Level	1
Highest Qualification?	Yes
Title Sequencing No	
Start Date	
Completion Date	
Institution	
Country	

Insert any new qualifications and the submission of these qualifications will be forwarded to your supervisor for approval. It is the Supervisors responsibility to sight original documentation related to that qualification prior to any approval being given.

### Training Requests

Select **Skills & Development** and then **Training Requests**. The following will display:

Training Requests
No Records returned
<a href="#">Add new record</a>
<small>This page was produced August 31, 2011 10:52 am by program WK8125 (revision 12.0) Copyright © Talent2 Works Pty Ltd. (ACN 010 602 892)</small>

If you wish to nominate a training course to attend click on 'Add new record'. Unless there are no current training courses to nominate yourself for, you will get the following screen:

## Training Requests

Select a training course category.

Course Category	Available Courses
<a href="#">HRSYS - HR Business Systems</a>	1

[Back to Training Requests](#)

Click on the 'Course Category' link and you will be given a list of courses available for that category.

## Training Requests

To nominate for a training course click on the "nominate" link to the right of the course.

Course Name	Details/Venue	Course Start Date	Duration	Nominate
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	06-JUN-2008	1hr (09.00-10.00)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	06-JUN-2008	1hr (10.30-11.30)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	23-MAY-2008	1hr (13.30-14.30)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	23-MAY-2008	1hr (10.30-11.30)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	11-APR-2008	1hr (09.00-10.00)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	09-APR-2008	1hr (10.30-11.30)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	28-MAR-2008	1hr (11.30-12.30)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	27-MAR-2008	1hr (11.30-12.30)	<a href="#">Nominate</a>
0001 - Web Reports (Including Salary Sign-off)	<a href="#">Details</a>	29-FEB-2008	1hr (11.30-12.30)	<a href="#">Nominate</a>

[Back to Courses](#)

Choose the course session you wish to attend by clicking on the 'Nominate' link at the end of that row and then fill out the corresponding nomination form (see below) – clicking on the 'Submit Training Nomination' button when completed.

## Training Requests

Course	H0001 - Alesco Users Training
Course Number	1
Course Start Date	13-FEB-2008
Your Details...	
Phone Number	<input type="text"/>
Disability/medical condition requiring special arrangements?	<input type="text" value="No"/>
If Yes, please specify the details.	<input type="text"/>
How did you find out about this course?	<input type="text" value="1 - Email"/>
Your Objectives...	
How does this training fit in with your Career Development Plan?	<input type="text"/>
What skills/knowledge do you want to gain from this course?	<input type="text"/>
<input type="button" value="Submit Training Nomination"/> <input type="button" value="Clear"/>	

## 9.0 TEAM MANAGEMENT DETAILS

Your Team Management Details access can be configured in two ways; to display details for staff that report to you (the default) or, to display details for all staff within a particular Organisational Unit (Clevel). See below for an example.

From the main menu – Click on the ‘**Team Management Details**’ menu and then the relevant report as listed below.

### Team List

The Team List report provides a simple list of staff currently reporting to ‘your’ position.

#### Based on Reporting Relationships:

**Team Members**

Click on Person Id to switch context to the person

Person Id	Job Id	Name	Position#	Position Title	Team Members
<a href="#">1. 00012345</a>	06	Flintstone, Fred	308047	Systems Support Officer	<a href="#">1. View</a>
<a href="#">2. 00023456</a>	03	Rubble, Barney	300344	Web Co-ordinator	<a href="#">2. View</a>
<a href="#">3. 00034567</a>	02	Jack, Ann Jill	105270	Information Systems Officer	<a href="#">3. View</a>
<a href="#">4. 00045678</a>	02	Fence, Noah	302730	Systems Support Officer	<a href="#">4. View</a>
<a href="#">5. Vacant</a>	--	----	304827	Information Systems Assistant	<a href="#">5. View</a>
<a href="#">6. Vacant</a>	--	----	308541	Systems Support Officer	<a href="#">6. View</a>

Clicking on the ‘View’ option in the “Team Members” column for a particular ‘Person Id’ allows you to view the employees who report to that person. When the results are returned, simply click on the link labelled ‘Click here to return to top of team’ to return to your Team List.

The team list can also be configured to display all staff within a Faculty, School etc. An example of this can be seen below. This function is very useful where a centrally located administrative person may need to view staff details for an entire business unit. Unfortunately, you lose the ability to then drill-down into subsequent team lists with this type of access.

### Team Matrix

The team matrix allows the manager to view a 3 month calendar displaying the approved leave currently recorded and booked for their staff. A date picker allows control over the date from which the 3 month period is projected and there is also the capability to restrict leave types. With the selections made, clicking on the ‘Display’ button will return the results.

**Team Matrix**

Start Date: 01-MAR-2011 to 29-May-2011 Leave Code: --- All Leave Codes ---

Show Training  Show Holidays  Show Leave

Person Id	Name	MARCH																			
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
00012345	1. Flintstone, Fred	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
00023456	2. Rubble, Barney																				
00034567	3. Jack, Ann Jill																				
00045678	4. Fence, Noah	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A
--	5. Vacant Position: 304827																				
--	6. Vacant Position: 308541																				

Records 1 to 6 of 6

**Legend:**

	Approval Deferred	<b>A</b>	Annual Leave
	Approved by Manager	<b>L</b>	Long Service Leave
	Processed thru Payroll	<b>P</b>	Paid Leave
	Submitted	<b>S</b>	Sick Leave
	Public Holiday	<b>U</b>	Unpaid Leave
	Training Waitlisted	<b>H</b>	Public Holiday
	Training Attended	<b>T</b>	Training
		<b>**</b>	Denotes various events exist for this day

## Team Leave Balances

The leave balances report allows you to view the balances for leave as at the current pay period. Clicking on the menu item provides you with a simple selection screen, where you can opt to view all leave types, or restrict your selection to a single leave type. With your selection made, click on the 'Find' button to view the results.

Team Leave Balances

Person Id	Name	Job	LV Code	Description	Actual Balance	Pro-rata Balance	Total Balance	Unit	Accrued To
00045678	<u>Fence, Noah</u>	02	LSL	Long Service Leave	0	357.669	357.669	Hours	28-AUG-2011
		02	REC	Annual Recreation Leave	36.573	0	36.573	Hours	28-AUG-2011
		02	SICK	Personal Leave (Sick/Carer's)	97.737	.324	98.061	Hours	28-AUG-2011
00023456	<u>Rubble, Barney</u>	03	LSL	Long Service Leave	0	126.475	126.475	Hours	28-AUG-2011
		03	REC	Annual Recreation Leave	33.683	0	33.683	Hours	28-AUG-2011
		03	SICK	Personal Leave (Sick/Carer's)	98.322	.054	98.376	Hours	28-AUG-2011
		03	TOIL	Time Off In Lieu of Overtime	0	0	0	Hours	28-AUG-2011
00034567	<u>Jack, Ann Jill</u>	02	LSL	Long Service Leave	0	315.092	315.092	Hours	28-AUG-2011
		02	REC	Annual Recreation Leave	98.13	0	98.13	Hours	28-AUG-2011
		02	SICK	Personal Leave (Sick/Carer's)	34	.257	34.257	Hours	28-AUG-2011
00012345	<u>Flintstone, Fred</u>	06	LSL	Long Service Leave	0	112.154	112.154	Hours	28-AUG-2011
		06	REC	Annual Recreation Leave	137.5	0	137.5	Hours	28-AUG-2011
		06	SICK	Personal Leave (Sick/Carer's)	6.87	.642	7.512	Hours	28-AUG-2011

Records 1 to 13 of 13

## Team Leave Bookings

The leave bookings screen allows you to view the approved leave bookings for your team. A simple selection screen enables you to make a selection on both the period of time and a specific leave type. After making your selections, click on the 'Find' button to view your results.

Team Leave Bookings

Person Id	Name	Job	LV Code	Description	Start date	End date	Amount	Unit	Med Cert	Leave Reason
00012345	<u>Flintstone, Fred</u>	06	REC	Annual Recreation Leave	23-AUG-2011	23-AUG-2011	7.5	Hours	N	

Record 1 of 1

## Probation Report

The probation report simply displays those employees who are still within their probationary period. The results of the report display the date that the probation is/was due to expire.

## Increment Report

The increment report displays those employees who are due an increment, displaying the date the increment is due, and the current step within their classification.

Increments Report

For 29-Aug-2011 to 31-Dec-2012

Person Id	Job	Name	Title	Increment Type	Increment Date	Award	Class	Step
00034567	02	<u>1. Jack, Ann Jill</u>	Information Systems Officer	Increment	13-MAY-2012	GEN	L05	03
00012345	06	<u>2. Flintstone, Fred</u>	Systems Support Officer	Increment	30-MAY-2012	GEN	L05	01

Records 1 to 2 of 2

## Team Appointment Summary

The appointment summary report displays all of those employees currently reporting to you. Additionally, this report includes appointment details about each employee, giving a more profiled view of their employment. You are provided with a brief selection screen enabling you to refine your search, and when the criteria has been entered, click the 'Find' button to view your results.

**Team Appointment Summary**

Person ID	Job	Name	Start Date	End Date	Occupancy Type	Title	Emp Status	Av
00034567	02	1. Jack, Ann Jill	01-AUG-2011	31-DEC-2049	Substantive	Information Systems Officer	OGING	GE
00023456	03	2. Rubble, Barney	13-SEP-2010	31-DEC-2049	Substantive	Web Co-ordinator	OGING	GE
00012345	06	3. Flintstone, Fred	30-MAY-2011	24-DEC-2011	Substantive	Systems Support Officer	FXT1	GE
00045678	02	4. Fence, Noah	28-FEB-2011	31-DEC-2049	Substantive	Systems Support Officer	OGING	GE

Records 1 to 4 of 4

## Team Birthdays

The Team Birthdays report allows you to view the birthdays for your staff within the nominated date range.

**Team Birthdays Report**

Enter query criteria

**Start Date**  (DD-MON only)  
**End Date**  (DD-MON only)

## Historical PDRs – Manager

Select **Team Management Details** and then **Historical PDRs - Manager**.

The Professional Development Review (PDR) is the University's performance management process. A new on-line system was implemented in August 2009 and these historical PDRs are for reviews conducted under the previous system.

New PDRs need to be created under the new system by navigating to **Staff Performance** and then **Professional Development Review**.

Usage tips and an overview of the current PDR process is available in the PDR User Guide (<https://www.his.admin.uwa.edu.au/his/PDRUserGuideStd01.asp>)

**PDR (Historical)**

**Team Reviews**

Staff ID	Name	Job#	Review Date	Status	Delegated Reviews
00012345	Flintstone, Fred	06			
00023456	Rubble, Barney	03			
00034567	Jack, Ann Jill	02			
00045678	Fence, Noah	02	<u>11-JAN-08</u>	Completed (by Reviewee)	
(Vacant)	(304827: INFORMATION SYSTEMS ASSISTANT)	--			
(Vacant)	(308541: SYSTEMS SUPPORT OFFICER)	--			

*Please Note: you can no longer create PDRs from this page. Please go to the [new PDR page](#).*

## Detailed Team Appointments

The detailed team appointment report displays the last occupancy change that was made for each employee that currently reports to you.

Audit ID	Employee No	Job No	Employee Name	Title	Organisational Unit	Effective Date	Reason	Agreed Salary	Occupancy %
<a href="#">35263165</a>	00045678	02	Fence, Noah	Systems Support Officer	HR Services	28-FEB-2011	ALLOW		100
<a href="#">32449000</a>	00023456	03	Rubble, Barney	Web Co-ordinator	HR Services	13-SEP-2010	CRPT		40
<a href="#">38304157</a>	00034567	02	Jack, Ann Jill	Information Systems Offc	HR Services	01-AUG-2011	TRANS		100
<a href="#">36847835</a>	00012345	06	Flintstone, Fred	Systems Support Officer	HR Services	30-MAY-2011	COMM		100

Records 1 to 4 of 4

[First](#) [Previous](#) [Next](#) [Last](#)

## Sick/Carer Leave w/o Cert. (this year)

Select **Team Management Details** and then **Sick/Carer Leave w/o Cert. (this year)**.

This screen will show you which of your staff have taken Sick/Carer Leave in the current year without a Medical Certificate.

Audit ID	Emp ID	Name	Date	Hours
<a href="#">34804314</a>	00012345	Flintstone, Fred	24-JAN-2011	7.50
<a href="#">34979691</a>	00023456	Rubble, Barney	07-FEB-2011	7.50
<a href="#">35008684</a>	00034567	Jack, Ann Jill	21-FEB-2011	7.50

Records 1 to 3 of 3

[First](#) [Previous](#) [Next](#) [Last](#)

## 10.0 APPROVAL DETAILS

### Approve Requests

From the main menu – click on the ‘Approvals Details’ menu and then ‘Approve Requests.’

The approve transactions menu item is designed for Supervisors whose employees are submitting leave bookings through ESS. Clicking on the menu item will provide a summary table of the items awaiting approval. You can approve leave on the radio buttons, however, if the button is “greyed” out i.e. you will not be able to approve in this area.

Approve Requests

Whole Day Leave Request

Approval Status				Record Details	Name	Leave Code	Start Date	End Date	Units	App. Level	Escalated To You By	Created Date	To Be Actioned By	Warning Exists
Approve	Reject	Escalate	No Action											
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	436041	Jack, Ann Jill	Annual Recreation Leave	21-NOV-2011	11-DEC-2011	112.5	1		29-MAY-2011	08-OCT-2011	

If the buttons are ‘greyed out’ you must go into the Record Details and approve in this area.

There are primarily two reasons for this approval requirement –

- 1) Because there is some form of ‘Warning Message’ attached to the application and HR requires you to be aware of that warning message prior to approving the application
- 2) For sick leave, there is a medical certificate attached, and again, HR requires the approver to sight that a medical certificate was identified as being attached to the application.

To approve or reject the application, you click on the “Approval Status” drop down list, the status of the leave application appears as “Submitted.” In order to approve or reject the leave application, click on the drop-down arrow next to the Approval Status and change to “Rejected/Approved/Deferred/Escalated”.

Please note if you select “Deferred” on the application then you will need to enter the date you would like it to be resubmitted, if you select “Escalated” on the application then it will automatically go to your Supervisor/Manager.

Comments can be entered in support of the leave approval, rejection or escalation as required.

Once all details are entered, click on “Update” to save the entry, or on “Cancel” to escape the leave request. The “Update” function will automatically update the Alesco Payroll System with no need for the employee to complete a leave from, or for a supervisor to sign it.



**Please Note:** Before approving sick leave you will be required to sight the employee’s medical certificate in line with the University’s Policy. Once the medical certificate has been sighted, forward it to Human Resources to be placed on the individual’s staff file. Schools can take a copy for their own records.

### Approval History

From the main menu – click on the ‘Approvals Details’ menu and then ‘Your Approval History.’

The approval history menu item is designed for Supervisors to see employees leave history. Select the employee you wish to view and click on the find button.

**Approval History**

Enter query criteria

**Employee**  ▼

**Approval Date**   to

This screen shows bookings that have been reversed and future bookings.

**Approval History**

**Leave Reversal**

Record ID	Name	Leave Code	Leave Start Date	End Date	App. Level	Escalated to you By	Created Date	To Be Actioned By
459507	Flintstone, Fred	Annual Recreation Leave	15-SEP-2011	15-SEP-2011	1		17-JUN-2011	26-JUN-2011
477187	Flintstone, Fred	Annual Recreation Leave	17-AUG-2011	17-AUG-2011	1		10-AUG-2011	19-AUG-2011

**Whole Day Leave Request**

Record Details	Name	Leave Code	Start Date	End Date	Units	App. Level	Escalated To You By	Created Date	To Be Actioned By	Warning Exists
477234	Flintstone, Fred	Annual Recreation Leave	23-AUG-2011	23-AUG-2011	7.5	1		10-AUG-2011	19-AUG-2011	
469766	Flintstone, Fred	Annual Recreation Leave	17-AUG-2011	17-AUG-2011	7.5	1		18-JUL-2011	27-JUL-2011	

### - What Happens if I Don't Action the Leave Request?

The Employee Self Service has been set to escalate all leave applications after ten working days. This means that once you have received an email stating that an employee has applied for leave, you will have ten working days to log onto the Employee Self Service and approve or reject the application.

If you are unavailable for greater than ten days, your own Supervisor or Manager will receive an email stating that a leave application has been escalated from you. In this case, your Manager will need to approve or reject the leave. Leave that has not been approved after it has escalated once will then escalate to Human Resources for a follow up after the 20 days.

Your employee will receive a system-generated email once you have approved a leave application.

### - What are the Important Points to Note in this Approval Process?

- Sight the Medical Certificate inline with the University's Policy and send to Human Resources for storage. (School may wish to take a copy for their own records)
- Check if the Employee has requested Pay in Advance. (If so check the pay in advance booking is inline with the ESS Leave User Guide for pay in advance)

If an employee has sought to delete an approved leave request, that application for reversal/deletion will also come through for approval – as displayed below.

## 11.0 STAFF PERFORMANCE

### Professional Development Review

Select **Staff Performance** and then **Professional Development Review**.

The Professional Development Review (PDR) is the University's performance management process.

This screen will allow you to create a new PDR for yourself as well as show you all of the PDRs that have been done in the current PDR format by you and your staff.

PDRs in the previous format are still available on ESS. The **Historical PDRs - Individual** can be found in the **Employment Details** folder and the **Historical PDRs - Manager** can be found in the **Team Management Details** folder.

Usage tips and an overview of the current PDR process is available in the PDR User Guide (<https://www.his.admin.uwa.edu.au/his/PDRUserGuideStd01.asp>)

### Professional Development Review

*Note: Usage tips and an overview of the PDR process is available in the [PDR User Guide](#)*

#### Your Reviews:

*Need to create a PDR?*

*Have you started at UWA in the last couple of months, or are you an existing member of staff who has recently had a significant change of role? Then you need to [create a PDR for Commencing Staff](#).*

*If not, please [create an Existing Staff PDR](#).*

	Review Date	Review Status	Note
1.	<a href="#">17-Nov-2010</a>	Complete	

#### PDRs conducted\* by you or for your review: (as Reviewer)

	Reviewee	Review Date	Attachments	Review Status	Note
1.	Flintstone, Fred	<a href="#">24-Aug-2011</a>	0	Notified Reviewer (pre-discussion)	<i>New staff / role PDR</i>
2.	Fence, Noah	<a href="#">19-Apr-2011</a>	0	Complete	
3.	Jack, Ann Jill	<a href="#">19-Nov-2010</a>	0	Complete - Reviewee Acknowledged	

\* The last 2 reviews per Reviewee, occurring within the last 3 years

### Performance Appraisal Review

COMING SOON