eHR

Maintain Certificated Employee Data Quick Sheets

05-24-2010

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Important Notes / Tips:

- DO NOT use the internet browser back arrow. 
    - o 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. Five minute warning messages will pop-up before you are logged out.

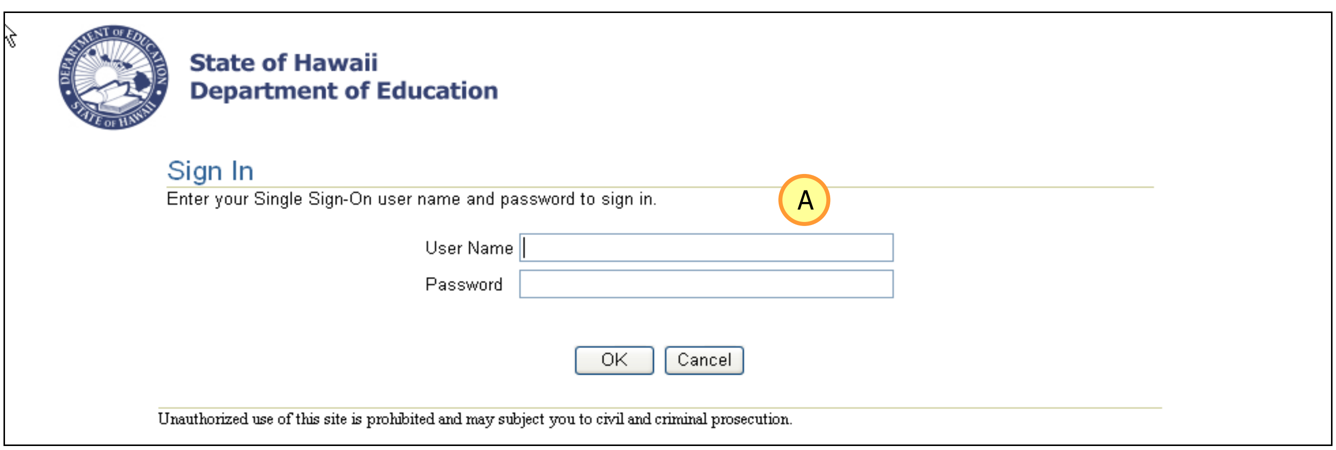
Getting Started

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 Centralized 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: **http://ohr.k12.hi.us**
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.**

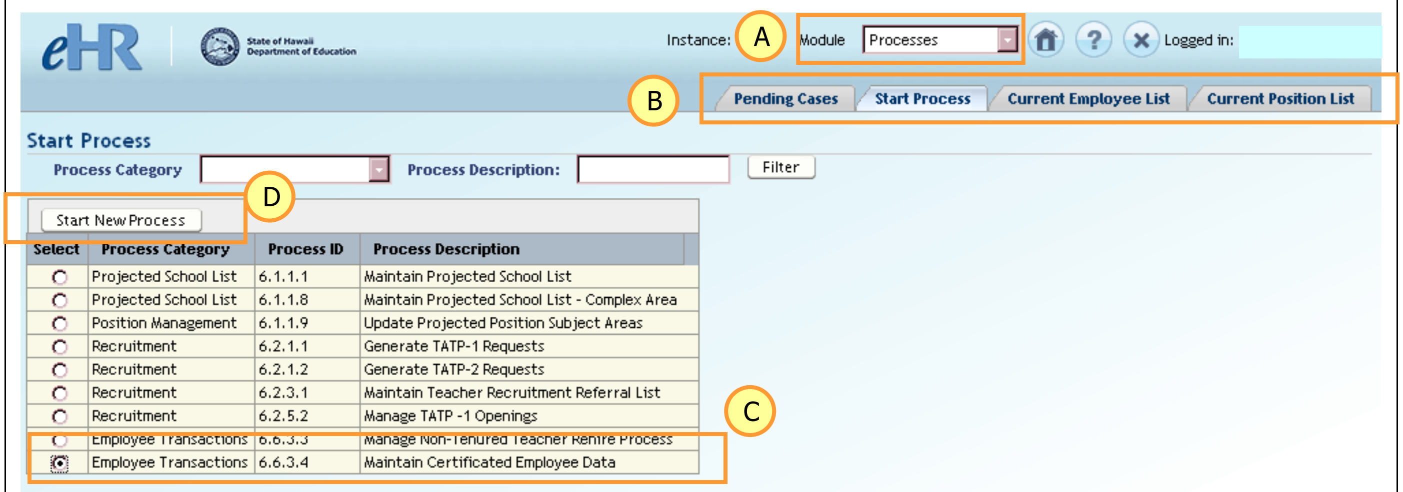


Start Maintain Certificated Employee Data Process

Description: This process is used to start the Maintain Certificated Employee Data Process.

Important Notes: This process only allows you to choose one employee per process.

1. Under ***Module*** drop down menu, select **Processes**. A
2. Click on **Start Process** tab. B
3. Select the **radio** button for **6.6.3.4 - Maintain Certificated Employee Data**. C
4. Click on **Start New Process** button. D
5. Enter a **Process Case Label** in the following format: ***Employee Name (Last, First) – Action with Effective Date*** (e.g. Smith, John – Reappointment on 07/27/2010).
6. Enter the Admin Location, or click on the flashlight icon to choose a location.
7. Enter the Employee ID, or click on the flashlight to choose an employee.
8. Click on **Submit Parameters**.



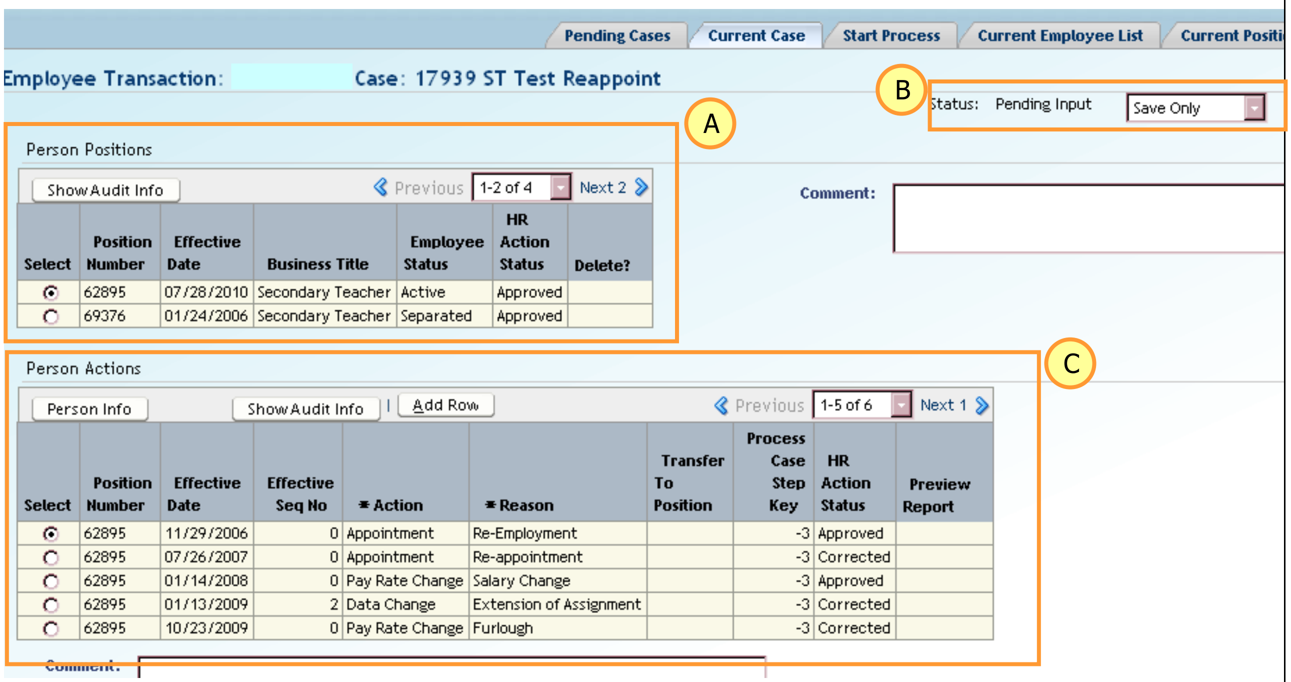
Logging Back into an Existing Process

Description: This process is used after a Process has been generated.

1. Under ***Module*** drop down menu, select **Processes**. The Pending Cases tab is displayed by default.
2. Click on **Show All Cases** box.
3. Select the **radio** button next to the **Process Case Label** you wish to access.
4. Click on **Go to Case.**

Navigating in Maintain Certificated Employee Data

Description: These instructions contain descriptions for screens in Maintain Certificated Employee Data



A

Person's Positions – Lists all positions that the teacher has held.

- Effective Date: Most current date that an action has been inserted for the teacher.
- Business Title: The position title for that position number.
- Employee Status: Shows which position that the teacher is currently active in.

B

Process Action drop down menu

- Save Only: Allows you to save any changes made. This allows you to return to this process to make any additional changes before submitting.
- Submit: Sends the process to Records & Transactions for approval. Unless process case is returned to you by Records & Transactions, no changes can be made until the approval process has been completed.
- Cancel: Deletes any modifications you have made to your process and you must start over.

C

Person Actions – Lists all actions for teacher.

- Person Info button: View only screen containing person info.
- Delete Row button: Allows you to delete the action row inserted in the process.
- Modify Effective Date button: Allows you to modify the effective date of the action row.
- Add Row: Inserts an action row with the current effective date.

Available Actions

Reappoint a Displaced Tenured Teacher

Description: These instructions illustrate how to re-appoint a displaced tenured teacher to the SAME position.

Important Note: **To appoint non-tenured teacher, use process 6.6.3.3 – Manage Non-Tenured Teacher Rehire Process**

1. Click **Add Row** button.
2. Make appropriate changes to ***Effective Date***.
3. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the employee has an Unassign Action that has a seq no = 0, then the seq no = 1)
4. Under the ***Action*** drop down, change to **Appointment**.
5. Under the ***Reason*** drop down, change to **Re-appointment**
6. At the bottom of the page, click **Edit Person Position Details**.
7. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
8. Make sure the ***Process Action*** drop down menu says **Save Only.**
9. Click **Go**.

Re-appoint – Transfer a Displaced Tenured Teacher

Description: These instructions illustrate how to re-appoint a displaced tenured teacher to a DIFFERENT position.

Important Note: **To appoint non-tenured teacher, use process 6.6.3.3 – Manage Non-Tenured Teacher Rehire Process**

1. Click **Add Row** button.
2. Make appropriate changes to ***Effective Date***.
3. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the employee has an Unassign Action that has a seq no = 0, then the seq no = 1)
4. Under the ***Action*** drop down, change to **Appointment**.
5. Under the ***Reason*** drop down, change to **Re-appointment - Transfer**.
6. In the ***Transfer to Position*** field, click on the **Search** (flashlight). A pop-up window listing vacant positions will appear.
   - Only vacant, certificated positions within your own district will appear.
   - To view the Qualifications of a position, select the **radio** button of the ***Position ID*** and the Qualifications will appear in a separate table within the same pop-up window.
   - You may also filter the list by Position ID, Location Description, Qualification Description, etc.
7. Select the **radio** button of the ***Position ID*** you would like to choose.
8. Click **Select**. The ***Position ID*** should appear in the box under ***Transfer to Position*** field.

   *Note: Due to the amount of information, it may take a few seconds for the value to populate in the Transfer To Position field.

9. At the bottom of the page, click the **Edit Person Position Details** button.
10. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
11. Make sure the ***Process Action*** drop down menu says **Save Only.**
12. Click **Go**.

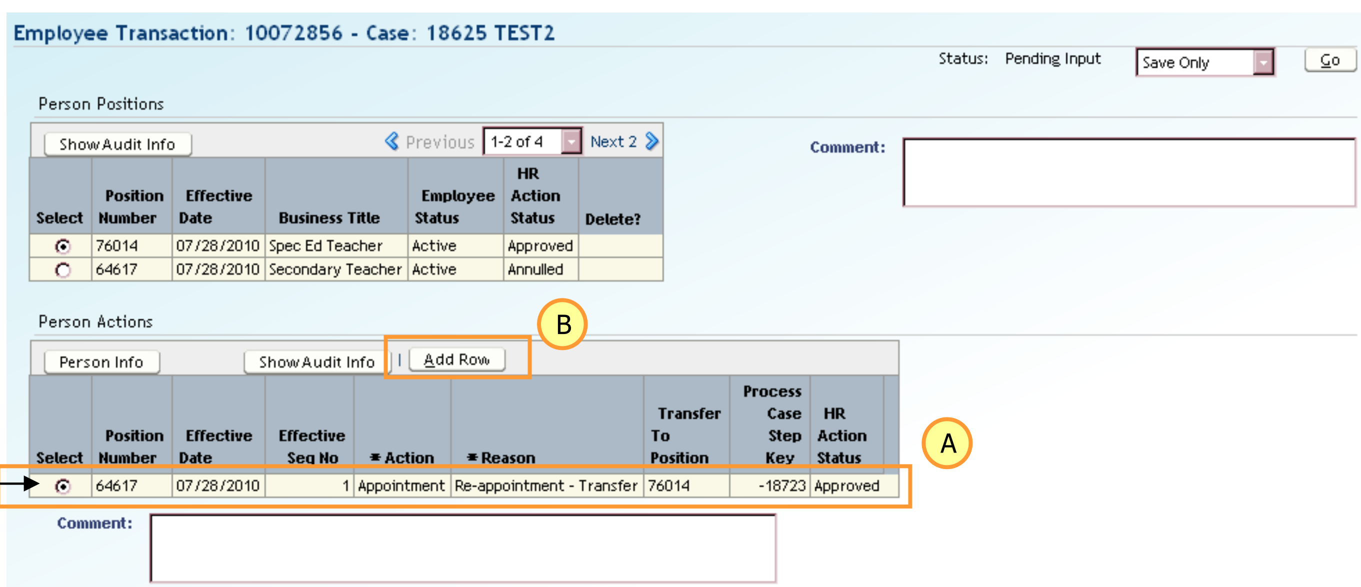
   - Please note, upon saving this record, there should be a **[1 / 2] > >>** icon displaying in the Position Details tab. This may be used to display the position details of where the employee is transferring from / to.

How to Correct A Reappointment To A Tenured Teacher

Description: These instructions illustrate how correct an appointment to a tenured teacher.

Important Note: **To change the position that a non-tenured teacher is appointed to, contact Teacher Recruitment.**

1. Select the **radio** button for the latest action row. A
2. Click **Add Row** button. B
3. Make appropriate changes to ***Effective Date***.
4. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the existing action has a seq no as 1, enter in 2)
5. Under the ***Action*** drop down, change to **Appointment**.
6. Under the ***Reason*** drop down, change to **Reappointment - Transfer**.
7. Insert the position number the teacher should be appointed to in the ***Transfer To Position*** column.
8. At the bottom of the page, click **Edit Person Position Details**.
9. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
10. Make sure the ***Process Action*** drop down menu says **Save Only.**
11. Click **Go**.



Resignation / Retirement

Description: These instructions illustrate how to resign or retire a teacher.

Important Note: All proper documentation (Form 190) still must obtain all appropriate signatures and be submitted to Personnel. Reference the Obligations tab in the Person Info section to see any pending obligations.

1. Click **Add Row** button.
2. Make appropriate changes to ***Effective Date***.
3. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the existing action has a seq no as 0, enter in 1)
4. Under the ***Action*** drop down, change to **Resignation** or **Retirement**.
5. Under the ***Reason*** drop down, select appropriate reason.
6. At the bottom of the page, click **Edit Person Position Details**.
7. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
8. Make sure the ***Process Action*** drop down menu says **Save Only.**
9. Click **Go**.

Leave without Pay – Long Term

Description: These instructions illustrate how to place a teacher on long term leave without pay.

Important Note: All proper documentation (Form 400a) still must obtain all appropriate signatures and be submitted to Personnel. Reference the Obligations tab in the Person Info section to see any pending obligations.

1. Click **Add Row** button.
2. Make appropriate changes to ***Effective Date***.
3. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the existing action has a seq no as 0, enter in 1)
4. Under the ***Action*** drop down, change to **Leave without Pay**.
5. Under the ***Reason*** drop down, change to **Long Term**.
6. At the bottom of the page, click **Edit Person Position Details**.
7. Insert in a **Leave NTE Date**.
8. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
9. Make sure the ***Process Action*** drop down menu says **Save Only.**
10. Click **Go**.

Leave with Pay - Vice

Description: These instructions illustrate how to place a teacher on leave with pay.

Important Note: **THIS ACTION SHOULD ONLY BE USED IF THE INCUMBENT IS GOING ON LONG TERM LEAVE AND THE POSITION WILL BE FILLED BY A SALARIED EMPLOYEE FOR AT LEAST ONE SEMESTER.** All proper documentation (Form 400a) still must obtain all appropriate signatures and be submitted to Personnel. Reference the Obligations tab in the Person Info section to see any pending obligations.

1. Click **Add Row** button.
2. Make appropriate changes to ***Effective Date***.
3. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the existing action has a seq no as 0, enter in 1)
4. Under the ***Action*** drop down, change to **Leave with Pay**.
5. Under the ***Reason*** drop down, change to **Vice**.
6. At the bottom of the page, click **Edit Person Position Details**.
7. Insert in a **Leave NTE Date**.
8. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
9. Make sure the ***Process Action*** drop down menu says **Save Only.**
10. Click **Go**.

Return From Leave

Description: These instructions illustrate how to return a teacher from leave.

Important Note: A teacher who wishes to return early from an already approved long term leave MUST follow procedures to request for an early return from leave.

1. Click **Add Row** button.
2. Make appropriate changes to ***Effective Date***.
3. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the existing action has a seq no as 0, enter in 1)
4. Under the ***Action*** drop down, change to **Return From Leave**.
5. Under the ***Reason*** drop down, select appropriate reason.
6. If necessary, enter in a Position ID in the ***Transfer To*** column.
7. At the bottom of the page, click **Edit Person Position Details**.
8. The **Leave NTE Date** should be blank.
9. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
10. Make sure the ***Process Action*** drop down menu says **Save Only.**
11. Click **Go**.
    - A **[1 / 2] > >>** icon displaying in the Position Details tab should appear. This is used to display the position details of where the employee is transferring from/to.

Transfer

Description: These instructions illustrate how to transfer a teacher from one position to another.

Important Note: PRO/Clerks can only view teachers that are in their districts. Therefore, if the teacher is transferring between districts, the district that the teacher is TRANSFERRING FROM must insert this action.

1. Click **Add Row** button.
2. Make appropriate changes to ***Effective Date***.
3. If Effective Date is the same as another action, enter in the next sequential number in the ***Effective Seq No*** column. (e.g. If the existing action has a seq no as 0, enter in 1)
4. Under the ***Action*** drop down, change to **Transfer**.
5. Under the ***Reason*** drop down, change to **Transfer**.
6. Enter in a Position ID in the ***Transfer To*** column.
7. At the bottom of the page, click **Edit Person Position Details**.
8. Make any appropriate changes to **Paycheck Location** or **FTE** or **Track**.
9. Make sure the ***Process Action*** drop down menu says **Save Only.**

12. Click **Go**.
    - Please note, upon saving this record, there should be a **[1 / 2] > >>** icon displaying in the Position Details tab. This may be used to display the position details of where the employee is transferring from / to.

Modify Effective Date

Description: These instructions illustrate how to modify the effective date of the action.

Important Note: These steps will need to be used if the effective date for the action row you just added has already been saved and you need to change/correct the date.

1. Select the **radio** button of the ***action*** row added.
    - If there is an action row that already has the effective date you are planning on using, you will need to make a note of the **Effective Date Seq No**.
2. Click the **Modify Effective Date** button. The Modify Effective Date page will appear.
3. In the ***New Effective Date*** field, enter in date
4. In the ***New Effective Date Seq No*** field, enter **0** if this is the first action with that specific effective date.
    - If NOT, you will enter the number that comes after the **Effective Date Seq No** from step 1. (e.g. If the **Effective Date Seq No from** step 1 was 0, then you would enter 1. If it were 1, then you would enter 2).
5. Click **Submit**.
6. The main page will appear and the action should have the corrected effective date.

Delete Row

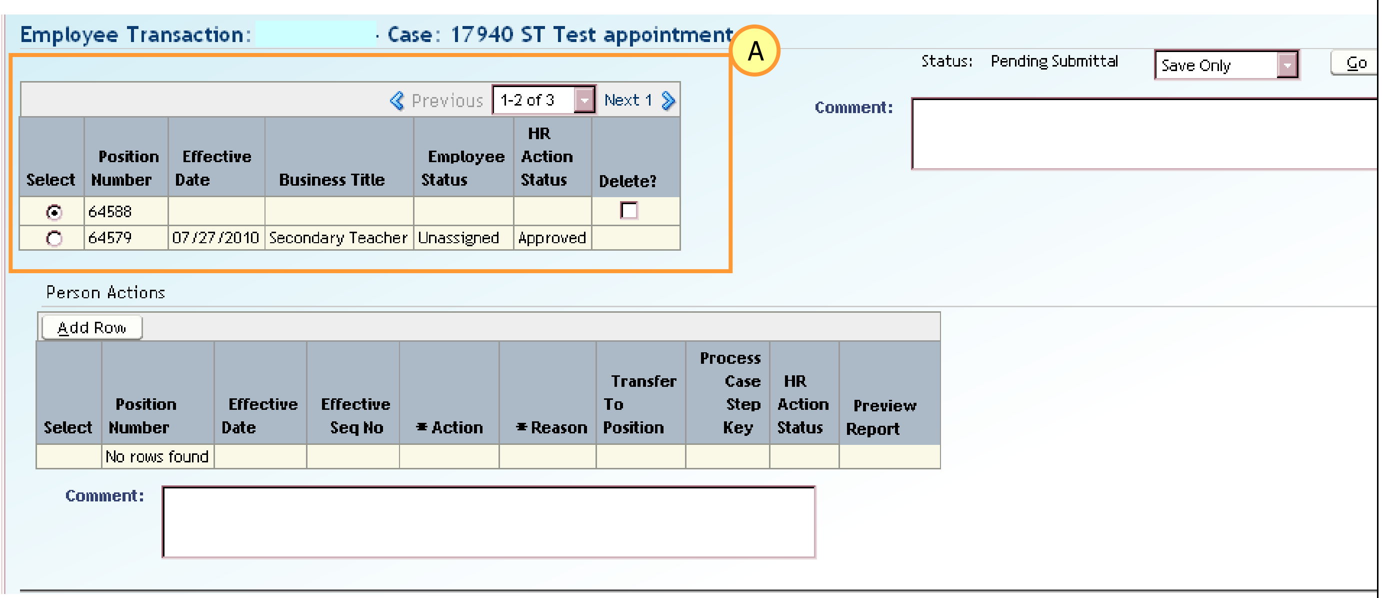
Description: These instructions illustrate how to delete the row of the action that was inserted in the current process. If you inserted the wrong action/reason and have already saved, you must delete the row and follow the appropriate instructions to add the correct action row.

Important Note: The Delete Row button will only be visible when the selected Person Action is an action row that has been inserted in this particular process.

1. Make sure the **radio** button is selected for the action you will be deleting.
2. Click the **Delete Row** button.
3. Pop-up window will appear disclaiming that the row data will be deleted permanently, click OK.

   If the row being deleted has a position number in the ***Transfer To Position* column, continue to step 4.

4. In the Person's Positions display, the position that was listed in the ***Transfer To Position*** column does not have an effective date, business title, employee status, or HR Action Status.
5. Check the white box in the Delete? Column, by clicking on the box. A
6. Make sure the ***Process Action*** drop down menu says **Save Only,**
7. Click **Go**.



Submitting Maintain Certificated Employee Data Process

Description: These instructions illustrate how to submit Maintain Certificated Employee Data Process.

Important Notes: Once the process is submitted, unless process case is returned to you by Records & Transactions, no changes can be made until the approval process has been completed.

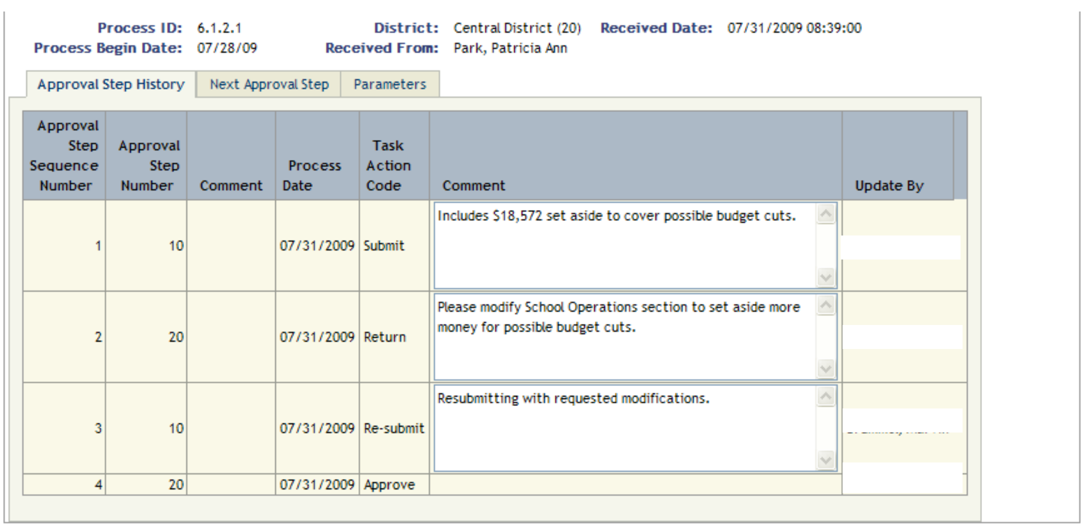
1. From the ***Process Action*** drop down menu, select **Submit**.
   - The ***Process Action*** drop down menu is located next to the ***Process Status*** field.
   - **IMPORTANT NOTE: If you choose Cancel it will delete any modifications you have made to your process and you must start over.**
2. **Enter comments** for Records & Transactions in the box next to Submit. If making changes to an already approved action, insert the following information in the comment box about the action row that should be annulled: **"Annul record: effective date = 00/00/0000; seq no = 0; action = Appointment; reason = Reappointment; position = 12345"**

   NOTE: Click on **More for additional space for comments.
3. Click **Go**.

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 anytime 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 History | Next Approval Step | Parameters

Approval Step Sequence Number	Approval Step Number	Comment	Process Date	Task Action Code	Comment	Update By
1	10		07/31/2009	Submit	Includes $18,572 set aside to cover possible budget cuts.	
2	20		07/31/2009	Return	Please modify School Operations section to set aside more money for possible budget cuts.	
3	10		07/31/2009	Re-submit	Resubmitting with requested modifications.	
4	20		07/31/2009	Approve		