



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

Quick Sheets

07-16-2021

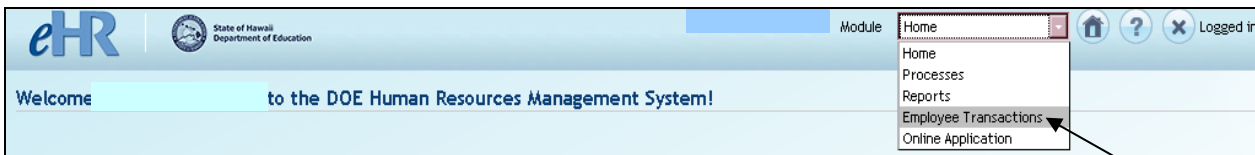


View an Employee's Form 5

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.

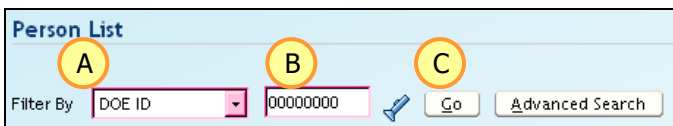
- Under **Module** drop down menu, select **Employee Transactions**.



- 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.

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

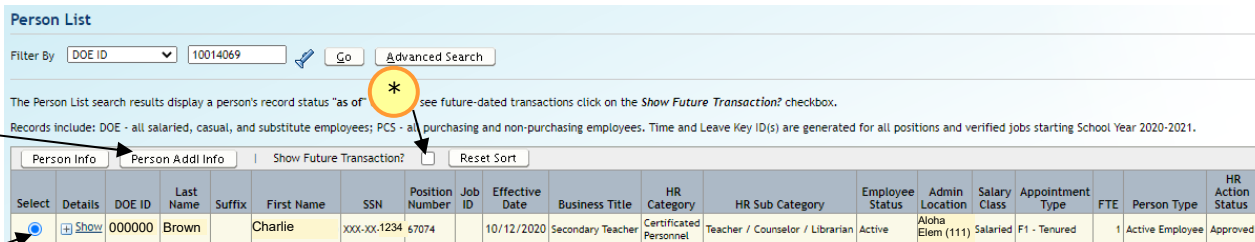


NOTE: To search for another employee, simply replace the DOE ID that was typed in with the new employee to be searched for.

- Select the **radio** button for the employee. **D**

NOTE: If the employee is new to DOE and/or has a future dated action, click on the box next to "Show Future Transaction?" *****

- Click the **Person Addl Info** button. **E**





eHR Viewing an Employee's Form 5

7. A list of all the employee's documents will appear.
8. To see only the employee's Form 5s
 - a. Change the Filter by to Document Type ID
 - b. Select Personnel Action Form from the drop-down menu
9. Click on **Download Document** link of the Form 5 you wish to view.

NOTE: If you would like to download all of the employee's Form 5s into one PDF, you can click on the Merge All Form 5s button.

The screenshot shows the 'Person Additional Info' for Charlie Brown. The 'Documents' section is filtered by 'Document Type ID' to 'Personnel Action Form'. A table lists two documents, both Adobe PDFs. Callout J points to the 'Return to Person List' link. Callout F points to the filter dropdowns. Callout G points to the 'Download Document' link in the table. Callout H points to the table headers.

Select	Document Type ID	Document Label	OS File Extension / Type	Effective Date	Effective Date Seq	Action	Reason	HR Action Status	End Date	Download Document	Annu?	Delete?
<input checked="" type="radio"/>	Personnel Action Form	MASS Action Form -- MASSUPD9934 (12292658)	Adobe PDF	07/27/2020	0	Pay Rate Change	Adjustment	Approved	10/15/2020	Download Document	No	
<input type="radio"/>	Personnel Action Form	MASS Action Form -- MASSUPD9934 (12292525)	Adobe PDF	07/01/2020	0	Pay Rate Change	New Salary Schedule	Approved	10/15/2020	Download Document	No	

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> , 5474 <u>5678</u> , 555 <u>5678</u>)



eHR Viewing an Employee's Form 5

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:

- DOE ID: [text box]
- Last Name: [text box] with a dropdown set to 'equals'
- First Name: [text box] with a dropdown set to 'starts with'
- SSN: [text box] with a dropdown set to 'equals'
- Position Number: [text box]
- Job ID: [text box]
- Effective Date: [text box]
- Business Title: [text box]
- HR Category: [dropdown menu] set to 'Certificated Personnel'
- HR Sub Category: [dropdown menu]
- Employee Status: [dropdown menu] set to 'Active'
- Administrative Location: [text box] set to '272'
- Paycheck Location (Warrant): [text box]
- Salary Class: [dropdown menu]
- UAC Object Code: [dropdown menu]
- Job Class ID: [text box]
- Appointment Type: [dropdown menu] set to 'F4 - LTA Prob'
- School Year Number: [text box]
- Bargaining Unit: [text box]
- FTE: [text box]
- Payroll Number: [text box]
- Salary Plan: [dropdown menu]
- Track: [text box]
- Comment: [text box]
- From Probation Semester: [dropdown menu]
- To Probation Semester: [dropdown menu]
- Person Type: [dropdown menu]
- Division / District: [dropdown menu]
- HR Action Status: [dropdown menu]
- Time and Leave Key ID(s): [text box]

 At the bottom left, there 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.

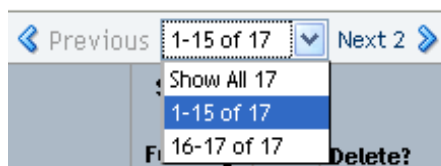
Field Descriptions for Advanced Search Options

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	Suffix	First Name	SSN	Position Number	Job ID	Effective Date	Business Title	HR Category	HR Sub Category	Employee Status	Admin Location	Salary Class	Appointment Type	FTE	Person Type	HR Action Status
<input checked="" type="radio"/>	Show	10101214	Brown			XXX-XX-5264	67074		10/12/2020	Secondary Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10011121	Candy			XXX-XX-4997	67249		10/12/2020	Secondary Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10112774	Douglas			XXX-XX-7208	79530		10/12/2020	Spec Ed Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10131331	Everest			XXX-XX-3139	72981F		10/12/2020	12-Mo Student Svcs Coord	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10111714	Fancy			XXX-XX-5990	60798		10/12/2020	Secondary Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10854711	Green			XXX-XX-2714	66747		10/12/2020	Secondary Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10101816	Hungry			XXX-XX-1813	60712		10/12/2020	Librarian	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10131133	Joker			XXX-XX-2080	607241		10/12/2020	Secondary Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10778214	Kramer			XXX-XX-5199	72756		10/12/2020	Spec Ed Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	Salaried F1 - Tenured		1	Active Employee	Approved
<input type="radio"/>	Show	10771214	Lover			XXX-XX-3125	73320		10/12/2020	Spec Ed Teacher	Certificated Personnel	Teacher / Counselor / Librarian	Active	Aloha Elem(111	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.