

## 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.

Hawaii State Department of Education | Instance: HRPARA1 | System Date/Time: 10/17/2019 07:57:16 | Module: Processes

**Start Process**

Please select the appropriate Process Category filter to see the full list of Processes that you can start. Select a category from the dropdown.

Process Category: [Dropdown] Process Description: [Text] Filter

**Start New Process** [Previous 10] 11-16 of 16 [Next]

Select	Details	Process Category	Process ID	Process Description
<input type="radio"/>	[+ Show]	Teacher Recruitment	6.2.5.7	Manage Teacher Referral List - NO Selections
<input type="radio"/>	[+ Show]	CSSP Recruitment	6.2.5.8	Manage CSSP Referral List
<input type="radio"/>	[+ Show]	Employee Transactions	6.6.3.3	Manage Non-Tenured Teacher Rehire Process
<input type="radio"/>	[+ Show]	Employee Transactions	6.6.3.4	Maintain Certificated Employee Data
<input checked="" type="radio"/>	[+ Show]	Employee Transactions	6.6.4.0	Generate TA Assignment
<input type="radio"/>	[+ Show]	Employee Transactions	6.6.5.0	Maintain Active TA Assignment

2. 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.

**Process Case** [Cancel] [Submit Parameters]

Generate TA Assignment

\* Process Case Label: TA VP Richard Pastor Castle High

Parameters

Prompt Text	Parameter Value
Position Admin Location	301 [Flashlight] Castle High
TA Position	76401 [Flashlight] Cohort Intern
TA Assignee	20169994 [Flashlight] Pastor, Richard
Begin Date	10/07/2019 [Flashlight]
End Date	01/01/2020 [Flashlight]

**\*\*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**.

**Employee Transaction: 20169994 Pastor, Richard - Case: 4283814 TA VP Richard Pastor Castle High**

Status: Pending Submittal   [Comments](#)

Person Positions

Select	Position Number	Effective Date	Business Title	Employee Status	Location Description	HR Action Status	Delete?
<input checked="" type="radio"/>	602211	07/29/2020	Secondary Teacher	Active	Castle High (301)	In Progress	
<input type="radio"/>	63268	10/18/2017	Counselor	Transferred	Castle High (301)	Approved	

Person Actions

Select	Position Number	Effective Date	Effective Seq No	Action	Reason	Transfer To Position	To Ta Posn Id	Process Case Step Key	HR Action Status
<input type="radio"/>	602211	07/29/2020	0	Appointment	Re-appointment			4139534	In Progress
<input checked="" type="radio"/>	602211	07/08/2020	0	TA Assignment	New TA Assignment		76401	4283814	Pending Submittal
<input type="radio"/>	602211	10/16/2019	0	Data Change	Emp Record/Posn Data Update			-4232068	Approved
<input type="radio"/>	602211	10/14/2019	0	Pay Rate Change	Salary Change			-4222560	Approved
<input type="radio"/>	602211	07/30/2019	1	Pay Rate Change	Salary Change			4011168	Approved

Comment: HR\_SF\_GEN\_TA\_ASSIGNMENT: System Generated TA Assignment Action

**TA Assignments**

Effective Date: 07/08/2020  
 Start Date: 07/07/2020  
 Incumbent DOE ID: \* Administrative Location: 301  
 End Date: 10/01/2020  
 Position Title: Cohort Intern  
 Position Number: 76401  
 Position Incumbent

\* TA Reason: Position is Vacant  
 \* Comment: Cohort Intern  
 \* TA Approval Code: Approved

Final approvers must select either "Approved" or "Rejected". All others should enter "Pending"

- 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.

The screenshot shows a form with a status field set to "Pending Submittal". To the right of the status field is a dropdown menu with the following options: "Save Only", "Select Action", "Save Only", "Submit", and "Cancel Process". The "Submit" option is currently selected and highlighted in blue. To the right of the dropdown menu is a "Go" button, which is highlighted with a red rectangular box. Further to the right is a "Comments" link.

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

Select	Details	Task Description	Process Case Step Key	Process Case Label	Process Step Status	Location Description
<input type="radio"/>	<a href="#">Show</a>	Generate TA Assignment	4064488	TA PRIN Barbara Oura Tavares Lihikai Elem	Approved	Lihikai Elem (416)

## 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.

Start Process

Please select the appropriate Process Category filter to see the full list of Processes that you can start. Select a category

Process Category:  Process Description:  Filter

Start New Process Previous 6 7-16 of 16 Next

Select	Details	Process Category	Process ID	Process Description
<input type="radio"/>	<a href="#">Show</a>	CSSP Recruitment	6.2.1.5	Generate Classified Requests to Fill
<input type="radio"/>	<a href="#">Show</a>	CSSP Recruitment	6.2.1.6	Generate Unskilled Labor Requests to Fill
<input type="radio"/>	<a href="#">Show</a>	Teacher Recruitment	6.2.3.1	Generate Teacher Referral List
<input type="radio"/>	<a href="#">Show</a>	Teacher Recruitment	6.2.5.4	Select/Hire New Teacher (from Referral List)
<input type="radio"/>	<a href="#">Show</a>	Teacher Recruitment	6.2.5.7	Manage Teacher Referral List - NO Selections
<input type="radio"/>	<a href="#">Show</a>	CSSP Recruitment	6.2.5.8	Manage CSSP Referral List
<input type="radio"/>	<a href="#">Show</a>	Employee Transactions	6.6.3.3	Manage Non-Tenured Teacher Rehire Process
<input type="radio"/>	<a href="#">Show</a>	Employee Transactions	6.6.3.4	Maintain Certificated Employee Data
<input type="radio"/>	<a href="#">Show</a>	Employee Transactions	6.6.4.0	Generate TA Assignment
<input checked="" type="radio"/>	<a href="#">Show</a>	Employee Transactions	6.6.5.0	Maintain Active TA Assignment

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

Process Case

Cancel Submit Parameters

Maintain Active TA Assignment

\* Process Case Label:

Parameters

Prompt Text	Parameter Value
Position Admin Location	416 Lihikai Elem
Active TA Assignments	10008095 Oura Tavares, Barbara (12-Mo Elem Prin III - Lihikai Elem)
Action	TTA (TA Assignment)
Reasons	Extend TA Assignment

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**.

**List**

Cancel Select

Filter By Description  Go

Select	Id	Description
<input checked="" type="radio"/>	10008095	Oura Tavares, Barbara (12-Mo Elem Prin III - Lihikai Elem)

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

Prompt Text	Parameter Value
Position Admin Location	416  Lihikai Elem
Active TA Assignments	10008095  Oura Tavares, Barbara (12-Mo Elem Prin III - Lihikai Elem)
Action	TTA (TA Assignment)
Reasons	<div style="border: 1px solid red; padding: 2px;">           End TA Assignment ▼            End TA Assignment            Extend TA Assignment         </div>

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

**Process Case**

Cancel **Submit Parameters**

Maintain Active TA Assignment

• Process Case Label:

Parameters

Prompt Text	Parameter Value
Position Admin Location	416  Lihikai Elem
Active TA Assignments	10008095  Oura Tavares, Barbara (12-Mo Elem Prin III - Lihikai Elem)
Action	TTA (TA Assignment)
Reasons	Extend TA Assignment ▼

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

Person Actions

Reset Sort Show Audit Info Show Highest Sequence Previous 1-5 of 13 Next 5

Select	Position Number	Effective Date	Effective Seq No	* Action	* Reason	Transfer To Position	To Ta Posn Id	Process Case Step Key	HR Action Status
<input checked="" type="radio"/>	600680	11/04/2019	1	TA Assignment	Extend TA Assignment		65840	4064491	Pending Submittal
<input type="radio"/>	600680	11/04/2019	0	TA Assignment	New TA Assignment		65840	4064488	Approved

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

TA Assignments

Effective Date: 11/04/2019 \* Administrative Location: 416  
 Start Date: 11/04/2019  
 \* End Date: 12/30/2019  
 Position Title: 12-Mo Elem Prin III  
 Name: Cabanilla, Shannon

\* TA Reason: Incumbent on Leave  
 \* Comment: Incumbent was to return to work on 12/2/19, but instead will return on 12/30/19.  
 \* TA Approval Code: Pending Approval

Final approvers must select either "Approved" or "Rejected". All others should enter "Pending".

Person ID 10035389

Show Audit Info

- 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
  - 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.

Status: Pending Submittal	Save Only ▼	<input type="button" value="Go"/>	<a href="#">Comments</a>
	Select Action		
	Save Only		
	Submit		
	Cancel Process		

## 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.

**Reports**

Report Category: Employee Reports    Description:    Filter

This listing displays reports that you can run based on your specific security rights.

Use the Report Category filter feature to limit the listing to a specific category of report, and enter a Description (full or partial) to help narrow down the search when the Filter button.

Note: \*\* indicates that a report's information is based on the prior day's work.

Select	Details	Report Category	Description
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	89 Day Hires
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	Classified Probationary Employees
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	Employees on Leave
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	Employees on Leave - Excel version
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	History Card Report
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	PAS Due Dates Report
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	PAS Due Dates Report - Excel
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	School Administrator Observation Training Report
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	Separation of Service Report
<input type="radio"/>	<a href="#">Show</a>	Employee Reports	Teachers with Differentials
<input checked="" type="radio"/>	<a href="#">Show</a>	Employee Reports	Temporary Assignments Tracking Report

2. 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.

**Process Case**

Cancel    **Submit Parameters**

Temporary Assignments Tracking Report

\* Process Case Label: TATrackingReport 2020-07-14

Parameters

Prompt Text	Parameter Value
Begin Date	07/01/2020
End Date	06/30/2021
Approval Status	All
Report Output Type	XLS (XLS - Microsoft Excel Format)
Report Destination	STR (Stream Output to Screen)