Manage Temporary Personnel Assignments

Introduction

Tracking of Temporary Personnel Assignments (TAs) within eHR will allow for accurate accounting of staff assignments that can impact recruiting, compensation, evaluations, and access roles\security. Currently, short-term TA assignments are only tracked by having a Form 10 submitted for payroll purposes after-the-fact. A Form 5 is used for long-term TA assignments (90 days or more) which are tracked in eHR because the position's prior incumbent is placed on leave (with or without pay).

Tracking of TAs in the personnel system will allow for automation and documentation of the approval process and provide information to other DOE and non-DOE systems that require notification for security access management.

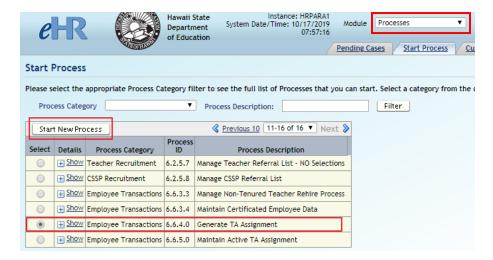
This functionality will allow District Personnel Regional Officers (PRO) or Complex Area Superintendents (CAS) to initiate and approve the temporary assignment of an individual into a school Principal position. While not directly impacting Annual Cycle processes, this TA process will also cover Vice-Principals and Athletic Directors (all school based Educational Officers <EOs>).

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Generating a TA Assignment

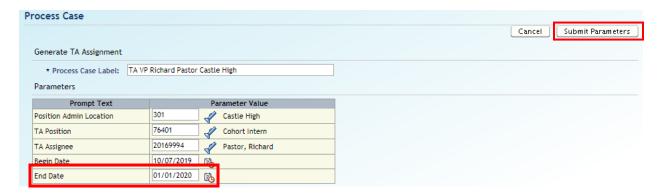
1. Access the **Processes** module, under the **Start Process** tab, select the **Generate TA Assignment** process (6.6.4.0), and click on the **Start New Process** button.



Input the necessary information for each field. All fields are required for this process. Clicking on the flashlight icon will produce a lookup box that may assist in inputting/selecting the correct information.

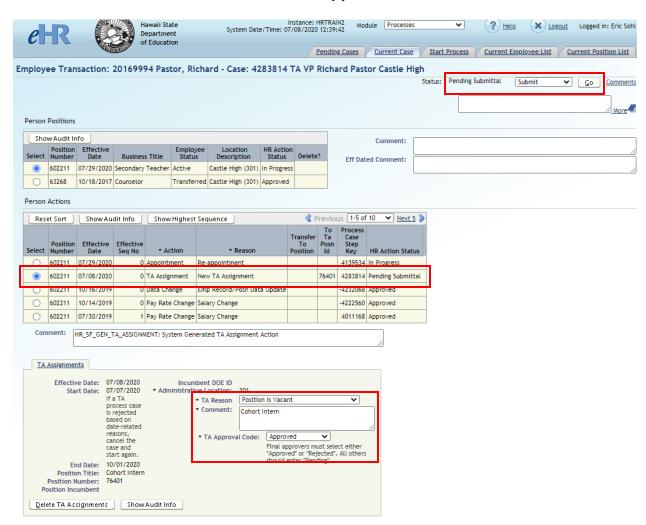
For the **Process Case Label**, we recommend the following naming convention: "TA [*Prin/VP/AD*] [*First Name*] [*Last Name*] [*School Location*]". Example: TA Prin Kolten Victorino Maui High

Click on the **Submit Parameters** button.



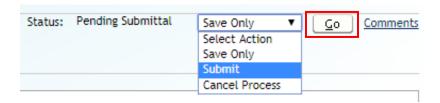
**End Date: The current process will only accommodate a TA period spanning one School Year (ex. 7/1/19 to 6/30/20). If the TA period spans across School Years (ex. 1/1/20 to 9/1/20), two TA cases need to be created. One case for the period 1/1/20 to 6/30/20, and another for the period 7/1/20 to 9/1/20.

 When a TA Assignment case is generated, a TA Assignment action is automatically entered into Person Actions. To complete the process, the following fields require attention: TA Reason, Comment, and TA Approval Code.

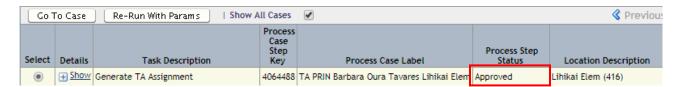


- TA Reason has the following options:
 - Incumbent on Leave
 - Position is Vacant
 - Incumbent on Temporary Assignment
- **Comment**: Additional comments regarding the assignment is inputted here.
- TA Approval Code has the following options:
 - Approved
 - Rejected

After information for the required fields have been entered, the case can be saved for later (Save Only), or submitted (Submit) for final approval. Select the appropriate option, and click on the **Go** button.



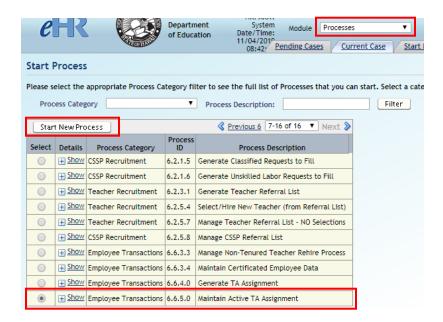
4. The TA Assignment case will indicate **Approved** in the Pending Cases list.



Maintaining Active TA Assignment

Use this process case to extend or end an active TA assignment.

1. Access the **Processes** module, under the **Start Process** tab, select the **Maintain Active TA Assignment** process (6.6.5.0), and click on the **Start New Process** button.

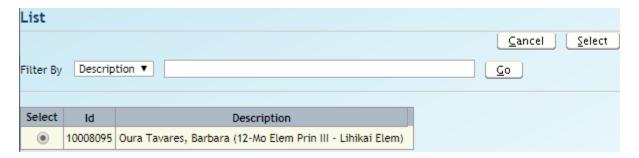


2. Input the necessary information for each field. All fields are required for this process.

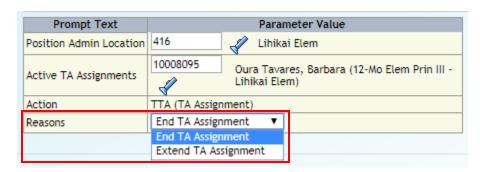
For the **Process Case Label**, we recommend the following naming convention: "[Extend/End] TA [Prin/VP/AD] [First Name] [Last Name] [School Location]". Example: Extend TA Prin Kolten Victorino Maui High



Clicking on the flashlight icon will produce a lookup box that may assist in inputting/selecting the correct information. Below is an example of the information that is brought up when clicking on the flashlight icon next to **Active TA Assignments**.



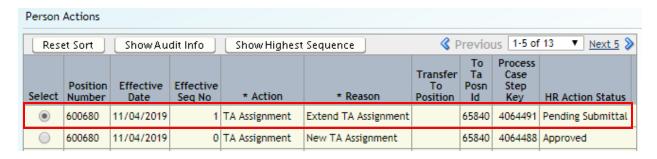
In the **Reasons** row, select **End** or **Extend** a TA assignment.



After all of the necessary information is entered, click on the **Submit Parameters** button.



3. When a Maintain TA Assignment case is generated, a TA Assignment action is automatically entered into Person Actions.

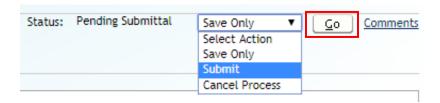


4. To complete the process, the following fields require attention: **End Date**, **TA Reason**, **Comment**, and **TA Approval Code**.



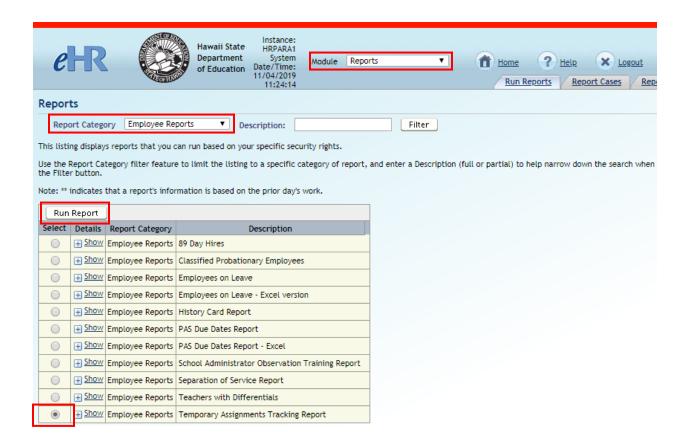
- End Date: Whether it is to End or Extend the TA assignment, adjust the date field as necessary.
- TA Reason has the following options:
 - Incumbent on Leave
 - Position is Vacant
 - Incumbent on Temporary Assignment
- Comment: Additional comments regarding the assignment are inputted here.
- TA Approval Code has the following options:
 - Approved
 - o Rejected

After information for the required fields have been entered, the case can be saved for later (Save Only), or submitted (Submit). Select the appropriate option, and click on the **Go** button.



Temporary Assignments Tracking Report

1. Access the **Reports** module, select **Employee Reports** from the **Report Category** drop down box, and click on the **Filter** button. Select the **Temporary Assignments Tracking Report**, and click on the **Run Report** button.



 Enter a label for the report, and fill in all of the parameter fields. Click the Submit Parameters button to generate the report. A Microsoft Excel file will be downloaded to your computer.

