



Viewing an Employee's Form 5 (Notification of Personnel Action)

Quick Sheets

09-21-2011



View an Employee's Form 5

Description: Official electronic copies of employee's Form 5s are stored in eHR.

Important Notes: Only the Form 5s that were generated and printed via eHR (those generated for the 2010-2011 School Year forward) are available in eHR to be downloaded. Employees will continue to receive a hard copy Form 5.

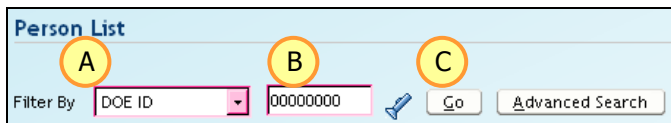
1. Under **Module** drop down menu, select **Employee Transactions**.



2. The Quick Search **Filter By** drop-down menu defaults to **DOE ID**. **A**

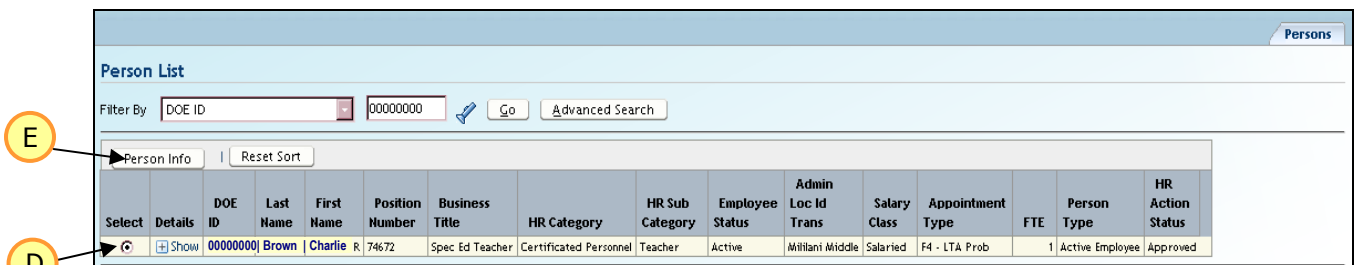
To search for an employee using other categories in the drop-down menu (Last Name, First Name, SSN, Position Number, or Job Class ID) or to search by multiple criteria via Advance Search, see Appendix A.

3. Type in the employee's unique 8-digit number. **B**
4. Click the **Go** button. **C**



NOTE: To search for another employee, simply replace the DOE ID that was typed in with the new employee to be searched for.

5. Select the **radio** button for the employee. **D**
6. Click the **Person Info** button. **E**





eHR Viewing an Employee's Form 5

7. Click the **Documents** tab. **F**

Person Info: 00000000 Brown, Charlie

DOE ID: 00000000 Last Name: Brown First Name: Charlie Middle Name: R

Documents

8. A list of all the Form 5s printed will appear.
9. Click on **Download Document** link of the Form 5 you wish to view. **G**

NOTE: If you click on another document without closing the window of the first document viewed, the new document will override the first document. A new window will NOT appear.

Person Info: 00000000 Brown, Charlie

DOE ID: 00000000 Last Name: Brown First Name: Charlie Middle Name: R

Documents

Filter By: Document Label

Select	Document Type ID	Document Label	OS File Extension / Type	Effective Date	Effective Date Seq	Action	Reason	HR Action Status	End Date	Download Document	Delete?
<input checked="" type="radio"/>	Personnel Action Form	Mass PAY/NSS July 2011 - E63 on 22-JUN-2011 (8120958)	Adobe PDF	07/01/2011	1	Pay Rate Change	New Salary Schedule	Approved	06/22/2011	Download Document	
<input checked="" type="radio"/>	Personnel Action Form	Year-Beg Personnel Action Form -- Final Run on 13-MAY-2011 (8018954)	Adobe PDF	07/01/2011	0	Appointment	Re-appointment	Approved	05/13/2011	Download Document	
<input checked="" type="radio"/>	Personnel Action Form	Mass PAY/FLUR July 2010 (7576648)	Adobe PDF	07/08/2010	2	Pay Rate Change	Furlough	Approved	07/21/2010	Download Document	
<input checked="" type="radio"/>	Personnel Action Form	07-08-2010 (7479610)	Adobe PDF	07/08/2010	1	Appointment	Re-appointment	Approved	07/08/2010	Download Document	

H Column Headers and Description of Data

Column	Description
Document Type ID	Type of document (Personnel Action Form = Form 5)
Document Label	Description of Document
OS File Extension/Type	Document Type (Form 5s are all Adobe-PDF format)
Effective Date	Effective date of the Form 5
Effective Date Seq	Sequence order of Form 5s for the same effective date
Action	Action description
Reason	Reason description
HR Action Status	Status of the action
End Date	Date the Form 5 was printed
Download Document	Link to download the document

10. Click the **Back** button or use the *breadcrumb trail* to return to the search screen.



Appendix A: Filters & Sorts

Important Note: The maximum amount of search results that can be displayed at a time is 500. If the amount of search results exceeds 500, an error message will appear. See the Advanced Search section below on how to narrow down your search results.

Quick Search (Filter By)

Description: Allows you to search for a particular employee by one primary filter.

Important Notes: Search results include the latest action for active, on leave, and inactive (separated) employees.

Search for an employee by Last Name, First Name, SSN, Position Number or Job Class ID

1. Select filter (Last Name, First Name, etc.) in the **Filter By** drop-down menu. **A**
2. A secondary drop-down menu will appear.
3. Select an item. See chart below for details about each item. **B**
4. Type in the information to search by. **C**
5. Click the Go button. **D**

Drop-down Options	Description
Equals	the system will search for an exact match to the value enter (e.g. DOE ID = 12345678)
Contains	the system will search for all records that include the value entered (e.g. Last Name contains 'Le' would retrieve <u>Le</u> , <u>Lee</u> , <u>Lea</u> , <u>McLean</u> , etc.)
Starts With	the system will search for all records that being with the value entered (e.g. First Name starts with 'Mary' would retrieve <u>Mary</u> , <u>Maryann</u> , <u>Mary Ann</u> , <u>Mary Jo</u> , etc.)
Ends With	the system will search for all records that end with the value entered (e.g. DOE ID ends with 5678 would retrieve 1234 <u>5678</u> , <u>54745678</u> , <u>5555678</u>)



Advanced Search

Description: Allows you to search by selecting multiple filters.

1. Click on the **Advance Search** button.
2. Enter text to search for into textboxes and/or select criteria from drop-down menus. The first six filters are the same filters available in the Quick Search. For detailed description of the filters, see table below.
3. Click the **Find** button.

For example: To search for all active certificated employees at a particular location that have an Appointment Type of Probationary (F4).

The screenshot shows the 'Person List' search interface. It includes a search criteria section with radio buttons for 'Result matches all conditions' (selected) and 'Result matches any condition'. Below this are several filter fields:

- Case Sensitive? (checkbox)
- DOE ID: [text box]
- Last Name: [text box] starts with [dropdown]
- First Name: [text box] starts with [dropdown]
- SSN: [text box] equals [dropdown]
- Position Number: [text box]
- Business Title: [text box]
- HR Category: [dropdown] (Certificated Personnel)
- HR Sub Category: [dropdown]
- Employee Status: [dropdown] (Active)
- Administrative Location: [text box] (292)
- Paycheck Location (Warrant): [text box]
- Salary Class: [dropdown]
- UAC Object Code: [dropdown]
- Job Class ID: [text box]
- Appointment Type: [dropdown] (F4 - LTA Prob)
- Effective Date: [text box]
- School Year Number: [text box]
- Bargaining Unit: [text box]
- FTE: [text box]
- Payroll Number: [text box]
- Salary Plan: [text box]
- Track: [text box]
- Comment: [text box]
- From Probation Semester: [dropdown]
- To Probation Semester: [dropdown]
- Person Type: [dropdown]
- District: [text box]
- HR Action Status: [dropdown]

 At the bottom are buttons for 'Find', 'Clear', and 'Quick Search'.

4. To clear all fields, click on the **Clear** button.
5. To return to Quick Search, click on the **Quick Search** button.

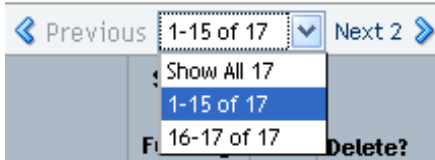
Field Descriptions for Advanced Search Options

Field	Description
Business Title	Same as Position Title
HR Category	Certificated Personnel or Classified Personnel
HR Sub Category	Civil Serv, EO, SSP or Teacher
Employee Status	Active, Leave With Pay, Leave of Absence, Retired, Separated, etc.
Administrative Location	Official Location of the position
Paycheck Location (Warrant)	Paycheck location
Salary Class	Casual, Salaried, or Substitute
UAC Object Code	10-month Position or 12-month Position
Job Class ID	5-digit job class code (aka Occupational Group Code)
Appointment Type	Appointment code for the employee
Effective Date	Effective date of the highest action row
School Year Number	Search by school year (e.g. For SY 2010-2011 enter in 2010)
Bargaining Unit	Employee's bargaining unit (e.g. 05 = HSTA full-time teachers)
FTE	FTE of the employee (e.g. full-time = 1.0; half-time = 0.5)
Payroll Number	Assigned payroll number
Track	Track number for multi-track schools or PCS
From & To Probation Semester	Use with only appointment type F4 and FT
Person Type	Active Employee or Former Employee
District	Search by 2-digit district code (e.g. Honolulu District = 10)
HR Action Status	Find employees with highest action row that is approved or pending



Select Number of Record Display

Pages default to a set number of records. In the example below, the default number is twenty (20) records. Additional records may be displayed by using the drop down menus, or the previous and next buttons located on the right.



Sorting Results By Columns

Description: Multiple results can be sorted in ascending or descending order by any column header.

Important Notes:

1. Click the column header to quickly sort results shown. One click will sort the results in ascending order and two clicks will sort the results in descending order.

For example: If you click on the column header for Last Name, the results will appear in ascending order alphabetically by last name. If you click on the column header for Last Name again, the results will appear in descending order.

Select	Details	DOE ID	Last Name	First Name	Position Number	Business Title	HR Category	HR Sub Category	Employee Status	Admin Loc Id Trans	Salary Class	Appointment Type	FTE	Person Type	HR Action Status
		10101214	Brown	Sandra	60216	Secondary Teacher	Certificated Personnel	Teacher	Active	Dole Middle	Salaried	F1 - Tenured	1	Active Employee	Approved
		10011121	Candy	Sandra	61594	Elem Teacher	Certificated Personnel	Teacher	Active	Maemae Elem	Salaried	F1 - Tenured	1	Active Employee	Approved
		10112774	Douglas	Sandra	75191	12-Mo Student Svcs Coord	Certificated Personnel	Teacher	Active	Haiku Elem	Salaried	F1 - Tenured	1	Active Employee	Approved
		10131331	Everest	Sandra	66649	Elem Teacher	Certificated Personnel	Teacher	Active	Late Elem	Salaried	F1 - Tenured	1	Active Employee	Approved
		10111714	Fancy	Sandra	76067	Spec Ed Tchrr/Pre-School	Certificated Personnel	Teacher	Active	Kailua Elem	Salaried	F1 - Tenured	1	Active Employee	Approved
		10854711	Green	Sandra	67392	Secondary Teacher	Certificated Personnel	Teacher	Active	Pearl City High	Salaried	F1 - Tenured	1	Active Employee	Approved
		10101816	Hungry	Sandra	68163	Secondary Teacher	Certificated Personnel	Teacher	Active	Keaau Middle	Salaried	F1 - Tenured	1	Active Employee	Approved
		10778214	Joker	Sandra	602374	Dist Off Tchrr	Certificated Personnel	Teacher	Active	Maui Elem	Salaried	F1 - Tenured	1	Active Employee	Approved
		10131133	Kramer	Sandra	73381	Counselor	Certificated Personnel	Teacher	Active	Waipahu Inter	Salaried	F1 - Tenured	1	Active Employee	Approved
		10771214	Lover	Sandra	60485	Secondary Teacher	Certificated Personnel	Teacher	Active	Maui High	Salaried	F1 - Tenured	1	Active Employee	Approved

NOTE: An up or down triangle will appear next to the column header that is currently being sorted. The up triangle (▲) means that it is sorted in ascending order and the down triangle (▼) means descending order.

2. To return the results back to the original view, click the **Reset Sort** button.