Mammoth Holdings			
	STANDARD OPERATING PROCEDURE	Document Number	SOP-HR-002
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Team Member Change Workflow Procedure			

I. OBJECTIVE

To detail and define Team Member change workflow processes and expectations.

II. SCOPE

This SOP is applicable for Paylocity a team member change workflows utilized by managers, human resources and payroll.

III. WORKFLOWS

1.0 Pre-workflow submission:

1.1 Submitter is responsible for validating compensation requests are within the compensation ranges that have been defined by leadership. If a compensation change is outside of the approved pay scales, the request will be denied unless written approval by upper management is provided. Refer to Payroll Guidelines for further approval instruction.

1.2 Submitter should be aware of promotion guidelines that have been established by the company including but not limited to, minimum age restrictions, background check requirements and PDP completion. (SOP-HR-003).

2.0 Approvals in Workflow:

2.1 Submitter - A person that initiates the workflow process for changes.

i. Role in workflow:
- Initiate a team member status change workflow any time there is a change in status to a team member's employment.

ii. Expectation:
- A submitter will submit a workflow change PRIOR to a change being implemented.
- For compensation and position changes, submission must be a minimum of 7 days prior to the effective date.
- Compensation adjustments must have a Monday effective date.
  *Note: changes may not be visible until weekly payroll is complete.
- Assist with follow up on the completion of the background check link (if applicable).
- Should the workflow be denied, the Submitter will be able to view the denial reason in the Approval Flow section at the bottom of the workflow by clicking on "View Approval History."

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Signature / Date	03/01/2023	03/01/2023	03/01/2023

- If moving forward to correct the denial reason, correct the appropriate information and resubmit the workflow.
- If the request is no longer being pursued, the submitter is expected to delete the submission.

2.2 Next Level Supervisor - The Submitter's supervisor

i. Role in workflow:
- Approve, deny or rescind a change submitted.

ii. Expectation:
- Approve, deny or rescind a change submitted within 3 business days of submitter's submission.
- If a Next Level Supervisor has not completed an action within 5 business days, HR/Payroll will delete the submission and a new change form will be required.

2.3 Human Resources - Human Resources Business Partner or otherwise assigned HR representative.

i. Role in workflow:
- Will ensure the workflow requests are in compliance with Mammoth Holdings' company standards.

ii. Expectation:
- HR will initiate and approve a background check (if applicable) and promotion/position offer letter.
- Will review team members employment records to ensure team member is in good standing.
- Assess alignment with Talent reviews or additional assessments if applicable.

2.4 Accounting

i. Role in workflow:
- Will ensure the workflow requests are in compliance with Mammoth Holdings' company budgets.

ii. Expectation:
- Approve or deny the workflow within 2 business days.

2.5 Payroll

i. Role in workflow:
- Will ensure the workflow requests are in compliance with Payroll practices.

ii. Expectation:
- Regularly audit workflow changes per pay period.

3.0 Initiating a change workflow:

3.1 Within Paylocity, navigate to HR & Payroll from the three bars in the grey box on the top left hand side of the screen.

3.2 From the landing page find the name of the team member you wish to initiate a change for and click on their name where it is highlighted in blue.

3.3 Once into the team members profile, select "Status & History" from the tabs under Employment.

3.4 On the Status & History tab you will see an orange button that reads "Manage Status & Seniority." Select this orange button.

3.5 The new page that opened will display Employee Status information. Toward the bottom of this page will be another orange button that reads, "Change Employee Status." Select this button.

3.6 On this page you will see basic information about the team member in a grey section on the left. Navigate to the section labeled "HR Action."

3.7 Select an action from the "Select HR Action" drop down box to begin the request for change approval.

3.8 Status Change Compensation.

- This option can be selected to make a basic compensation change for the team member.

i. Status Change Compensation change reasons:
   - 90-day Merit Increase
   - Annual Merit Increase
   - Market Adjustment (HR/Payroll Only)
   - New Hire
   - New Hire Correction
   - Promotion
   - Rehire
   - Transfer
   - Voluntary Demotion

3.9 Status Change Leave of Absence.

- This option is utilized internally by the Human Resources Department.

3.10 Status Change Position.

- This option will be selected for changes involving supervisor, employment status, position, location and compensation.
- Please note when submitting a Status Change Position:

- Under the change supervisor section, the Supervisor and Reviewer drop down should reflect the same supervisor in both.
- "Is Supervisor/Reviewer" should be checked if the person is a supervisor.
- **On all promotions, please indicate if the role is a replacement by entering the name of the team member being replaced or note that it is not a replacement.**
- There are three toggles in grey boxes to select Yes/No responses.
- Change Compensation with Position Change?
- Toggle this one to "Yes" if compensation will also change, otherwise leave the default "No" selection.
- Change Pay Settings?
- Leave this marked as the default "No."
- Change Union Settings?
- Leave this marked as the default "No."

3.11 Status Change Termination.

- This option will be used for any team member departing from Mammoth Holdings. You will select one of three workflow options listed below.

i. Voluntary – Notice Un-fulfilled.

- This should be used when a team member leaves on their own terms, but does not fulfill a full two week advance notice of departure or when no advanced notice is given.

ii. Voluntary – PTO Payout Termination

- This option should be used when a team member leaves on good terms with fulfillment of their advanced notice of departure, when state law requires the payout of PTO or HR approved PTO payout. A provided written resignation is required for this action and should be attached within the workflow.
  - Please note, if this option is selected prior to the team members last day and the team member does not end up fulfilling their notice, the submitter should notify HR/Payroll of the updated last day worked. Payroll will hold the workflow in their step of the approval process until the appropriate date and will review timecards when necessary.

iii. Involuntary – Team Member Termination Request

- It is required Human Resources has approved this request PRIOR to the dismissal of any team member. This option will require attached documentation for the approval of dismissal of the team member.

3.12 When the appropriate changes have been entered into the workflow, select the "Submit for Approval" orange button at the bottom of the page.

3.13 A new page will populate highlighting in two columns the before and after of the change.

3.14 Review the highlighted changes to confirm the information is correct. If the information needs to be corrected, select the "edit" button at the bottom of the page and it will take you to the previous page. Once the change information is correct, select the "Submit" orange button at the bottom of the page to initiate the approval workflow.

IV. ASSOCIATED DOCUMENTS

- Payroll Guidelines
- SOP-HR-003

SOP No.	Effective Date	Reason for revision
SOP-HR-002	03/01/2023	SOP Creation
SOP-HR-002	03/21/2023	Added accounting step
SOP-HR-002	03/23/2023	Reorganized change reasons