

State of Hawaii Department of Education

*e*HR WSF Position Buy/Sell Quick Sheets

10-2-2012

For Questions please contact your Complex Area Business Manager



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Basics

<u>Important Notes:</u> DO NOT use the internet browser back arrow. For additional information, click **Help** from the WSF Position Buy/Sell module and review the overview document.

The system will automatically time you out after thirty (30) minutes of inactivity. To remain active in eHR, you must either save your work or navigate through the eHR system. 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.

Logging into the eHR System

Description: How to access the WSF Position Buy/Sell Process via the Internet.

<u>Important Notes:</u> Browser pop-up blockers need to be disabled for the *e*HR website. Please consult your internet browser Help for assistance to allow pop-ups from this website.

- 1. Open up an **internet connection** Note: Edge, Chrome and Mozilla Firefox browsers are supported.
- Type in the URL address: <u>https://ehr.k12.hi.us/hrprod/</u> Note: The address starts with "https", not "http".
- 3. You will need your Azure AD User Name and Password.
 - Your User Name is your Employee ID and @k12.hi.us. You Employee ID may be listed on your DOE ID Badge.
 - Your Azure AD Password is the same as what you use in DOE Gmail.
- 4. Click on the DOE Employee Login button and you will use the Azure AD user name and password screens.

DOE Employee Login
DOE Employee Login
Current DOE Employees: Username is your employee ID plus "@k12.k12.hi.us" or employeeID@k12.hi.us. Your Employee ID number can be found on your DOE ID badge. Password is your DOE password as used in Gmail, Infinite Campus, ServiceNow, PDE3 and SSES.

3	State of Hawaii Department of Education	eHR WSF Position Buy/Sell Quick Sheets				
nus a	and Tabs	A				
2 H	State of Hawaii Department of Education	Instance: HRPROD Module Processes 💽 👔 Home 🗞 ? Help 🗶 Logout Logged in: Chap Adr				
⁷ Sell Posi		C Pending Cases Current Case Start Process Cu Bimployee List Current Position List				
A	Standard Module	Navigation Menu				
	Title	Description				
	Module Dropdown Menu	Enables access to different modules.				
	Home	Returns user back to the Home Page from any module.				
	Help	Opens the Help feature (pop-up window) which provides useful information specific to the page being viewed.				
		For example, clicking on Help from the WSF Position Buy/Sell 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 Screen Overview, Screen Actions, Quick Sheets, etc.; while clicking on Help from the Reports page will bring you directly				
	Login/Logout	Displays user name and enables user to log out from the system				
В	Case Tabs	Description				
B	Case Tabs Title Process Case De	Description				
B	Case Tabs Title Process Case De process. For exan the user will have o	Description finition: For each process that exists, a process case represents an instance of that nple, "WSF Buy Position" has been defined as a process. By creating a new case, created a unique process case for buying a WSF position.				
B	Case Tabs Title Process Case De process. For exan the user will have of Pending Case	Description finition: For each process that exists, a process case represents an instance of that nple, "WSF Buy Position" has been defined as a process. By creating a new case, created a unique process case for buying a WSF position. Displays cases that require some action by the user. Click on the checkbox next to "Show All Cases" to view all cases the user has been or is involved in.				
В	Case Tabs Title Process Case De process. For exan the user will have of Pending Case Start Process	Description finition: For each process that exists, a process case represents an instance of that nple, "WSF Buy Position" has been defined as a process. By creating a new case, created a unique process case for buying a WSF position. Displays cases that require some action by the user. Click on the checkbox next to "Show All Cases" to view all cases the user has been or is involved in. Enables user to create a new case.				
В	Case Tabs Title Process Case De process. For exan the user will have of Pending Case Start Process View Selections	Description finition: For each process that exists, a process case represents an instance of that nple, "WSF Buy Position" has been defined as a process. By creating a new case, created a unique process case for buying a WSF position. Displays cases that require some action by the user. Click on the checkbox next to "Show All Cases" to view all cases the user has been or is involved in. Enables user to create a new case.				
в	Case Tabs Title Process Case De process. For exan the user will have of Pending Case Start Process View Selections Title	Description finition: For each process that exists, a process case represents an instance of that nple, "WSF Buy Position" has been defined as a process. By creating a new case, created a unique process case for buying a WSF position. Displays cases that require some action by the user. Click on the checkbox next to "Show All Cases" to view all cases the user has been or is involved in. Enables user to create a new case. Description				



Icons and Navigation		
Title		Description
Dropdown menus	Select an Action 👻	Downward blue arrows indicate dropdown menus which are predefined options from which users may select.
Flashlight	4	The Flashlight icon indicates a "look up" feature that allows users to view and select specific information. Alternatively, information may be entered directly into the field using your keyboard.
-Hide	- Hide	Hides additional information about a specific record.
Memo Pad	4	Clicking on the Memo Pad icon will bring up a text editor window.
Page Title	Example: 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 "Fill Position".
Radio Button	۲	Radio Buttons enable users to select specific items, in this case a specific record, on which to work.
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.
Keyboard Shortcut Keys (Alt+ <i>shortcut letter</i>) or (Alt+Shift+ <i>shortcut letter</i>)	Example:	Buttons with text that contain an underlined letter indicate that the button can be executed with a keyboard shortcut key. Depending on the browser being used, this can be done by using Alt+ <i>shortcut</i> <i>letter</i> or Alt+Shift+ <i>shortcut letter</i> , where the shortcut letter is the letter underlined. Refer to your browser's documentation for more information. For example, from the Financial Plan Details screen you can add a new row by using Alt+A or Alt+Shift+A.



Record Display

All Record Display

Some pages default to displaying all records.

Select Number of Record Display

Other pages default to a set number of records. For example, the Buy Sell Positions List displays just the first fifteen (15) records. Additional records may be displayed by using the dropdown menus, or the previous and next buttons.

🔇 Previous	1-15 of 17 🔽	Next 2 📎
	Show All 17	
	1-15 of 17	
E.	16-17 of 17	Delete?

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. For example, clicking on the column header for Posn No, will sort records in ascending order numerically by Position Number. 	
Filters/ Quick Search	Specific modules have a basic search feature which allows for the entry of criteria for record selection. Filters may be a dropdown or a textbox. Enter text to search for into textboxes and/or select criteria from dropdowns and click on Go .	Erase the filter criteria and click Go .
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. Enter text to search for into textboxes and/or select criteria from dropdowns and click on Find .	Click Quick Search.
Searching Using Wildcards (%)	The % key is used as a wildcard and can be used in textboxes with Quick Search and Advanced Search . It can be used before and/or after a portion of the information you are looking for. For example, to see both 10 and 12 month Elementary positions, type in %elem% to pull up all positions that have "elem" as a part of their title.	



Getting Started

Initiati	Initiating a Buy/Sell Request								
Descri	Description: How to generate a WSF Position Buy/Sell Case.								
1.	1 Under Module drondown select Processes								
2.	Click on Start Process tab.								
3.	Select one of the following options:								
	6.1.3.1 – WSF Buy Position.								
	6.1.3.2 – WSF Sell Position.								
4.	Click on Start New Process.								
5.	Enter a Process Case Label . E								
	Please use the following convention when naming your case:								
	School Name position type – buy or sell (i.e. Aloha El Cert – Buy)								
	 Please note that you will be unable to change the Process Case Label once the Case has been created. 								
6.	Select the type of request (Buy or Sell) and position type (HR Category: Certificated or F								
7.	Click on Submit Parameters.								
	Pending Cases Start Process								
	Start Process Process Category Position Management Process Description: Filter								
	Start New Process D Select Details Process ID Process Description								
	Show Position Management 6.1.3.1 WSF - Buy Position								
	C Bostition Management 6.1.3.2 WSF - Sell Position								
	Eshow Position Management 6.1.3.4 ICAA Sell Position								
	Process Case								
	WSF - Buy Position								
	Parameters								
	Prompt Text Parameter Value								
	Buy or Sell Buy								
	HR Category Certificated Personnel								
	Admin Location 00								



Logging Back into a WSF Buy/Sell Request									
Description: How to access a WSF Position B	Buy/Sell request that ha	as been	previously gene	erated.					
 Under <i>Module</i> dropdown, select Proc Click on Pending Cases tab. Click the "select" radio button for the c 	esses. A	Request	case. C						
4. Click of Go To Case.									
 Alternatively, you can click on the "Go Home page for steps 1 and 2 above. columns will probably be the most hel 	 Alternatively, you can click on the "Go to Pending Tasks" button in the Messages box from the Home page for steps 1 and 2 above. The Task, Case Label, and Process Case Step Key columns will probably be the most helpful in finding the desired Buy/Sell Request case. 								
 By default, the Pending Cases tab will action on. For example, if a Buy/Sell show in the Pending Cases tab by def Cases" checkbox is checked. 	 By default, the Pending Cases tab will only show Pending Cases that the user needs to take action on. For example, if a Buy/Sell Request has already been approved, the case will not show in the Pending Cases tab by default. To see all cases, make sure that the "Show All Cases" checkbox is checked 								
	A								
CHR State of Hawaii Instance: Moo	tule Processes	Home	>>> ? Help	× Logout	Logged in: Chap Admin				
	B Pending Cases	Start Pro	cess Current Employe	ee List Curre	ent Position List				
Pending Cases									
Filter By Process Case Label	<u>Go</u> <u>A</u> dvanced Search								
Go To Case Re-Run With Params Show All Cases			🔇 Pres	vious 1-10 of 15	💌 Next 5 📎				
Select Details Task Description Key Process	ess Case Label	Process Step Status	Location Description	Last Updated By	Last Update Date				
C Show WSF - Buy / Sell 450115 Aloha E	l Cert - Buy	Pending Input	Aloha Elem (XXX)	Admin, Chap	03/22/2012				



Screen Overview

The *e*HR WSF Position Buy/Sell process has several screens: the **Buy Sell Positions List**, **Buy/Sell Process**, **Create Position**, **and Process Position** screens. The screens differ in appearance, but the basic functions and actions available are similar. The navigational aids (A, B below) are repeated at the top of each screen.

	CHR State of Kaussian Instance: HRDEVL Module Processes The Home (Herder & Cognet in: Chap in the Chap															
Buy Sett Positions - Aloha Elem (XXX) - Case 450115: Aloha El Cert - Buy C D																
Filter By Posn No																
り	Admini	Hide		12345	0 Elem T	eacher 1	1.000 07/28/200	P 0	Active	P	Update Position	00000000	Doe, John	Active	F1	1.000
Administrative Location: A Office Location: A Job Cass ID: 50520 Hit Category: Certificated Personnel Hit Sub Category: Teacher / Counselor / Librarian Bangaining Unit: US Position Funds																
	Effect Date	Budget ve Program ID	Long Desc	cription	Fund Percent	Fund Location ID	Object of Expenditure	UAC Object Code								

- Aids that allow you to navigate throughout the eHR system.
- B View menu bar that allows you to navigate to the Buy Sell Positions List screen.
- C Title for the current WSF Buy/Sell Process Case.
- D Indicates the status of the current Process Case and allows the user to take action on the current Process Case. The actions available to you are dependent upon your system authorization.
- E Aid that allows you to filter by various position parameters to locate a specific position, or selection of positions, within the Buy Sell Positions List.
- *E* Creates a pdf version of the Buy/Sell request form. This report should be run after the request has been approved and completed for posting (takes the place of the former WSF-1 form).
- G) Brings up a screen showing the position details for the position selected.
- H) List of positions that can be bought or sold.



BUY REQUESTS

Buy/Sell	Position List							
Descripti	on: Definitions for th	ne position actions and expanded views available in the Buy/Sell Position List screen for						
<u>BUY</u> req	uests.							
Filter By	Poso No	Co Advanced Search Buy New Position Print Buy Sell Position List Penort						
Positi	ion Details Buy FTE Bu	IV Existing Posn not on FP Convert 10 to 12 Month Show All 10-Mo Posns? Show Abolished? Show Non-WSF?						
	В							
	Buy Position Actio	ns – Creates a request to buy a position.						
	Title	Description						
A	Buy New Position	Buy a brand new WSF funded position.						
В	Buy FTE	Increase the FTE count of an existing, WSF funded position that is less than 1.00 FTE.						
	Buy Existing	Fund an existing, established position that may have inadvertently been left off your						
C	Posn not on FP	Financial Plan.						
		To change the funding for a NON-WSF position to WSF Funded (i.e. changing a Title I position to WSF).						
D	Convert 10 to 12 Month	Convert an existing 10-month position, WSF Funded position to a 12-month position.						
	View Options – Checking one or more of these boxes will expand the Buy/Sell positions list for positions not shown by default.							
	Show All 10	Description						
E	Month Positions?	BUY Existing Posn not on FP or Convert 10 to 12 Month).						
F	Show Abolished?	Expands the list to include all abolished, WSF funded positions (primarily used to BUY Existing Posn not on FP).						
G	Show Non-WSF?	Expands the list to include non-WSF funded positions (primarily used to BUY Existing Posn not on FP).						



Α

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eHR WSF Position Buy/Sell Quick Sheets

Buy/Sell Process

<u>Description</u>: Defines the information required when requesting a **<u>BUY</u>**.

	Buy Certificated Positions - Buy FT	E
A	Position Number: Administrative Location: Office Location: Object of Expenditure Job Class Position Title: HR Category: HR Sub Category: Bargaining Unit: ILC Object Code:	12345 Aloha Elem Aloha Flem 2510 50520 Elem Teacher Certificated Personnel Teacher / Counselor / Librarian 05 2500
В	Current FTE: Ending FTE: Track: Effective Date: Buy/Sell Cost Amount: Buy/Sell Rationale:	0.500 1.000 DOE (2011-2012) 02/01/2012 13,446 Continue

Details of Position – Information related to the position in the buy request.

Title	Description
Position Number	Displays either existing position number, or temporary "NP" number assigned to a new position. An official position number will be assigned by OHR when the request is completed.
Administrative Location / Office Location	Refers to the location of the position. For schools, these locations will be the same.
Object of	Object code for the position title you wish to buy or increase.
Expenditure	
Job Class ID	Corresponding Job Class code for the position you wish to buy or increase.
Position Title HR Category HR Sub Category Bargaining Unit Salary Plan Salary Range UAC Obj Code	Additional information corresponding to the type of position you wish to buy or increase. Most information provided is for OHR use / information.

Details of Buy Request – Information required in order to complete the buy request.

	Title	Description
	FTE	The FTE count of the position you wish to buy or increase.
	(for Buy FTE:	
B	Current FTE and	
$\mathbf{}$	Ending FTE)	
	Track	If a multi-track school, the track the position will be placed in.
	Effective Date	The effective start date of the request (the effective date of the establishment of the position).
	Buy/Sell Cost	The pro-rated cost amount for the position you are buying or increasing, based on
	Amount	the effective start date.
	Buy/Sell	Brief explanation of why you are requesting to buy or increase the position.
	Rationale	



Requesting to Buy a New Position		
Description: How to enter a request to buy a new position.		
Filter By Posn No		
Buy Certificated Positions - Buy New Position		
Position Number: Administrative Location: Aloha Elem Aloha Elem Aloha Elem		
Object of Expenditure: 2510 Object Description: Elem Teacher Tho face to SERE		
Position Title: Elem Teacher HR Category: Certificated Personnel HR Sub Category: Teacher / Coursefor / Librarian		
B Bargaining Unit: 05 Salary Rans: T Salary Range:		
UAC Object Code: 2500 FTE: 1.000 Track: DOC (2011-2012)		
Effective Date: 01/01/2012 Buy/SetCost Amount: 31,191 Buy/SetRel And the reason for requesting the position		
here.		
C Continue Cancel		
A 1 Click the Buy New Position button		
B 2. Enter the Object of Expenditure , using look up feature (flashlight), if necessary.		
 If Job Class ID is not automatically filled in, enter Job Class ID. NOTE: Job Class (position level) of actual established position may differ from the code 		
entered. OHR will use its discretion to establish the necessary position.		
 4. Enter the FTE count. Certificated positions can be established as 0.50 FTE or 1.00 FTE 		
 Classified positions may be established in increments of 0.125 FTE. 		
5. For multi-track schools, enter the Track for the requested position.		
6. Enter the Effective Start Date for the position. This will be the date that the position will be available to fill.		
 For Classified positions, effective date defaults to 15 days from current date. 		
 Effective Date may be edited to an earlier or later date as needed. 		
 Actual Effective Date may be changed by OHR to accommodate processing times. 		
7. The Buy/Sell Cost Amount will calculate the pro-rated cost based on the effective date used.		
8. Enter the Buy/Sell Rationale ; the reason for requesting the position.		
• This field is REQUIRED . You will be unable to submit your request if this field is not completed.		
• If necessary, you may edit / amend this field on the Process Position and Create Position screens.		
 Unck on the Continue button, located under the Rationale field. IMPORTANT NOTE: Once you click on Continue you will be unable to change the object or ich class. 		
codes, effective date, or FTE.		
D 10. You will be directed to the Create Position screen. Click on the Save Changes button.		



Reque	Requesting to Buy FTE (increase FTE for existing position)			
Description: How to enter a request to increase the FTE of an existing position.				
Positio	on De 🗛 Buy FTE Buy Existing Posn not on FP Convert 10 to 12 Month Show All 10-Mo Posns? 🔲 Show Abolished? Show Non-WSF? 🔲			
Buy Cert	ificated Positions - Buy FTE			
	Position Number: 12345 Administrative Location: Aloha Elem Office Location: Aloha Elem Object of Expenditure 2510 Job Class 50520 Position Title: Elem Teacher			
(HR Category: Certificated Personnel HR Sub Category: Teacher / Counselor / Librarian Bargaining Unit: 05 Back Save Changes			
	Current TFE: 0.500 Ending FTE: 1.000 ▼ Track: DOE (2011-2012) Effective Date: 01/01/2012 Buy/Sell Cast Amount: 15,596 Buy/Sell Rationale: Enter the reason for requesting the increase here.			
	C Continue Cancel			
1.	Select the position you wish to increase from the Buy Sell Positions List screen by clicking on the radio button next to the position.			
A 2. B 3.	 A 2. Click the Buy FTE button. B 3. The Current FTE field will show the existing position FTE. Select the desired resulting position FTE from the local data and the second second			
	 Certificated positions can be increased from 0.50 FTE to 1.00 FTE. 			
	Classified positions may be increased in increments of 0.125 FTE.			
4.	Enter the Effective Start Date for the increase.			
	 For Certificated positions, effective date defaults to 10 days from the current date. For Classified positions, effective date defaults to 15 days from current date. 			
	 Effective Date may be edited to an earlier or later date as needed. 			
	 Actual Effective Date may be changed by OHR to accommodate processing times. 			
5.	 The Buy/Sell Cost Amount will calculate the pro-rated cost based on the effective date entered and FTE increase. 			
6.	Enter the Buy/Sell Rationale ; the reason for requesting the increase.			
	• This field is REQUIRED . You will be unable to submit your request if this field is not completed.			
	 If necessary, you may edit / amend this field on the Process Position screen. 			
U 7.	 IMPORTANT NOTE: Once you click on Continue, you will be unable to change the effective date or ETE 			
D 8.	You will be directed to the Process Position screen. Click on the Save Changes button.			
9.	Screen will refresh and indicate "Transaction completed successfully!". Click on Back to return to the Buy Sell Positions List screen.			



Reque	Requesting to Buy Existing Posn not on FP		
Description: How to enter a request to fund an existing, established position inadvertently left off the approved Financial Plan.			
Positio	on Details Buy A Buy Existing Posn not on FP Convert 10 to 12 Month Show All 10-Mo Posns? Show Abolished? Show Non-WSF?		
Buy/Sell P	rocess		
	Position Number: 12345 Administrative Location: Aloha Elem Object of Expenditure 2209 Job Class 09342 Position Title: School Custodian II HIC School Custodian II		
В	Back Save Changes Bargaining Unit: 01 UAC Object Code: 2000 FTE: 0.500 Track: DOE (2011-2012) Effective Date: 07/01/2012		
	C Continue Cancel		
1.	Select the position you wish to fund from the Buy Sell Positions List screen by clicking on the radio button next to the position.		
A 2.	• You may need to check one or more of the expanded view boxes to find the position. Click the Buy Existing Posn not on FP button.		
B ^{3.}	Enter the Effective Start Date for the position.		
	 For Classified positions, effective date defaults to 15 days from current date. 		
	 Effective Date may be edited to an earlier or later date as needed. 		
	 Actual Effective Date may be changed by OHR to accommodate processing times. 		
4.	 The Buy/Sell Cost Amount will calculate the pro-rated cost based on the effective date entered and FTE increase. 		
5.	Enter the Buy/Sell Rationale ; the reason for requesting the position.		
	• This field is REQUIRED . You will be unable to submit your request if this field is not completed.		
	 If necessary, you may edit / amend this field on the Process Position screen. 		
6.	Click on the Continue button, located under the Rationale field.		
	• IMPORTANT NOTE: Once you click on Continue you will be unable to change the effective date.		
b 7. 8.	Screen will refresh and indicate "Transaction completed successfully!". Click on Back to return to the Buy Sell Positions List screen.		



Requesting to Convert 10 to 12 Month			
Description: How to convert a 10-month position to a 12-month position.			
Positi	ion Details 🛛 Buy FTE 🛛 Buy Existing Posn not o 🗛 🖸 Convert 10 to 12 Month 🗍 Show All 10-Mo Posns? 🔲 Show Abolished? 🔲 Show Non-WSF? 🔲		
Buy Certi	ficated Positions - Convert 10 to 12 Month		
	Position Number: 1233 Administrative Location: Aloha Elem		
Original (Object of Expenditure / Job Class 2510 / 50520		
	Object Description: Elem Teacher 12-Wo Process Position		
	Position Title: 12-Wo Elem Teacher HB Calegory: Certificated Personnel		
	HR Sub Category: Teacher / Counselor / Librarian Bargaining Unit: 05		
	Salary Plan: T Salary Range:		
	UAC Object Code: 2000 FTE: 0.500		
	Effective Date: 01/01/2012		
	Buy/Sell Cost Amount: 1,184 Buy/Sell Rationale: Enter reason for conversion here.		
1	Coloct the WCC position you wish to convert from the Duy Coll Depitions List core on by disking on the		
1.	radio button next to the position		
	 You may need to check the "Show All 10-Mo Posns?" expanded view box to find the position 		
	IMPORTANT NOTE: Only multi-track schools can convert 10-month Vice Principals or 10-month		
	Educational Assistants to 12-month positions.		
A 2.	Click the Convert 10 to 12 Month button.		
3.	Enter the Object of Expenditure , using look up feature (flashlight), if necessary.		
B 4.	If Job Class ID is not automatically filled in, enter Job Class ID.		
	NOTE: Job Class (position level) of actual established position may differ from the code entered.		
	OHR will use its discretion to establish the necessary position.		
5.	Enter the Effective Start Date for the conversion.		
	 For Certificated positions, effective date defaults to 10 days from the current date. 		
	 For Classified positions, effective date defaults to 15 days from current date. 		
	 Effective Date may be edited to an earlier or later date as needed. 		
	 Actual Effective Date may be changed by OHR to accommodate processing times. 		
6.	The Buy/Sell Cost Amount will calculate the pro-rated cost based on the effective date entered.		
7.	Enter the Buy/Sell Rationale ; the reason for requesting the conversion.		
	This field is REQUIRED . You will be unable to submit your request if this field is not completed.		
\frown	 If necessary, you may edit / amend this field on the Process Position screen. 		
C 8.	Click on the Continue button, located under the Rationale field.		
	• IMPORTANT NOTE: Once you click on Continue you will be unable to change the effective date.		
D 9.	You will be directed to the Process Position screen. Click on the Save Changes button.		
10	 Screen will retresh and indicate "Transaction completed successfully!". Click on Back to return to the Buy Sell Positions List screen. 		



Modifying a Buy Request			
Description: How to modify a pending buy request.			
Important Notes: Once the WSF Buy/Sell case is submitted, changes cannot be made unless the CAS returns the request to you for modifications.			
B Position Details Buy FTE Buy Existing Posn not on FP Convert 10 to 12 Month Show All 10-Mo Posns? Show Abolished? Show Non-WSF?			
Buy/Sell Buy/Sell Posn Tk Posn			
Process Position			
Position Number: NP4683 Show Audit Info Show Audit Info Control Public Action Show Audit Info Control Public Action Control Public A			
D Delete Row Show Audit Info			
Position Dt HR Action Step Select Number *Eff Dt Seq *Action *Reason Status Key O NP4683 07/01/2011 O Establish Position Buy Position Pending Submittal 459752			
Beckurg to WCE Buy Sell Portitions			
Information			
Process Position E Back Save Changes			
A 1. Select the pending position you wish to modify from the Buy Sell Positions List screen by clicking on the radio button next to the position.			
Any pending position buys will be at the top of the list, in red.			
 Click the Position Details button. This will havigate you to the Process Position screen. In the list of Current Position Actions locate the row with the pending buy request. 			
Actions are sorted in descending order by date (most recent first).			
 I ypically, the buy request will be the first entry In the Reason column, it will say Buy Position or Buy FTE. Select the pending request by dicking on the radio button part to the action 			
5. Click on Delete Row .			
 You will be warned that the "row data will be deleted permanently." If you are sure you wish to continue, select OK. 			
(E) 6. Screen will refresh and indicate "Transaction completed successfully!". Click on Back to return to the Buy Sell Positions List screen.			
IMPORTANT NOTE: This action will delete the selected buy request. Use this method to change or correct the Object or Job Class code, effective date or FTE of a pending request by deleting the current request row and re- entering the request with the correct information.			



TIPS for Buy Requests

Multiple BUY requests may be created / submitted within a single case, as long as the positions requested are in the same HR Category (Certificated or Classified).

For example, within a single Certificated BUY case, you may request to:

- buy a new 1.00 FTE;
- buy a new 0.50 FTE;
- increase an existing 0.50 FTE to 1.00 FTE; AND
- convert an existing 1.00 FTE 10-month position to a 12-month position



SELL REQUESTS

Buy/Sell Position List

Description: Definitions for the position actions available in the Buy/Sell Position List screen for **SELL** Requests.

Position Details	Sell Position	Sell FTE
	A	

Buy Position Actions – Creates a request to sell a position.

	Title	Description
A	Sell Position	Sell an entire VACANT, WSF funded position.
В	Sell FTE	Decrease the FTE count of an existing, WSF funded Classified position.



А

В

Buy/Sell Process

Description: Defines the information required when requesting a SELL.



Details of Position – Information related to the position in the sell request.

Title	Description
Position Number	The position number you have selected to sell.
Administrative	The location of the position. For schools, these locations will be the same.
Location / Office	
Location	
Position Title	Additional information corresponding to the type of position you wish to sell or
HR Category	decrease.
HR Sub Category	
Bargaining Unit	
UAC Obj Code	

Details of Sell Request – Information required in order to complete the sell request.

Title	Description
FTE	The FTE count of the position you wish to buy or decrease.
(for Sell FTE:	
From FTE and To	
FTE)	
Track	If a multi-track school, the track the position is in.
Effective Date	The effective start date of the request (the date the position will no longer active).
Buy/Sell Cost Amount	The pro-rated cost amount for the position you are selling or decreasing, based on the effective start date.
Buy/Sell Rationale	Brief explanation of why you are requesting to sell or decrease the position.



Requesting to Sell a Position			
Description: How to enter a request to sell a position.			
Position Det A Sell Position Sell FTE			
Buy/Sell Process			
B B B B B B B B B B B C B C B C B C C C C C C C C C C C C C	Process Position Back Save Changes		
Buy/Sell Cat Mount: Buy/Sell Rationale: Buy/Sell Rationale: C C Continue Cancel			
 Select the position you wish to sell from the Buy Sell Positions List screen by clicking on the radio button next to the position Oliver to the position button 			
3. Enter the Effective Start Date for the posi-	ion. This is the date that the position will be inactivated.		
For Certificated and Classified position	s. effective date defaults to the current date.		
Effective Date may be edited to later date	ate as needed.		
 Retro sells (backdating of requests) are 	NOT allowed.		
Actual Effective Date may be changed	by OHR to accommodate processing times.		
4. The Buy/Sell Cost Amount will calculate t	he pro-rated cost based on the effective date used.		
5. Enter the Buy/Sell Rationale; the reason f	or selling the position.		
• This field is REQUIRED . You will be unable to submit your request if this field is not completed.			
If necessary, you may edit / amend this	s field on the Process Position screen.		
C 6. Click on the Continue button, located under the Rationale field.			
IMPORTANT NOTE: Once you click c	• IMPORTANT NOTE: Once you click on Continue you will be unable to change the effective date.		
 You will be directed to the Process Position 8. Screen will refresh and indicate "Transaction Sell Positions List screen. 	on screen. Click on the Save Changes button. on completed successfully!". Click on Back to return to the Buy		



NOTE: To request to decrease a <u>*CERTIFICATED*</u> position, please contact your PRO. They will split the existing certificated position and provide a new position number to sell.

Reque	sting to Sell FTE (decrease FTE for existing position; for <u>CLASSIFIED</u> position only)
<u>Descrip</u>	otion: How to enter a request to decrease the FTE of an existing, CLASSIFIED position.
	Position Details Sell Posit A Sell FTE
Buy/Sell F	Process
E	Position Number: 12345 Administrative Location: Aloha Elem Office Location: Aloha Elem Position Title: School Qustodian II HR Category: Civil Service Bargaining Unit: 01 UAC Object Code: 200 Current FTE: 0.500 Ending FTE: 0.250 → Effective Date: 01/01/2012 Buy/Sell Rationale: Enter the reason for requesting the decrease here.
1.	C C Continue Cancel Select the position you wish to decrease from the Buy Sell Positions List screen by clicking on
A 2. B 3.	Click the Sell FTE button. The Current FTE field will show the existing position FTE. Select the desired resulting position FTE from the dropdown list in the Ending FTE field. • Classified positions may be decreased in increments of 0.125 FTE.
4.	Enter the Effective Start Date for the decrease.
	 For Certificated and Classified positions, effective date defaults to the current date.
	Effective Date may be edited to a later date as needed.
	 Retro sells (backdating of requests) are NOT allowed.
5.	 Actual Effective Date may be changed by OHR to accommodate processing times. The Buy/Sell Cost Amount will calculate the pro-rated cost based on the effective date entered and FTE decrease.
6.	Enter the Buy/Sell Rationale; the reason for requesting the decrease.
	• This field is REQUIRED . You will be unable to submit your request if this field is not completed.
	 If necessary, you may edit / amend this field on the Process Position screen.
C 9.	Click on the Continue button, located under the Rationale field.
	 IMPORTANT NOTE: Once you click on Continue you will be unable to change the effective date or FTE.
D7.	You will be directed to the Process Position screen. Click on the Save Changes button.
8.	Screen will refresh and indicate "Transaction completed successfully!". Click on Back to return to the Buy Sell Positions List screen.



Modifying a Sell Request

<u>Description:</u> How to modify a pending sell request.

Important Notes: Once the WSF Buy/Sell case is submitted, changes cannot be made unless the CAS returns the request to you for modifications.

B	Posi	ition Detail	s Sell Po:	sition	1												
			Buy/Sell														Emp
	Select	Details	Cost Amount	Posn No	Tk	Position Title	FTF	Posn Eff Dt	Posn Sea No	Poso Status	PC	Reason	DOE	Name	Employee Status	Ap Ty	Fte Am
A	O	+ Show	-17,216	NP4679	0	Elem Teacher	1.000	04/03/2012	1	Inactive - Sold	T	Sell Position		Hunic	50003	.,	
						-											
	Proce	ss Positi	on														
									Back								
	Posi	ition Numb	er: NP4679														
	Show	Audit Info									1	'he row data wil	l be dele	ted perma	anently if you pr	oceed.	
	Curr	ent Positio	on Action:									are you sure you	want to	continue?			
		elete Row	Show	Audit Info													
U									Process				D	OF	Car	ncel	
		Positi	on	* Eff Dt			HR	Action	Case Sten								
	Sele	ct Numbe	er * Eff Dt	Seq	* Act	ion * Reaso	n Stat	us	Key								
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	🧏 Reti	urn to WSF I	Buy Sell Position	< 2i													
	Informa	ation															
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	Proces	ss Positio	n														
								Back Sa	ve Change	s							
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A	1. 3	Select	the per	ding	pos	ition sell yo	u wi	sh to m	odity	from the	Buy	y Sell Po	sitio	ns Li	st scree	n by	
	C		g on the	radic) DU	tton next to	the	positio	n.								
	•	Ar	ny pendi	ng po	sitic	on sells will	be a	at the to	op of t	he list, in	rec	l.					
	2. (Click t	he Posi	tion I	Deta	ails button.	Thi	s will na	avigat	e you to t	the	Process	Pos	ition	screen.		
	3. I	n the	list of C	urren	t Po	osition Act	ions	s locate	the p	ending s	ell r	equest.					
	•	Ac	tions ar	e sor	ted i	in descend	ing d	order by	/ date	(most re	cen	t first).					
		• Tv	pically.	the se	ell re	equest will	be tł	ne first e	entrv								
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ente	ring	the re	quest w	ith the	e co	rrect inforn	natic	on.		•		Ū			•		



TIPS for Sell Requests

Multiple SELL requests may be created / submitted within a single case, as long as the positions requested are in the same HR Category (Certificated or Classified).

For example, within a single Classified SELL case, you may request to:

- sell a vacant 1.00 FTE;
- sell a vacant 0.50 FTE; AND
- decrease an existing, vacant 1.00 FTE to 0.50 FTE



Special Cases (Sells)

Retro (back-dated) sell requests are <u>NOT</u> allowed. However, there are a few special cases where an exception may be made. These are the <u>ONLY</u> accepted exceptions to the "no retro dated sell requests" rule.

Timing Issue for Recently Vacated Positions

There is a known timing issue in the Position Buy/Sell Process in eHR. There may be instances when a position is reflecting as vacant in the current position information (school list), but the Buy/Sell process does not recognize that position as being vacant yet. These instances may straddle a weekend, lowering the cost of a position by the time the position shows as vacant for the Buy/Sell process.

To avoid penalizing the school for this timing issue, Budget and OHR will allow for requested changes to the effective date of the sell request, of <u>no more than 7 days</u> prior to date of request. The following steps should be taken by the requestor:

- School / User enters request to sell position in eHR, but position is not available to sell
- School confirms position is vacant (contact PRO if needed)
- School / User re-enters request to sell position in eHR within 7 days, position is now available to sell NOTE: School / User <u>MUST</u> include, in rationale, that effective date of sell should be changed to date position was vacated (include date)
- OHR will modify the effective date of the sell request, as long as the change is within the 7 day window, and finalize processing.

Example 1:

Position 12345 becomes vacant on Friday, 10/21 (1.00 FTE Teacher, cost = \$43,016). School starts sell request in eHR, but position is not reflected as available to sell (not vacant). School confirms with PRO that position is vacant. On Monday, 10/24, school starts new sell request. Position is now available to sell, but the amount has decreased to \$41,941. School includes in the rationale for the request, "Position became vacant on 10/21. Please amend effective date to 10/21." OHR-CCG will verify date and amend effective date and amount as needed.

Example 2:

Position 54321 became vacant on Friday, 10/21 (1.00 FTE Teacher, cost = \$43,016). On Wednesday, 11/16, school starts sell request in eHR (cost is now \$38,716). School includes in the rationale for the request, "Position became vacant on 10/21. Please amend effective date to 10/21." OHR-CCG will **NOT** amend effective date and amount since the request was submitted more than 7 days after the position became vacant. Effective date will remain 11/16.



Correcting the funding source of an existing WSF position

If a school needs to correct the funding source of an existing WSF funded position (for instance, correcting the funding source of a Teacher or EA position from WSF to Title I), as of a prior date, please contact your PRO for assistance and further instructions.

NOTES:

- PRO / OHR will complete any needed transfers of positions and/or incumbents prior to school / user entering request in eHR.
- When entering the sell case in eHR, school / user <u>MUST</u> include the effective date of the funding source change in the rationale
- School must monitors payroll reports. When payroll expenditures for the position stop posting to the WSF
 Prog ID, school submits an AC-4 to Accounting Section to transfer all YTD expenditures for the position to
 the CORRECT funding source (Prog ID).
- School sends copy of COMPLETED AC-4 to OHR-CCG as confirmation that all charges associated with
 position being sold have been transferred to the correct program.
- OHR will modify the effective date of the sell request and finalize processing.

OHR-CCG will NOT amend the effective date of the sell request <u>without a copy of the completed AC-4</u>. If the completed AC-4 is not received by the time the Position Buy/Sell process closes for the year, the sell request will be completed with the original effective date as submitted.



Submitting a WSF Buy/Sell Request

Description: How to submit your WSF Buy/Sell Request.

<u>Important Notes:</u> Once the WSF Buy/Sell case is submitted, changes cannot be made unless the CAS returns the request to you for modifications.

- 1. From the Select Action column dropdown, select Submit.
 - The Select Action dropdown menu is located next to the Status field.
 - If you choose <u>Cancel Process</u> it will permanently delete the entire WSF Position Buy/Sell Case and you must start over.
- 2. Enter comments for your CAS in the box next to Submit. Click on More for additional space for comments.

 Status: Pending Submittal Select Action
- 3. Click Go.

ing Submittal Select Action V Select Action Cancel Process Save Only Submit

Go



Checking the Status of a WSF Buy/Sell Request Description: How to check the status of a WSF Buy/Sell Request. A) 1. Under *Module* dropdown, select **Processes**. 2. Click on the Pending Cases tab. Click on the "Show All Cases" checkbox if you don't see the desired В WSF Position Buy/Sell Case. Click on +Show icon for the desired WSF Position Buy/Sell case. 3. In the example below, the Approval Step History shows that the WSF Buy/Sell Request was submitted by the Principal, Returned by the CAS, Resubmitted by the Principal, Approved by the CAS, then Completed by OHR. Click on Next Approval Step to see what is required next. Click on **Parameters** to see what parameters were submitted for the Case. Example: Instar Module Processes m Home PHelp 🗙 Logout State of Hawaii SS Ŧ HR A Pending Cases Start Process **Current Employee List** Current Po В Pending Cases Filter By Process Case Label 👻 🔹 Aloha El Cert - Buy <u>Go</u> <u>A</u>dvanced Search Go To Case Re-Run With Params Show All Cases V Task Process Case Process Case **Process Step** Location Last Updated Last Update Select Details Description Step Key Label Status Description Βу Date 😑 Hide | WSF - Buy / Sell 459748 Aloha El Cert - Buy Aloha El (xxx) 04/03/2012 OHR ۲ Approved Received From: OHR Process ID: 6.1.3.1 District: Central District (20) Received Date: 04/03/2012 Process Begin Date: 04/03/12 Approval Step History Next Approval Step Parameters Approval Task Step Approval Task Sequence Step Process Action Description Number Number Comment Date Code Comment Update By WSF - Buy / Sell 10 04/03/2012 Submit Submitting requesting for buying a new teacher position. Principal 1 CAS Returning... WSF - Buy / Sell 2 20 04/03/2012 Return WSF - Buy / Sell 3 10 04/03/2012 Re-submit Re-submitting... Principal CAS WSF - Buy / Sell 4 20 04/03/2012 Approve Approving... WSF - Buy / Sell 5 30 04/03/2012 Approve OHR Completing.



Returning a WSF Buy/Sell Request (For CAS Use Only)								
<u>Descri</u> j	Description: How to Return a WSF Buy/Sell Request back to the Principal or CABM.							
Importa CAS re	Important Notes: After the WSF Buy/Sell Request is submitted by the Principal, changes cannot be made unless the CAS returns the request for modifications.							
1.	1. From the Select Action column dropdown, select Return.							
	• The Select Action dropdown menu is located next to the Status field.							
2.	From the Return To column dropdown, select the Principal's or CABM's name.							
3.	 Enter comments for the Principal or CABM in the box next to Return. Click on More for additional space for comments. 							
4.	Click Go .							
Status:	In Progress Submit by Principal Return To: Principal V Please modify per our discussion More Go							

Approving a WSF Buy/Sell Request (For CAS Use Only)							
Description: These instructions illustrate how to Approve a WSF Buy/Sell Request.							
Important Notes: Once the WSF Buy/Sell Request is approved by the CAS, any changes need to be discussed with your PRO. A subsequent request may need to be submitted.							
 1. From the Select Action column dropdown, select Approve. The Select Action dropdown menu is located next to the Status field. 							
2. Enter comments in the box next to Approve. Click on More for additional space for comments.							
3. Click Go .							
Status: In Progress Submit by Principal, Chap Select Action Select Action Approve Return							



Process Flow Email
Description: These instructions illustrate how to find a Buy/Sell Case in eHR using the Process Flow Email.
 After OHR has approved a Buy/Sell case, you will receive a Lotus Notes email similar to the one shown below. The Lotus Notes provides you with the basic information about the case: A Process Case label name - Indicates if it is a Certificated or Classified / Buy or Sell B Location Description - Indicates School/Complex Area related to the case C Case status - "Approve" indicates case has been approved by OHR D Process Case Step Key – Unique ID used to identify a case. Use to look up a case in eHR.
Process Flow Email for - Aloha Elem Cert-Sell(62631) at location - Aloha Elem(XXX)
Aloha John, You are one of the task approvers and/or informees of - "WSF Buy / Sell" Process Case.
The process case details are as follows. Process Case A : Aloha Elem Cert-Sell(12345) at location - Aloha Elem(XXX) Task : WSF Buy / Sell(PCBSCHBUYSEL) Task Action : Approve C Action Comments : Process Case Step Key : 123456 D
For buy/sell cases: - Contact your Personnel Regional Officer to fill new positions. - Please print report of the completed buy or sell transaction and post on the School Bulletin Board for 30 days.
Mahalo!
E_TASK_ACTN

0	State of Ha Departme	awaii nt of Edu	ucation	e	HR WSF Po	sition	Buy/Sell (Quick S	heets	
2.	Use the	e Proc	ess Case	Step Ke	ey number to fi	ind the o	case in eHR.			
	A Under <i>Module</i> dropdown, select Processes .									
	B Clio	ck on /	Pending (Cases t	ab					
	C Sel	ect Pr	ocess Ca	se Ste	o Key from the	e 'Filter l	By' dropdow	n		
	D Ent	ter the	Process	Case St	tep Key numbe	er from t	he Lotus No	otes you	received.	Click Go .
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	G0 T	o Case	Show Al		Refresh List					
	Select	Details	Task Description	Case Step Key	Process Case Label	Process Step Status	Location Description	Last Updated By	Last Update Date	
	\bigcirc	🛨 Show	WSF Buy / Sell	123456	Aloha Elem Cert-Sell	Approved	Aloha El (xxx)	OHR	08/03/2012	
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Buy Sell Reports

Generating the Buy Sell Position List Report							
The Buy Sell Position List Report allows you to produce a PDF report for the current buy/sell case. The report replicates the former WSF-1 Buy/Sell form, which is to be posted for 30 days.							
As reports are run, they will appear in a new browser window. You may either choose to print the report, or save a copy of the PDF report on your computer for future reference and/or printing. To close the report, simply close the browser window containing the report. From the Reports screen you have the option of running additional reports or navigating to another screen.							
Important Notes: Pop-up blockers need to be disabled for the eHR website. For assistance disabling pop-up blockers, refer to your internet browser's Help. 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. For assistance downloading Adobe Acrobat Reader, click on the Help button.	at						
Filter By Posn No - Go Advanced Searcl Print Buy Sell Position List Report							
 Enter the approved Buy/Sell Position Case (see Logging Back into a WSF Buy/Sell Request above). Click on Print Buy Sell Position List Report. 							
. The report will open as a pdf file in a new browser window/tab.							
. User may either Print or Save a copy of the pdf file. Tip: If you are using Firefox as your Browser, select "Save Page As" from the File Menu to save using the default report name.							
5. To exit report, close report viewer (Adobe) window.							



Buy Sell Log Report

The **Buy Sell Log Report** allows you to produce a PDF or Excel report for all cases (pending and completed) for a specific Org ID or all Orgs within a Complex Area.

When submitting a report case, you may select to Stream Output to Screen or Save Output to DB:

- Selecting **Stream Output to Screen** will create a download of the report immediately to your computer. The report will not be saved in the Reports Cases tab.
- Selecting **Save Output to DB** will save the report to the Reports Cases tab within eHR. You may then download the report at any time.

When the PDF reports are downloaded, they will appear in a new browser window. You may either choose to print the report, or save a copy of the PDF report on your computer for future reference and/or printing. To close the report, simply close the browser window containing the report.

As Excel reports are downloaded, you will be prompted to Open or Save the file. Choosing Open will open the report in Excel. You will be prompted to save the file upon exiting. Choosing Save will save the file to the location you specify on your computer. You may then open the file from that location.

<u>Important Notes:</u> Pop-up blockers need to be disabled for the *e*HR website. For assistance disabling pop-up blockers, refer to your internet browser's Help. 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. For assistance downloading Adobe Acrobat Reader, click on the Help button.



	State of Hawaii Department of Education
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Reports Report Category Position Run Report C Select Details Report Category Position Report Category Position Report C Select Details Report Category Position Report C Select Details Report Category Position Report C Select BuySell Log - XLS * Process Case BuySell Log - XLS * Process Case BuySell Fund Source Id Report Output Type Report Detaination 1. Select Reports from 2. Select BuySell Log 3. Enter a Process C 4. Click Run Report. 5. Enter the parameter • Location ID: 5. Enter the parameter • Location ID: • School Year: • Buy Sel								
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Glossary

Title	Description
Module	Different areas / functions in eHR.
Process	A Process is a task or series of tasks involving a workflow. The WSF Position Buy/Sell process, for example, may consist of starting, submitting and approving a WSF Buy or Sell Request.
Case or Process Case	For each process that exists, a process case represents an instantiation of that process. For example, "WSF Buy Position" has been defined as a process. By creating a new case, the user will have created a unique process case for buying a WSF position. Case can be created per location per year.
Start Process	Go to the "Start Process" screen to start a new WSF Position Buy/Sell Process Case.
Pending Case	Cases that require action by the user.
Current Case	The selected case.
Continue	Click on the "Continue" button from the Buy/Sell Process screen to save the current buy or sell request information and continue to the Process Position screen.
Cancel	Click on the "Cancel" button from the Buy/Sell Process screen to cancel the current buy or sell request and return to the Buy/Sell Positions List screen.
Submit	The user would select "Submit" from the Actions dropdown list to Submit the WSF Buy/Sell Request for approval.
Re-submit	The user would select "Re-submit" from the Actions dropdown list to Re-submit the WSF Buy/Sell Request for approval.
Return	The CAS would select "Return" from the Actions dropdown list to Return the WSF Buy/Sell Request to the Principal for modifications.
Approve	The CAS would select "Approve" from the Actions dropdown list to Approve the submitted WSF Buy/Sell Request.
Cancel Process	Select "Cancel Process" from the Actions dropdown list to <u>cancel the Process</u> and permanently delete the entire WSF Position Buy/Sell Case.