



Establish a Matrix Team (Matrix Team Manager)

A matrix team allows you to temporarily manage an employee in HR Links who doesn't officially report to you. Matrix teams should rarely be needed, and only when an employee's supervisor is temporarily unavailable to manage the employee in HR Links.

While the matrix team is in place, both you and the "reports to" supervisor can:

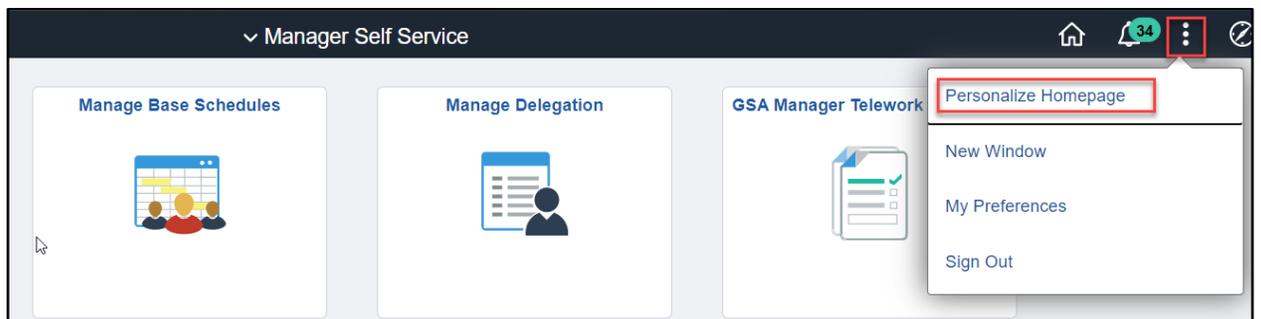
- See the employee in the My Team tile
- Approve timesheets and absence requests
- Create new performance plans
- Approve "Initiate SF-52" requests for the employee
- Receive email notifications about transactions that need approval (leave requests, timesheets, "reviewer" approval for level 5 performance ratings, etc.
- Receive email notifications (emails about probationary periods and upcoming Within Grade Increases, career ladder promotions, and Not-To-Exceed dates).

You will not be able to access the employee's existing performance plan if it was created prior to the matrix team being established. However, the plan can be transferred to you by your [HR's performance management staff](#).

Add Matrix Team Tile

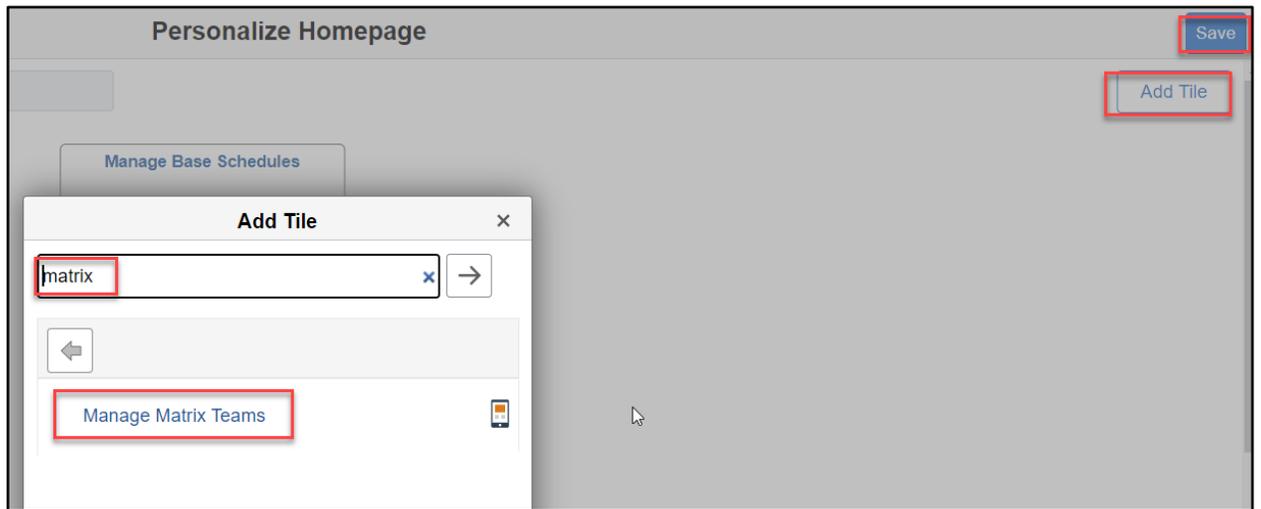
If you don't have the "Manage Matrix Team" tile, you must add it before establishing your matrix team.

1. From the *Manager Self Service homepage* click the Actions list icon and select **Personalize Homepage**.



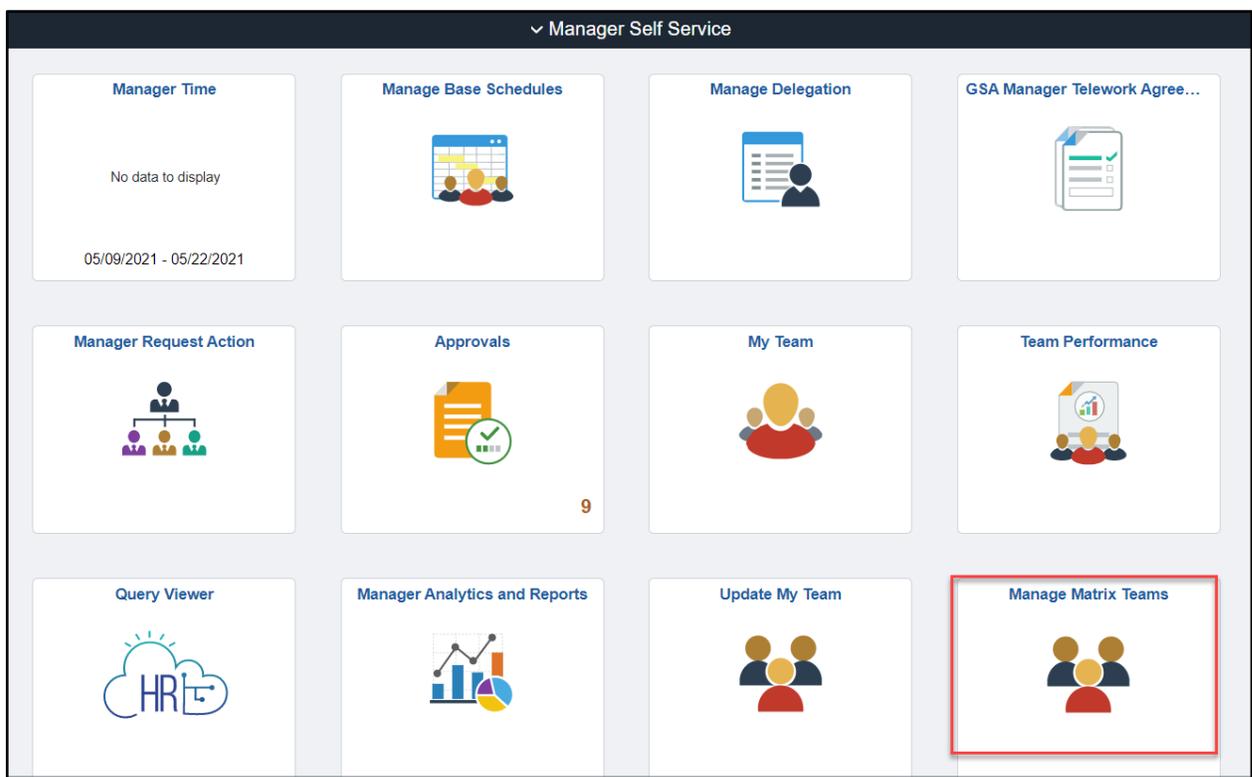


2. Select **Add Tile**. Search for Manage Matrix Teams in the search bar. Select the **Manage Matrix Teams tile** from the list. Select the **Save** button.

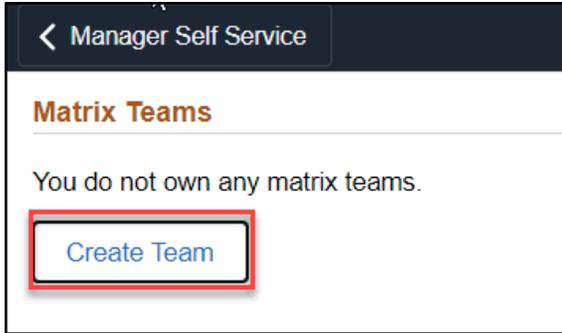


Request Matrix Team from “Reports To” Supervisor

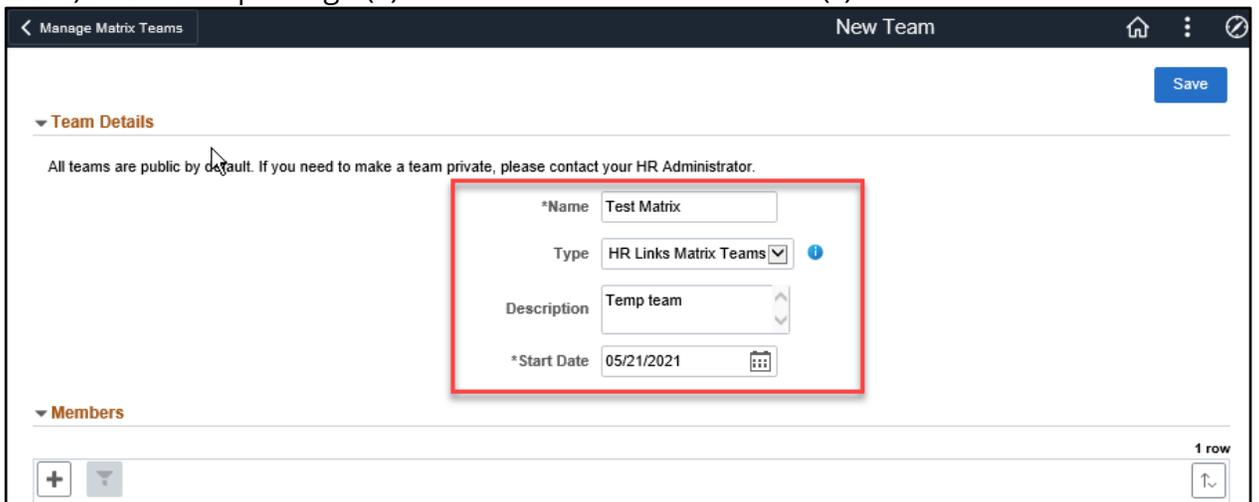
1. From the **HR Links Manager Self Service** homepage, select the **Manage Matrix Teams** tile.



2. Click on **Create Team**.



3. Enter the **Name** of your team, **Matrix Team Type** (select HR Links Matrix teams), **Type Description**, and **Start Date**. (The Start Date cannot be earlier than today's date.) Select the plus sign (+) to add a Matrix Team member(s). Select **Save**.



4. Enter the **employee's email** or **employee's name** to search for the employee you'd like to add to your matrix team. From the search results, select the checkbox next



to the name of the employee. Select **continue**.

Person Search

Cancel Continue

ate,

Search Results 17 rows

<input type="checkbox"/>	Name / Title	Department / Location
<input type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	Sustainability Program Special	Energy & Sustainability Branch TX-FORT WORTH-FB Taylor St
<input checked="" type="checkbox"/>	Management & Program Analyst	HRS Technology Center DE-HOCKESSIN-HOME

5. Enter the **Start Date** (cannot be earlier than today's date), **End Date** (NTE Date), and whether they are a **Team Lead**. The **Role inTeam** should remain "Member". Select **Done**

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Back Done

Member Details

[Redacted]

Start Date

End Date

Role in Team

Team Lead



6. Select **Save**.

Team Details

All teams are public by default. If you need to make a team private, please contact your HR Administrator.

*Name: HRT2T Detail
Type: HR Links Matrix Teams
Description: HRT2T Matrix Team
*Start Date: 05/24/2021

Members

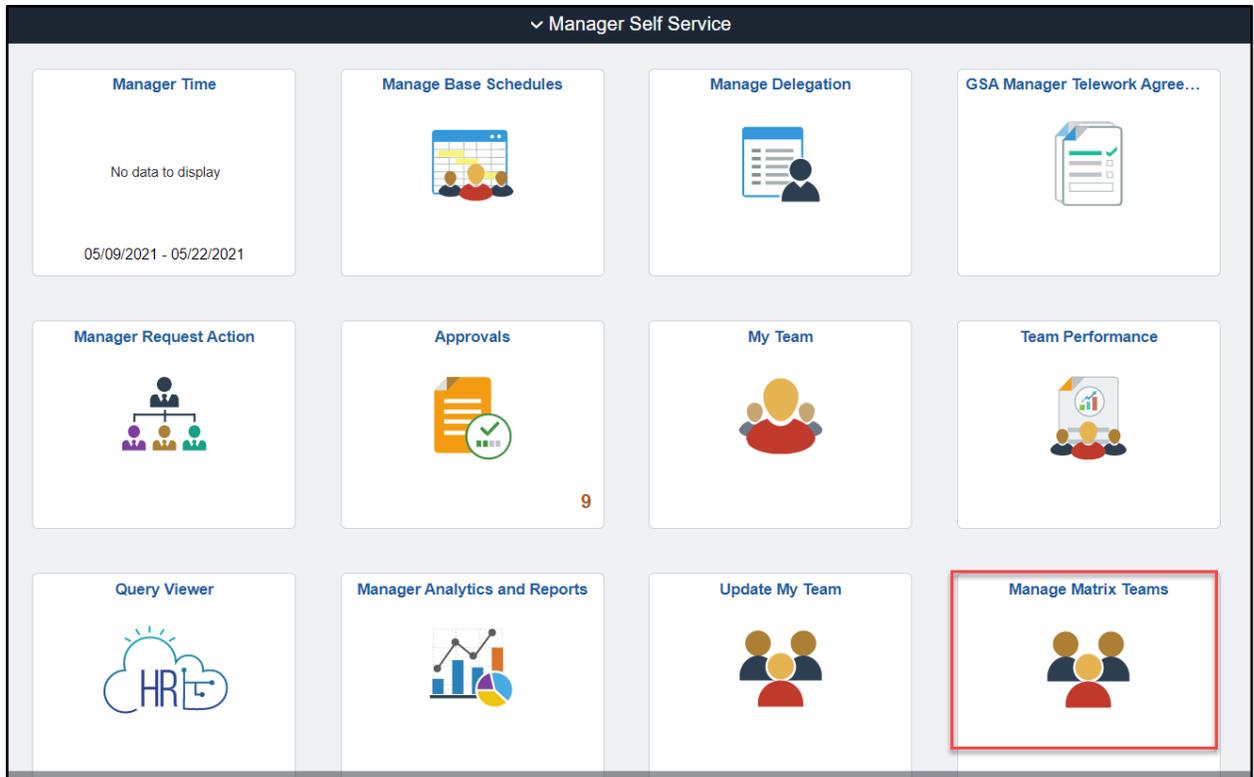
Name/Job Title	Start/End Date	Status	Role in Team/Team Lead	Email/Phone
Management and Program Analyst	05/19/2021	Active	Owner	
Management & Program Analyst	05/24/2021	Draft	Member	

7. The 'reports to' supervisor will now approve the Matrix team in HR Links.

Manage and Inactivate Matrix Teams

Once the Matrix Team is no longer needed, the matrix team Manager needs to update the status to "Inactive". This step is only required if a matrix team is ending early, or the end date was left blank when the matrix team was set up.

1. From the **HR Links Manager Self Service** homepage select the **Manage Matrix Teams** tile.



2. Select the active Matrix Team.



3. Expand the **Team Details** Section. Update the Status to **Inactive**. Select **Save**.

