# Projected School List (PSL)

# Quick Sheets

# 01-15-2019

State of Hawaii
Department of Education

**eHR Projected School List Quick Sheets**

**Table of Contents**

## 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:

OTM 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.

## Projected School List Check List

| ✔ | Checklist Items | Page No. |
|---|---|---|
| | **Working on your Projected School List…** | |
| | Access automatically generated Projected School List | 7 |
| | 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:<br>A.  Review your Buy/Sell List.  Make sure all positions have been extended, reactivated, or abolished.<br>    1.  Keep a Bought Position (to extend)<br>    2.  Re-activating a Sold Position<br>    3.  Abolish a Position<br>B.  Make position changes.<br>    1.  Change Position Subject Area<br>    2.  Create a New Position<br>    3.  Funding Changes<br>    4.  Position FTE Changes<br>C.  Review your Leave List.  Take care of all employees on leave.  Make sure all employees who are currently on leave have an updated PSL action.<br>D.  Review your Non-Projected List.  There should be no names on this list.  If there are names on the list review FAQ #19.<br>E.  Make employee changes.<br>    1. Resign/Retire<br>    2. Unassign a Teacher<br>    3. Place an Employee on Leave Without Pay<br>    4. Transfer a Employee to Another Position<br>    5. Return Employee from Leave<br>    6. Fill a Vacant Position<br>    7. Change Employee FTE | <br><br><br><br>8<br>10<br>12<br><br>19<br>13<br>16<br>18<br><br><br><br>FAQ's<br><br><br>21<br>22<br>27<br>23<br>25<br>24<br>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 |

## Getting Started

| Log in to eHR System via the CHAP Portal |
| --- |

Important Notes:

- A DOE Internet Password is necessary. This the same password used for Lotus Notes webmail, eCSSS, PDE[3], OEC and CSD.

- If you do not have a DOE Internet Password or are experiencing log in difficulties, please contact the Customer Service Desk at (808)377-8320 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. Internet Explorer, Mozilla Firefox, and Safari).
2. Type in the URL address: **https://hidoeotm.org**
3. Click on **Launch eHR**.
4. Enter your **User Name** and **Password.** (A)

   - Your User Name is either your Lotus Notes User Name (i.e. John Smith) or your Employee ID Number that may be listed on your DOE ID Badge.

   - Your Password is your DOE Internet Password.
5. Click on **OK** button**.**

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



eHR | State of Hawaii Department of Education

**System Availability**
Daily, 2:00am - 1:00am, Hawaii Standard Time (HST)
\*\*Please check System Messages after logging in for additional information on planned system outages.

\* Unauthorized use of this site is prohibited and may subject you to civil and criminal prosecution.

**Login Difficulties**
Contact the Centralized Service Desk
(808) 377-8320, Monday - Friday, 7:00am - 5:00pm (HST), except on State/Federal holidays.

Sign In

(A) User Name
Password

OK  Cancel

---

## 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 *Module* drop down menu, select **Processes**.



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. Ⓐ

3.  Select the **radio** button next to the case where the Task Description is labeled, **Maintain Projected School List** and the Process Case Label will be "**PSL 2017** – *location*" Ⓑ

4.  Click on **Go to Case** button. Ⓒ
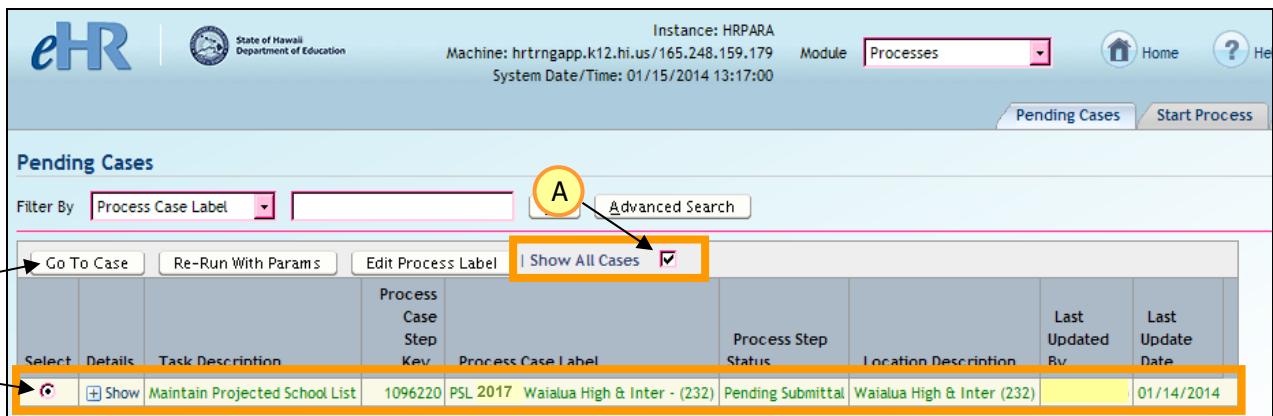
## Projected School List - Position Transactions

---

### Keep a Bought Position via the approved AFP

Description:   These instructions illustrate how to extend a bought position that was included in the FP FTE.

Important Notes:  The Buy Sell List must be cleared before submitting the PSL

Quick Tips:  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.

---

1. Bought Positions may 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 bought *position* you need to extend.  Ⓐ
3. Click the **Position Transaction** button. Ⓑ



4. The Position Transaction page will appear.
5. Click **Add Row** button.
6. Leave the Effective Date and Sequence Number.  (Exception:  Multi-track schools use: 7/1/14)
7. Under *Action* column drop down menu, select **Update Position**. Ⓒ
8. Under *Reason* column drop down menu, select **Keep Bought Position**. Ⓓ
9. In the *Comment* box, note changes being made. Ⓔ



10. Click **Edit Position Details** at the bottom of the **Position Details** tab. The Position Status will change to Active.

## Keep a Bought Position via the approved AFP

11. Click on the *Position Funds* tab. (F)

12. Click **Edit Position Funds** button. (G)



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



- 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

Quick Tips:  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.

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 *Reason* column drop down menu, select **Re-activate Sold Position**.  (B)
8. In the *Comment* box, note changes being made.

Current Position Action:

| Select | Position Number | * Eff Dt | * Eff Dt Seq | * Action | * Reason | HR Action Status | Process Case Step Key |
|---|---|---|---|---|---|---|---|
| ⦿ | 60740 | 07/27/2011 | 0 | Update Position | Re-activate Sold Position | In Progress | 113263 |
| ○ | 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 Details | Funds | Position Qualifications | Position Incumbents |

Position Info                                    Job Class Info

Effective Date :  07/01/2010 00000                    P
HR Category:  Certificated Personnel                   *
HR Sub Category:  Teacher / Counselor / Librarian
Position Status:  Active                        * Bar
Position Control:  Temporary                    * Object of E
Salary Class:  Salaried
Appointment NTE / End Date:                          Sa
Division / District:  Leeward District (30)           UAC O
Branch / Complex Area:  CA Campbell-Kapolei (931)    DOE School Ye
Section / Complex:  Complex-Kapolei (835)
* Administrative Location:  282  Kapolei Elem
* Office Location:  282  Kapolei Elem

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 Authority:
Consent Decree:
FLSA Exemption Flag:  ☐

[Edit Position Details]  [Show Audit Info]

10. Click on the *Position Funds* tab.  (D)
11. Click **Edit Position Funds** button.  (E)

| Position | (D) **Funds** | Position Qualifications | Position Incumbents |

[Show Audit Info]  |  [Edit Position Funds]

| Select | Effective Date | * Budget Program ID | Description | * Position Control | Budgeted Flag | * Job Class ID | Fund Source | UAC Appr ID | * Fund Location ID | UAC Object ID | Object Code | Object of Expenditure | Exp Obj Id Trans | UAC Proj ID | * Fund Percent | Delete? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ⦿ | 07/01/2009 00000 | 42101 | WSF-Instruction(42101/10) | Permanent | ☑ | 50520 | G | 010 | 282 | 2500 | 2510 | | Elem Teacher | A01 | 100 | |

| **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.



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.

## 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.

2. Select the **radio** button of the ***position*** you need to abolish.  **A**
3. Click the **Position Transaction** button.  **B**



4. The Process Position page will appear.
5. Click **Add Row** button.



6. Leave the Effective Date and Sequence Number.  (Exception:  Multi-track schools use: 7/1/14)
7. Under the ***Action*** column drop down menu, select **Abolish Position**.  **C**
8. The ***Reason*** column will automatically populate with Abolish Position.  **D**
9. In the ***Comment*** box, add a comment indicating why the position is being abolished or deleted.  **E**



10. Click **Edit Position Details** button at the bottom of the ***Position Details*** tab.  **This is required to abolish a position.**  The Position Status changes to Abolished.
11. Click **Save Changes** button.
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.

## 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

Quick Tips: 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.

| Filter By | Posn No | | | Go | Advanced Search | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

| Employee Transaction | Position Transaction | Fill Position | Create Position | Update Retro | Show Previously Abolished? ☐ | Reset Sort | ‹ Previous 30 61-78 of 78 ▾ Next › |

| Select | Details | Posn No | Position Status | Tk No | PC | DOE ID ▵ | Last Name | First Name | Employee Status | Position Title | Appt Type | Posn FTE | Emp FTE | Emp Action | Emp Action Effective Date | Position Reason |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ⦿ | ⊞ Show | 64643 | Active | 7 | P | 10092217 | Brown | Kimberly | Unassigned | Spec Ed Teacher | F4 (0-2) | 1 | 1 | Unassign | 07/01/2011 | Posn Qual |
| ○ | ⊞ Show | 72632 | Active | 4 | P | 10093333 | White | Sara | Active | Elem Teacher | F1 | 1 | 1 | Appoint | 07/01/2011 | Posn Qual |
| ○ | ⊞ Show | 60391 | Active | 7 | T | 10093499 | Mouse | Steffany | Active | Spec Ed Teacher | F1 | 1 | 1 | Appoint | 07/01/2011 | Updt Posn |

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. **(A)**

   • 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 |

**Create Position**

Position Number: 600688
* Job Class ID: _____ **(A)** **(B)**
Job Class Title:

   • 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**. **(C)**

     • 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 Month Elementary Teacher. **(D)**

     • Click **Go** button. **(E)**

     • Select the **radio** button of the *Job Class ID* for the new position. **(F)**

     • Click **Select** button. Most fields will fill automatically based on the Job Class Code. **(G)**

**Job Class** **(C)** **(D)** **(E)** Cancel | Select **(G)**

| Filter By | Long Description ▾ | %elem | Go | Advanced Search |
|---|---|---|---|---|

| Select | Job Class ID | Long Description | Object of Expenditure | Bargaining Unit | FTE | Salary Plan | Salary Range | HR Sub Category | Salary Class | UAC Object Code |
|---|---|---|---|---|---|---|---|---|---|---|
| ○ | 51245 | 12-Mo MT Elem Prin V | 2691 | 06 | 1 | 4E | 09 | EO | SAL | 2000 |
| ○ | 50522 | 12-Mo Elem Teacher | 2549 | 05 | 1 | T | | Teacher | SAL | 2000 |
| ○ | 50302 | 12-Mo Elem-Sec Teacher | 2549 | 05 | 1 | T | | Teacher | SAL | 2000 |
| ⦿ | 50520 | Elem Teacher | 2510 | 05 | 1 | T | | Teacher | SAL | 2500 |

**(F)**

## Create a New Position

4. Select the appropriate number to choice in the ***Track*** field drop-down menu. (H)

- If the new position is for a multi-track school or Public Charter School, change the defaulted track (DOE) to the appropriate track description.
- If the new position is for any other location, leave the track as DOE.

5. Leave the ***Effective Date***. (Exception: Multi-Track schools use: 7/1/14)
6. **Input** a ***Comment*** indicating reason for creating the new position. (I)
7. The **FTE** default is 1.00 (100%). If the new position is .50 (50%), change the FTE to .50. (J)
8. The **Office (Warrant) Location** defaults to the administrative location. (K)
9. Under ***Position Funds*** tab*,* click **Add Funds** button. (L)

### Create Position

| | |
|---|---|
| Position Number: 600688 | (H) ✳ Track: DOE (2011-2012) |
| ✳ Job Class ID: 50520 | ✳ Effective Date: 07/27/2011 |
| Job Class Title: Elem Teacher | (I) Comment: Creating new position |

**Position Info**

| | | | |
|---|---|---|---|
| Position Title: | Elem Teacher | | |
| HR Category: | Certificated Personnel | | |
| HR Sub Category: | Teacher / Counselor / Librarian | | |
| Salary Class: | Salaried | | |
| Position Status: | Active | | |
| Position Control: | Temporary | | |
| Position NTE Date: | | | |
| Administrative Location: | Kapolei Elem (282) | | |
| (K) ✳ Office Location: | Kapolei Elem | | |
| Comment(s): | | | |

**Job Class Info**

| | |
|---|---|
| ✳ FTE: | 1.0000 (J) |
| ✳ Bargaining Unit: | 05 |
| ✳ Object of Expenditure: | 2510 |
| Salary Plan: | Teacher |
| Salary Range: | |
| UAC Object Code: | 10 Month Position |

**Position Funds**

(L) Add Funds

| Effective Date | ✳ Budget Program ID | Description | ✳ Position Control | Budgeted Flag | ✳ Job Class ID | Fund Source | UAC Appr ID | ✳ Fund Location ID | UAC Proj ID | ✳ Fund Percent | Delete? |
|---|---|---|---|---|---|---|---|---|---|---|---|
| No rows found | | | | | | | | | | | |

10. In the ***Budget Program ID*** field click on the **Search (flashlight)**. (M)

- A pop-up window listing of AFP Budget Programs will appear.

**Position Funds**

Add Funds (M)

| Effective Date | ✳ Budget Program ID | Description | ✳ Position Control | Budgeted Flag | ✳ Job Class ID | Fund Source | UAC Appr ID | ✳ Fund Location ID | UAC Proj ID | ✳ Fund Percent | Delete? |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 07/27/2011 | | | Temporary | ☑ | 50520 | | | 282 | | 100 | ☐ |

## Create a New Position

11. Select the **radio** button for the *Program ID* you would like to use. **(N)**

    - *NOTE:* If you are creating a new position with a funding source 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. After completing steps 13 to 18, if you go back to Position Transaction for this position, you should now see the Description of the Budget Program added.

12. Click **Select** button. **(O)**

    - 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.

**Budget Program**

Cancel  **(O)**  Se...

Filter By  Budget Program ID ▾  [   ]  Go  Advanced Search

| Select | Budget Program ID | Description | Funding Source | Short Description | UAC Appropriation | UAC Project | Budget Program Budget ID | UAC Fund |
|--------|-------------------|-------------|----------------|-------------------|-------------------|-------------|--------------------------|----------|
| ○ | 42101 | WSF-Instruction(42101/13) | GW | Gen-WSF | 010 | A01 | 1001230101 | G |
| ○ | 42102 | WSF-Ell(42102/13) | GW | Gen-WSF | 010 | A02 | 1001230102 | G |
| ○ | 42103 | WSF-Instructional Support(42103/13) | GW | Gen-WSF | 010 | A03 | 1001230103 | G |
| ⊙ | 42104 | WSF-Student Services(42104/13) | GW | Gen-WSF | 010 | A04 | 1001230201 | G |

**(N)**

13. The *Job Class ID* field will automatically populate. **(P)**
14. The *Fund Location ID* defaults to the current location. **Do not change**. **(Q)**
15. The *Fund Percent* defaults to 100 (100%). **(R)**
16. Leave the *Delete* box blank. **(S)**

**Position Funds**

Add Row

| Effective Date | *Budget Program ID | Description | *Position Control | Budgeted Flag | *Job Class ID **(P)** | Fund Source | UAC Appr ID | *Loc ($/D) **(Q)** | UAC Proj ID | *Fund Percent **(R)** | Object of Expenditure | UAC Object Code | Delete? **(S)** |
|----------------|---------------------|-------------|-------------------|---------------|----------------------|-------------|-------------|--------------------|-------------|----------------------|----------------------|-----------------|---------|
| 07/24/2013 | 42104 | WSF-Student Services(42104/13) | Temporary | ☑ | 52260 | Gen-WSF | 010 | 201 | A04 | 100 | 2525 | 2500 | ☐ |

17. If the funding is split between two different sources, click the **Add Funds** button again to add an additional funding source. Repeat steps 9 through 10. Upon completion, change *Fund Percent* to 50% for each of the two rows.

18. If the funding is split between two different Object of Expenditures, change the Job Class ID for the appropriate Budget Program ID. To search for the ID, click the Search (flashlight).

**Position Funds**

Add Row

| Effective Date | *Budget Program ID | Description | *Position Control | Budgeted Flag | *Job Class ID | Fund Source | UAC Appr ID | *Fund Loc ($/D) | UAC Proj ID | *Fund Percent | Object of Expenditure | UAC Object Code | Delete? |
|----------------|---------------------|-------------|-------------------|---------------|---------------|-------------|-------------|------------------|-------------|---------------|----------------------|-----------------|---------|
| 07/24/2013 | 42101 | WSF-Instruction(42101/13) | Temporary | ☑ | 52260 | Gen-WSF | 010 | 201 | A01 | 50 | 2525 | 2500 | ☐ |
| 07/24/2013 | 42104 | WSF-Student Services(42104/13) | Temporary | ☑ | 52260 | Gen-WSF | 010 | 201 | A04 | 50 | 2525 | 2500 | ☐ |

19. Click **Save Changes** button. Automatically return to the Projected List.
20. On the Projected List, the Position Reason will now show New Posn in red.

| **Funding Changes** |
|---|

Description:   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

Quick Tips:   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 Action:

| Select | Position Number | ✷ Eff Dt | ✷ Eff Dt Seq | ✷ Action | ✷ Reason | HR Action Status | Process Case Step Key |
|---|---|---|---|---|---|---|---|
| ◉ | 60182 | 01/06/2013 | 0 | Update Position | Change Position Qualification | Approved | -2 |
| ○ | 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

Current Position Action:

| Select | Position Number | ✷ Eff Dt | ✷ Eff Dt Seq | ✷ Action | ✷ Reason | HR Action Status | Process Case Step Key |
|---|---|---|---|---|---|---|---|
| ◉ | 61222 | 07/01/2011 | 0 | Update Position | Fund Change | Pending Submittal | 29375 |
| ○ | 61222 | 05/31/2010 | 0 | Update Position | Change Position Qualification | Approved | -2 |
| ○ | 61222 | 07/01/2009 | 0 | Update Position | Update Position | Approved | -2 |
| ○ | 61222 | 07/01/2005 | 0 | Update Position | Update Position | Approved | -2 |
| ○ | 61222 | 08/30/1989 | 0 | Add Position | New Position | Approved | -2 |

Comment:  Changing funding

Position Info

Effective Date :  07/01/2009 00000
HR Category:  Certificated Personnel
HR Sub Category:  Teacher / Counselor / Librarian
Position Status:  Active
Position Control:  Permanent
Salary Class:  Salaried
Appointment HTE / End Date:
Division / District:  Leeward District (30)
Branch / Complex Area:  CA Campbell-Kapolei (931)
Section / Complex:  Complex-Kapolei (835)
✷ Administrative Location:  282  Kapolei Elem
✷ Office Location:  282  Kapolei Elem

CSSP Info

Civil Service Exempt Status:  Exempt Category A
Civil Service Exemption Not-to-exceed Date:
Temporary Reclass Not-to-exceed Date:
Legal Authority:
Consent Decree:
FLSA Exemption Flag:  ☐

Edit Position Details   Show Audit Info

9.  Click **Edit Position Details** button at the bottom of the **Position Details** tab.
10. Click on the **Funds** tab.   D
11. Click **Edit Position Funds** button.   E

| 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? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ◉ | 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)**.



- 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. (G)

- 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 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.



18. Click **Save Changes** button.

19. Click **Back** button.

20. On the Projected List, the Position Reason column will show *Fund Chg* in red.

## 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.

Quick Tips:  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**. (A)
6.   Under *Reason* column drop down menu, select **FTE Increase** or **FTE Decrease**. (B)
7.   In the *Comment* box, notes changes being made. (C)



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.



10. Click **Save Changes** button.
11. Click **Back** button.
12. On the Projected List, the Position Reason column will show *FTE Chg* in red.

| 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.

Current Position Action:

| | Show Audit Info | | Add Row | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Select** | **Position Number** | **✱ Eff Dt** | **✱ Eff Dt Seq** | **✱ Action** | **✱ Reason** | **HR Action Status** | **Process Case Step Key** |
| ⦿ | 72934X | 07/01/2010 | 0 | Update Position | Extend | Approved | 11561 |
| ○ | 72934X | 02/01/2010 | 0 | Update Position | Update Position | Approved | -2 |

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 **Change Position Qualification**. Ⓑ

Current Position Action:

| | | | **✱ Eff Dt Seq** | Ⓐ **✱ Action** | Ⓑ **✱ Reason** | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Select** | **Position Number** | **✱ Eff Dt** | | | | **HR Action Status** | **Process Case Step Key** |
| ⦿ | 71930 | 07/01/2011 | 0 | Update Position | Change Position Qualification | Pending Submittal | 29375 |
| ○ | 71930 | 07/01/2018 | 0 | Update Position | Change Position Qualification | Approved | -2 |
| ○ | 71930 | 07/01/2009 | 0 | Update Position | Update Position | Approved | -2 |

7. Click on the **Position Qualifications** tab. Ⓒ
8. Click on **Edit Qualifications** button. Ⓓ

Ⓒ

| Position Details | Funds | Position Qualifications | Bargaining Unit Exclusions | Documents | Position Incumbents | Position Job Class Quals |
| --- | --- | --- | --- | --- | --- | --- |

| Show | Ⓓ | Edit Position Qualifications | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Select** | **Eff Date Seqno Display** | **✱ Qualification ID** | **Qual Description** | **✱ Qualification Type** | **Subject** | **Grade ID** | **Grade Description** | **Long Description** | **Delete?** |
| ⦿ | 01/09/2011 00000 | MLD | MultiDisciplinary | Teacher Subject Area | | 09 | 9th Grade | | |
| ○ | 01/09/2011 00000 | SP | Spanish | Teacher Subject Area | | 09 | 9th Grade | | |
| ○ | 01/09/2011 00000 | SP | Spanish | Teacher Subject Area | | 10 | 10th Grade | | |

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

9. If changing grade level only, skip to step #14.

10. If no Position Qualifications exist, click on **Add Row** button. (E)

11. Select the flashlight icon corresponding to the **Qualification ID** you would like to change. The Qualification LOV pop-up window should appear. (F)



12. Select the appropriate *Teacher Subject Area* using the radio button next to the respective Qualification. (G)

13. Click **Select** button. (H)



14. In the *Grade ID* field, click on the **Search** (flashlight). A pop-up window should appear.

15. In the Grade ID pop-up window, select the **radio** button for the Grade ID you would like to use. (I)

16. Click **Select** button.

17. In the *Long Description* 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. (J)

   NOTE: To remove a subject area, check the delete box at the end of rows that will not apply to the projected school year. (K)



18. Click **Save Changes** button.

19. Click **Back** button.

20. On the Projected School List, the Position Reason column will show *Posn Qual* in red.

## 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.

Important Notes: 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. **A**
2.  Click the **Employee Transaction** button. **B**



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 OTM based on Form DOE OHR 300-011.
5.  Under the *Action* column drop down menu, select **Resignation**. **C**
6.  Under the *Reason* column drop down menu, defaults to Resignation. Select appropriate reason **D** based on the Form DOE OHR 300-011.
    **NOTE: If no reason is indicated on the Form DOE OHR 300-011, leave as Resignation.



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

## 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 OTM once the Form DOE OHR 300-011 and ERS confirmation is processed.
5. Under *Action* column drop down menu, select **Retirement**. (E)
6. The *Reason* column will automatically populate with **Voluntary Service Retirement**. (F)

Person Actions

| | Delete Row | Modify Effective Date | | Show Audit Info | | Add Row | | | | | | | | | ≪ Previous | 1-5 of 9 | Next 4 ≫ |

| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ◉ | 63797 | 07/01/2011 | 0 | Retirement | Voluntary Service Retirement | | 29375 | Pending Submittal | ☐ | ☐ | ☐ | Report | Report |
| ○ | 63797 | 07/01/2010 | 0 | Appointment | Re-appointment | | 11561 | Approved | ☐ | ☐ | ☑ | Report | Report |
| ○ | 63797 | 10/23/2009 | 0 | Pay Rate Change | 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

Description: 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**. (A)
5. The *Reason* column will automatically populate with **Unassigned**. (B)

Person Actions

| | Delete Row | Modify Effective Date | | Show Audit Info | | Add Row | | | | | | | | | ≪ Previous | 1-5 of 9 | Next 4 ≫ |

| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ◉ | 63797 | 07/01/2011 | 0 | Unassign | Unassigned | | 29375 | Pending Submittal | ☐ | ☐ | ☐ | Report | Report |
| ○ | 63797 | 07/01/2010 | 0 | Appointment | Re-appointment | | 11561 | Approved | | | | Report | Report |
| ○ | 63797 | 10/23/2009 | 0 | Pay Rate Change | Furlough | | -3 | Approved | ☐ | ☐ | ☐ | Report | Report |

6. Click **Save Changes** button.
7. Click **Back** button.
8. 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

Description: 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. (C)



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. (D)
9. Click **Select** button. (E)



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.



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

| **Fill a Vacant Position** |
| --- |

Description:  These instructions illustrate how to fill a vacant position.  Vacant positions appear in green letters on your Projected List.

1. Select the radio button of the position you would like to fill. **(A)**
2. Click on the **Fill Position** button. **(B)**



3. The Fill Position page will appear.
4. Input the **Employee ID** of the employee to be placed in this position **OR** *click on the Flashlight* **(C)** icon to get a list of available employees.
5. Click **Save Changes** button. **(D)**



6. Automatically returned to the Projected List page.
7. The Emp Action field on the Projected List will show Appoint fr XXXXX (Posn No.) in red.

## Return an Employee from Leave

Description:  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.  (B)
3.  Click the **Employee Transaction** button.  (C)



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



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**. (F)
5. Under *Reason* column drop down menu, select **Return to Another Position.** (G)



6. In the *Transfer To Position* field click on the **Search (flashlight)**. A pop-up window listing vacant positions will appear. (H)
   - From the pop-up window, you may also filter by position ID.
7. Select **radio** button for the *Position ID* you would like to assign the teacher. (I)
8. Click **Select** button. (J)



9. The *Position ID* should appear in the box under *Transfer to Position* field.
10. Click **Save Changes** button.
    - Please note, upon saving this record, there should be a **[1 / 2] > >>** icon displaying. This may be used to show the position details of where the employee is transferring to / from.
11. Click **Back** button.
12. The employee will no longer be on the Leave List. On the Projected School List, the Employee Action field will show RetfrLeave to XXXXX (Posn No).

C. Employee is on extended leave and will be placed by the District PRO.

1. The system automatically generates an Unassign/Pending Leave Resolution Projected School List action.
2. No changes to this action are necessary. The employee will show on the Summary View as an Unassigned/Leave Tenured Employee.
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 (B) Form DOE OHR 300-001.
   **\*\*NOTE:** If no reason is given, select **Long Term**.



7. On the *Position Details* tab, under the *Employee Info* section, in the **Leave NTE Date** field, (C) enter in the date the last day of the contract of the projected school year (mm/dd/yyyy).



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**:

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**.  (D)
6. Under *Reason* column drop down menu, select appropriate reason based on  (E)
   Form DOE OHR 300-001.
   **\*\*NOTE:** If no reason is given, select **Long Term**.



7. On *Position Details* tab, under *Employee Info* section, in the **Leave NTE Date** field, enter in the  (F)
   date to the last day of the first semester of the projected school year (mm/dd/yyyy).



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

## 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.



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.

# eHR Projected School List Quick Sheets

## Submitting Projected School List Process

Description:  These instructions illustrate how to submit your Projected School List.

Important Notes:  Once the process is submitted, changes must be made by PRO or State Office, unless the Projected 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.
   - **IMPORTANT NOTE:  If you choose Cancel 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 **More** for additional space for comments.

3. Click **Go** button.

## 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.

| Process ID: 6.1.2.1 | | | District: Central District (20) | Received Date: 07/31/2009 08:39:00 | | |
| Process Begin Date: 07/28/09 | | | Received From: Park, Patricia Ann | | | |

| 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

Important Notes: 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.

## Seniority Report

1. Under **Module** drop down menu, select **Reports**.
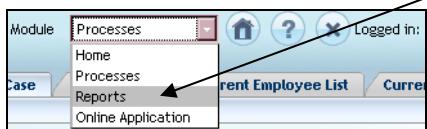
   

2. Select **radio** button for the **Seniority Report**. (A)
3. Click **Run Report** button. (B)
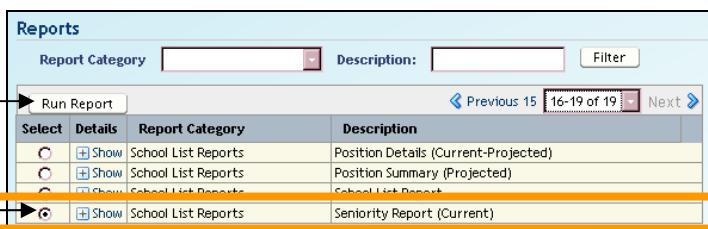
   

4. Enter a **Report Label**. (i.e. _School name_ Seniority Report) (C)
5. Input the **Location ID** or click on the **Search (flashlight)**. A pop-up window listing allowed (D) locations will appear.
   a. Select **radio** button for the **Location**.
   b. Click **Select** button.
6. Choose **Report 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. (E)
7. Click **Submit Parameters** button. (F)
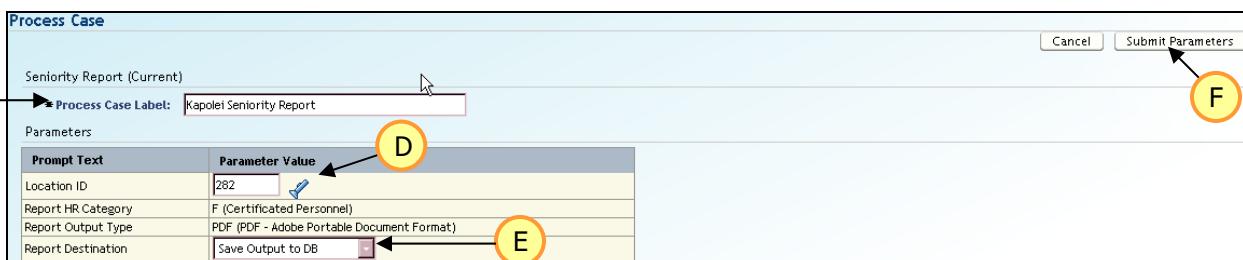
   

8. The report can now be printed or saved to another location if desired.

## 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 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

1. Under *Module* drop down menu, select **Reports**.
2. Select **radio** button for the *Position Details (Current-Projected)*. (A)
3. Click **Run Report** button. (B)

**Reports**

| Report Category | | Description: | Filter |
|---|---|---|---|

(B) ► Run Report          ≪ Previous 15   16-19 of 19   Next ≫

| Select | Details | Report Category | Description |
|---|---|---|---|
| (A) ◉ | ⊞ Show | School List Reports | Position Details (Current-Projected) |
| ○ | ⊞ Show | School List Reports | Position Summary (Projected) |

4. Enter a **Report Label**. (i.e. *School name* Position Details) (C)
5. In the *Current/Projected field* 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. (D)
6. In the *Location ID* field click on the **Search (flashlight)**. A pop-up window listing allowed locations will appear. Click the appropriate **radio** button and click **Select**. (E)
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. (F)
   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)

(C) ✱ **Process Case Label:** Kapolei Position Details

Parameters

| Prompt Text | Parameter Value |
|---|---|
| Current/Projected (D) | Projected Position Details |
| Location ID | 282   (E) |
| Order by Code | School List Sort   (F) |
| Report Output Type | ...able Document Format) |
| Report Destination | |

(dropdown: School List Sort / Position Number / Last Name / Budget Prog Id)

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 Parameters** button.
10. The report can now be printed or saved to another location if desired.

## Position Details Report

### Sample Position Details Report



| Column | Description |
|---|---|
| Position # | |
| TK | Track Number |
| PC | Position Control: P = Permanent, T = Temporary |
| Person ID | DOE Employee ID |
| Name | Last, First Middle<br>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 |

## Position Summary Report

1. Under *Module* drop down menu, select **Reports**.
2. Select **radio** button for the *Position Summary (Projected)*. (A)
3. Click **Run Report** button. (B)



4. Enter a **Report Label**.  (i.e. *School name* Position Summary) (C)
5. In the *Location ID* field click on the **Search (flashlight)**.  A pop-up window listing allowed (D) locations will appear.  Click the appropriate **radio** button and click **Select** button.
6. In the *School Year* field click on the drop down menu to select the appropriate School Year. (E)
7. In the *Summary Section* field click on the drop down menu to select the appropriate section you (F) would like to have printed.
    a.  All Sections
    b.  AFP & Proj SL Position Funding
    c.  Vacant Positions
    d.  Deleted Positions
    e.  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.

## 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**

| 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 |
| | | | | **Total:** | **2.00** |

**Deleted Positions**

No Rows Returned

**Unassigned/Leave Tenured Employees**

| Employee ID | Last Name | First Name | Position Title | Unassign Reason | Appoint Type | Employee Status | FTEs |
|---|---|---|---|---|---|---|---|
| 10010380 | Girl | Powerpuff | Elem Teacher | Pend Lv Rs | F1 | Leave | 1.00 |

| Qual Type | Description | Subject | Grade Level | |
|---|---|---|---|---|
| HQ | Highly Qualified for Elementary | Elementary | Kdgn to 6th Grade | |
| HQ | Highly Qualified for Elementary Special Education | Elementary Special Education | Kdgn to 6th Grade | |
| | | | **Total:** | **1.00** |

## Appendix A: System Navigation/Information

These instructions contain descriptions for screens and additional processes in eHR.
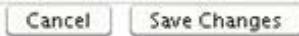
Important System Notes: DO NOT use the internet browser back arrow**.**

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.

### Menus and Tabs



Projected List | Temporary List | Early Return List | Buy Sell List | Leave List | Non Projected List | Summary

**Ⓐ   Standard Module 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. <br> • 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 List 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 ✖ | Displays user name and enables user to log out from the system. |

**Ⓑ   Case Tabs**

| Title | Description |
|-------|-------------|
| **Process Case Definition:** For each process that exists in CHAP, a process case represents an instantiation of that process. For example, "Maintain Projected School List" has been defined in CHAP as a process. By clicking on "Create New Case", the user will have created a unique process case for maintaining their Projected School List. | |
| Pending Cases | Displays cases that require some action by the user in green. To see all cases, click on Show All Cases. |
| Current Case | Displays the current case. |
| Start Process | Enables user to create a new case. |
| Current Employee List | Displays all current employees as of today. Click on Show Future to see future dated actions. |
| Current Position List | Displays all current positions and incumbents. Click on Show Abolished to see abolished positions. |

## Icons and Navigation

| Title | | Description |
|---|---|---|
| **Action Buttons** | Cancel    Save Changes | Allows users to perform or cancel an action. Typically displayed to the right of the screen.<br>• If Save is one of the Action Buttons, it is important to click it in order to keep your changes.<br>• If actions buttons are displayed both above and below a task, you only need to click one of the options. |
| **Calendar/Clock** | | 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** | | 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:<br>**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** | ⊙ | 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. |

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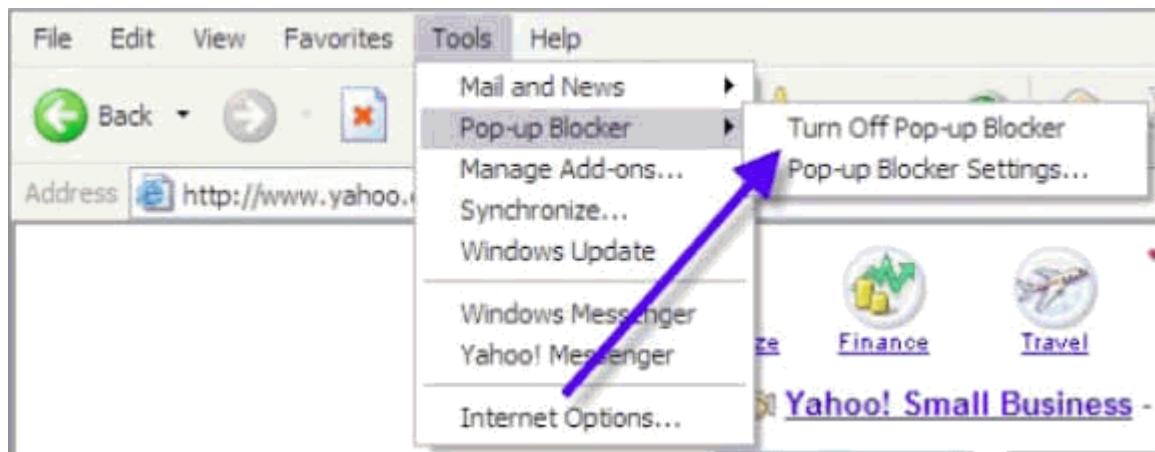
Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can go back into the menu again to turn on the pop-up blocker.

------------------------------------------------------------------------------------------------

## 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:

The following icon is the pop-up blocker:
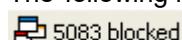
To allow pop-ups to appear, merely click on the icon. You should now see the following:
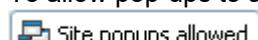
Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can click the icon again to re-enable the pop-up blocker.

| 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.
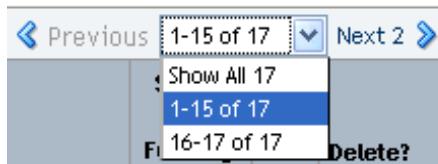


## Sorts and Filters

| | 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.<br><br>• 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)<br><br>• 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".<br><br> | Erase the filter criteria and click **Filter/Find**.<br><br>• The Reset Sort button does **not** 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.<br><br>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

---

### Projected School List - Menus and Tabs



A  Projected List | Temporary List | Early Return List | Buy Sell List | Leave List | Non Projected List | Expired Licenses | Summary
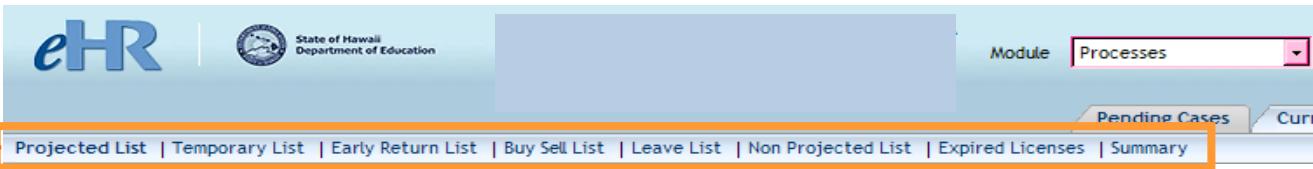
**A**  **View Selections**

| Title | Description |
|---|---|
| Projected School List | Lists all projected employee and position transactions for the upcoming school year. |
| Temporary List | Lists all non-tenured teachers who are unassigned for the upcoming school year. |
| Early Return List | Lists employees who returned early to another school within the district but have return rights to their original school. |
| Buy/Sell List | Lists all positions that were either bought or sold during the current school year. |
| Leave List | Lists employees on leave from the school. |
| Non-Projected List | Lists employees who do not have a Projected School List action. |
| Expired Licenses | Lists employees with expired licenses or licenses that will expire before the start of the next school year. |
| Summary | Provides a comparison of the Approved AFP and the Projected AFP. It also lists Vacant Positions, Deleted Positions and Unassigned Tenured Teachers. |

### Projected School List Column Headers

Description: Provides definitions for the headers on the Projected School List Screen.

## Projected School List - Menus and Tabs

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

| B 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.) <br> 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 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 meet minimum licensing requirements |
| | F6 = | Limited Term-Tenured appointment, assigned to a temporary state/district position |
| | F7 = | Limited Term-On early return from leave, assigned 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, 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 |
| | FW = | Limited Term-Temporary appointment; certification pending HTSB license |
| | | |
| | **EO – Educational Officer** | |
| | FA = | Regular-Tenured appointment |
| | FB = | Limited Term Appointment-Probationary |
| | FC = | Limited Term Appointment-Probationary Vice, position is guaranteed to former incumbent who is currently serving probation |
| | FD = | Limited Term-Vice, position is currently guaranteed to a former incumbent who is currently on LWOP or in a temporary position or assignment |
| | FE = | Limited Term Appointment-Temporary position, temporary 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 DOE EO Tenure |
| | FK = | State/District Trainee |
| | FL & F8 = | Limited Term Appointment-Ace Trainee |
| | FN = | Board Employee |

## Projected School List - Menus and Tabs

### Projected School List - Summary Page

Description: 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.

Pending Cases | Current Case | Start Process | Curr

Projected List | Temporary List | Early Return List | Buy Sell List | Leave List | Non Projected List | Summary

**Projected Year 2011-2012 School List Summary - Manoa Elem (137)**

**A** Academic Financial Plan (AFP) / Projected School List Position Funding

| Select | Details | Fund Source | Budget Program | Object of Expenditure | Expenditure Object | AFP FTE | Budgeted Posn FTE | Posn FTE | Emp FTE |
|---|---|---|---|---|---|---|---|---|---|
| ○ | + Show | Gen-Categ | Gen Ed-Article VI Inclusion Teachers(15953/11) | 2505 | Reg Ed/Article VI Teacher | 1 | 2 | 2 | 2 |
| ○ | + Show | Gen-Categ | Special Education in Regular Schools(17131/11) | 2519 | Spec Ed Teacher-Pre-Sch | 1 | 1 | 1 | 1 |
| ○ | + Show | Gen-Categ | Special Education in Regular Schools(17131/11) | 2563 | Spec Ed Teacher | 3 | 3 | 3 | 3 |
| ○ | − Hide | Gen-WSF | WSF Adjustment(15954/11) | 2510 | Elem Teacher | 0 | 1 | 1 | 1 |

**1**
| Position Number | Effective Date | Admin Location | Posn FTE | Fund % | Budgeted Flag |
|---|---|---|---|---|---|
| 600695 | 07/27/2010 | Manoa Elem | 1 | 100 | ☑ |

**2**
| Position Number | DOE ID | Last Name | First Name | Effective Date | Admin Location | Emp FTE | Fund Percent |
|---|---|---|---|---|---|---|---|
| 600695 | 10074004 | Rubble | Barney | 07/27/2011 | Manoa Elem | 1 | 100 |

| Select | Details | Fund Source | Budget Program | Object of Expenditure | Expenditure Object | AFP FTE | Budgeted Posn FTE | Posn FTE | Emp FTE |
|---|---|---|---|---|---|---|---|---|---|
| ○ | + Show | Gen-WSF | WSF-Instruction(42101/11) | 2510 | Elem Teacher | 24 | 24 | 24 | 22 |
| ○ | + Show | Gen-WSF | WSF-Instructional Support(42103/11) | 2522 | School Librarian | 1 | 1 | 1 | 1 |
| ○ | + Show | Gen-WSF | WSF-School Administration(42112/11) | 2606 | Vice Principal | 1 | 1 | 1 | 1 |
| ○ | + Show | Gen-WSF | WSF-School Administration(42112/11) | 2607 | Principal | 1 | 1 | 1 | 1 |
| ○ | + Show | Gen-WSF | WSF-Student Services(42104/11) | 2524 | Student Services Coordinator 12-Mo | 1 | 1 | 1 | 1 |
| ○ | + Show | Gen-WSF | WSF-Student Services(42104/11) | 2525 | Counselor-Regular | 1 | 1 | 1 | 1 |
| ○ | + Show | Gen-WSF | WSF-Student Services(42104/11) | 2545 | Counselor-High Risk | 1 | 1 | 1 | 1 |
| **Total** | | | | | | **35** | **37** | **37** | **35** |

**C** Vacant Positions

| Details | Posn No | Position Title | Position Control | Track | Vacant FTE | Action | Reason |
|---|---|---|---|---|---|---|---|
| + Show | 74806 | Elem Teacher | Permanent | 0 | 1 | Updt Posn | Posn Qual |
| + Show | 60811 | Elem Teacher | Temporary | 0 | 1 | Updt Posn | Posn Qual |
| **Total** | | | | | **2** | | |

**D** Deleted Positions

| Posn No | Position Title | Last Action | Effective Date | FTE |
|---|---|---|---|---|
| 600850 | Elem Teacher | Abol Posn | 07/27/2011 | 1 |
| **Total** | | | | **1** |

**E** Unassigned/Pending Leave Tenured Employees

| DOE ID | Last Name | First Name | Position Title | Unassigned Reason | Appointment Type | Employee Status | FTE |
|---|---|---|---|---|---|---|---|
| 10084813 | Pugwash | Captain | Elem Teacher | Unassigned | F1 | Unassigned | 1 |
| 10010380 | Girl | Powerpuff | Elem Teacher | Pend Lv Rs | F1 | Leave | 1 |
| **Total** | | | | | | | **2** |

## 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. |
| **(C)** 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.



Employee Transactions screen will appear.

## Projected School List - Menus and Tabs

| Display Section | Description |
|---|---|
| (A) Person Position | Displays the all positions (most recent position at the top) that the employee has been in. |
| (B) Person Actions | Displays all actions that have occurred for the employee while in the position selected on the Person Position display. |
| • Position Number | Position number that the employee is in for the action. |
| • 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. |
| (C) 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
# FAQ's

# 01-15-2019

## FAQs Table of Contents

## 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 OTM.

**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.

**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.

**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.

# 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: *L* Inconsistent with Leave NTE Date: *NULL*. Please adjust Emp Status/Leave NTE Date to be consistent with each other.** | 1. 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.<br>2. 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 "*Prior employee status mismatch with Action/Reason – (mp_val_rslt_6)*".  FYI – Prior Employee Status is *Leave of Absence*.  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.<br><br>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.<br><br>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.<br><br>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.<br><br>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.<br><br>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.<br><br>See instructions on how to change a position's subject area and/or grade level. |