eHR

# View Employee Data
# Quick Sheets

# 6-4-10

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## Getting Started

### Access the CHAP Portal

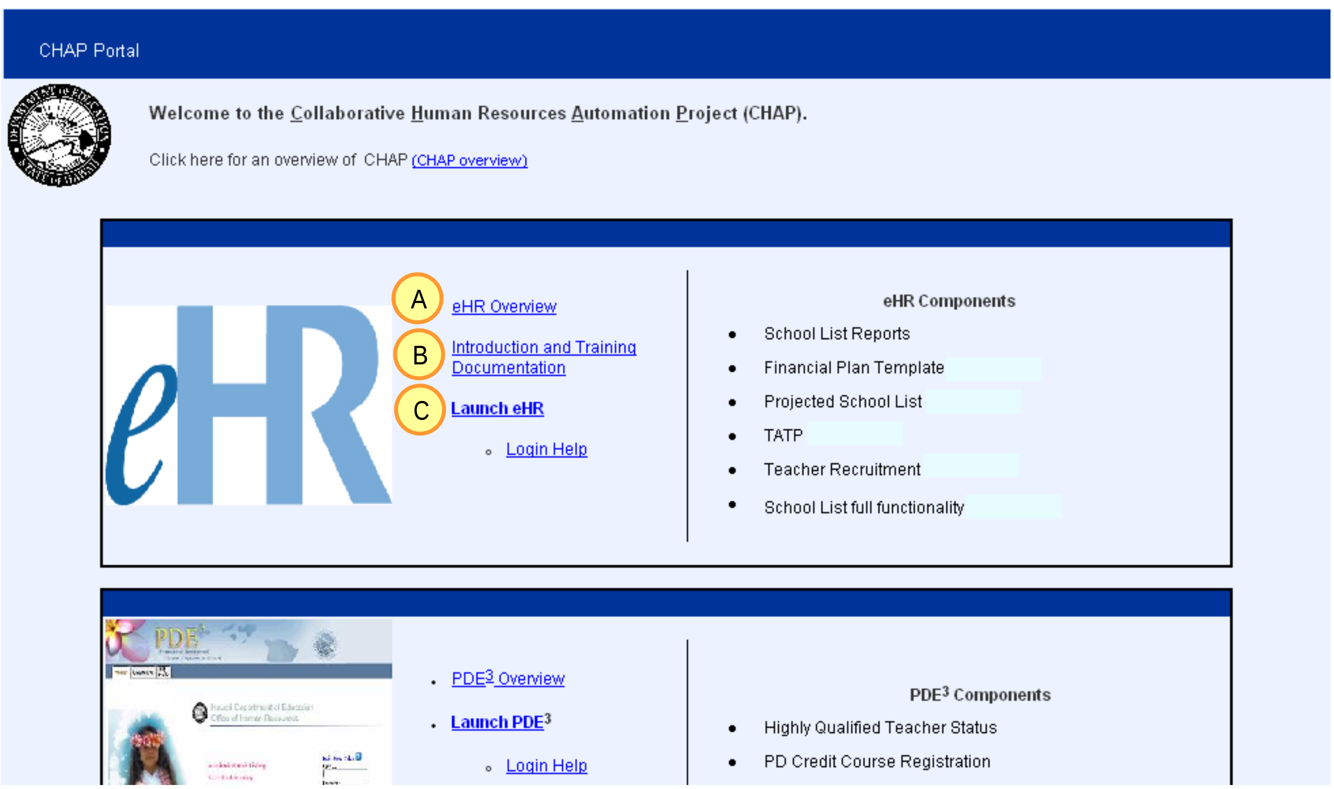
Description: The CHAP Portal page is the main directory for information pertaining to eHR and PDE3. It provides an overview of eHR, Introduction and Training Documentation, Login Help, and access to Launch eHR.

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. CHAP Portal page will appear

A **eHR Overview**: provides an overview of what eHR is about.

B **Introduction and Training Documentation**: contains Quick Sheets and Video Demonstrations

C **Launch eHR**: connects directly to the eHR Log In page.



## Important Notes/Tips:

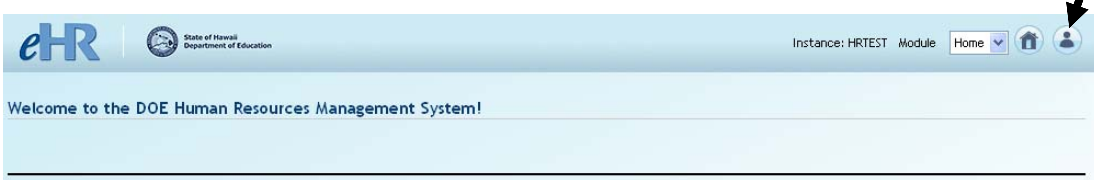
- DO NOT use the internet browser back arrow.
  - If you accidentally click the back arrow, try clicking on **refresh** to see if your connection can be re-established.
- For security purposes the system will automatically time out after thirty (30) minutes of inactivity. Five minute warning messages will pop-up before you are logged out.
- Note: Access to screens are based on your user role. Some screens may not be available to you.

## Log in to eHR System via the CHAP Portal

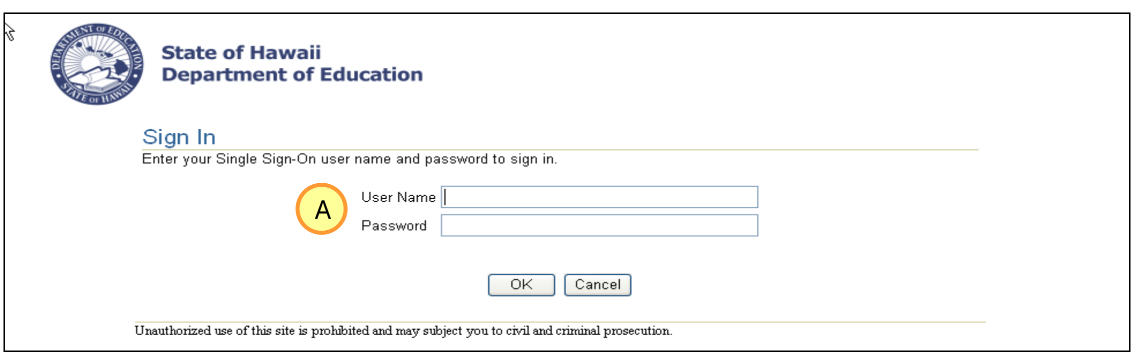
<u>Important Notes</u>:

- A DOE Internet Password is necessary. This is 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. Click on **Launch eHR** from the main CHAP Portal page.
2. Click on the *Person icon* in the top right hand corner.




3. 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.
4. Click on **OK.**



## eHR Home Page

<u>Important Notes:</u>
Pop-up blockers must be disabled in order to view the Help Page. See 'Appendix C' for instructions on disabling common pop-up blockers. You may also call the Centralized Service Desk for assistance.

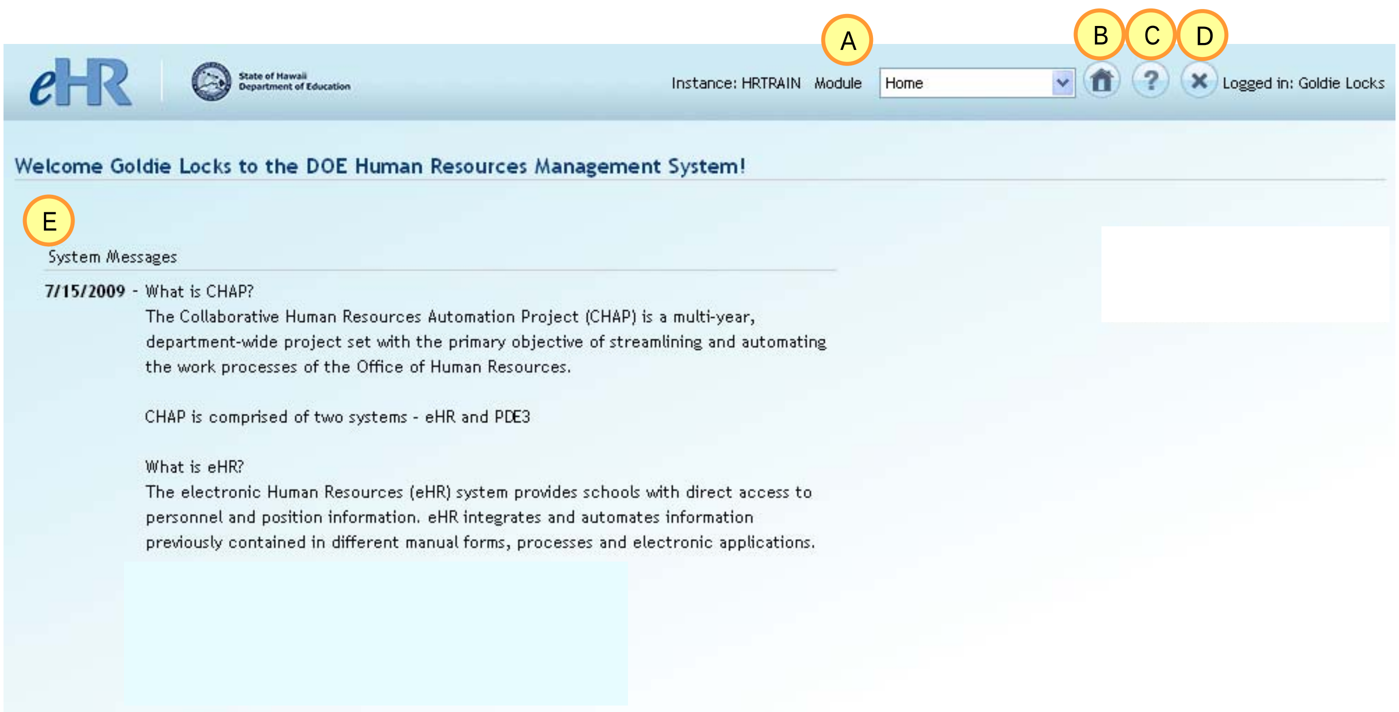
1. Click on the **Module** drop-down menu to access various modules within eHR. A
2. Click on **Home** icon to return to the home page from any screen. B
3. To access Help page, click on **Help** icon**.** C

   The main Help page contains items such as Instructional Videos, most recent version of Quick Sheets, Report List, Frequently Asked Questions, and a Reference page. If you click on Help from other screens within the module, specific page help will appear.

   - Click on **Instructional Videos** to bring up a menu of short step-by-step instructions for performing specific tasks.
   - Click on **Quick Sheets** to view and print the most recent version of this document.
   - Click on **Report List** to view a list of the available reports and see samples.
   - Click on **Frequently Asked Questions** to read responses to common questions.

Note: With the exception of the instructional videos, you will need to close the Help screen in order to proceed

4. Click on **eHR LogOut** icon to log out of eHR. D
5. **System Messages** shows eHR related notices or important messages. E

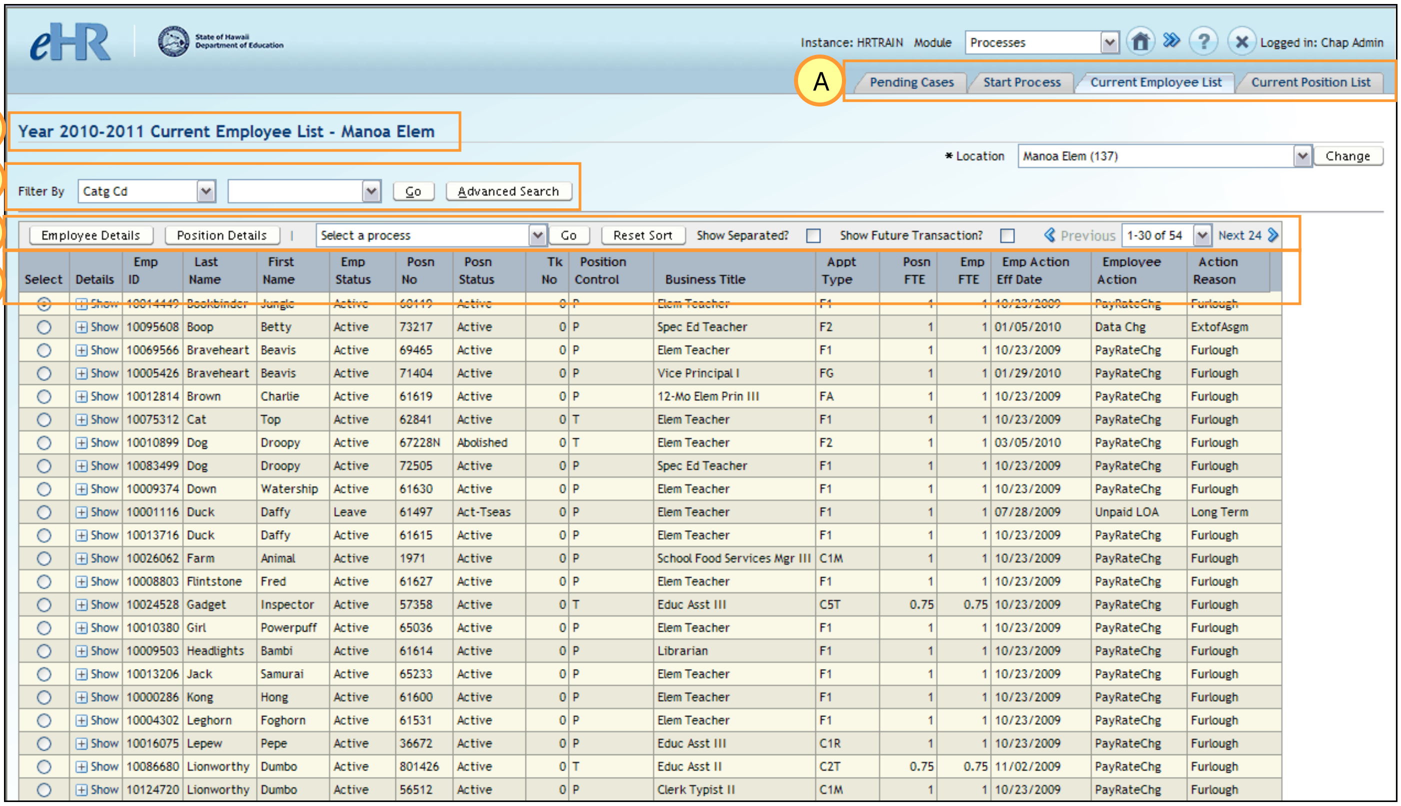


## Access the Current Employee or Current Position List

1. Under ***Module*** drop down, select **Processes.** A
2. Click on **Current Employee List** tab OR **Current Position List** tab. B
3. Choose a Location from the **Location** drop down menu. C
4. Click on Change button. D
5. The display defaults to the Current Employee List or Current Position List.


# General Navigation

## Current Employee List / Current Position List




## A Tabs

| | |
|---|---|
| **Pending Cases:** | Lists all pending cases. Click the **Show All Cases** checkbox to view all cases that are viewable to you, regardless of Process Step Status. |
| **Start Process:** | Allows users to create a new process case. Only process that users have access to will be listed. |
| **Current Employee List:** | Lists all current employees in alphabetical order. |
| **Current Position List:** | Lists all positions (filled and vacant) in School List order. |

## B Screen Header

| | |
|---|---|
| **Screen Header:** | Identifies the page you are on and the location you are viewing. |

## C Filter

| | |
|---|---|
| **Filter By:** | You can filter your list by any of the selections in the drop down choices. (Note: the list is in column header order) |
| **Secondary filter box:** | Input the criteria for the filter here. |
| **Go button:** | Click on the Go button to apply the filter. |
| **Advanced Search:** | Allows you to filter with more than one criteria. |

**NOTE:** Please see Appendix B for filtering instructions.

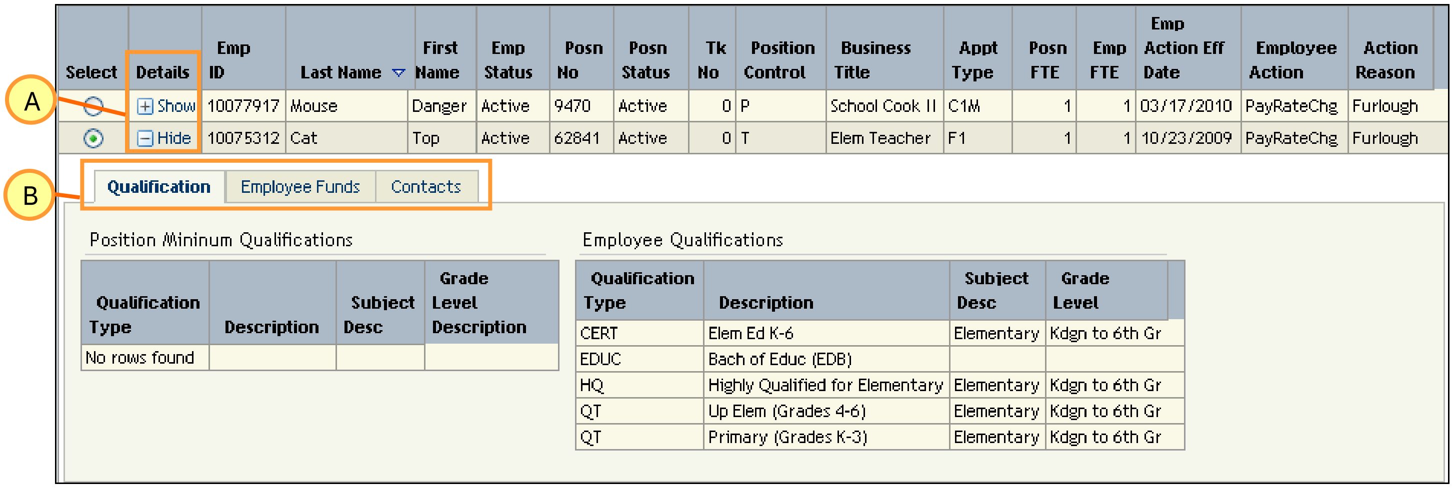
## D Action options

| | |
|---|---|
| **Employee Details button:** | Click here to go to the Employee Details or transaction screen for the selected employee to see Form 5 information. |
| **Position Details button:** | Click here to go to the Position Details or transaction screen for position information for the selected employee or position incumbent history. |
| **Select a process drop down:** | Use drop down arrow to select available processes for the selected employee. Click **Go** button to go to start the process. |
| **Reset Sort button:** | Click here to reset the sort order to the original sort order. |
| **Show Separated? Box:** **(**located on the Current Employee List**)** | Check this box to see employees who have resigned, retired or were terminated from this location |
| **Show Abolished? box** (located on the Current Position List) | Check this box to see positions that have been abolished |
| **Show Future Transaction? box:** | Check this box to see future dated transactions in the Employee List. |

## E Column Headings

See Appendix A for an alphabetical list of the Column headings descriptions and legends for all codes.

## Show Details




| Select | Details | Emp ID | Last Name | First Name | Emp Status | Posn No | Posn Status | Tk No | Position Control | Business Title | Appt Type | Posn FTE | Emp FTE | Emp Action Eff Date | Employee Action | Action Reason |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Show | 10077917 | Mouse | Danger | Active | 9470 | Active | 0 | P | School Cook II | C1M | 1 | 1 | 03/17/2010 | PayRateChg | Furlough |
| | Hide | 10075312 | Cat | Top | Active | 62841 | Active | 0 | T | Elem Teacher | F1 | 1 | 1 | 10/23/2009 | PayRateChg | Furlough |

Position Mininum Qualifications

| Qualification Type | Description | Subject Desc | Grade Level Description |
|---|---|---|---|
| No rows found | | | |

Employee Qualifications

| Qualification Type | Description | Subject Desc | Grade Level |
|---|---|---|---|
| CERT | Elem Ed K-6 | Elementary | Kdgn to 6th Gr |
| EDUC | Bach of Educ (EDB) | | |
| HQ | Highly Qualified for Elementary | Elementary | Kdgn to 6th Gr |
| QT | Up Elem (Grades 4-6) | Elementary | Kdgn to 6th Gr |
| QT | Primary (Grades K-3) | Elementary | Kdgn to 6th Gr |

## Show Details

A **Click on the "⊞ Show":** Additional employee / position information is displayed.

B **Qualification tab:** Displays Position Minimum Qualifications and Employee Qualifications.

(Note: Position Minimum Qualifications will be added in future modules. The Employee Qualifications currently shows licensure, HQ and educational data for Certificated employees only).

**Employee Funds tab:** Displays current Employee UAC funding information.
(Current Employee List)

**Position Funds tab:** Displays current Position UAC funding information.
(Current Position List)

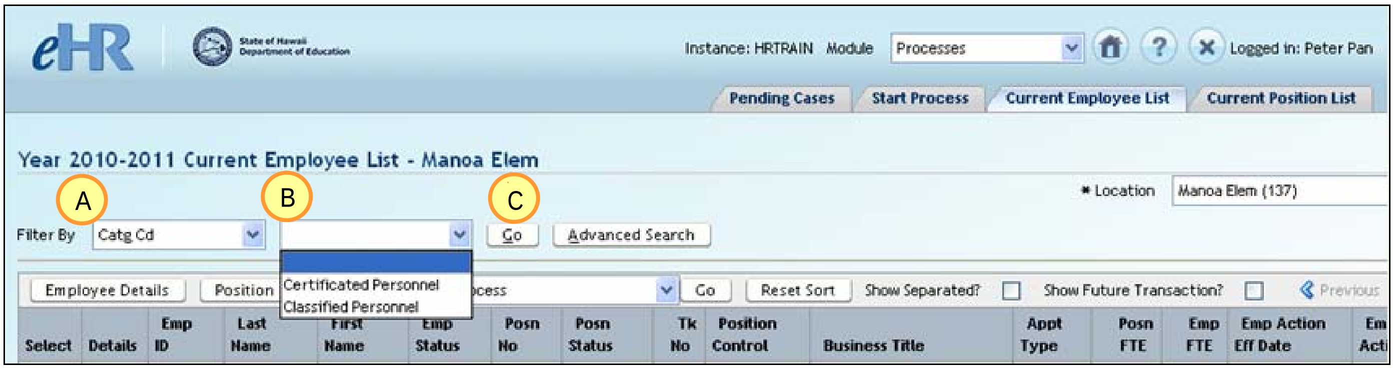
**Contacts tab:** Currently displays only the employee's business email address.
(Current Employee List)

**Course Area tab:** Displays, by school year, the courses being taught (from eSIS).
(Current Position List)

## Using Current Employee List, how do I…

### View only Certificated or Classified employees?

1. Make sure **Catg Cd** is selected in the **Filter By** drop down menu. A
2. Select either **Certificated Personnel** or **Classified Personnel** in the **Secondary Filter box.** B
3. Click on Go . C




### View all employees (Certificated and Classified) after I have used the filter above?

1. Clear the Secondary Filter (in the case above, choose the blank line above Certificated Personnel)
2. Click on Go .

### View employee list in a different order?

1. Click on the column header once to sort in ascending order and twice to sort in descending order. (e.g., Click on ***Business Title*** column header to sort by business title)
2. Click the Reset Sort button to return to the default alphabetical sort.

## View a select list of employees?

- By Appointment Type (e.g., Probationary Employees only)
  1. From the **Filter By** drop down menu, select **Appoint Type**.
  2. Enter the appropriate data for the filter in the secondary filter box. (**F4** for Certificated Probationary Employees or **C2** for Classified Probationary Employees)
  3. Click on Go.
  4. Click on any column header to see the list in a different sort order

- By Business Title (e.g., Educational Assistants only)
  1. From the **Filter By** drop down menu, select **Business Title**.
  2. Enter the appropriate data for the filter in the secondary filter box. (**Educ** will bring up all Educational Assistants)
  3. Click on Go.
  4. Click on any column header to see the list in a different sort order

- By Employee Status (e.g., Employees on leave only)
  1. From the **Filter By** drop down menu, select **Emp Status**.
  2. Enter the appropriate data for the filter in the secondary filter box. (**Leave** for all employees, both Certificated and Classified, on leave)
  3. Click on Go.

NOTE: The **%** sign is used as a "wild card" in the beginning of the search fields within CHAP - eHR. Please see the Appendix for more filter and search instructions, including how to use the Advanced Search button.

## View a select list of employees using multiple criteria?

***For example:*** *show Certificated Employees who separated from 7/1/08 only*

1. Click on the **Show Separated?** box. Show Separated? ☐
2. Click on Advanced Search box.
3. Enter the appropriate data in the filter boxes.
   - Category**: *Certificated Personnel***
   - Emp Action Eff Date: ***7/1/08***
   - Separated: ***Y***
4. Click on Find.
5. Click on any column header to see the list in a different sort order.

NOTE: The **%** sign is used as a "wild card" in the beginning the search fields within CHAP - eHR.

## View an employee's qualifications?

1. Under the ***Details*** column, click on **Show** for the desired employee.
2. Employee qualifications will be displayed.

NOTE: Click on **Employee Funds** and **Contacts** tab to see additional data.

## View information from an employee's latest Form 5?

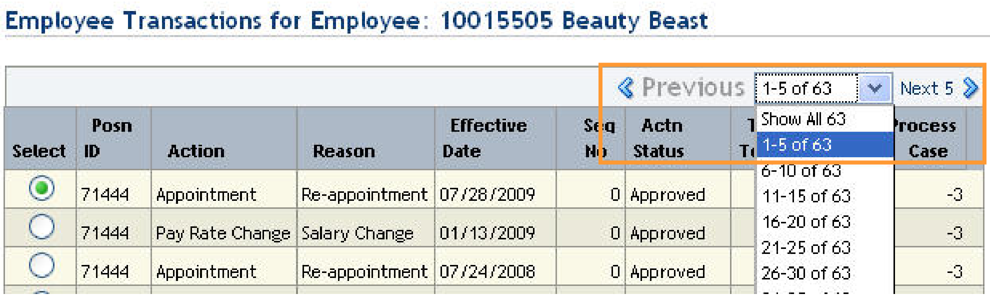
1. Click on **Select** radio button of the desired employee. Select
2. Click on Employee Details action button.
3. The ***Employee Position Details*** tab lists Form 5 information for the radioed button transaction.
4. Click Back to return to the **Current Employee List**.

NOTE: Additional Form 5 data can be seen in the Employee Funds, Name and Address tabs. Each of the tabs lists data related to the selected effective dated transaction.

## View historical Form 5 information for an employee?

1. Click on **Select** radio button of the desired employee. Select
2. Click on Employee Details action button.
3. Click on **Select** radio button of the action / effective date of the Form 5 transaction to view details.
4. To see historical data for the ***Name and Address*** tabs, select a transaction with an earlier **Effective Date** than the Effective Date of the name or address.
5. Click Back to return to the Current Employee List.

NOTE: The default view displays only 5 rows. Click on the a**rrow key Next 5** to view the next 5 rows or click on the drop down arrow to select **Show All** to view all rows. Using the Show All feature may affect the performance of the system if there are a significant amount of records.




## View employee funding details?

1. Click on **Select** radio button of the desired employee. Select
2. Click on Employee Details action button.
3. Click on ***Employee Funds*** tab for effective dated Employee Fund information.
4. Click Back to return to the Current Employee List.

NOTE: The Employee Funds information is the UAC information from the Form 5 for the radio buttoned action for the employee.

## View separated employees?

This shows employees that have resigned, retired or terminated employment with the DOE. Employees that have transferred within the DOE will not appear.

From the **Current Employee List**

1. Click the **Show Separated?** box. Show Separated?
2. All separated employees will appear in blue. The ***Effective Date*** column will show when the employee separated from the DOE. The ***Employee Action*** and ***Action Reason*** columns will show the type of separation.
3. To narrow your list of separated employees, use the Filter By **Effective Date** and enter the date which you would like to see separations that are equal to or greater than the date you have chosen.
4. Unclick the **Show Separated?** box to return to the Current Employee List view.

NOTE: The effective date for employee separations in eHR is the day after the close of business date (last work day).

## View future dated employee transactions?

Note: The Current Employee List defaults to today's date for all employee actions. To see future dated transactions, follow the instructions below.

From the **Current Employee List**

1. Click the **Show Future Transaction?** box. Show Future Transaction? ☐
   The most future dated transaction for that employee will appear in turquoise color.
2. Unclick the **Show Future Transaction?** box to return to the Current Employee List view.

## View Certificated employees who have not been placed for the upcoming school year?
## (NOTE: useful during summer months, prior to new school year)

From the **Current Employee List**

1. From the **Filter By** drop down menu, select **Category**.
2. Select **Certificated Personnel** from blank dropdown box.
3. Click on Go.
4. Click the **Show Future Transaction?** box. Show Future Transaction? ☐
5. After screen yields results, click on column header ***Emp Action Eff Date***.
6. After screen re-sorts, employee records that have an **effective date prior to the beginning of their respective school year** represent those employees who have not yet been placed.

## Using Current Position List, how do I…

### View only Certificated or Classified positions?

1. From the **Filter By** drop down menu, select **Category**.
2. Select either **Certificated Personnel** or **Classified Personnel** in the next box.
3. Click on Go.

### View the position list in a different order?

1. Within the School List, click on the column header once to sort in ascending order and twice to sort in descending order. (e.g., Click on ***Position Title*** column header to sort by position title)
2. Click the Reset Sort button to return to the default alphabetical sort.

### View a position's course description?

1. Under the ***Details*** column, click on **Show** for the desired employee.
2. Click on the ***Course Area*** tab.
3. eSIS course area data, listed by school year, will be displayed. This data is updated regularly from eSIS.

NOTE: Click on ***Qualification*** or ***Position Funds*** tabs to see additional data.

### View the details of a position's last action?

1. Click on **Select** radio button of the desired position. Select
2. Click on Position Details action button.
3. The ***Position Details*** tab lists information for the selected position action.
4. Click Back to return to the **Current Position List**.

NOTE: Additional position data can be seen in the ***Position Funds***, ***Position Incumbents*** and ***Position Qualifications*** tabs. Each of the tabs lists data related to the selected effective date.

## View a position's action history?

1. Click on **Select** radio button of the desired position. Select
2. Click on Position Details action button.
3. Click on **Select** radio button of the effective date of the action to view details for this action.
4. The tab details are connected to the radioed button effective date.
5. Click Back to return to the **Current Position List**

NOTE: The default view displays only 5 rows. Click on the **arrow key Next 5** to view the next 5 rows or click on the drop down arrow to select **Show All** to view all rows.

## View a position's incumbent history?

1. Click on **Select** radio button of the desired position. Select
2. Click on Position Details action button.
3. Click on the **Select** radio button for the effective dated action.
4. Click on the ***Position Incumbents*** tab.
5. Only incumbent actions later than the effective date of the position action will be displayed. Select an earlier dated position action to view additional incumbent history.
6. Click Back to return to the **Current Position List.**

NOTE: The default view displays only 10 rows. Click on the **arrow key Next 10** to view the next 10 rows or **Show All** to view all rows.

## View current vacant positions only?

1. From the **Filter By** drop down menu, select **vacant positions**.
2. The secondary filter should automatically be filled with a **Y**.
3. Click on Go.

## View future vacant positions only?

1. Click on the **Show Future Transaction?** box. Show Future Transaction?
2. From the **Filter By** drop down menu, select **vacant positions**.
3. The secondary filter should automatically be filled with a **Y**.
4. Click on Go.

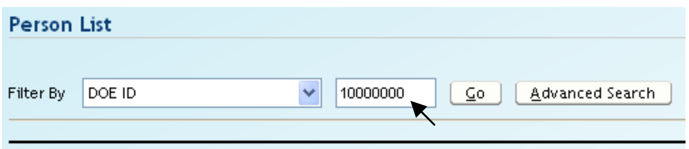
## Records & Transactions Screens

### Access Individual Employee Data – Quick Search

Description: This filter allows you to search by a single criteria to find an individual(s) employee data.

Important Notes: The Search function will only display up to 100 rows. See instructions on Access Individual Employee Data – Advanced Search to search by multiple criteria.

1. Under ***Module*** drop down menu, select **Employee Transactions**.
2. Choose appropriate **Filter By** drop down selection (e.g. DOE ID).
3. Input appropriate search criteria in **Secondary Filter** box (e.g. 10000000).
4. Click Go button.



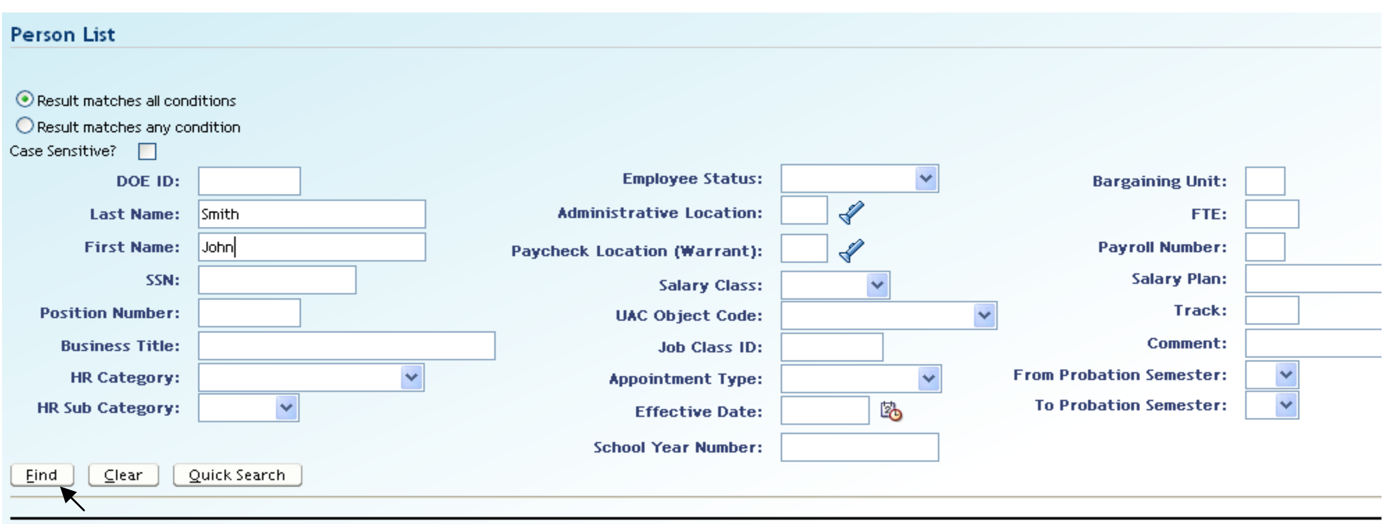

### Access Individual Employee Data – Advanced Search

Description: This filter allows you to search by multiple criteria to find an individual(s) employee data.

Important Notes: The Search function will only display up to 100 rows.

1. Under ***Module*** drop down menu, select **Employee Transactions**.
2. Click Advanced Search button.
3. Input multiple search criteria.
4. Click Find button.

   **To hide the Advance Search, click on Quick Search button.

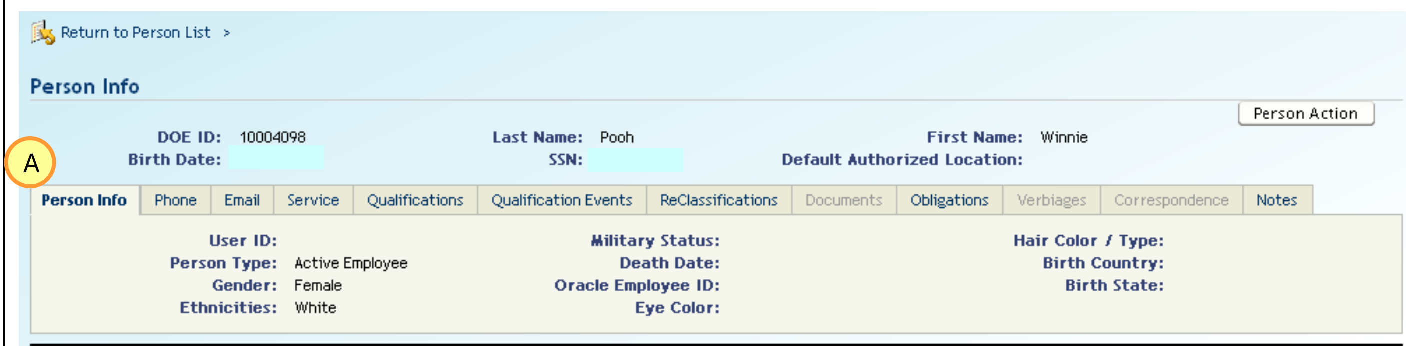


## View Person Details

Description: In the Person Details screen, the following tabs are available: Person Info, Phone, Email, Service, Qualifications, Qualification Events, ReClassification, Documents, Obligations, Verbiages, Correspondence, Notes.

Important Notes: Access to the tabs above is limited by your eHR user role.

1. From the Person List screen, select **radio** button for employee data you wish to view. Select
2. Click on Person Details button.
3. Select appropriate tab to view data**.**
4. Click Back button or the **Breadcrumb Link** at the top to return to Person List.




## A Tabs

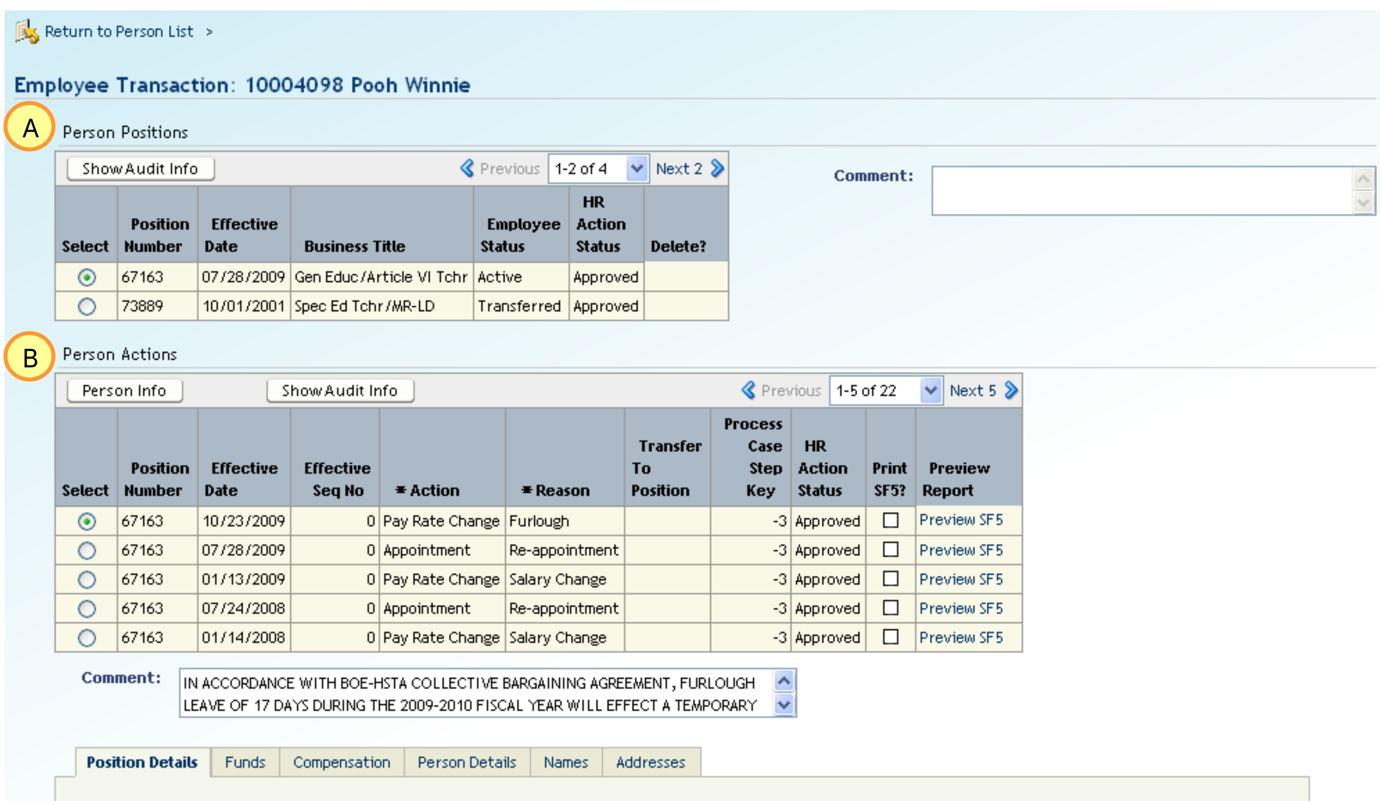
| | |
|---|---|
| **Person Info:** | Contains all confidential personal information about the employee. |
| **Phone:** | Lists employee's phone numbers. |
| **Email:** | Lists employee's email addresses. |
| **Service:** | Lists employee's service data. |
| **Qualifications:** | Lists employee's qualifications. |
| **Qualification Events:** | Lists employee's qualification events. |
| **ReClassifications:** | Lists employee's reclassification data. |
| **Documents:** | Contains PDF copies of all Form 5s that have been printed for the employee. |
| **Obligations:** | Lists all of the employee's pending obligations. |
| **Verbiages:** | Recruitment Screens. |
| **Correspondence:** | Recruitment Screens. |
| **Notes:** | Lists any notes for the employee. |

## View Person Action

Description: In the Person Action screen, the following information is available: Person's Positions, Person Actions, Form 5 Details, UAC Funding, Compensation, Person Details, Names, Address.

Important Notes: Access to the above information is limited by your eHR user role.

1. From the Person List screen, select **radio** button for employee data you wish to view. Select
2. Click on Person Action button.
3. In **Person's Positions** display, the most recent position will be selected by default. If you wish to view a different position, select appropriate **radio** button. A
4. In **Person Actions** display, the most recent action will be selected by default. If you wish to view a different action, select appropriate **radio** button. B
5. Select appropriate tab to view data.
6. Click Back button or the **Breadcrumb Link** at the top to return to Person List.


Return to Person List >

Employee Transaction: 10004098 Pooh Winnie

A Person Positions

Show Audit Info | Previous 1-2 of 4 Next 2 | Comment:

| Select | Position Number | Effective Date | Business Title | Employee Status | HR Action Status | Delete? |
|---|---|---|---|---|---|---|
| ◉ | 67163 | 07/28/2009 | Gen Educ/Article VI Tchr | Active | Approved | |
| ○ | 73889 | 10/01/2001 | Spec Ed Tchr/MR-LD | Transferred | Approved | |

B Person Actions

Person Info | Show Audit Info | Previous 1-5 of 22 Next 5

| Select | Position Number | Effective Date | Effective Seq No | * Action | * Reason | Transfer To Position | Process Case Step Key | HR Action Status | Print SF5? | Preview Report |
|---|---|---|---|---|---|---|---|---|---|---|
| ◉ | 67163 | 10/23/2009 | 0 | Pay Rate Change | Furlough | | -3 | Approved | ☐ | Preview SF5 |
| ○ | 67163 | 07/28/2009 | 0 | Appointment | Re-appointment | | -3 | Approved | ☐ | Preview SF5 |
| ○ | 67163 | 01/13/2009 | 0 | Pay Rate Change | Salary Change | | -3 | Approved | ☐ | Preview SF5 |
| ○ | 67163 | 07/24/2008 | 0 | Appointment | Re-appointment | | -3 | Approved | ☐ | Preview SF5 |
| ○ | 67163 | 01/14/2008 | 0 | Pay Rate Change | Salary Change | | -3 | Approved | ☐ | Preview SF5 |

Comment: IN ACCORDANCE WITH BOE-HSTA COLLECTIVE BARGAINING AGREEMENT, FURLOUGH LEAVE OF 17 DAYS DURING THE 2009-2010 FISCAL YEAR WILL EFFECT A TEMPORARY

Position Details | Funds | Compensation | Person Details | Names | Addresses

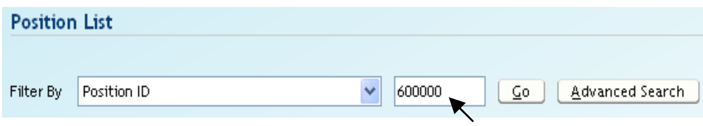
## Position Screens

### Access Individual Position Data – Quick Search

Description: This filter allows you to search by a single criteria to find an individual(s) position data.

Important Notes: The Search function will only display up to 100 rows. See instructions on Access Individual Position Data – Advanced Search to search by multiple criteria.

1. Under ***Module*** drop down menu, select **Position Management**.
2. Choose appropriate **Filter By** drop down selection (e.g. Position ID).
3. Input appropriate search criteria in **Secondary Filter** box (e.g. 600000).
4. Click Go button.



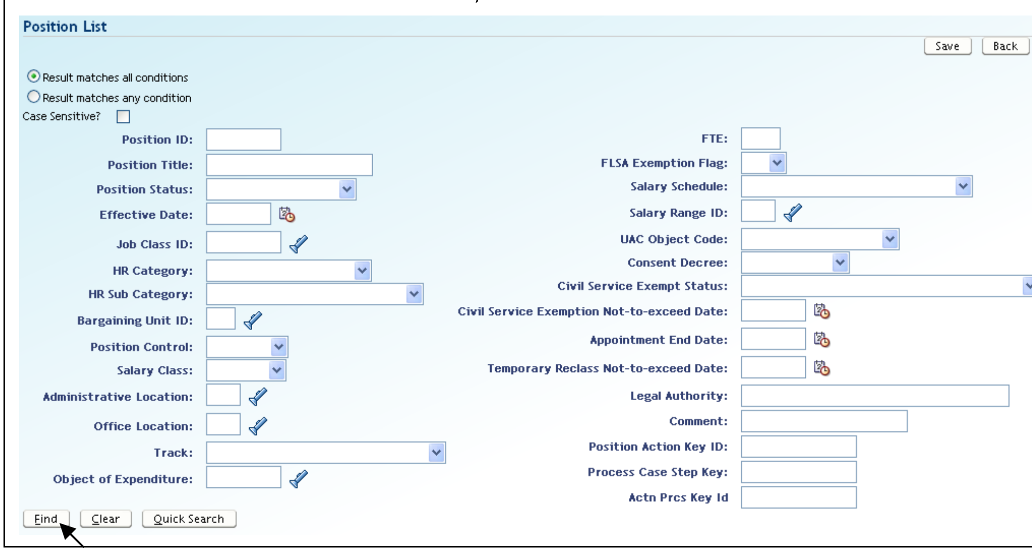

### Access Individual Position Data – Advanced Search

Description: This filter allows you to search by multiple criteria to find an individual(s) Position data.

Important Notes: The Search function will only display up to 100 rows.

1. Under ***Module*** drop down menu, select **Position Management**.
2. Click Advanced Search button.
3. Input multiple search criteria.
4. Click Find button.

   **To hide the Advance Search, click on Quick Search button.

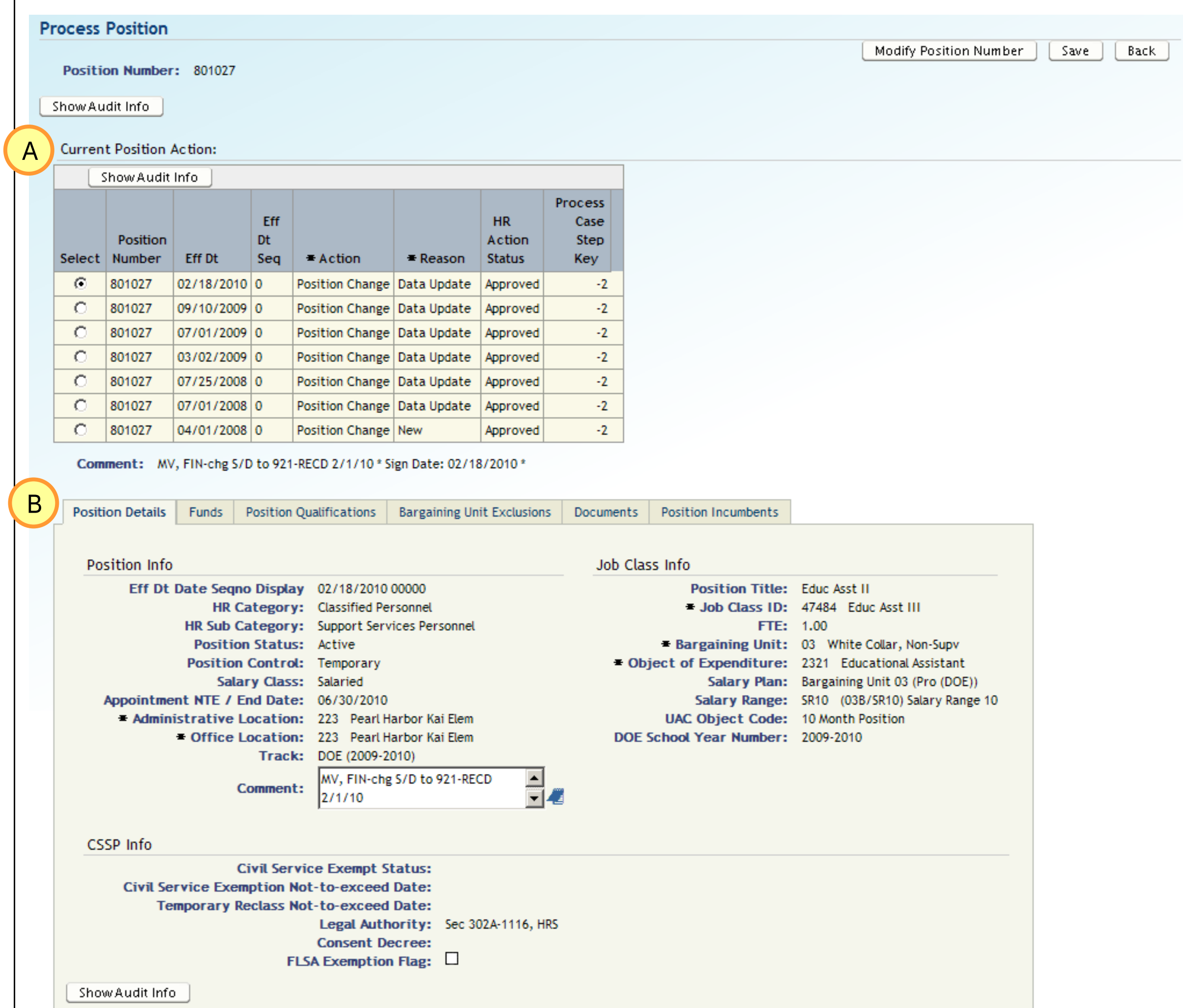


## View Position Details

Description: In the Position Details screen, the following tabs are available: Position Details, Funds, Position Qualifications, Bargaining Unit Exclusions, Documents, Position Incumbents.

Important Notes: Access to the tabs above is limited by your eHR user role.

1. From the Position List screen, select **radio** button for position data you wish to view. Select
2. Click on Position Details button.
3. In **Current Position Action** display, the most recent position action will be selected by default. If you wish to view a different position action, select appropriate **radio** button. A
4. Select appropriate tab to view data. B
5. Click Back button or the **Breadcrumb Link** at the top to return to Position List.



## B Tabs

**Position Details:** Contains position information.

**Funds:** Identifies funds for the position.

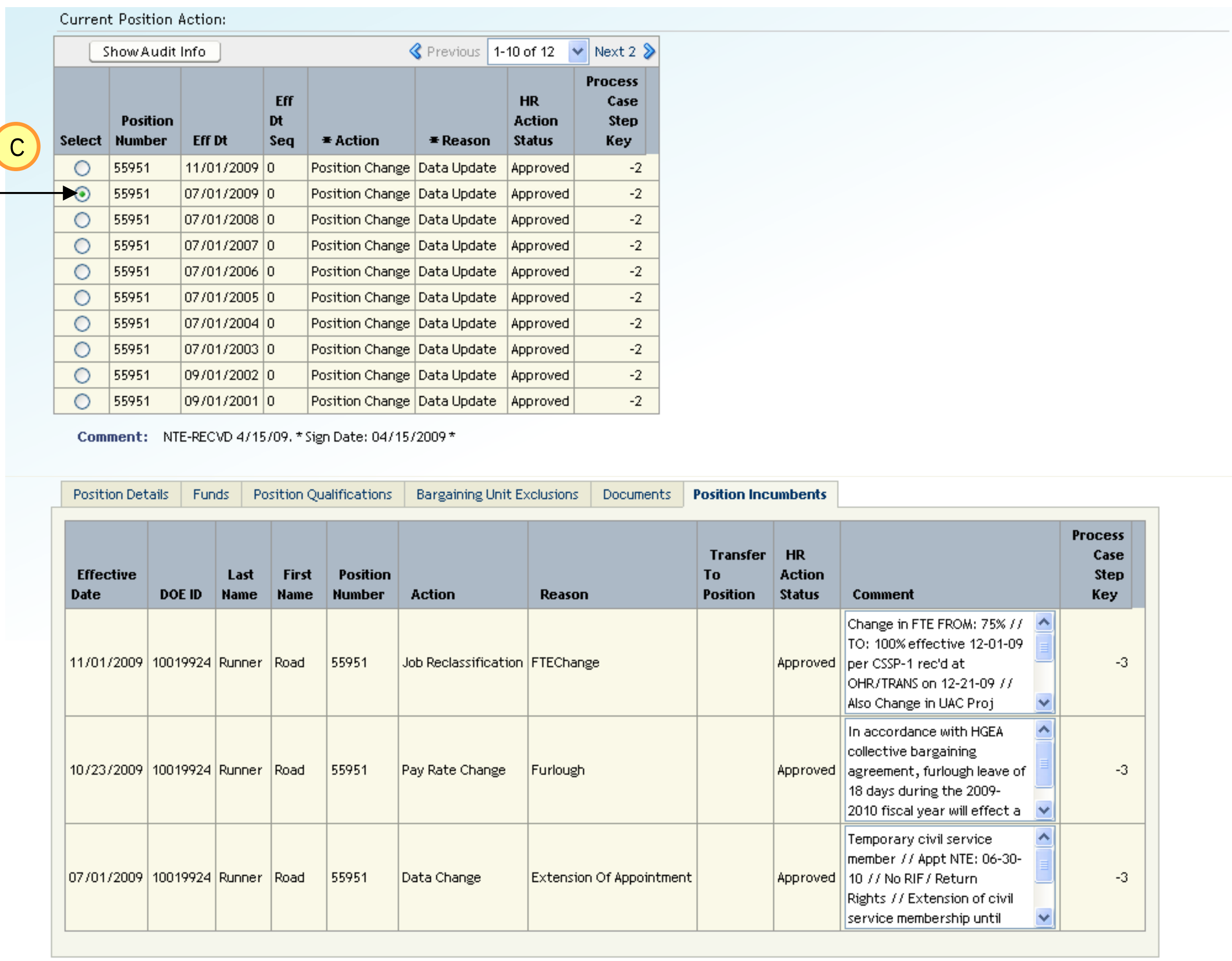
**Position Qualifications:** Lists teacher subject areas or Classified position selective certifications.

**Bargaining Unit Exclusions:** Identifies the reason that the position is excluded.

**Documents:** Contains documents associated with the position.

**Position Incumbents:** Lists only incumbent actions later than the effective date of the position action will be displayed. Select an earlier dated position action to view additional incumbent history. C

C



Current Position Action:

Show Audit Info | Previous | 1-10 of 12 | Next 2

| Select | Position Number | Eff Dt | Eff Dt Seq | * Action | * Reason | HR Action Status | Process Case Step Key |
|---|---|---|---|---|---|---|---|
| ○ | 55951 | 11/01/2009 | 0 | Position Change | Data Update | Approved | -2 |
| ● | 55951 | 07/01/2009 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 07/01/2008 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 07/01/2007 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 07/01/2006 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 07/01/2005 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 07/01/2004 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 07/01/2003 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 09/01/2002 | 0 | Position Change | Data Update | Approved | -2 |
| ○ | 55951 | 09/01/2001 | 0 | Position Change | Data Update | Approved | -2 |

**Comment:** NTE-RECVD 4/15/09. * Sign Date: 04/15/2009 *

Position Details | Funds | Position Qualifications | Bargaining Unit Exclusions | Documents | **Position Incumbents**

| Effective Date | DOE ID | Last Name | First Name | Position Number | Action | Reason | Transfer To Position | HR Action Status | Comment | Process Case Step Key |
|---|---|---|---|---|---|---|---|---|---|---|
| 11/01/2009 | 10019924 | Runner | Road | 55951 | Job Reclassification | FTEChange | | Approved | Change in FTE FROM: 75% // TO: 100% effective 12-01-09 per CSSP-1 rec'd at OHR/TRANS on 12-21-09 // Also Change in UAC Proj | -3 |
| 10/23/2009 | 10019924 | Runner | Road | 55951 | Pay Rate Change | Furlough | | Approved | In accordance with HGEA collective bargaining agreement, furlough leave of 18 days during the 2009-2010 fiscal year will effect a | -3 |
| 07/01/2009 | 10019924 | Runner | Road | 55951 | Data Change | Extension Of Appointment | | Approved | Temporary civil service member // Appt NTE: 06-30-10 // No RIF / Return Rights // Extension of civil service membership until | -3 |

## Reports

__Important Notes:__

- **Please refer to the Home Help screen in CHAP - eHR for an updated Reports document** listing all available reports, their description, and samples.
- **Pop-up blockers need to be disabled for the CHAP - eHR website.** The Home Help page has instructions for how to disable pop-up blockers.
- **Adobe Acrobat Reader 6.0 or higher must be installed**. The Home Help page has instructions for how to download Adobe Reader.

### Employees on Leave Report (PDF)

1. Under ***Module*** drop down at the top of the page, select **Reports**.
2. Select **radio** button for the ***Employees on Leave***.
3. Click **Run Report**.
4. Enter a **Process Case Label**. This is a title that you give the report. It is helpful to add a descriptor that includes some of the data. (i.e. *District or Employee Type*)
5. In the ***HR Category*** field click on the **drop down** arrow in the ***Parameter Value*** field.
6. Select **Category.** (All, Certificated Personnel, Classified Personnel)
7. In the ***Location ID*** field click on the flashlight for a list of available locations or type in the Location ID (e.g. 10 for Honolulu District or 00 for State wide)
8. Select **Report Destination**.
9. Click **Submit Parameters**.
10. The system will automatically go to the Report Cases tab. Select **radio** button for the ***Process Case Label*** (name you gave your report). Click on **Download File** in the ***Document Image*** field.

### Employees on Leave Report (Excel version)

1. Under ***Module*** drop down at the top of the page, select **Reports**.
2. Select **radio** button for the ***Employees on Leave – Excel version***.
3. Click **Run Report**.
4. Enter a **Process Case Label**. This is a title that you give the report. It is helpful to add a descriptor that includes some of the data. (i.e. *District or Employee Type*)
5. In the ***Location ID*** field click on the flashlight for a list of available locations or type in the Location ID (e.g. 10 for Honolulu District or 00 for State wide)
6. In the ***HR Category*** field click on the **drop down** arrow in the ***Parameter Value*** field.
7. Select **Category.** (All, Certificated Personnel, Classified Personnel)
8. Click **Submit Parameters**.
9. The system will automatically go to the Report Cases tab. Select **radio** button for the ***Process Case Label*** (name you gave your report). Click on **Download File** in the ***Document Image*** field.

## Form 5 Action Report

Description: This excel report is run daily by Records & Transactions for use by Payroll and Employee Benefits. It lists all personnel actions completed by Records & Transactions and corresponds with the Form 5 Daily Report (PDFs of Form 5s).

1. Under ***Module*** drop down at the top of the page, select **Reports**.
2. Click on the **Report Cases** tab.
3. Click the **Show All Cases** box.
4. Select **radio** button for the ***Form 5 Action Report*** for the date and office of the report. (e.g., Payroll 6-3-10)

   *Note: Payroll report in will be ordered by payroll number. Benefits report will be ordered alphabetically by last name. RTS (Records & Transactions Section) report will be ordered by HR Category, District, School.

5. Click the **Download File**. The file will come up in a web version of Excel. Click File, Save As to save to a desktop version of Excel.

## View the Form 5 Daily Report (PDFs of Form 5s)

Description: This PDF report is run daily by Records & Transactions. When accessing this daily report, you have the option of viewing an individual Form 5 or merging all individual Form 5s into one PDF.

1. Under ***Module*** drop down at the top of the page, select **Reports**.
2. Click on the **Report Cases** tab.
3. Click the **Show All Cases** box.
4. Select **radio** button for the ***Form 5 Daily*** for the date of the report.
5. Click the **Download File**.
6. To view an individual Form 5 click ***Download File*** link for the specific Form 5 **or** click **Merge All Files And Download** button to see all of the Form 5's merged together in one PDF.

## Pre-Populated DOE-V1 Form

Important Notes: To request position updates, please print and submit this form using the normal routing procedures.

1. Under ***Module*** drop down at the top of the page, select **Reports**.
2. Under **Report Category** drop down, select **Position Reports**.
3. Click on **Filter** button.
4. Select **radio** button for the ***Pre-Populated DOE-V1 Form****.*
5. Click **Run Report** button.
6. Enter a **Process Case Label**. This is a title that you give the report. It is helpful to add a descriptor that includes some of the data. (i.e. *Position Number*)
7. In the **Position ID** field, enter the desired position number.
8. Click **Submit Parameters**.
9. The system will automatically go to the Report Cases tab. Select **radio** button for the ***Process Case Label*** (name you gave your report). Click on **Download File** in the ***Document Image*** column.
10. If you have **Adobe Acrobat Professional**, you can use the **typewriter** feature to complete the downloaded file.

## Appendix A: Detailed table / field description
(alphabetical order)

<table>
<tr><th>Column Header</th><th>Description</th><th>Details</th></tr>
<tr><td>Action Reason</td><td>Action Reason</td><td>Current employee or position action reason.<br>NOTE: If the “Show Future Transaction” box has been checked, the most future dated transaction for that employee will be displayed.</td></tr>
<tr><td rowspan="2">Ap Ty</td><td colspan="2">Appointment Type</td></tr>
<tr><td colspan="2">Certificated Staff: “F” + Appointment Type
<table>
<tr><th>Certificated</th><th>Appointment Type</th></tr>
<tr><td rowspan="2">F</td><td><u>Teachers</u><br>1 = Regular-Tenured appointment, assigned to unobligated position<br>2 = Limited Term-Tenured appointment, a temporary position or assigned to a position obligated to another employee<br>4 = Limited Term-Probationary appointment<br>5 = Limited Term-Temporary teacher appointment & does not meet minimum licensing requirements<br>6 = Limited Term-Tenured appointment, assigned to a temporary state/district position<br>7 = Limited Term-On early return from leave, assigned temporarily to a non-guaranteed position<br>9 = Limited Term-Temporary teacher appointment agreement; licensed<br>Q = Dual License–Return to Special Education<br>R = Retiree returned to special education or shortage area<br>S = State Employee at Public Charter School-Employed by Public Charter School and not a Dept. of Education Employee<br>T = Teacher for America-Temporarily employed DOE teacher recruited by Teach for America<br>V = Limited Term-Temporary appointment; meets minimum certification requirements & teaching out-of-field certification<br>W = Limited Term-Temporary appointment; certification pending HTSB license</td></tr>
<tr><td><u>EO’s</u><br>A = Regular-Tenured appointment<br>B = Limited Term Appointment-Probationary<br>C = Limited Term Appointment-Probationary Vice, position is guaranteed to former incumbent who is currently serving probation<br>D = Limited Term-Vice, position is currently guaranteed to a former incumbent who is currently on LWOP or in a temporary position or assignment<br>E = Limited Term Appointment-Temporary position, temporary state or district position<br>F = Limited Term Appointment-Temporary/Acting Appointment<br>G = Limited Term Appointment-Temporary, not qualified for position<br>H = Limited Term Appointment-Temporary Position/Vice<br>K = State/District Trainee</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Column Header</th><th>Description</th><th>Details</th></tr>
<tr><td>Ap Ty (con't)</td><td colspan="2">Classified Staff : "C" + Appointment Type + Employee Status
<table>
<tr><th>Classified</th><th>Appointment Type</th><th>Employee Status</th></tr>
<tr><td rowspan="2">C</td><td rowspan="2">1 = Permanent<br>2 = Probationary<br>5 = Temporary<br>6 = TAOL<br>9 = Exempt<br>C = 89 Day Hire</td><td><u>Civil Service</u><br>M = Civil Service Member<br>N = Non-Civil Service Member<br>U = Temporary Civil Service Member</td></tr>
<tr><td><u>SSP (Support Services Personnel)</u><br>R = Permanent SSP Employee<br>T = Temporary SSP Employee</td></tr>
</table>
Examples:<br>C1M = Permanent Civil Service Member<br>C5R = Permanent SSP Employee in a temporary position</td></tr>
<tr><td>Business Title</td><td>Business Title</td><td>Based on the employee's job class description</td></tr>
<tr><td>Catg Cd</td><td>Category Code</td><td>F = Certificated Employee<br>C = Classified Employee – Civil Service<br>S = Classified Employee – SSP (Support Services Personnel)</td></tr>
<tr><td>Details</td><td>Additional Employee Details</td><td>" Show": When clicking on this field, more Employee details are displayed.</td></tr>
<tr><td>Emp/Posn Action Eff Date</td><td>Effective Date of Employee/Position Action</td><td>Effective date of the current employee transaction in the Current Employee List or the current position transaction in the Current Position List.<br>NOTE: If the "Show Future Transaction" box has been checked, the most future dated transaction for that employee will be displayed.</td></tr>
<tr><td>Emp FTE</td><td>Employee FTE</td><td>Employee Full Time Equivalency<br>i.e. 1.00 = 100% .50 = 50%</td></tr>
<tr><td>Emp Status</td><td>Employee Status</td><td>Active = Active<br>Leave = Leave<br>Leave W/Py = Leave with Pay<br>X-ferred = Transferred<br>Retired = Retired<br>Separated = Separated (Resignations or Terminations)<br>Suspended = Suspended<br>Unassigned = Unassigned Certificated employee</td></tr>
<tr><td>Employee Action / Position Action</td><td>Employee Action / Position Action</td><td>Current employee action or current position action.<br>NOTE: If the "Show Future Transaction" box has been checked, the most future dated transaction for that employee will be displayed, if applicable.</td></tr>
<tr><td>Employee Id</td><td>Employee ID</td><td>Official DOE employee identification number.</td></tr>
<tr><td>Last Name, First Name</td><td>Last Name, First Name</td><td>For middles names, pre-fixes and suffixes, go to the Names tab in the Employee Details.</td></tr>
<tr><td>PC</td><td>Position Control</td><td>P = Permanent<br>T = Temporary</td></tr>
</table>

| Column Header | Description | Details |
|---|---|---|
| **Posn FTE** | **Position FTE** | Position Full Time Equivalency<br>i.e.  1.00 = 100%   .50 = 50% |
| **Posn No / Posn ID** | **Position Number** | Position Number |
| **Posn Status** | **Position Status** | Active = Active<br>Abolished = Abolished<br>Inactive = Inactive<br>Act-UnfWSF = Active – Unfunded WSF (includes RWOA, Unfunded WSF, and Pending)<br>Act–Bought = Active – Bought (currently only displaying for Certificated positions)<br>Inact–Sold = Inactive – Sold (currently only displaying for Certificated positions) |
| **Process Case** | **Process Case Number** | This is a system assigned case number associated with all transactions that are initiated within CHAP- eHR.  Data that has been downloaded from existing OHR systems will display as:  '-3' for employee actions and '-2' for position actions. |
| **Select** | **Select an Employee** | Choose this radio button to "select" the employee to view Employee or Position Details. |
| **Seq No** | **Sequence Number** | This indicates the order for multiple transactions done on the same day. |
| **Tk No** | **Track Number** | System assigned number for tracks in multi-track schools. Default for non-track schools is 0. |

# Appendix B  Sorts and Filters

## Sorts and Filters

Below are a few tips on how to sort and filter the information on a given screen. **Sorting** changes the order in which the information is displayed, whereas **filtering** will show only the requested information based on user specified criteria.

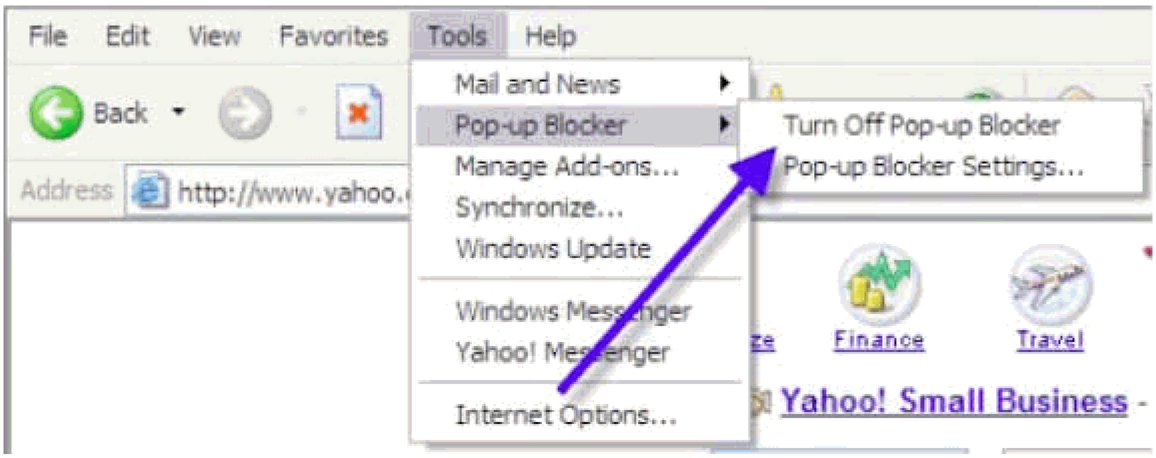
| | How to Sort/Filter | How to Return Information back to original view |
|---|---|---|
| **Sorting by Columns** | Click the **column header** to quickly sort information displayed in a table.<br>• For example, if you click on the column header for Business Title, records will appear in ascending order alphabetically by business title. Clicking on the Business Title column header again will sort in descending order | Click **Reset Sort**. |
| **Filters** | Click the **Filter by** drop down menu to select a primary filter and select/enter secondary filter (if applicable)<br>• For example, if you'd like to see all of the tenured teachers, you would select Filter By "Appoint Type", type in "F1" in the secondary filter and click "Go".<br>• The % key is used as a wildcard. It can be used before a portion of the information you are looking for. For example, if you want to see both 10 and 12 month Elementary positions, you could type in %elem to pull up all positions that have Elem as a part of their title.<br><br>Note: The % key does NOT need to be used at the end of the data as the system automatically assumes that one is there. | Erase the secondary filter criteria and click **Go**.<br>• The Reset Sort button does <u>not</u> apply to filters. |
| **Advanced Filters** | Use the **Advanced Search** feature to select multiple criteria for your search. | Click on **<u>C</u>lear**<br>Click on **Back to Quick Search**. |

## Appendix C  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):



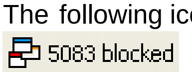

Once this is done, then you should be able to use the online system properly. Once you are finished using the online system, you can go back into the menu again to turn on the pop-up blocker.

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

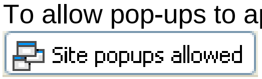
### Google Toolbar

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:



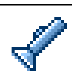
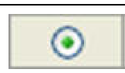

To allow pop-ups to appear, merely click on the icon. You should now see the following:




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.

## Navigational Tips

### 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. |