

eHR Projected School List Quick Sheets



Projected School List (PSL)

Quick Sheets

01-13-2017



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About the Projected School List

The **Projected School List** (PSL) is for certificated employees only. The Projected School List is completed after the Financial Plan has been submitted and is used to project reappointments for certificated employees for the upcoming school year. During the automatic generation of a Projected School List in the eHR system, tenured and qualified probationary teachers are automatically reassigned to their current positions. Non-tenured teachers and qualifying probationary teachers who will become tenured are automatically unassigned.

Enhancements and Updates:

OHR is constantly striving to make improvements to eHR and our processes. You will notice quite a few enhancements from last year's process. We continue to welcome your feedback and suggestions. A few of the enhancements you'll see:

- Projected School List process cases will now be automatically generated
 - All projected school lists will be automatically generated prior to the opening dates listed on Projected School List Check List (page 5).
 - See page 7 for step by step instructions on how to access your Projected School List.
- Projected School List process cases cannot be cancelled
 - All projected school lists cannot be cancelled or deleted without a request to your PRO who will notify the appropriate system administrators.
- Reminder Emails
 - All principals and state/district offices secretaries (PROs will receive a summary email) will
 receive reminder emails regarding the deadlines for PSL if the process case has not been
 submitted.

Important Notes / Tips:

- DO NOT use the internet browser back arrow.
 - If you accidentally click the back arrow, try clicking on refresh to see if your connection can be re-established.
- For security purposes the system will automatically time out after thirty (30) minutes of inactivity. A five minute warning message will pop-up before you are logged out.
- 'Ctl F' will bring up a search function within your internet browser. This can be helpful when looking for an individual within a large school list.
- Common Error Message section located at the end of the Quick Sheets. This can be helpful when an error message pops up while trying to complete an action or process.





eHR Projected School List Quick Sheets

Projected School List Check List

	Checklist Items	Page No.	Deadline
Workir	ng on your Projected School List		
	Access automatically generated Projected School List	7	01-17-17
	Review your Summary Page. Make sure that your Financial Plan totals have been uploaded.	Appndx 44	
	Print a Seniority Report if you have any displaced teachers.	31	
	 Review and update your generated Projected School List: A. <u>Review your Buy/Sell List</u>. Make sure all positions have been extended, reactivated, or abolished. Keep a Bought Position (to extend) Re-activating a Sold Position Abolish a Position B. <u>Make position changes</u>. Change Position Subject Area Create a New Position Funding Changes Position FTE Changes C. <u>Review your Leave List</u>. Take care of all employees on leave. Make sure all employees who are currently on leave have an updated PSL action. Review your Non-Projected List. There should be no names on this list. If there are names on the list review FAQ #19. Make employee changes. Resign/Retire Unassign a Teacher 	8 10 12 19 13 16 18 FAQ's 21 22	
	 Blace an Employee on Leave Without Pay Transfer a Employee to Another Position Return Employee from Leave Fill a Vacant Position Change Employee FTE 	27 23 25 24 29	
	Check that all vacant positions have a teacher subject area by going to the summary page, looking at Part B, Vacant Positions, and clicking on the +Show button. If changes/updates are needed, see instructions on page 21, Change a Position Subject Area and/or Grade Level. NOTE: These subject areas will be reflected in your TATP Posting.	37	
When	ready to submit your Projected School List		
	Review your Leave List, Buy/Sell List, and Non-Projected List.		
	Review your Summary Page. Make sure that all of your WSF totals match. If your WSF totals exceed your allocated amount, you will NOT be able to submit your Projected School List.		
	Add comments for the PRO. Submit your Projected School List.	30	4:30pm 01-30-2017



Getting Started

Log in to eHR System via the CHAP Portal

Important Notes:

- A DOE OE ` \^ÁQEÖ Password is necessary. This the same password used for Õ{ an ADOHÊ
 Q.-a, ac/ÁOaq] ` ADA à ADA construction of ADA and ADA construction of ADA and ADA construction of ADA and ADA construction.
- If you do not have a DOE Œ ` \^ÁŒ Password or are experiencing log in difficulties, please contact the Q/ÁP^|] Desk at (808)Í Î I -Î €€€ between the hours of 7:45am and 4:30pm HST Monday through Friday except on State/Federal holidays.
- 1. Open up an internet connection (i.e. Òå*^ÊÔ@[{ ^, Mozilla Firefox, and Safari).
- 2. Type in the URL address: http://\]XcYcha .cf[
- 3. Click on Launch eHR.
- 4. You will need your Azure AD User Name and Password.
 - Your Azure AD User Name is your Employee ID and @k12.hi.us. Your Employee ID Number may be listed on your DOE ID Badge.
 - Your Password is your DOE Azure AD Password as you use for Gmail.
- 5. Click on the **DOE Employee Login** button.

**NOTE: See Appendix A for instructions on how to log back into an existing case

eHR Awal'i State Department of Education	Sys
System Availability Daity, 2:00am - 1:00am, Hawaii Standard Time (HST) "Please check System Messages after logging in for additional information on planned system outages.	
Non-DOE Employee Login	DOE Employee Login
* Username * Password	DOE Employee Login
Reminder: Passwords are case sensitive.	
* Unauthorized use of this site is prohibited and may subject you to civil and criminal prosecution.	Current DOE Employees: <u>Username</u> is your employee ID plus "@k12.k12.hi.us" or employeeID@k12.hi.us Your Employee ID number can be found on your DOE ID badge. <u>Password</u> is your DOE password as used in Gmail, Infinite Campus, ServiceNow PDE3 and SSES.
Registered users (non-DOE employees):	FOR PASSWORD ASSISTANCE ONLY: Call the IT Help Desk, Monday-Friday:
<u>Username</u> is the Email Address you registered with. Password is the password you registered with.	 Oahu - (808) 564-6000



Accessing Automatically Generated Projected School List
Description: This process is used to access the Projected School List. The process case has automatically been generated for you.
Important Note: If you see a Projected School List that is not at your authorized location, contact your PRO immediately.
1. Under <i>Module</i> drop down menu, select Processes .
effe States of Module Home Operations of Module Home
Welcome to the DOE Human Resources Management System! Reports Reports Online Application
2. The Pending Cases tab is displayed by default. This shows all your pending cases.
NOTE: If the process case you are looking for is not displayed, click on Show All Cases.
Projected School List and the Process Case Label will be "PSL 2015 – location"
4. Click on Go to Case button.
Instance: HRPARA
System Date/Time: 01/15/2014 13:17:00
Pending Cases Start Process
Filter By Process Case Label
Go To Case Re-Run With Params Edit Process Label Show All Cases
Process Case Step Step Step Step Step Step Step Ste
B 🗄 Thow Maintain Projected School List 1096220 PSL 2015 Watalua High & Inter - (232) Pending Submittal Watalua High & Inter (232) 01/14/2014



eHR Projected School List Quick Sheets

Projected School List - Position Transactions

Keep a	a Bought F	Position	via the	approve	ed AFP										
Descrip	otion: These	e instructi	ons illus	trate how	to extend a b	ought posi	tion that v	vas incluo	ded in the	e FP FTE.					
Importa	portant Notes: The Buy Sell List must be cleared before submitting the PSL														
<u>Quick T</u> Change	<u>ips</u> : FTE ai es and/or Pc	nd/or Tea sition Sul	cher Sub oject Are	oject Area a and/or	changes ma Grade Level	y be made Change se	at the sar ction for ir	ne time. Istruction	See the is.	Position F	TE				
1.	 Bought Positions may be accessed via the Buy Sell List view. Select the radio button of the existing bought position you need to extend. A 														
3.	 Select the radio button of the existing bought <i>position</i> you need to extend. A Click the Position Transaction button. B 														
	Filter By Posn No B Advanced Search														
	Employee Transaction Position Transaction Fill Position Create Position Update Retro I Show Previously Abolished? Reset Sort & Previous 30 61-78 of 78 Next Posn Position Tk Last First Employee Appt Posn Emp Action Position														
A	Select Details N	o Status 643 Active	No PC	DOE ID Nam 10092217 Brow	ne Name Stat	us Position signed Spec Ed Te	Title Type eacher F4 (0	• FTE •2) 1	FTE Action 1 Unassign	Effective Date	Reason Posn Qual				
	C	632 Active 391 Active	4 P 7 T	10093333 White 10093499 Mous	e Sara Acti e Steffany Acti	ve Elem Teaci ve Spec Ed Te	her F1 eacher F1	1	1 Appoint 1 Appoint	07/01/2011 07/01/2011	Posn Qual Updt Posn				
5. 6. 7. 8. 9.	Click Add I Leave the I Under Acti Under Rea In the Com	Row butto Effective I fon colum son colur ament boy	on. Date and n drop d nn drop k, note cl	l Sequenc own men down mei nanges be	ce Number. (u, select Upc nu, select Ke eing made. (C 72934X 07/7 72934X 02/7 Exception: ate Positic ep Bought	Multi-track on. C Position	sate Position Extern late Position Update schools u	d Approved Position Approved Se: 7/1/14)					
	Current Position A	ction:													
	Position Select Number	≢ Eff Dt	≠Eff Dt Seq ≠Actio	C	Reason	HR Action Status	Process Case Step Key	Position Details	Funds Position Q	ualifications Position Inc	Job Class Info				
		07/27/2011	0 Update 0 Update F	Position Ke	eep Bought Position ange Position Qualification	Pending Submit	tal 115462		Effective Date : 07, HR Category: Cer HR Sub Category: Tea	/01/2010 00000 rtificated Personnel acher / Counselor / Libraria	Pc ≢. ∩				
	O 61607	05/31/2010 07/28/2009 08/30/1989	0 Update F 0 Update F 0 Add Posit	Position Upo	ange Position Qualification date Position w Position	Approved Approved	-2 -2 -7	Appointme	Position Status: Act Position Control: Ter Salary Class: Salary	nporary aried	# Barg # Object of E:				
(E Comment:							Branci S • Admini	Division / District: Lee h / Complex Area: CA ection / Complex: Cor istrative Location: 282 © Office Location: 282	eward District (30) Campbell-Kapolei (931) mplex-Kapolei (835) 2 Kapolei Elem 2 Kapolei Elem	34 UAC O DOE School Ye				
10.	Click Edit I The Positic	Position I In Status	Details a will chan	at the bott ge to Acti	om of the Po ive.	sition Deta	ails tab.	CSSP Info Civit S Edit Position Do	Civil Servic Gervice Exemption Not- emporary Reclass Not- (FLSA ShowAudit	e Exempt Status: Exempt to-exceed Date: Legal Authority: Consent Decree: Exemption Flag:	Category A (Engaged in 1				



Keep a Bought Position via the approved AFP



13. In the Budget Program ID field click on the Search (flashlight).

	Position Details Funds Position Qualifications Position Incumbents															
	Add Row															
Se	ect	Effective Date	≢ Budget Program ID	Description	* Position Control	Budgeted Flag	≭ Job Class ID	Fund Source	UAC Appr ID	¥Fund Location ID	UAC Object Code	Object of Expenditure	Exp Obj Id Trans	UAC Proj ID	¥ Fund Percent	Delete?
	•	07/01/2011 0	42101 🧳	-	Permanent	V	50520			282 🧳	2500 💽	2510	Elem Teacher		100	

- A pop-up window listing available Budget Programs will appear.
- 14. Select the **radio** button for the **Program ID** you would like to use.
- 15. Click Select button.
 - The *ID* will appear in the box under *Budget Program ID* field. The *Description*, *Fund Source, UAC Appropriation ID* and *UAC Project ID* will also appear.
- 16. The Job Class field will automatically populate. Review and make any necessary changes.
- 17. If the funding is split between two different sources, click the Add Row button in the Position Funds to add an additional funding source. Follow steps 13 to 16 above. Change Fund Percent to 50% for each of the two rows.
- 18. Click Save Changes button.
- 19. Click Back button
- 20. On the Projected List, the Position Status should now show *Active* and the Position Reason column will show *Bought Pos* in red.
 - If the Position Status still shows Act-Bght, go back into the Position Transaction and follow instructions on Step #10 to Edit Position Details.



Re-activating a Sold Position via the approved AFP														
Description: These instructions illustrate how to re-activate a sold position that was included in the FP FTE.														
Important Notes: The Buy Sell List must be cleared before submitting the PSL														
<u>Tips:</u> FTE and/or Teacher Subject Area changes may be made at the same time. See the Position FTE ges and/or Position Subject Area and/or Grade Level Change section for instructions.														
1. Sold Positions may also be accessed via the Buy Sell List view. Projected List Temporary List Early Return List Buy Sell List Leave Lis														
2. Select the radio button of the existing sold position you need to reactivate.														
3. Click the Position Transaction button. The Position Transaction page will appear.														
4. Click Add Row button.														
5. Leave the Effective Date and Sequence Number. (Exception: Multi-track schools use: 7/1/14)														
6. Under Action column drop down menu, select Update Position. (A)														
7. Under <i>Reason</i> column drop down menu, select Re-activate Sold Position. B														
8. In the <i>Comment</i> box, note changes being made.														
Current Position Action:														
Select Position * Eff Dt bt self A B HR * Reason HR Status Process Case Step Key Image: Select Constrainty of the select Constrain														
60740 07/28/2010 0 Update Position Sell Position Approved -88094 60740 05/31/2010 0 Update Position Change Position Qualification Approved -2														
9. Click Edit Position Details at the bottom of the Position Details tab. The Position Status changes to Active. Position Info Position (Info Position Info Understand Pages Position Info Position (Info Position Info </td														
10. Click on the <i>Position Funds</i> tab. D														
11. Click Edit Position Funds button. E														
Position U Funds Position Qualifications Position Incumbents														
Snow Augritute Function Function F *Budget *Job UAC *Fund UAC														
Program *Postion Budgeted Class Fund Appr Location Object Object Fund Fund Select Effective Date ID Description Control Flag ID Source ID ID Code Expenditure Id Trans ID Delete? © 07/01/2009 00000 42/01 WSF-Instruction(42101/10) Permanent ID 552/0 G 010 28/0 2510 Elem Teacher Hot 100 ID														



Re-activating a Sold Position via the approved AFP

12. In the Budget Program ID field click on the Search (flashlight) a pop-up window will appear.

Pos	tion Details	Funds Posit	tion Qualification	ns Position	Incumbents										
Add	Add Row														
Select	Effective Date	∓Budget Program ID	Description	★ Position Control	Budgeted Flag	≭ Job Class ID	Fund Source	UAC Appr ID	∓Fund Location ID	UAC Object Code	Object of Expenditure	Exp Obj Id Trans	UAC Proj ID	≢Fund Percent	Delete?
۲	07/01/2011 0	42101	-	Permanent	V	50520			282 🚀	2500	2510	Elem Teacher		100	

- 13. Select the radio button for the Program ID you would like to use.
- 14. Click Select button.
 - The *ID* will appear in the box under *Budget Program ID* field. The *Description*, *Fund Source, UAC Appropriation ID* and *UAC Project ID* will also appear.
- 15. The Job Class field will automatically populate. Review and make any necessary changes.
- 16. If the funding is split between two different sources, click the Add Row button in the Position Funds to add an additional funding source. Follow steps 12 to 15 above. Change Fund Percent to 50% for each of the two rows.
- 17. Click Save Changes button.
- 18. Click Back button.
- 19. On the Projected List view, the Position Status should now show Active and the Position Reason column will show *Reactivate* in red.
 - If the Position Status still shows Inact-Sold, go back to the Position Transaction and follow instructions on Step #9 to Edit Position Details.

Re-activating a Previously Abolished Position
Description: Re-activating a previously abolished position that was included in the FP FTE.
Important Notes: Please contact your PRO to re-activate the position number.
1. To view previously abolished positions, click the "Show Prev Abolished?" check box.
Filter By Posn No
Employee Transaction Position Transaction Fill Position Create Position Show Prev Abolished? Reset Sort Previous 1-30 of 55



Abolish a Position Description: These instructions illustrate how to abolish position. Important Notes: The position must be vacant in order to abolish. Transfer or unassign any employees first. А 2. Select the radio button of the position you need to abolish. 3. Click the **Position Transaction** button. Filter By Posn No -B o Advanced Search Employee Transaction Position Transaction Fill Position Create Position Update Retro | Show Previously Abolished? 🔲 Reset Sort Tk Last First Employee Status Appt Emp Emp FTE Action Emp Action Posn Position Posn Position DOE ID Effective Da ct Details PC Type Reason А ▶₀ 10092217 Brown Unassigned ec Ed Teache F4 (0-2) 07/01/2011 Active Kimberly 1 Unassign Posn Oual H Show + Show 72632 10093333 White Sara Active Elem Teacher F1 1 Appoint 07/01/2011 Posn Qual Active 4 P 0 + Show 60391 Active 7 T 10093499 Mouse Steffany Active Spec Ed Teacher F1 1 Appoint 07/01/2011 Updt Posn -11 Current Position Action Show Audit Info Add Row The Process Position page will appear. 4. Click Add Row button.-5. 72934X 72934X Update Position Extend Update Position Update Position 11561 02/01/2010 0 6. Leave the Effective Date and Sequence Number. (Exception: Multi-track schools use: 7/1/14) С 7. Under the *Action* column drop down menu, select *Abolish Position*. The **Reason** column will automatically populate with Abolish Position. 8. In the *Comment* box, add a comment indicating why the position is being abolished or deleted. Е 9. Current Position Action: 2 Position Details Funds Position Qualifications Position Incumbents rocess Position Info Job Class Info Case Effective Date : 07/01/2010 00000 HR Category: Certificated Personnel HR Sub Category: Teacher / Counselor / Librarian Position Status: Active HR Action Step Position Dt С D Number **∓**Eff Di Sec . # ≜etic ₩ P Status Кеу Salary Class: Salaried nt NTE / End Date: Division / Dive-72934X 07/01/2011 🗞 0 Abolish Position Abolish Position Pending Submittal 29375 Object of I O 72934X 02/01/2010 0 Update Position Update Position Division / District: Leeward District (30) bisision / District: Leeward District (30) sch / Complex Area: CA Campbell-Kapolei (931) Section / Complex: Complex-Kapolei (835) inistrative Location: 282 Kapolei Elem • Office Location: 282 Kapolei Elem Approved UAC DOE School Comment: Abolishing position due to Ε Office Location: 10. Click Edit Position Details button at the bottom of the Position CSSP Info Civil Service Exempt Status: Exempt Category A (Engaged in Civil Service Exemption Not-to-exceed Date: Temporary Reclass Not-to-exceed Date: Legal Authonity: Concern Increas-Details tab. This is required to abolish a position. The Position Status changes to Abolished. Consent Decree: FLSA Exemption Flag: 11. Click Save Changes button. Edit Position Details Show Audit Info 12. Click Back button. 13. On the Projected List, the Position Status should now show Abolished, and the Position Reason for this position will show Abol Posn in red. (The Posn No and Position Title will turn blue) If the position number & title are still black, go back into the Position Transaction and follow instructions on Step #9 to Edit Position Details.

۲	🕂 Show	64643	Abolished	7	>	10092217	Brown	Kimberly	Unassigned	Spec Ed Teacher	F4 (0-2)	1	1 Unassign	07/01/2011	Abol Posn
0	🕂 Show	65178	Active	7	2	10004328	White	Cynthia	Active	Spec Ed Tchr/Pre-School	F1	1	1 Appoint	07/01/2011	Posn Qual
0	🕀 Show	66576	Active	5	r	10013439	Mouse	Grace	Active	Spec Ed Tchr/Pre-School	F1	1	1 Appoint	07/01/2011	Posn Qual



Create a New Position

Description: These instructions illustrate how to create a new position.

Important Notes: Please contact your PRO to establish 12 month or Educational Officer positions

<u>Quick Tips:</u> ALL VACANT teacher positions require a Teacher Subject Area to be entered in order to submit the PSL. For instructions, see section: Position Subject Area and/or Grade Level Change.

1. Click the Create Position button.

Filte	r By	Posn N	0			<u> </u>	<u>_</u>	<u>A</u> dvance	ed Search								
C	Employee Transaction Position Transaction Fill Position Create Position Update Retro Show Previously Abolished? 🗖 Reset Sort & Previous 30 61-78 of 78 🔤 Next 📎																
		Posn Position Tk Last				First	Employee		Appt	Posn	Emp	Emp	Emp Action	Position			
Set	ect	Details	No	Status	No	PC	DOE ID 🔼	Name	Name	Status	Position Title	Туре	FTE	FTE	Action	Effective Date	Reason
(•	🗄 Show	64643	Active	7	Р	10092217	Brown	Kimberly	Unassigned	Spec Ed Teacher	F4 (0-2)	1	1	Unassign	07/01/2011	Posn Qual
0	0	🕂 Show	72632	Active	4	Р	10093333	White	Sara	Active	Elem Teacher	F1	1	1	Appoint	07/01/2011	Posn Qual
(0	🛨 Show	60391	Active	7	Т	10093499	Mouse	Steffany	Active	Spec Ed Teacher	F1	1	1	Appoint	07/01/2011	Updt Posn

Create Position

Α

Position Number: 600688

F

■ Job Class ID:

Job Class Title:

- 2. The Create Position page will appear.
- 3. In the Job Class ID (formerly known as Occ Grp Code) field input the Job Class Code.
 - Some of the common Job Class IDs are:
 - 50000 Secondary Teacher
 - 50520 Elementary Teacher
 - 50600 Spec Ed Teacher
 - 50608 Spec Ed Tchr/Pre School
 - 50350 Gen Educ/Article VI Teacher
 - If the Job Class ID you are needing is **not** listed above:
 - Click the Search (flashlight) (B)
 - A pop-up window listing all job classes will appear.
 - In the *Filter By* drop down menu, select Long Description.
 - In the free text field next to the *Filter By* drop down menu, enter a portion of the job class code description.
 - You may use the '%' key as a wildcard. Example: Enter %elem to find a 12 D
 Month Elementary Teacher.
 - Click Go button.
 - Select the radio button of the Job Class ID for the new position.
 - Click Select button. Most fields will fill automatically based on the Job Class Code. G

Job C	lass	C	D				-(<u>C</u> ano	el <u>S</u> el	lect
Filter B	ly Lo	ng Description 📃	%elem					o <u>A</u> dva	anced Sea	rch	
	Job							1. Contraction of the second s		UAC	1
	Class		Object of	Bargaining		Salary	Salary	HR Sub	Salary	Object	
Select	ID	Long Description	Expenditure	Unit	FTE	Plan	Range	Category	Class	Code	
0	51245	12-Mo MT Elem Prin V	2691	06	1	4E	09	EO	SAL	2000	
00	51245 50522	12-Mo MT Elem Prin V 12-Mo Elem Teacher	2691 2549	06 05	1	4E T	09	EO Teacher	SAL SAL	2000 2000	
000	51245 50522 50302	12-Mo MT Elem Prin V 12-Mo Elem Teacher 12-Mo Elem-Sec Teacher	2691 2549 2549	06 05 05	1 1 1	4E T T	09	EO Teacher Teacher	SAL SAL SAI	2000 2000 2000	

В



Create	e a New P	osition										
4.	Select the	appropriate	number	to choice	in the <i>Tra</i>	ack field	d drop-c	down m	enu. H			
	•	If the new defaulted	position track (DC	is for a mu DE) to the	ulti-track appropria	school ate trac	or Publi k descri	c Chart iption.	er School	, chang	le the	
	•	If the new	position	is for any	other loca	ation, le	eave the	e track a	as DOE.			
5.	Leave the	Effective L	Date. (Ex	ception: M	lulti-Tracl	< schoo	ls use:	7/1/14)				
6.	Input a C	omment ind	licating re	ason for c	reating th	ne new	positior	n. I			-	
7.	The FTE of	default is 1.0	00 (100%)). If the ne	ew positio	on is .50) (50%)	, chang	e the FTE	to .50.	U	
8.	The Offic	e (Warrant)	Locatior	n defaults	to the ad	ministra	ative loc	ation.	ĸ		<u> </u>	
9.	Under Po	sition Fun	ds tab, cli	ck Add F u	unds butt	on.)					
	Coopte Desit											
	Create Posit	ion						6				
	F	osition Number: 6	00688	~	H= Trac	C DOE (2	011-2012)	-				
		■ Job Class ID: Job Class Title: E	lem Teacher		Effective Dat	e: 07/27/2	2011 🔥					
				(G [Creatin	g new posicio					
	Position Info	Position	Title: Elem Tea	acher				Job Class	Into #F	TE: 1 0000		
		HR Cate HR Sub Cate	gory: Certifica	ated Personnel / Counselor / Lib	rarian				■ Bargaining Ur	nit: 05		
		Salary Desition S	Class: Salaried	, coansolor , Els				= 0bje	ct of Expenditu Salary Pla	re: 2510 an: Teache	r	
		Position S Position Co	ntrol: Tempora	iry					Salary Ran UAC Object Cod	ge: 1e: 10 Mon	th Position	
		Position NTE Administrative Loc	Date: ation: Kapolei E	Elem (282)					-			
	(K * Office Loc	ation: Kapolei	Elem		•						
		Comme	nt(s):									
G	Position Fun	ds										
C	Effective	≭ Budget			Budgeted	 ≢ Job	Fund	UAC	≭ Fund	UAC	≭ Fund	
	Date No rous four	Program ID	Description	Control	Flag	Class ID	Source	Appr ID	Location ID	Proj ID	Percent	Delete?
10.	In the Bu	daet Proara	m ID field	d click on t	the Searc	h (flas	hliaht).	M				
•	•		window	isting of A	ED Buda		rome wi		or.			
	•	A pop-up	WINGOW II	ISTING OF A	FP Dudge	er mog	ianis Wi	iii appea	al.			

	m ID Descriptio	n Control	Budgeted Flag	ed # Job Class ID	Fund Source	Appr ID	≠Fund Location ID	UAC Proj ID	∓ Fund Percent	Dele
07/27/2011	1	Temporary	V	50520			282		100	E



11. Se 12. Cli	ick S o udget	the radi • NC AF Pro 18 De elect bu • Th Fu • Program Budget Program	o button for the <i>Pre</i> DTE: If you are cre P, manually input to ogram window will , if you go back to b escription of the Bur utton.	ogram eating a the Pro pop-up Positior dget Pr the boy	ID you you gram ID gram ID b. Click in Transa rogram a cunder briation	would like osition with o into Budg on Cancel action for th added. Budget Pr ID and UA	to use. N a funding s et Program button. Aft his position	source N I D field er comp , you sho field. Th ID will a	OT listed The Bud leting ste buld now e Descri lso appea	in the dget ps 13 to see the ption , tr.		2
12. Cli	ick So udget ilter By	 NC AF Profination AF Program NC Program 	DTE: If you are cre P, manually input to ogram window will , if you go back to b escription of the Bur utton. D will appear in and Source, UAC of m	eating a the Pro pop-up Positior dget Pr the bo»	new po gram ID . Click n Transa ogram a cunder priation	osition with) into Budg on Cancel action for th added. Budget Pr ID and UA	a funding s et Program button. Aft his position rogram ID	source N ID field er comp , you sho field. Th ID will a	IOT listed The Bud leting ste buld now e Descri lso appea	in the dget ps 13 to see the ption , tr.		D
Fi	udget ilter By	Hudget Budget	e <i>ID</i> will appear in and Source, UAC a m	the bo> Approp	k under	Budget Pi ID and UA	rogram ID \C Project	field. Th <i>ID</i> will a	e Descri so appea	ption , Ir.		
Bi Fi	ilter By	Fu Program Budget Program	m Program ID		priation	ID and UA	AC Project	<i>ID</i> will a	so appea	ır.		
B Fi s	ilter By	Budget Program	m Program ID 💌		5-] (6							2
Fi	ilter By	Budget Budget Program	Program ID 💌							⊆ancel	<u>S</u> e	
s	Select	Budget Program				dvanced Search	1					
5	Select	Program			Funding	Chart			Budget			
		ID	Description		Source	Description	Appropriation	Project	Budget ID	Fund		
	0	42101	WSF-Instruction(42101/13)		GW	Gen-WSF	010	A01	1001230101	G		
	0	42102	WSF-EII(42102/13)		GW	Gen-WSF	010	A02	1001230102	G		
	0	42103	WSF-Instructional Support(4	42103/13)	GW	Gen-WSF	010	A03	1001230103	G		
N	\odot	42104	WSF-Student Services(4210-	4/13)	GW	Gen-WSF	010	A04	1001230201	G	1	
14. Th 15. Th 16. Le ₽α	ne <i>Fu</i> ne <i>Fu</i> eave t	nd Loc nd Pere he Dele	ation ID defaults to cent defaults to 10 ete box blank.	o the cu 0 (100%	wrrent low (%). R	cation. Do	o not chang	ge. Q				
Ŀ	Add Row							~	~			
Ef Da	iffective ate	≭ Budget Program ID	Description	★ Position Control	Budgeted Flag	P # Job Class ID	UAC Fund Appr Source ID	Q P Loc (S/D)	JAC roj Percent	Object of Expenditure	UAC Object Code	S Delete?
07/	/24/2013	42104 🧳	WSF-Student Services(42104/13)	Temporary		52260	Gen-WSF 010	201 🎻 A	100	2525	2500	
17. If t ad to	the fu Iditior 50%	nding is al fund for eac	s split between two ing source. Repea h of the two rows.	differe it steps	nt sourc 9 throu	es, click th gh 10. Up	ne Add Fur on complet	ids butto ion, cha	on again t nge Func	o add an I Percen	t	
18. If t the	the fu e app	inding is propriate	s split between two Budget Program I	differe D. To	nt Objeo search f	ct of Exper for the ID,	nditures, ch click the Se	ange the earch (fla	e Job Clas Ishlight).	ss ID for		
A	Add Row											
Ef	ffective	■ Budget Program ID	Description	■ Position Control	Budgeted Flag	≭ Job Class ID	UAC Fund Appr Source ID	Fund Pr Loc (S/D) ID	JAC roj ≢Fund Percent	Object of Expenditure	UAC Object Code	Delete?
07/	/24/2013	42101	WSF-Instruction(42101/13)	Temporary		52260	Gen-WSF 010	201 🗳 AC	50	2525	2500	
07/	/24/2013	42104	WSF-Student Services(42104/13)	Temporary		52260	Gen-WSF 010	201 🗳 🗛	4 50	2525	2500	
	ick C	avo Ch	andoe button Aut	omotio		rn to tha D	rojoctod Lic	+				



Funding Changes

<u>Description:</u> These instructions illustrate how to make funding changes to an existing position.

Important Notes: FTE and/or Teacher Subject Area changes may be made at the same time. See the Position FTE Changes and/or Position Subject Area and/or Grade Level Change section for instructions

<u>Quick Tips:</u> If processing Fund Changes only, begin at step 1. If other position changes have been made skip to step 8.

1. Select the **radio** button of the existing **position** that needs a fund change.

- 2. Click the **Position Transaction** button.
- 3. The Process Position page will appear.
- 4. Click Add Row button.

Current	Position Act	Ten:					
	Show Audit I	nfo 🚺 🦲	dd Row				
Select	Position Number	≭ Eff Dt	≢ Eff Dt Seq	■ Action	≖ Reason	HR Action Status	Process Case Step Key
۲	60182	01/06/2013	0	Update Position	Change Position Qualification	Approved	-2
0	60182	01/04/2012	0	Update Position	Change Position Qualification	Approved	-2

- 5. Leave the Effective Date and the Sequence Number. (Exception: Multi-track schools use: 7/1/14)
- 6. Under *Action* column drop down menu, select **Update Position**.
- 7. Under *Reason* column drop down menu, select Fund Change. (B)
- 8. In the *Comment* box, notes changes being made. (C)

	Position		₩Eff	(A)	В	HP Action	Process Case	Position Details	Effectiv	e Date : 07/01/2009.000	Position Incumb
Select	Number	≠ Eff Dt	Seq	* Action	 ≢ Reason	Status	Key		HR Ca HR Sub Ca	tegory: Certificated Pe tegory: Teacher / Coun	rsonnel selor / Librarian
۲	61222	07/01/2011 🔥	0	Update Position 🚽	Fund Change	Pending Submittal	29375		Position Position Salar	Status: Active Control: Permanent y Class: Salaried	
0	01222	0573172010	U	opuate Position	change Position Quanneation	Approved	-2	Appointme	nt NTE / Er Division /	id Date: District: Leeward Distric	± (30)
0	61222	07/01/2009	0	Update Position	Update Position	Approved	-2	Branch	/ Comple	x Area: CA Campbell-Kap	olei (931)
0	61222	07/01/2005	0	Update Position	Update Position	Approved	-2	Si T Admini	ction / Co	mplex: Complex-Kapolei cation: 282 Kapolei Ele	i(835)
0	61222	08/30/1989	0	Add Position	New Position	Approved	-2		Office Lo	cation: 282 Kapolei Ele	an an
C						-		CSSP Info			
COM	Ch	anging funding						Civil Se Te	rvice Exe nporary I	Civil Service Exempt Stat mption Not-to-exceed Da Reclass Not-to-exceed Da Legal Author Consent Decr	tus: Exempt Categ ate: ate: ity: ee: lae: □

- 10. Click on the **Funds** tab.
- 11. Click Edit Position Funds button.

Sho	🔑 dit Info 🗍	Edit Position	Funds												
Select	E Effective Date	≭ Budget Program ID	Description	★ Position Control	Budgeted Flag	≇ Job Class ID	Fund Source	UAC Appr ID	∓Fund Location ID	UAC Object Code	Object of Expenditure	Exp Obj Id Trans	UAC Proj ID	¥Fund Percent	Delete?
\odot	07/01/2009 00000	42101	WSF-Instruction(42101/10)	Permanent		50520	G	010	282	2500	2510	Elem Teacher	A01	100	



Funding Changes 12. In the Budget Program ID field click on the Search (flashlight). Position Details Funds Position Qualification: Add Rme HAC elect Date Expenditur ld Trans ercent Delete? Elem Teacher 07/01/2011 0 42101 50520 Permanent ✓ \checkmark 282 🧳 2500 🔽 2510 100 A pop-up window listing available Budget Programs will appear. **NOTE:** If you are changing the funding source to one NOT listed in the AFP, manually input the Program ID into Budget Program ID field. The Budget Program window will pop-up. Click on Cancel button. Continue with #15 below. 13. Select the **radio** button for the **Budget Program ID** you would like to use. F 14. Click Select button. • The **ID** will appear in the box under **Budget Program ID** field. The **Description**, Fund Source, UAC Appropriation ID and UAC Project ID will also appear. G Budget Program <u>C</u>ancel <u>S</u>elect Filter By Budget Program ID <u>G</u>o <u>A</u>dvanced Search 2 🔇 Previous 🛛 1-10 of 13 📃 Next 3 📎 Budget Budget нас Shor UAC HAC rogran Аррго Descri Proje Budget ID Fund Source aw Content & Perform Std-Asses ent(15654/11) GX 654 003150200 F Gen Ed-Article VI Inclusion Teachers(15953/11) 15953 015 153 1501010800 G 154 10012381001 15. The Job Class ID field will automatically populate. 16. If the funding is split between two different sources, click the Add Row button in the Position Funds to add an additional funding source. Follow steps 12 to 15 above. Change Fund Percent to 50% for each of the two rows. 17. If the funding is split between two different Object of Expenditures, change the Job Class ID for the appropriate Budget Program ID. Click the Search (flashlight) under Job Class ID to search for the ID, select, enter Fund Loc (S/D), change Fund Percent. Add Row Flag O7/24/2013 0 15953 Gen Ed-Article VI Inclusion Teachers(15953/10) Permanent ✓ 4 1 2500 2505 Reg Ed/Article VI Teacher 153 50 07/24/2013 0 42101 🖋 WSF-Instruction(42101/10) ſ 201 \circ • econdary Teache A01 18. Click Save Changes button. 19. Click Back button. 20. On the Projected List, the Position Reason column will show Fund Chg in red.



eHR Projected School List Quick Sheets

Position FTE Changes

Description: These instructions illustrate how to make FTE changes to an existing position.

Important Notes: If decreasing the position FTE, the incumbent FTE must be changed first. See Change an Employee FTE instructions.

<u>Quick Tips</u>: Funding and/or Teacher Subject Area changes may be made at the same time. See the Position Funding Changes and/or Position Subject Area and/or Grade Level Change section for instructions.

If processing FTE Changes only, begin at step 1. If other position changes have been made skip to step 7.

- 1. Select the radio button of the existing *position* that needs an FTE change.
- 2. Click the **Position Transaction** button. The Process Position page will appear.
- 3. Click **Add Row** button.
- 4. Leave the Effective Date and Sequence Number. (Exception: Multi-track schools use: 7/1/14)
- 5. Under Action column drop down menu, select Update Position.
- 6. Under *Reason* column drop down menu, select FTE Increase or FTE Decrease.
- 7. In the *Comment* box, notes changes being made.

								Position Details Fund	Position Qualifications	Position Incumbent
Select	Position Number	≖ Eff Dt	≢Eff Dt Seq	A * Action	B * Reason	HR Action Status	Process Case Step Key	Position Info Effect HR +	ve Date : 07/01/2009 000 ategory: Certificated Pe ategory: Teacher / Coun	J 100 rsonnel selor / Librarian
\odot	61222	07/01/2011	0	Update Position 🔻	FTE Increase	Pending Submittal	29375	Positio	n Status: Active Control: Permanent	
0	61222	05/31/2010	0	Update Position	Change Position Qualification	Approved	-2	Sal	ary Class: Salaried	
0	61222	07/01/2009	0	Update Position	Update Position	Approved	-2	Division	/ District: Leeward Distric	rt (30)
0	61222	07/01/2005	0	Update Position	Update Position	Approved	-2	Branch / Comp Section /	ex Area: CA Campbell-Kap Complex: Complex-Kapole	olei (931) i (835)
0	61222	08/30/1989	0	Add Position	New Position	Approved	-2	 Administrative 	ocation: 282 Kapolei Ele	m
Com	ment: Inc	creasing FT	E to 10	00%				CSSP Info Civil Service Ex Temporary	Civil Service Exempt Sta emption Not-to-exceed D Reclass Not-to-exceed D Legal Author Consent Decc	tus: Exempt Categor ate: ate: ity:

- 8. Click Edit Position Details at the bottom of the Position Details tab.
- 9. Change the *FTE* field to the appropriate amount, i.e. 1.00 or 0.50.



Edit Position Details Show Audit Info



Change a Position's Subject Area and/or Grade Level

Description: These instructions illustrate how to change the subject area of a position.

Important Notes: ALL VACANT teacher positions require a Teacher Subject Area to be entered in order to submit the PSL.

Quick Tips:

- a. All of the currently listed Teacher Subject Area rows will appear in the Teacher Assignment and Transfer (TATP) postings.
- b. For a listing of all Teacher Subject Areas and Grade Level Descriptions, see Appendix D.
- c. If processing Position Qualification Changes only, begin at step 1.
- d. If other position changes have been made skip to step 7 to add Position Qualification(s).
- 1. Select the **radio** button of the **position** you would like to change the subject area(s) for.
- 2. Click the **Position Transaction** button. The Position Transaction page will appear.
- 3. Click Add Row button.



- 4. Leave the Effective Date and Sequence Number. (Exception: Multi-track schools use: 7/1/14)
- 5. Under Action column drop down menu, select Update Position. (A)
- 6. Under *Reason* column drop down menu, select Change Position Qualification.

Select	Position Number	≖ Fff Dt	∓Eff Dt Seg	₹ Action	A	≭ Reason	В)	HR Action	Proces Cas Ste	is ie ip
o	71930	07/01/2011 📸	0	Update Po	sition 📘	Change Posi	ion Qualific	ation 🔽 Pe	ending Submitta	293	75
õ	71930	05/01/2010	0	Update Pos	ition	Update Positi	on Qaannea on	cion Ap	pproved pproved		-2
Click Click	on the on Edi	Position (t Qualifica	Qual ation	ificatio s butto	o ns tab. on. D	C					
Click Click	on the on Edi	Position (t Qualifica	Qualition ation	ificatio s butto Bargaining	o ns tab. n. D	C Document	Position	incumbents	Position Job Class	Quals	1
Click Click Position	on the on Edi C Details Fu	Position (t Qualificands) Position Qual	Qualition ation qualifications	ificatio s butto Bargaining tions	ens tab. n. D g Unit Exclusion * Qualificati	C ns Document	· Position Grade	Grade	Position Job Class	Quais	
Click Click Position	on the on Edi C Details Fu Details Fu En or Date t Sequo Disp 01/09/2011	Position (t Qualifica nds Position Qual Edit Position B UD 00000 M D	Qualition ifications Qualifica ttion Qualifica	ificatio s butto Bargaining tions scription	s Unit Exclusion	C ns Document ion Subject Area	Grade	Grade Description 9th Grade	Position Job Class	Quals	
Click Click Position	on the on Edi Details Fu Details Fu En volate t Segno Disp 01/09/2011 01/09/2011	Position (t Qualification Qualified Position Qualified D Construction Construction Construction Position Qualified D Construction	Quali ation ifications Qualifica ttion Qualifica Dec Mut	ification s butto Bargaining utions ual scription tiDisciptinary	a Unit Exclusion	Ins Document	Position Grade ID 09 09	Grade Description 9th Grade 9th Grade	Position Job Class	Quals	



Change a Position's Subject Area and/or Grade Level
 If changing grade level only, skip to step #14. If no Position Qualifications exist, click on Add Row button. If no Position Qualifications exist, click on Add Row button. Select the flashlight icon corresponding to the Qualification ID you would like to change. The Qualification LOV pop-up window should appear.
E Position Details Funds Postulifications Bargaining Unit Exclusions Documents Position Incumbents Position Job Class Quals Add Row. F F F F G Select Display 10 Image: Spanish Teacher Subject Area Image: Spanish Teacher Subject Area Image: Spanish Imag
Qualifications LOV
G Qualification Qualification Description Subject Level ID Subject Level ID Subject Level Description Subject Level Description Subject Level Description O ACA Teacher Subject Area Academic Coach Mentor Image: Coach Mento
 14. In the <i>Grade ID</i> field, click on the <i>Search</i> (flashlight). A pop-up window should appear. 15. In the Grade ID pop-up window, select the <i>radio</i> button for the Grade ID you would like to use. I 16. Click <i>Select</i> button. 17 In the <i>Long Description</i> box, type additional subject content area(s) if desired. The
Qualification description as well as the information in the Long Description box will appear in the Teacher Assignment and Transfer (TATP) posting. NOTE: To remove a subject area, check the delete box at the end of rows that will not apply to K the projected school year.
Position Details Funds Position Qualifications Position Incumbents Add Row Image: Constraint of the state of the s
 Click Save Changes button. Click Back button. On the Projected School List, the Position Reason column will show Posn Qual in red.



eHR Projected School List Quick Sheets

Projected School List - Employee Transactions

NOTE: The generation of the Projected School List will automatically create an action row for every employee. The following are instructions for updating the action rows that were automatically created.

Resign/Retire an Employee

Description: These instructions illustrate how to enter a Resignation or Retirement in the Projected School List.

<u>Important Notes:</u> For those that will be **resigning**, *Form DOE OHR 300-011 Separation from Service* must be submitted. For those that will be **retiring**, *Form DOE OHR 300-011 Separation from Service* must be submitted and a confirmation from ERS must be received.

A. Resigning an employee on the Projected School List:

- 1. Select the **radio** button of the **employee** you would like to resign.
- 2. Click the Employee Transaction button.

(B)	Filter By	Posn N oyee Tra	o .nsactior	n] Posi	ition 1	Trans	action	<u>Go</u> <u>A</u> d	vanced Sea	rch Re	set Sort	17 🔽	1				
	Select	Details	Posn No	Posn Status	Tk No	Р С	Employee Id	Last Name	First Name	Emp Status	Position Title 🛆	Ар Ту	Posn FTE	Emp FTE	Employee Action	Effective Date	Position Reason
	\circ	🛨 Show	61619	Active	0	Р	10012814	Brown	Charlie	Active	12-Mo Elem Prin III	FA	1	1	Appoint	07/01/2009	Updt Posn
	\bigcirc	🛨 Show	72066	Active	0	т	10006429	White	Snow	Active	12-Mo Student Svcs Coord	F1	1	1	Appoint	07/01/2009	Updt Posn
	\bigcirc	🛨 Show	61638	Active	0	Р	10009637	Mouse	Danger	Active	Counselor	F1	1	1	Appoint	07/28/2009	Updt Posn
	0	🛨 Show	75048	Active	0	Р	10005426	Braveheart	Beavis	Active	Counselor/High Risk	F1	1	1	Appoint	07/28/2009	Updt Posn
	0	🕀 Show	61603	Active	0	Р	10037158	Pooh	Winnie	Unassigned	Elem Teacher	F4	1	1	Unassign	07/24/2009	Updt Posn
	\triangleright	- Hide	61615	Active	0	Р	10013716	Duck	Daffv	Active	Elem Teacher	F1	1	1	Appoint	07/28/2009	Updt Posn

- 3. The Employee Transaction page will appear. In the Person Actions display (see screenshot below), there should be a row for the projected year. Make the following changes to the row.
- 4. The *Effective Date* column is automatically populated, leave the date as is. Do not click the Modify Effective Date button. The effective date will be updated by OHR based on Form DOE OHR 300-011.
- 5. Under the *Action* column drop down menu, select **Resignation**.
- 6. Under the *Reason* column drop down menu, defaults to Resignation. Select appropriate reason Dased on the Form DOE OHR 300-011.

**NOTE: If no reason is indicated on the Form DOE OHR 300-011, leave as Resignation.

Person	Actions												
D	elete Row	Modify Ef	fective Date	Show Audit Info	Add Row					🔇 Pre	evious 1-	5 of 24	Next 5 📎
Select	Position Number	Effective Date	Effective Seq No	C * Action	D * Reason	Transfer To Position	Process Case Step Key	HR Action Status	Marked For Form 5 Print?	Form 5 Corrected?	Form 5 Already Printed?	Preview Form 5	New Hire Profile
۲	63711	07/01/2011	0	Resignation	Moving - Mainland		29375	Pending Submittal				Report	Report
0	63711	07/01/2010	0	Appointment	Re-appointment		11561	Approved				Report	Report
0	63711	11/06/2009	0	Pay Rate Change	Furlough		-3	Approved				Report	Report
0	63711	07/01/2009	0	Appointment	Re-appointment		-3	Approved				Report	Report
0	63711	01/05/2009	0	Pay Rate Change	Salary Change		-3	Approved				Report	Report

- 7. Click Save Changes button.
- 8. Click **Back** button.
- 9. The Emp Action field on the Projected List will show Resign in red.



eHR Projected School List Quick Sheets

Resign/Retire an Employee

- B. Retiring an employee on the Projected School List:
 - 1. Select the **radio** button of the **employee** you would like to retire.
 - 2. Click the **Employee Transaction** button.
 - 3. The Employee Transaction page will appear. In the Person Actions display, there should already be a row for the projected year. Make the following changes to the row.
 - 4. The *Effective Date* column will automatically populate, leave the date as is. The effective date will be updated by OHR once the Form DOE OHR 300-011 and ERS confirmation is processed.
 - 5. Under Action column drop down menu, select Retirement.
 - 6. The *Reason* column will automatically populate with Voluntary Service Retirement.

	Person	Actions													
	De	lete Row	Modify Ef	fective Date	Sh	owAudit Info 🗍 🛃	Add Row					🔇 P	revious	1-5 of 9	Next 4 📎
	Select	Position Number	Effective Date	Effective Sea No	* Action	E	*Reason	Transfer To Position	Process Case Step Key	HR Action Status	Marked For Form 5 Print?	Form 5 Corrected?	Form 5 Already Printed?	Preview Form 5	New Hire Profile
	o	63797	07/01/2011	0	Retirement	•	Voluntary Service Retirement		29375	Pending Submittal				Report	Report
Ц	0	63797	0770172010	U	Appointment		Re-appointment		11561	Approved			M	Report	Report
	0	63797	10/23/2009	0	Pay Rate Chan	ge	Furlough		-3	Approved				Report	Report

- 7. Click Save Changes button.
- 8. Click **Back** button.
- 9. The Emp Action field on the Projected List will show Retirement in red.

Unassign a Teacher

<u>Description</u>: These instructions illustrate how to unassign a teacher.

- 1. Select the radio button of the employee you would like to unassign.
- 2. Click the **Employee Transaction** button.
- 3. The Employee Transaction page will appear. In the Person Actions display, there should already be a row for the projected year. Make the following changes to the row.
- 4. Under Action column drop down menu, select Unassign.
- 5. The *Reason* column will automatically populate with Unassigned.

Person	Actions													
De	lete Row	Modify Ef	fective Date	Show A	udit Info I <u>A</u> dd Ro						🔇 Pi	revious	1-5 of 9	Next 4 📎
Select	Position Number	Effective Date	Effective Sea No	* Action) *R	B	Transfer To Position	Process Case Step Kev	HR Action Status	Marked For Form 5 Print?	Form 5 Corrected?	Form 5 Already Printed?	Preview Form 5	New Hire Profile
0	63797	07/01/2011	0	Unassign	Unas	signed		29375	Pending Submittal				Report	Report
0	63797	10/23/2009	0	Pay Rate Change	Eurlou	gh		-3	Approved				Report	Report

- 6. Click Save Changes button.
- 7. Click Back button.
- If the teacher is tenured, their name should now appear on the Summary View under Unassigned Tenured Teachers. If the teacher is non-tenured, their name should now appear on the Temporary List.



Transfer a Employee to Another Position Within the Same Location

<u>Description</u>: These instructions illustrate how to transfer a employee from their current position to a position that is vacant within the same location.

- 1. Select the radio button of the employee you would like to transfer.
- 2. Click the **Employee Transaction** button.
- 3. The Employee Transaction page will appear. In the Person Action display, there should already be a row for the projected year. Make the following changes to the row.
- 4. Under Action column drop down menu, leave as Appointment. A
- 5. Under *Reason* column drop down menu, select **Re-appointment Transfer**. (B)
- 6. The Transfer To Position field will open to enter in a position number.

	De	lete Row	Modify Ef	fective Date	Show Audit Info	I Add Row						🔇 Pi	evious 🖌	I-5 of 9
S	elect	Position Number	Effective Date	Effective Sea No * Act	ion A	# Reason	Transfer Position	C To	Process Case Step Key	HR Action Status	Marked For Form 5 Print?	Form 5 Corrected?	Form 5 Already Printed?	Previe Form 5
	۲	63797	07/01/2011	0 Appoir	tment	Re-appointment - Transfer			29375	Pending Submittal				Report
F	ŏ	63797	10/23/2009	0 Pay Bat	e Change	Furlough		1	-3	Approved				Report

- 7. In the *Transfer To Position* field click on the **Search (flashlight)**. A pop-up window listing positions with available FTE will appear.
 - From the pop-up window, you may also filter by position ID.
- 8. Use the **radio** button to select the **Position ID** you would like to assign the teacher to.
- 9. Click Select button. (E)

Ì	Vacant	: Positior	าร						Cancel	<u>S</u> elect	(
F	Filter By	/ Position	n Number		Go	<u>A</u> dvance	d Search				
	Select	Position Number	Position Title	Position Status	Administrative Location	Location Description	Vacant FTE	HR Category	Track		
	•	66435	Elem Teacher	Active	282	Kapolei Elem	1	Certificated Personnel	6		

- 10. The *Position ID* should appear in the box under *Transfer to Position* field.
- 11. Click Save Changes button.
 - Please note, upon saving this record, there will be a [1 / 2] > >> icon displaying under the Position Details tab. This is used to show the position details of where the employee is transferring to / from.

	Position Details	Funds	Person UACs	Names	Addresses
٢1	(2) 🔊 🔊	Fransferre	d To Position Infr	1	
[172]		ransterre	d to Position Into)	
	Employee Info				
		Effec	tive Date: 07/	01/20110	0:00:00

- 12. Click Back button.
- 13. The Emp Action field on the Projected List will show Appoint to XXXXX (Posn No.) in red.



Description: These instructions illustrate how to fill a vacant position. Vacant positions appear in g your Projected List.	green lette	rs on
 Select the radio button of the position you would like to fill. Click on the Fill Position button. 		
Filter By Posn No		
Employee Transaction Position Transaction Fill Position Create Position Update Retro Show Previously Abolished? Reset Sort & Processor Posn Position Tk Last First Employee Appt Posn Emp	revious 30 61-78 of Emp Action	78 Next > Position
A Select Details No Status No PC DOE ID Name Name Status Position Title Type FTE FTE Action	Effective Date 07/01/2011	Reason Posn Oual
C ⊞ Show 72632 Active 4 P 10093333 White Sara Active Elem Teacher F1 1 1 Appoint C ⊞ Show 60391 Active 7 T 10093499 Mouse Steffany Active Spec Ed Teacher F1 1 1 Appoint	07/01/2011	Posn Qual Updt Posn
3 The Fill Position page will appear		
4 Input the Employee ID of the employee to be placed in this position OP click on the Elas	hliaht 🦲	
icon to get a list of available employees.)
5 Click Save Changes button		
🎉 Return to Projected List >		
Fill Position	Cancel Save C	hanges
Position Number: 64643		inges
First Name:		
Effective Date Seq No: 0 Action Comment:		
Employee Info Employee Position Info		
Appointment Begin Date: 07/01/2011 126 HR Sub Category: Teacher / Counselor / Librarian Appointment NTE / End Date: 06/30/2012 126 Salary Class: Salary Clas		
Appointment Type: FTE: 1.00 Paycheck Location (Warrant): Kapolei Elem # Job Class ID: 50600		
Administrative Location: Kapolei Elem (282)		
Other Info Salary Range: 02 Step:		
Comment: Posn Share Cd		
ERS FICA: ERS Group:		
Beneitt Lugiouty Code: ▲ Payroll Number:		
To Probation Semester:		
6. Automatically returned to the Projected List page.		
7 The Emp Action field on the Projected List will show Appoint fr XXXXX (Posp No.) in red		

۲	∃ Show 71871	Active	0 P	10010422 Brown	Laurie	Active	12-Mo Elem Teacher	F1	1	1 Appoint fr 65687X	07/01/2011	Updt Posn
0	+ Show 60715	Active	7 P	10009312 White	Sharon	Active	Elem Teacher	F1	1	1 Appoint	07/01/2011	Posn Qual
0	∃ Show 61222	Active	5 P	10010374 Mouse	Carrie Ann	Active	Elem Teacher	F1	1	1 Appoint	07/01/2011	Posn Qual



Return an Employee from Leave

<u>Description</u>: These instructions illustrate how to return an employee from Leave, or change the status to Unassign for employees on extended leave that will be placed by the District PRO.

Important Notes:

1. Each employee on leave has been automatically unassigned by the system, with a Reason Code of: Pending Leave Resolution.

- 2. If the teacher on leave will be returned to the same position, the employee taking their place must be unassigned first.
- 3. If an employee on extended leave will be District Unassigned, see "C." below for instructions.

A. Employee is returning to the same position:

- 1. Click the Leave List view. (A)
- 2. Select the radio button of the employee you would like to return from leave.
- 3. Click the Employee Transaction button.

	Vear 7	011-20	112 1 -	ava List	_				201 201		vela I						
	Tear 2	.011-20			-				ije. 27.		yeter				51	tatus: Pendir	g Submittal
	Filter By	Posn N	0		-			Go	<u>A</u> dvance	d Search							
ト	+ Emr	lovee Tra	nsactio	n Posi	tion T	ransac	tion	Fill Positio	n] Cri	eate Position	Undate Retr		Reset S	ort			
											, (, , , , , , , , , , , , , , , , , ,		_		Fue	Emp Action	D = -141 = -
	Select	Details	Posn No	Position Status	Tk	PC		Last Name	First Name	Employee Status	Position Title	Appt Type	POSN	EMP	Action	Effective	Position
-	Select	Details	Posn No 72623	Position Status Active	Tk No O	PC P	DOE ID 10005460	Last Name Brown	First Name Kimberly	Employee Status Leave	Position Title 12-Mo Counselor	Appt Type F1	Posn FTE	FTE 1	Action Unassign	Date 07/01/2011	Reason Updt Posn
	Select	Details + Show + Show	Posn No 72623 62258	Position Status Active Active	Tk No 0 5	PC P	DOE ID 10005460 10010052	Last Name Brown White	First Name Kimberly Robin	Employee Status Leave Leave	Position Title 12-Mo Counselor Elem Teacher	Appt Type F1 F1	Posn FTE 1	Emp FTE 1	Action Unassign Unassign	Date 07/01/2011 07/01/2011	Position Reason Updt Posn Updt Posn

- 4. The Employee Transaction page will appear.
- 5. Under Action column drop down menu, select Return from Leave.
- 6. Under *Reason* column drop down menu, select Return to the Same Position.

Γ	Person	Actions												
	De	lete Row	Modify Ef	fective Date	ShowAudit Info	Add Row					🔇 Pi	revious 🖌	1-5 of 7 🔽	Next 2 📎
	Select	Position Number	Effective Date	Effective Seq No	* Action	* Reason	Transfer To Position	Process Case Step Key	HR Action Status	Marked For Form 5 Print?	Form 5 Corrected?	Form 5 Already Printed?	Preview Form 5	New Hire Profile
I	e	62258	07/01/2011	0	Return from Leave	Return to the Same Position		29375	Pending Submittal				Report	Report
Ι	0	62258	11/29/2010	0	Leave of Absence without Pay	Health Reasons		-29918	Approved				Report	Report
	0	62258	07/01/2010	0	Appointment	Re-appointment		11561	Approved				Report	Report
	0	62258	10/23/2009	0	Pay Rate Change	Furlough		-3	Approved				Report	Report
	0	62258	07/01/2009	0	Appointment	Re-appointment - Transfer		-3	Approved				Report	Report

- 7. Click Save Changes button.
- 8. Click Back button.
- 9. The employee will no longer be on the Leave List. On the Projected School List, the Emp Action field will show RetFrLeave in red.



Return an Employee from Leave

- B. Employee is returning to a different position:
 - 1. Click the Leave List view.
 - 2. Select the **radio** button of the *employee* you would like to return from leave.
 - 3. Click the **Employee Transaction** button. The Employee Transaction page will appear.
 - 4. Under Action column drop down menu, select Return from Leave.
 - 5. Under *Reason* column drop down menu, select Return to Another Position. G

	Persor	n Actions													
		elete Row	Modify Ef	fective Date	ShowAud	lit Info 🗍	Add Row						《 P	revious	1-5 of 7
	Select	Position Number	Effective	Effective Sea No	F		# Reason)	Transfer To Position	Process Case Step Key	HR Action Status	Marked For Form 5 Print?	Form 5 Corrected?	Form 5 Already Printed?	Preview Form 5
	۲	62258	07/01/2011	0	Return from Leave	·	Return to Anothe	r Position 🕞	4	2937	5 Pending Submittal				Report
	00	62258 62258	11/29/2010 07/01/2010	0	Leave of Absence with Appointment	iout Pay	Health Reasons Re-appointment			-29918	Approved Approved				Report Report
6. 7.	In th vaca Sele	ne Tra ant pos • Fr ect rad	nsfer T sitions v rom the lio butto	To Pos will ap pop-u	<i>ition</i> field o bear. p window, the Positio	vlick on you ma n ID yo	the Sear ay also filt	ch (flas er by po ike to as	hlight). sition ID. ssign the	A pop- teache	up windov er.	w listi	ng 🖰		
8.	Clic	k Sele	ct butto	on. 🕤							$\overline{}$				
<u> </u>	Filter Select	By Position Position Number 66435	Position Title Elem Teach	Positi Status ner Active	Administrative Location 282	<u>e</u> Location Descripti Kapolei Ele	anced Search Vacant on FTE m 1 C	HR Category ertificated Per	Cance Track sonnel	I <u>S</u> ele					
9. 10	The . Clicl	Posit k Save	<i>ion ID</i> Chan	should ges bi	appear in t	the box	k under T i	ransfer	to Positi	on fiel	d.				
		• Pl m	ease no ay be u	ote, up ised to	on saving to show the p	this rec positior	ord, there details o	e should f where	be a [1 / the empl	2] > > oyee is	> icon dis s transferi	playir ing to	ng. Thi o / from	is ı.	
11	. Clicl	k Bacl	k buttor	า.											
12	. The Action	emplo on field	oyee wil d will sh	ll no lo now <mark>R</mark> e	nger be on etfrLeave to	the Le	ave List. X (Posn I	On the No).	Projectec	l Scho	ol List, the	e Emp	oloyee		
C. <u>Em</u>	ploye	e is or	n exten	ded le	ave and wil	l be pla	aced by th	e Distric	<u>xt PRO</u> .						
1.	The List	syster action	m autor	natica	lly generate	es an L	Inassign/F	Pending	Leave R	esoluti	on Projec	ted S	chool		
2.	No d Una	change ssigne	es to th ed/Leav	is actio 'e Ten	on are nece ured Emplo	essary. byee.	The emp	oloyee w	ill show c	n the	Summary	View	as an		

3. Inform the District PRO that you have unassigned an employee who is returning from extended leave.



Place an Employee on Leave Without Pay (LWOP) Description: These instructions illustrate how to place an employee on Leave without Pay. Important Notes: Form DOE OHR 300-001 Application for Leave of Absence, School-Level Certificated Employees must be submitted. A. Employee will be on Leave without Pay for the entire school year: 1. Select the radio button of the employee you would like to place on leave without pay. 2. Click the Employee Transaction button. 3. The Employee Transaction page will appear. 4. Do not change the effective date. 5. Under Action column drop down menu, select Leave of Absence without Pay. A 6. Under *Reason* column drop down menu, select appropriate reason based on В Form DOE OHR 300-001. **NOTE: If no reason is given, select Long Term. Person Actions 🔇 Previous 1-5 of 24 📑 Next 5 🔰 Delete Row | Modify Effective Date | Show Audit Info I Add Row Marke Process А В Transfer For Case Form 5 Effective Effective Step HR Activ Form 5 Date Kev Form 5 0 Leave of Absence without Pay 💽 Child Care · Report 63711 07/01/2011 29375 Pending Submittal Report 7. On the **Position Details** tab, under the Employee Info section, in the Leave NTE Date field, С enter in the date the last day of the contract of the projected school year (mm/dd/yyyy). Position Details Funds Person UACs Names Addresses \mathbb{Q} Employee Info Employee Position Info Effective Date: 07/01/2011 00:00:00 Position Number: 63711 Appointment Begin Date: 07/01/2011 Business Title: Elem Teacher **≠FTE:** 1 06/30/2013 at NTE (End Data) Appoint С 50520 Elem Teacher ■ Job Class ID: Leave NTE Date: 06/30/2012 👸 Bargaining Unit: 05 Teachers Paycheck Location (warrant): 202 Salary Plan: Teacher 🧹 Kapoleⁱ Elem Salary Range: 02 Certificated Salary Range (T/02) ■ Administrative Location: 282 Kapolei Elem Step: 12 Division / District: Leeward District (30) UAC Object Code: 2500 Branch / Complex Area: CA Campbell-Kapolei (931) Track: Red Track (2011-2012) Section / Complex: Complex-Kapolei (835) Appointment Type: F1 - Tenured DOE School Year Number: 2011-2012 HR Category: Certificated Personnel HR Sub Category: Teacher / Counselor / Librarian Salary Class: Salaried Employee Status: Leave of Absence Comment:

- 8. Click Save Changes button.
- 9. Click **Back** button.
- 10. The Emp Action field will show Unpaid LOA in red.



Place an Employee on Leave Without Pay (LWOP) B. Employee will be on Leave without Pay for only the first semester: Select the **radio** button of the **employee** you would like to place on leave without pay. 1. 2. Click the Employee Transaction button. 3. The Employee Transaction page will appear. 4. Do not change the effective date. 5. Under Action column drop down menu, select Leave of Absence without Pay. 6. Under *Reason* column drop down menu, select appropriate reason based on Form DOE OHR 300-001. **NOTE: If no reason is given, select Long Term. Person Actions 🔇 Previous 1-5 of 8 🔽 Next 3 🔈 Delete Row Modify Effective Date Show Audit Info I Add Row Marked Transfer D Е Case For Form 5 Position Effective Effective Step HR Action Form 5 Print? Form 5 Already Prev Hire То \odot 64908 07/01/2011 0 Leave of Absence without Pay _ Long Term Report -29375 Pending Submittal Report LISST ADDION č Furlough Report 64908 10/23/2009 0 Pay Rate Change -3 Approved Report 7. On Position Details tab, under Employee Info section, in the Leave NTE Date field, enter in the date to the last day of the first semester of the projected school year (mm/dd/yyyy). Position Details Funds Person UACs Names Addresses Employee Position Info Employee Info Effective Date: 07/01/2011 00:00:00 Position Number: 64908 Business Title: Elem Teacher Appointment Begin Date: 07/01/2011 👸 **≠**FTE: 1 Appointment NTE / End Date: 06/30/2012 ≠ Job Class ID: 50520 Elem Teacher F Leave NTE Date: 01/03/2012 🕅 ■ Bargaining Unit: 05 Teachers Salary Plan: Teacher Salary Range: 03 Certificated Salary Range (T/03) ■ Administrative Location: 282 Kapolei Flem Step: 07 Division / District: Leeward District (30) UAC Object Code: 2500 Branch / Complex Area: CA Campbell-Kapolei (931) Track: Green Track (2011-2012) Section / Complex: Complex-Kapolei (835) DOE School Year Number: 2011-2012 Appointment Type: F1 - Tenured HR Category: Certificated Personnel HR Sub Category: Teacher / Counselor / Librarian Salary Class: Salaried Employee Status: Leave of Absence Comment: 8. Click Save Changes button. 9. Click Back button. 10. The Emp Action field will show Unpaid LOA in red. 10003734 Brow Duce Elem Teache E Leave + Show 64587 Active 7 P 10015063 White Elsa Elem Teacher E1 1 Unpaid LC 07/01/2011 Posn Qual

5 P

10082492 Mouse

Polly Ann Active

Elem Teacher

1

1

1 Appoint

F1

Posn Qual

07/01/2011



Change an Employee FTE

Description: These instructions illustrate how to make changes to an employee's FTE.

IMPORTANT NOTE: If increasing the incumbent FTE, the position FTE must be changed first. See Position FTE Changes instructions.

- 1. Select the **radio** button of the existing *employee* you would like to change the FTE for.
- 2. Click the **Employee Transaction** button.
- 3. The Employee Transaction page will appear.
- 4. Leave the Action, Reason, and Effective Date columns as is.
- 5. On the Position Details tab, change the *FTE* field to the appropriate amount, i.e. 1.00 or 0.50.

mployee Info	Employee Position Info
Effective Date: 07/01/2011 00:00:00 Appointment Begin Date: 07/01/2011 100:00:00 Appointment NTE / End Date: 06/30/2012 100 Leave NTE Date: 06/30/2012 100 * Paycheck Location (Warrant): 282 100 * Administrative Location: 282 Kapolei Elem Division / District: Leaverd District (30) Branch / Complex Area: CA Campbell-Kapolei (931) Section / Complex: Complex-Kapolei (355) Appointment Type: F1 - Tenured HR Category: Certificated Personnel HR Sub Category: Salaried Employee Status: Salaried Comment: Comment	Position Number: 64908 Busit of strates in the strates of the str

- 6. Click Save Changes button.
- 7. Click Back button.
- 8. On the Projected School List, the Emp Action column will show red to indicate that a change has been made to the employee.



Submitting Projected School List Process

<u>Descrip</u> Importa Project	otion: These instructions illustrate how to submit your Projected School List. ant Notes: Once the process is submitted, changes must be made by PRO or State Office, unless the ted School List Process is returned to you.
1.	From the Select an Action drop down menu, select Submit.
	The Select an Action drop down menu is located next to the Status field. Submit Cancel Process
	 IMPORTANT NOTE: If you choose <u>Cancel</u> it will delete any modifications you have made to your Projected School List and you must start over.
2.	Enter comments for your PRO or Position Management in the box next to Submit. Click on A
3.	Click Go button. B
	Status: Pending Submittal Submit

Track Case Status

After submitting a task, you will be able to track the status of your submission:

- Click on the **Pending Cases** tab.
- Click on the **Show All Cases** checkbox.
- Select your submitted Projected School List and click on the **+Show** icon under the **Details** column.

The example below shows the **Approval Step History** for a Financial Plan. It shows that the Principal submitted the Financial Plan, the CAS returned it, the Principal resubmitted it and the CAS Approved it. You can click on the Next Approval Step tab at any time to see who 'has' the case selected.

P Process B	rocess ID: egin Date:	6.1.2.1 07/28/09	Rece	District eived From	: Central District (20) Received Date: 07/31/2009 0 : Park, Patricia Ann	8:39:	:00
Approval S	tep History	Next Appro	oval Step F	Parameters			
Approval Step Sequence Number	Approval Step Number	Comment	Process Date	Task Action Code	Comment		Update By
1	10		07/31/2009	Submit	Includes \$18,572 set aside to cover possible budget cuts.	<	Brummel, Marvin
2	20		07/31/2009	Return	Please modify School Operations section to set aside more money for possible budget cuts.	<	Park, Patricia
3	10		07/31/2009	Re-submit	Resubmitting with requested modifications.	<	Brummel, Marvin
4	20		07/31/2009	Approve			Park, Patricia



Run Reports

<u>Important Notes:</u> Pop-up blockers need to be disabled for the eHR website. Appendix A includes instructions for disabling common pop-up blockers. You may also consult your internet browser Help for assistance in allowing pop-ups from this website. If Adobe Acrobat Reader 6.0 or above is not installed, you will be prompted to install it. This is needed to view the PDF format for reports.

Senior	ity Report
1.	Under <i>Module</i> drop down menu, select Reports .
	Module Processes Image: Comparison of the second s
2. 3.	Select radio button for the Seniority Report . A Click Run Report button. B
B-	Reports Filter Run Report C Previous 15 16-19 of 19 Next > Setect Details Report Category Description C Show School List Reports Position Details (Current-Projected) C Show School List Reports Position Summary (Projected) C Show School List Reports Position Details (Current)
4.	Enter a Report Label. (i.e. School name Seniority Report)
5.	Input the <i>Location ID</i> or click on the Search (flashlight) . A pop-up window listing allowed D locations will appear.
	 a. Select radio button for the <i>Location</i>. b. Click Select button.
6.	Choose Report Destination. If the Report Destination is set to 'Stream Output to Screen', the report will appear. The report can be printed or saved to another location. If the Report Destination is 'Save Output to DB', the document will be saved to your Report Cases. Click Download File and your report will open in a separate window.
7.	Click Submit Parameters button.
C	Process Case Cancel Submit Parameters Seniority Report (Current) Parameters Parameters Prompt Text Parameter Value Location ID 282 Prompt Text Parameter Value Location ID 282 Prompt Text Parameter Value E
8.	The report can now be printed or saved to another location if desired.



Seniority Report

NOTE: The Seniority Report is the total number of years/months that the employee has of teaching experience with the department at the END of the current school year.

Sample Seniority Report

Teachers by Seniority with Cert Information

Appt Type	Status	FTE	Name	Person ID	Position #	DOE Service Year/Month	License
137 Manoa	a Elem						
F1	Active	1.00	Headlights, Bambi	10009503	61614	26/5	Soc Stud, Sch Libn
F1	Active	1.00	Tweetie, Sylvester	10012371	61602	26/0	Elem
F1	Active	1.00	Willows, Windy	10012857	60422	24/6	Elem
F1	Active	1.00	White, Snow	10006429	72066	24/5	Elem
F1	Active	1.00	Jack, Samurai	10013206	65233	24/0	Elem
F1	Active	1.00	Rendezvous, Belleville	10013827	61642	23/7	Elem
F1	Active	1.00	Mouse, Mickey	10013312	67231	21/9	Elem
F1	Active	1.00	Down, Watership	10009374	61630	20/6	Elem
F1	Active	1.00	Mononoke, Princess	10007441	62078	19/0	Elem
F1	Active	1.00	Duck, Daffy	10013716	61615	17/4	Elem
F1	Active	1.00	Mononoke, Princess	10003121	61628	15/9	Elem
F1	Active	1.00	Stimpy, Ren	10008042	61607	15/1	Elem

Column	Description
Appt Type	Employee's current appointment type
Status	Employee's current status
FTE	Employee's current FTE
Name	Last, First Middle
Person ID	DOE Employee ID
Position #	Current position employee is in
DOE Service Years/Months	Employee's total DOE teacher service. This is the total number of years/months that the employee has of teaching experience with the department at the end of the current school year.
License	Type of Hawaii License this employee holds.



Position Details Report
 Under <i>Module</i> drop down menu, select Reports. Select radio button for the <i>Position Details (Current-Projected)</i>. Click Run Report button.
Reports Filter Report Category Description: Filter B Run Report Previous 15 16-19 of 19 Next > Select Details Report Category Description A C School List Reports Position Details (Current-Projected)
 Enter a Report Label. (i.e. <u>School name Position Details</u>) In the <i>Current/Projected field</i> click on the drop down menu and select Projected Position Details. NOTE: Clicking on Current Position Details will provide you with Current School List information only.
 In the Location ID field click on the Search (flashlight). A pop-up window listing allowed (E) locations will appear. Click the appropriate radio button and click Select.
 7. In the Order by Code field click on the drop down menu and select the appropriate order in which you would like your report to be sorted. a. School List Sort: Sorted using the default sort order of the School List b. Position Number: Sorted by Position ID c. Last Name: Sorted by Last Name d. Budget Prog ID: Sorted by Budget Program ID
Process Case Position Details (Current-Projected) • Process Case Label: Kapolei Position Details Parameters Projected D Projected Position Details Location ID 282 Order by Code School List Sort Report Output Type School List Sort Position Number Last Name Budget Prog Id
 Choose Report Destination. If the Report Destination is set to 'Stream Output to Screen', the report will appear. The report can be printed or saved to another location. If the Report Destination is 'Save Output to DB', the document will be saved to your Report Cases. Click Download File and your report will open in a separate window. Click Submit Parameters button.
10. The report can now be printed or saved to another location if desired.



Position Details Report

Sample Position Details Report

Certificated Current Position Details

						Appt		LoolD / BroilD	
Position #	тк	РС	Person ID	Name	Position Title	Аррт Туре	FTE	ExpObjID / PCT	Teacher Subject Area
137 Manoa	a Eler	m							
61619	0	Ρ	10012814	Brown, Charlie Licn: Elem	12-Mo Elem Prin III	FA	1.00	137 / A12 / 2607 / 100	
71404	0	Ρ	10013955	Run, Chicken Licn: English (LI06)	Vice Principal I	FD	1.00	137 / A12 / 2606 / 100	
61614	0	Ρ	10009503	Headlights, Bambi Licn: Soc Stud, Sch Libn	Librarian	F1	1.00	137 / A03 / 2522 / 100	
61638	0	Ρ	10009637	Mouse, Danger Licn: Scouns K-12	Counselor	F1	1.00	137 / A04 / 2525 / 100	
75048	0	P	10005426	Braveheart, Beavis Licn: Sch Couns 7-12	Counselor/High Risk	F1	1.00	137 / A04 / 2545 / 100	
72066	0	Т	10006429	White, Snow Licn: Elem	12-Mo Student Svcs Coord	F1	1.00	137 / A04 / 2524 / 100	
60119	0	Ρ	10014449	Bookbinder, Jungle Licn: Elem Ed K-6	Elem Teacher	F1	1.00	137 / A01 / 2510 / 100	Science, MultiDisciplinary
60180	0	Р	10008943	Tintin, Rin Licn: Elem	Elem Teacher	F1	1.00	137 / A01 / 2510 / 100	Social Studies, MultiDisciplinary
60422	0	Ρ	10012857	Willows, Windy Licn: Elem	Elem Teacher	F1	1.00	137 / A01 / 2510 / 100	Mathematics, MultiDisciplinary

<u>Column</u>	Description
Position #	
ТК	Track Number
PC	Position Control: P = Permanent, T = Temporary
Person ID	DOE Employee ID
	Last, First Middle
Name	Type of Hawaii License this employee holds
Position Title	Title of the position
Appt Type	Appointment of Type of the employee
FTE	Employee's FTE amount
LocID/ProjID/ExpObjID/PCT	UAC Information (Location ID, Project ID, Object of Expenditure ID, UAC Fund Percentage)
Teacher Subject Area	Teacher Subject Area for the position



Positi	on Sum	mary Report	
1. 2. 3.	Under <i>I</i> Select r Click R	<i>Module</i> drop down m adio button for the <i>I</i> un Report button.	nenu, select Reports . Position Summary (Projected). A
	Reports		
	Report	Category	Description: Filter
B-	Run Rer	port	Previous 15 16-19 of 19 Next >
	Select De	tails Report Category	Description
		Chow School List Poports	Position Dataile (Current Projected)
		Show School List Reports	Position Summary (Projected)
4. 5.	Enter a In the <i>L</i> location	Report Label . (i.e. ocation ID field click s will appear. Click	<u>School name Position Summary</u> (C) to on the Search (flashlight) . A pop-up window listing allowed D the appropriate radio button and click Select button.
6.	In the S	chool Year field clic	k on the drop down menu to select the appropriate School Year.
7.	In the S would li	<i>Summary Section</i> fie ke to have printed.	Id click on the drop down menu to select the appropriate section you
	a.	All Sections	
	b.	AFP & Proj SL Posi	tion Funding
	с.	Vacant Positions	
	d.	Deleted Positions	
	e.	Unassigned Tenure	d Employees
			- . .

Position Summary (Project	ed) +
Process Case Label:	Kapolei Position Summary
Parameters	
Prompt Text	Parameter Value
Location ID	282
School Year	2011-2012
Summary Section	All Sections (F)
Report Output Type	All Sections Format)
Report Destination	AFP & Proj. SL Position Funding Vacant Positions
	Deleted Positions
	Unassigned Tenured Employees

- 8. Choose Report Destination. If the Report Destination is set to 'Stream Output to Screen', the report will appear. The report can be printed or saved to another location. If the Report Destination is 'Save Output to DB', the document will be saved to your Report Cases. Click Download File and your report will open in a separate window.
- 9. Click Submit Report button.
- 10. The report can now be printed or saved to another location if desired.

F



Position Summary Report

Sample Position Summary Report



Position Summary 2010-11SY

137 Manoa Elem

Academic Financial Plan (AFP) & Projected School List Position Funding

Fund Source	Budget Program	Obj Exp Code	Description	AFP FTEs	POSN FTES	EMP FTEs
Gen-Categ	Gen Ed-Article VI Inclusion Teachers(15953/11)	2505	Reg Ed/Article VI Teacher	1.00	2.00	2.00
Gen-Categ	Special Education in Regular Schools(17131/11)	2519	Spec Ed Teacher-Pre-Sch	1.00	1.00	1.00
Gen-Categ	Special Education in Regular Schools(17131/11)	2563	Spec Ed Teacher	3.00	3.00	3.00
Gen-WSF	WSF-Instruction(42101/11)	2510	Elem Teacher	24.00	24.00	23.00
Gen-WSF	WSF-Instructional Support(42103/11)	2522	School Librarian	1.00	1.00	1.00
Gen-WSF	WSF-School Administration(42112/11)	2606	Vice Principal	1.00	1.00	1.00
Gen-WSF	WSF-School Administration(42112/11)	2607	Principal	1.00	1.00	1.00
Gen-WSF	WSF-Student Services(42104/11)	2524	Student Services Coordinator 12- Mo	1.00	1.00	1.00
Gen-WSF	WSF-Student Services(42104/11)	2525	Counselor-Regular	1.00	1.00	1.00
Gen-WSF	WSF-Student Services(42104/11)	2545	Counselor-High Risk	1.00	1.00	1.00
			Total	: 35.00	36.00	35.00

Vacant Positions

	317				
Position ID	Position Title	Action	Reason	Effective Date	FTES
600850	Elem Teacher	Est Posn	Buy Posn	08/30/2010	1.00
74806	Elem Teacher	Updt Posn	Posn Qual	01/02/2011	1.00
				Tota	al: 2.00

Deleted Positions

No Rows Returned

Unassigned/Leave Tenured Employees

Employee ID	Last N	ame	First Name	Position Title	Unassign Re	eason	Appoint Type	Employee Statu	IS	FTEs
10010380	Girl		Powerpuff	Elem Teacher	Pend Lv Rs	F	1	Leave		1.00
Qual Type	e	Description		Subject		Grade	Level			
HQ		Highly Qualified for	Elementary	Elementary		Kdgn t	o 6th Grade			
HQ		Highly Qualified for Education	Elementary Special	Elementary Spe Education	ecial	Kdgn t	o 6th Grade			
								т	otal:	1.00



eHR Projected School List Quick Sheets

Appendix A: System Navigation/Information

These instructions contain descriptions for screens and additional processes in eHR.

Important System Notes: DO NOT use the internet browser back arrow.

The system will automatically time you out after thirty (30) minutes of inactivity. This is a security measure implemented to avoid misuse of the system. Please ensure that you save your transactions as you go to avoid losing any transactional history.

	and Tabs	
eHR	State of Hawaii Department of Education	A Module Processes (1) (2) (X) Logged in: 1
alaseled total	I Tamana list I Fada Data and ist I F	B Pending Cases Current Case Start Process Current Employee List Current Position Li
ijected List	Temporary List Early Return List E	uuyseii List Leave List Non Projected List Summary
A	Standard Module N	Navigation Menu
	Title	Description
	Module Drop Down Menu	Enables access to different modules.
	Home 👔	Returns user back to the CHAP Home Page from any module.
	Help	Opens the CHAP Help feature which provides useful information specific to the page being viewed.
		 For example, clicking on Help from the Projected School List page will bring you to a Help page that contains a menu window which allows you to access a variety of Help topics such as the Projected School Lis Screen Overview, Screen Actions, Quick Sheets, etc.; while clicking on Help from the Reports page will bring you directly to a Help document
		summarizing how to use the report functionality.
	Login/Logout	summarizing how to use the report functionality. Displays user name and enables user to log out from the system.
В	Login/Logout 💌	summarizing how to use the report functionality. Displays user name and enables user to log out from the system.
В	Login/Logout 💌 Case Tabs Title	summarizing how to use the report functionality. Displays user name and enables user to log out from the system. Description
В	Login/Logout Case Tabs Title Process Case Derinstantiation of that as a process. By comaintaining their P	summarizing how to use the report functionality. Displays user name and enables user to log out from the system. Description finition: For each process that exists in CHAP, a process case represents an t process. For example, "Maintain Projected School List" has been defined in CHAP clicking on "Create New Case", the user will have created a unique process case for trojected School List.
В	Login/Logout Case Tabs Title Process Case Der instantiation of that as a process. By c maintaining their P Pending Cases	summarizing how to use the report functionality. Displays user name and enables user to log out from the system. Description finition: For each process that exists in CHAP, a process case represents an t process. For example, "Maintain Projected School List" has been defined in CHAP clicking on "Create New Case", the user will have created a unique process case for projected School List. Displays cases that require some action by the user in green. To see all cases, click on Show All Cases.
В	Login/Logout Case Tabs Title Process Case Derinstantiation of thar as a process. By comparison of their P Pending Cases Current Case	summarizing how to use the report functionality. Displays user name and enables user to log out from the system. Description finition: For each process that exists in CHAP, a process case represents an t process. For example, "Maintain Projected School List" has been defined in CHAP clicking on "Create New Case", the user will have created a unique process case for projected School List. Displays cases that require some action by the user in green. To see all cases, click on Show All Cases. Displays the current case.
В	Login/Logout Case Tabs Title Process Case Derinstantiation of that as a process. By comparison of that as a process. By comparison of the process of t	summarizing how to use the report functionality. Displays user name and enables user to log out from the system. Description finition: For each process that exists in CHAP, a process case represents an t process. For example, "Maintain Projected School List" has been defined in CHAP clicking on "Create New Case", the user will have created a unique process case for projected School List. Displays cases that require some action by the user in green. To see all cases, click on Show All Cases. Displays the current case. Enables user to create a new case.
В	Login/Logout Case Tabs Title Process Case Der instantiation of that as a process. By c maintaining their P Pending Cases Current Case Start Process Current Employee List	summarizing how to use the report functionality. Displays user name and enables user to log out from the system. Description finition: For each process that exists in CHAP, a process case represents an t process. For example, "Maintain Projected School List" has been defined in CHAP clicking on "Create New Case", the user will have created a unique process case for projected School List. Displays cases that require some action by the user in green. To see all cases, click on Show All Cases. Displays the current case. Enables user to create a new case. Displays all current employees as of today. Click on Show Future to see future dated actions.



cons and Navigation	on	
Title		Description
Action Buttons	Cancel Save Changes	 Allows users to perform or cancel an action. Typically displayed to the right of the screen. If Save is one of the Action Buttons, it is important to click it in order to keep your changes. If actions buttons are displayed both above and below a task, you only need to click one of the options.
Calendar/Clock	1 20	The Calendar and Clock icon allows users to open a calendar and select a date. Users may also enter the date directly into the field if they do not want to pull up a calendar. Manually entered dates need to follow the following format: MM/DD/YYYY.
Drop down menus	Select an Action 👻	Downward blue arrows indicate drop down menus which are predefined options that users may select from.
Flashlight	4	The Flashlight icon indicates a "look up" feature that allows users to view and select specific information. Alternatively, information may be keyboarded directly into the field.
-Hide	Hide	Hides additional information about a specific record.
Page Title	Example: Fill Position	The Page Title is displayed at the upper left of the screen. The Page Title describes the action that is being performed. In this example, the page title is called "Create Position".
Radio Button	۲	Radio Buttons enable you to select specific items, in this case a specific record, that you would like to work on.
Required Fields	×	The asterisk indicates this is a required field. The system prevents users from moving forward with a specific task if a required field is not completed.
+Show	+ Show	Displays additional information about a specific record.



eHR Projected School List Quick Sheets

Disabling Common Pop-Up Blockers

Please contact the Centralized Service Desk (CSD) at (808) 377-8320 if you have questions or difficulty disabling your pop-up blocker.

Internet Explorer

To disable the pop-up blocker while on the site, open the **Tools** menu, select the **Pop-up Blocker** option, and select the **Turn Off Pop-up Blocker** option (as shown below):

File Edit View Favorites	Tools Help	
And a A	Mail and News	
Sack + Sack +	Pop-up Blocker Turn Off Pop-up Blocker	
Address in http://www.yahoo.	Manage Add-ons Pop-up Blocker Settings Synchronize Windows Update	
	Windows Messenger Yahoo! Messenger Ze <u>Finance</u> <u>Travel</u>	
	Internet Options M Yahoo! Small Business	5

Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can go back into the menu again to turn on the pop-up blocker.

Google Toolbar

The Google Toolbar is provided by Google to facilitate searching the web, as well as providing pop-up blocking. This pop-up blocker is part of a menu bar and appears in the browser as follows:

Google -	💙 👸 Search Web	🔹 酸 Search Site	🚿 🕘 🗸 🗗 5083 blocked	Notions 🔁	1
The following icon is the	9 pop-up blocker:				
To allow pop-ups to app	ear, merely click on the icon.	You should now s	see the following:		
Once this is done, then system, you can click th	you should be able to use the le icon again to re-enable the l	online system pro pop-up blocker.	operly. Once you are finishe	ed using the or	nline



Records Display, Sorts, & Filters

All Record Display

Some pages default to displaying all records.

Select Number of Record Display

Other pages default to a set number of records. In the example below, the default number is fifteen (15) records. Additional records may be displayed by using the drop down menus, or the previous and next buttons.

🔇 Previous	1-15 of 17 🛛 🔽	Next 2 📎
	Show All 17	
	1-15 of 17	
E)	16-17 of 17	Delete?

Sorts and Filters

	How to Sort/Filter	How to Return Information back to original view
Sorting by Columns	 Click the column header to quickly sort information displayed in a table. For example, if you click on the column header for Last Name, records will appear in ascending order alphabetically by last name. 	Click Reset Sort.
Filters/ Quick Search	Click the Filter by drop down menu to select a primary filter and select/enter secondary filter (if applicable) For example, if you'd like to see all of the vacant positions you would select Filter By "Vacant Position", ensure "yes" is selected and click "Go". Filter By Vacant Position Yes Go	 Erase the filter criteria and click Filter/Find. The Reset Sort button does <u>not</u> apply to filters.
Advanced Search	Specific modules also have an advanced search feature which allows for the entry of multiple criteria with several options for record selection. Filters may be a dropdown or a textbox. Enter text to search for into textboxes and/or select criteria from dropdowns and click on Find .	Click Back to Quick Search.



Appendix B: Projected School List Navigation

Product Case Operation Projected List Temporary List Early Return List Buy Sell List Leave List Non Projected List Expired Licenses Summary Oview Selections Projected School Lists all projected employee and position transactions for the upcoming structure Title Description Projected School Lists all projected employee and position transactions for the upcoming structure Temporary List Lists all non-tenured teachers who are unassigned for the upcoming school Early Return List Lists employees who returned early to another school within the district bereturn rights to their original school. Buy/Sell List Lists all positions that were either bought or sold during the current school Leave List Lists employees on leave from the school.	es C school											
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eHR Projected School List Quick Sheets

Projected School List - Menus and Tabs

Listed below are the column headers and a brief description of the elements of the Projected School List.

Column Header	Description
Select	Radio button to select the row for an employee or a position transaction
Details C	Click on 'Show' for additional employee or position details.
Qualification Tab	 a. Position Minimum Qualifications – A position's subject area(s) and Highly Qualified status. (NOTE: the data listed is based off of the current year's teaching assignment.) b. Employee Qualification – Qualifications from the HQ data base
Funds Tab	Funding information for this employee. (i.e. UAC, Budget Prog ID, etc.)
Course Area Tab	Employee assignments from the eSIS database. (NOTE: the data listed is the current year's teaching assignment. The Projected School Year data will be updated prior to school starting.
Position Details Tab	Information regarding the last action for this position.
 Employee Details Tab 	Information regarding the last action on this employee. Probationary semesters are also included in this tab.
Posn No	Position Number
Position Status	This field replaces the position number suffixes. Some examples include: Active, Act-Bought, Inact-Sold, etc.
Tk No	Track Number (for multi-track schools only, non track schools will show 0)
PC	Position Control (P=permanent; T=temporary)
DOE ID, Employee ID, Person ID	Official DOE Employee ID
Last Name	Current last name of record for employee
First Name	Current first name of record for employee
Employee Status	Employee Status. Some examples include: Active, Unassigned, Leave, X-ferred, Retired, Separated, etc.
Position Title	Position title
Appt Type	Appointment Type (see below for detailed chart)
Posn FTE	Position FTE or Full Time Equivalency (1.00 = 100%; 0.50 = 50%)
Emp FTE	Employee FTE or Full Time Equivalency (1.00 = 100%; 0.50 = 50%)
Emp Action	Latest employee action on Projected School List. This replaces the "Placement Action" on the manual school list.
Emp Action Effective Date	The effective date of the employee action.
Position Reason	The last action for this position.



Projected School List - Menus and Tabs

Appt Type – Appointment Type	Teacher	
	F1 =	Regular-Tenured appointment, assigned to unobligated
	1	position
	F2 =	Limited Term-Tenured appointment, a temporary position
		or assigned to a position obligated to another employee
	F4 =	Limited Term-Probationary appointment
	F5 =	Limited Term-Temporary teacher appointment & does not
	15 -	meet minimum licensing requirements
	F6 –	Limited Term-Tenured appointment, assigned to a
	10 -	tomporary state/district position
	F7 —	Limited Term On early return from leave, accided
	1.1 -	temperarily to a nen gueranteed position
	FO	temporarily to a non-guaranteed position
	F9 =	Limited Term-Temporary teacher appointment agreement;
		licensed
	FP =	State Employee at Public Charter School – Employed by
		Public Charter School and not a DOE Employee; however,
	1	has DOE Tenure
	FQ =	Dual License–Return to Special Education
	FR =	Retiree returned to special education or shortage area
	FS =	State Employee at Public Charter School - Employed by
		Public Charter School and not a DOE Employee
	FT =	Teacher for America -Temporarily employed DOE teacher
		recruited by Teach for America
	FV =	Limited Term-Temporary appointment: meets minimum
		certification requirements & teaching out-of-field
		certification
	FW =	Limited Term-Temporary appointment: certification
	1 –	nending HTSB license
	EO – Edu	Icational Officer
	FA =	Regular-Tenured appointment
	FB =	Limited Term Appointment-Probationary
	FC =	Limited Term Appointment-Probationary Vice position is
	10 -	guaranteed to former incumbent who is currently serving
		probation
	FD -	Limited Term Vice, position is currently guaranteed to a
	$\Gamma D =$	former incumbent who is currently on LWOD or is a
	1	tormer incumbent who is currently on LWOP of IN a
	EE	temporary position or assignment
	$\mathbf{FE} =$	Limited Term Appointment-Temporary position, temporary
	- EE	state or district position
	FF =	Limited Term Appointment-Temporary/Acting Appointment
	FG =	Limited Term Appointment-Temporary, not qualified for position
	FH =	Limited Term Appointment-Temporary Position/Vice
	FI =	Superintendent / Superintendent Subordinate position with DOE EO Tenure
	FJ =	Superintendent / Superintendent Subordinate position without DOF FO Tenure
	1	
	FK -	State/District Trainee
	FK =	State/District Trainee
	FK = FL & F8 =	State/District Trainee Limited Term Appointment-Ace Trainee



Projected School List - Menus and Tabs

Projected School List - Summary Page

<u>Description</u>: Provides a comparison of the FTE in the Approved AFP and the Projected List (existing positions and employees). It also lists all vacant positions, deleted positions, and unassigned tenured teachers.

jected l	List Ten	nporary	/ List Early	/ Return I	List Bu	uy Sell List Lea	ive List	Non Pr	rojected	List	Summary		1					
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Acad	lemic Fin	ancial	Plan (AFP)	/ Projec	ted Sch	nool List Positie	n Fund	ling										
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B	Hide	Gen-W	ISF WSF A	djustmen	t(15954)	/11)	\bigcirc	2510		Elem Te	eacher		10	0		1	1	
Positio	on Effe	ctive	Admin	Posn	Fund	Budgeted		osition		La	st First	Effective	Ad	min	Emp		Fund	
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Projected School List - Menus and Tabs

	Display Section	Description
A	Academic Financial Plan (AFP) / Projected School List Position Funding	Provides a comparison of the Approved AFP, the Budgeted Position FTE, the Position FTE, and the Employee FTE. The AFP FTE must be equal to or greater than the Budgeted Position FTE. The Position FTE and Employee FTE help to determine the Budgeted Position FTE.
	B • Details	This allows you to show/hide more information about the Position FTE and the Employee FTE. By clicking on the +Show, it will provide additional information below the selected funding row.
	1	The table on the left lists all the positions that make up the Position FTE and the Budgeted Posn FTE. It lists the position number, effective date, admin location, position FTE, Fund %, and Budgeted Flag. The Position FTE is added up to show the total in the Position FTE column. If the Budgeted Flag is checked, the Position FTE is added up to show the total in the Budgeted Position FTE column.
	2	The table on the right is a list of all the employees that are currently in the positions listed on the left. The Employee FTE is added up to show the total in the Employee FTE column.
	Fund Source	This is the funding source. All Gen-WSF funding sources must be balanced in order to submit the Projected School List
	Budget Program	Detailed description of the budget program ID in parentheses.
	Object of Expenditure	The object of expenditure from the AFP/Position funds.
	Expenditure Object	Description of the expenditure object or position type for the positions
	AFP FTE	FTE amount from the approved Academic Financial Plan (AFP). This number is not to be exceeded by the other columns (Budgeted Posn FTE, Posn FTE, Emp FTE). If it does exceed, the line becomes blue.
	Budgeted Posn FTE	The Budgeted Position FTE is the total amount of position FTE that is budgeted based on the Budgeted flag in Position funds tab. This must match or be less than your AFP FTE for the Fund Source 'Gen-WSF'.
	Posn FTE	The Position FTE is the total position FTE at this location for the particular Budget Program.
	Emp FTE	The Employee FTE is the total employee FTE that has been assigned for the projected year. This number should be less than or equal to the Position FTE.
С	Vacant Positions	This is a list of all the vacant positions at this location.
D	Deleted Positions	This is a list of positions that have been abolished in the Projected School List.
E	Unassigned / Pending Leave Tenured Employees	This is a list of tenured employees that have not been appointed for the projected year. They have either been unassigned in the PSL or their leave status has not been resolved. These employees need to be placed.



Projected School List - Menus and Tabs

Projected School List - Employee Transaction Screen

Click on the Employee Transactions button.

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Projected School List - Menus and Tabs

Display Section Person Position Person Actions		Description Displays the all positions (most recent position at the top) that the employee has been in.	
		•	Position Number
•	Effective Date	Effective date of the transaction.	
•	Effective Seq No	This indicates the order for multiple actions done on the same day.	
•	Action	The type of action being taken for the action.	
•	Reason	The reason for the action.	
•	Transfer To Position	If transaction involves transferring the employee from one position to another, the position that the employee is transferring to should be entered into this field.	
•	Process Case Key	This is a system assigned case number associated with all actions that are initiated within eHR.	
•	HR Action Status	Reflects the current status of the action.	
Tabs			
•	Position Details tab	Lists all details about the action row selected in the Person Action display	
•	Funds tab	Shows the funds for the employee.	
•	Names tab	Name of employee.	
•	Addresses tab	Address of the employee.	



eHR Projected School List Quick Sheet



Projected School List FAQ's

01-13-2017



eHR Projected School List Quick Sheet

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System Related Questions

1. I don't see my appropriate location when I try to view my Projected School List?

Please contact your PRO office. The PRO office will contact the eHR System Administrator to update your location access.

2. After logging onto eHR, I receive an error message stating, "You do not have authorization to access this page"?

Please contact your PRO office. The PRO office will contact the eHR System Administrator to update user access.

3. While working on my School List, I received an "Internal Error" message.

Please click on the "Continue" button to return to the Home page. If the error message persists, please close your internet browser, re-open it, and log back into eHR.

4. What happens if I accidentally delete a record?

When a projected row for an employee is deleted, the employee name will no longer appear on the Projected School List screen. Their name will now appear on the Non-Projected List screen. Go to the Non Projected List screen, and choose the Employee Transactions button for this employee. Click on 'Add Row' and make the necessary changes to the Action / Reason for the Projected School Year.

5. What does 'Cancel Process' do?

"Cancel Process" is an option on the "Select an Action" drop down menu for submitting your Projected School List. This option will delete the entire process case that you have created and edited. All position and employee transactions will be deleted from the system. Please use extreme caution when using the "Cancel Process" functionality. If you do decide to utilize the "Cancel Process" a case, click on Create New Case tab to generate another list.

6. What is the "Show Previously Abolished" box on the Projected School List screen?

By clicking on the "Show Previously Abolished" box, your Projected School List will display positions that have been abolished within the current school year. Additionally, abolished positions that currently have an employee on leave in the position will be displayed, regardless of when it was abolished. Abolished positions will display on the Projected School List in blue.



7. What do the following colors mean within my school list?

Red - Represents a change that has been made to either a Position or Employee for the projected school year.

Blue - Represents a position that has been abolished.

Green - Represents a position with available FTE to be filled.

- **Orange** Represents an employee that has been automatically returned to their original location as part of the Projected School List process. Examples of these are ACE Interns and employees who are returning from leave early.
- **Green (highlight)** Represents a transaction that has occurred to a specific employee subsequent to the Projected School List being created. Because there are multiple processes occurring at the same time, the Projected School List will need to be automatically updated to reflect such changes. For example, if there is a change to an employee's appointment type for the current school year after the Projected School List has been generated, the employee will be highlighted in green.
- Yellow (highlight) Represents a transaction that has occurred to a specific Position subsequent to the Projected School List being created.

Projected School List Questions

8. EOs are on my Projected School List. What actions am I allowed to make for them?

Because Educational Officers (EOs) are Board of Education appointed to their positions, the only changes that are allowed are: resign or retire an employee, abolish a vacant position, place an employee on leave, return an employee on leave, or make funding changes. All other actions will be done by OHR.

9. Why is an Extended Leave employee on my school list?

Employees who are on Extended Leave will still show up on your Projected School List, even though they become District Unassigned employees. If you are not returning the employee to your school, you do not need to do anything. They will show on the Summary View as Unassigned/Leave Tenured Employees. Please inform your District PRO that this employee will need to be placed.

10. How do I change a position from 12 month to 10 month?

1. Create a new 10 month position.

2. In the comments box for the new 10 month position, note the 12 month position number that you are abolishing.

- 3. Transfer the incumbent to the new position (if applicable).
- 4. Abolish the 12 month position.



eHR Projected School List Quick Sheet

11. I abolished a position. How do I re-establish it?

1. From the Projected School List view, choose the abolished position and click on Position Transaction.

- 2. Choose the Abolished row and click on Delete Row.
- 3. Save Changes.

12. I was working on my Projected School List but now when I log onto the system it does not appear under my "pending cases"?

In order to access your Projected School List, please click on the "Show All Cases" checkbox. Your Projected School List process case should be listed within this tab in green. NOTE: If your process case is not listed in green, this means that it has been submitted to your PRO. Please contact them to return it to you in the event you need to continue working on it.

13. I need to have my PRO view some of the proposed changes I am making prior to submitting my Projected School List. How can I do this?

Your respective PRO is able to log onto the system and view your Projected School List prior to you submitting it. If you have questions regarding position and employee changes that you are making, both of you are able to log onto eHR and view your respective School List at the same time.

14. My FTE totals do not match on the Summary View.

1. If the Person or Position FTE totals exceed the AFP totals, the Budget Program line will be blue.

2. Click on the Detail overflow to see a list of positions and employees associated with the Budget Program and Object of Expenditure to see if there is a discrepancy.

15. What do I need to check prior to submitting my Projected School List?

Check the Non Projected List to make sure that no names are showing on this list (see FAQ, "What do I do if someone is on the Non-Projected List?"). See below for more information.

Check the Buy/Sell List to make sure that no positions are showing on this list. Reference pages 9 to 11 on how to remove these positions from your list.

Check the Summary screen to view AFP totals, Vacant Positions, Deleted Positions and Unassigned Tenured Employees. NOTE: If your WSF totals on your Projected School List exceed your Financial Plan totals, you will be unable to submit your Projected School List. You will receive an error message. You will need to make adjustments prior to submittal.

Run the Position Details and Position Summary reports.



eHR Projected School List Quick Sheet

16. I get an error message when I try to submit my Projected School List.

Check to make sure that the AFP FTE, Posn FTE and Emp FTE on the Summary View are correct. (see note above if they do not match). The system will not allow you to submit your Projected School List if the WSF Budget Programs are highlighted blue. Please make adjustments and re-submit.

Check to make sure the Non-Projected List is blank. If employees are on the Non-Projected List, the system will not allow you to submit your Projected School List. An employee will appear on the Non-Projected List when they do not have a projected row. This can happen at the time of generation of the Projected School List, or because their generated row was deleted. Click on 'Add Row' and make the necessary changes to the Action / Reason for the Projected School Year.

17. How do I establish a 12-month position?

12-month positions cannot be created in the PSL. If new FTE was included in the AFP, please inform your PRO and then Class & Comp will create the position for you.

18. How do I see all subject areas for my school?

Run the Position Details Report. See the report instructions in the Report section. Be sure to fill in the Location ID for the school/district that you want to view.

19. What do I do if someone is on the Non-Projected List?

Any certificated employee who does not have a row for the projected year will be on the Non-Projected list. You will need to add a row for this person. Select the radio button of the employee and click on the Employee Transactions button. Click the Add Row button. Select the appropriate Action and Reason. Click on the Save Changes button. Click on the Back button. The employee will no longer appear on the Non-Projected List. The employee will now appear on the Projected List.

20. How do I buy or sell a position in my Projected School List?

You cannot buy or sell positions in Projected School List. This must be done during the Buy-Sell process that begins in May. If you have any questions contact Class & Comp.

21. Is there a faster way to change between the employee and the position?

YES! There is a hyperlink from the Employee Transactions to immediately go to the Position Transactions. Select the radio button for employee/position that you want to change. Click on the Employee Transactions button. This will take you to the Employee Transactions screen. On the Position Details tab, at the top of the right-hand column, click on the position number. This will automatically take you to the Position Transactions screen. Here you can make any changes to the position.



on eHR Projected School List & TATP Quick Sheets

Common Error Messages

Error Message	Description
(6.1.1.1 – FUND_VAL) – Position Funding FTE may not exceed Financial Plan FTE at appropriate level.	Check Summary view. Position FTE does not match what is on the Financial Plan. See FAQ on "My FTE totals do not match on the Summary View" on how to determine what budget program is not matching up.
(PPOD 040) – Leave NTE Date preceeds Effective Date. Please adjust Leave NTE Date.	The date entered in the Leave NTE Date field is a date before the Effective Date of the action. Change the date to a date after the effective date.
(PPOD 090) – Employee status invalid because latest eligibility status is Ineligible. Please adjust eligibility status or employee status.	This means that this employee has been flagged by Teacher Recruitment as Ineligible for Rehire. Contact Teacher Recruitment for specific information.
(PPOD 115) – Employee Status: <i>L</i> Inconsistent with Leave NTE Date: <i>NULL</i> . Please adjust Emp Status/Leave NTE Date to be consistent with each other.	 There is no date in the Leave NTE Date field. When placing an employee on leave, the Leave NTE Date must be filled in with an appropriate date. There is a date in the Leave NTE Date field. When returning an employee from leave, the Leave NTE Date must be blank.
(PPOD 205) – Action/Reason can not be processed due to " <i>Prior employee status</i> <i>mismatch with Action/Reason –</i> (<i>mp_val_rslt_6</i>)". FYI – Prior Employee Status is <i>Leave of Absence</i> . Please use correct Action/Reason –or- adjust Action/Reason Resulting/Transfer Status.	This means that the action row cannot follow the previous action row because the action is incorrectly used. For example, if an employee is on leave, the appropriate action for the next action row should be Return From Leave not Appointment.
(PPOD 210) - Transaction for Person / Position / Eff Date / FTE 1 can not be processed. Only 0 Position FTE available. Please adjust FTE amount.	 There is no position FTE available to allow the employee to be placed into this particular position. It means that there is already an incumbent (another employee) occupying the position. To check to see the incumbent currently occupying the position, search for the position, go to Position Transactions, and click on the Incumbent tab. This will list all the employees that currently have actions in this position.
(PPOD 220) - Transaction for Person / Position / Eff Date / FTE 1 can not be processed. Only 0 Employee FTE available. Please adjust FTE amount.	There is no employee FTE available to allow the employee to be placed into this particular position. It means that this employee is currently in another position.To see what position the employee is currently occupying, search for the employee and go to Employee Transactions.



(RQSA 105) – Action/Reason can not be processed due to "Prior Detail Status mismatch with Action Resulting Status. Invalid Status Change". FYI – Prior Employee Status is NO prior status. Please use correct Action/Reason –or- adjust action/reason resulting status.	The action/reason cannot be changed for the "Initiate Request to Fill" action row (original row). This row must exist as it is originally created. Follow the instructions on Step 2: Modify TATP Requests to ADD a new action row.
(RQSD 110) – Request 21710 with same position/job class/category is already open/on hold. Please close or fill open/held request first or change position/job class/category.	This means that a request for the position you are trying to create has already been generated. There cannot be two requests for the same position. Review your TATP Request Listings. Make sure that if this position is to be posted in TATP that the Request to Fill Status says "Open Request".
(6.1.1.1 - FUND_VAL) - Position Funding FTE may not exceed Financial Plan FTE at appropriate level. (6.1.1.1 - FUND_VAL) - Person Funding FTE may not exceed Financial Plan FTE at appropriate level.	Check the Buy Sell List (Positions appear that were bought or sold in the current school year). Check the Summary Page if FTE is available for any WSF Program ID and then use Keep Bought Position, Reactivate Sold Position, or Abolish Position as appropriate.
(6.1.1.1 - NONPRJ) - This case cannot be submitted. There are still Non Projected List Rows.	Check the Non Projected List. Employees on this list do not have an action row for the projected year. See FAQs, question 16 for instructions on how to remove an employee from the Non Projected List.
(6.1.1.1: VAC_SUBJ) - Vacant position(s) do(es) not have a Subject Area and/or Grade Level. Please add Teacher Subject Area(s) and/or Grade Level(s) on Position Qualifications Tab.	Check the subject area of the position stated in the error message. The subject area of the position is missing the appropriate subject area or grade level. See instructions on how to change a position's subject area and/or grade level.