SCUSD NEW-CHANGE-END POSITION HRA



Table of Contents

| What is a Human Resource Authorization | 2 |
|---|------|
| Accessing Human Resource Authorizations in Escape | 3 |
| Searching from the Authorizations Activity: | 5 |
| Authorization Information | 6 |
| Item Information | 6 |
| Item To-Do Task Information | 8 |
| Approval Information | 8 |
| Accounts | 8 |
| Running Authorization and Item Snapshots: | 9 |
| Create New Position Request | 9 |
| Create Position Change Request | 12 |
| Create Position End Request | 14 |
| Approve New/Change/End Position Request | . 15 |
| New Position Approval Workflow | 18 |
| Position Change/End Approval Workflow | 19 |

What is a Human Resource Authorization

So now that you know Employee Onboarding will be completed by using an HRA and you know how you will be notified when you need to take part in the process of onboarding a new hire, let's learn more about what an HRA really is and how you will access them in Escape.

A Human Resource Authorization (HRA) is an Escape process that allows for approval routing and notifications of proposed changes to employees or positions. Once all approvals are granted and the item is posted, the changes are applied to the records within Escape as defined in the item.

An HRA is an electronic change request for employees and positions. They are used for a variety of processes and can include approval routing, To-Do or Task management and electronic notifications to Stakeholders as the process unfolds. The purpose of an HRA for a district is to eliminate the paper trail and replace it with a streamlined electronic process that allows for cross departmental communication and a transparent and clear procedure.

An HRA is made up of a package and at least 1 item. Think of an HRA package as an electronic binder and the HRA items are the different dividers within that binder or another way to think about it is the HRA package is a file folder with the items being sections within that folder.

Accessing Human Resource Authorizations in Escape

When you are notified that the New Hire Onboarding HRA has been imported or that it is your turn in the process to act, you will want to access the HRA in Escape. HRA access can be accomplished in various ways, depending on user preference.

The Escape activity for maintaining Human Resource Authorizations is:

- HR/Payroll HR Authorizations Authorizations
- (Quick Start = HRA)
- Remember that help is available via the TOOLS How To button and Tutorial button.

| Activities | 😜 🗸 097 - SC HR / Pay | roll - HR Authorizations - Authoriz | zations |
|--|--|-------------------------------------|---------|
| 097 - Sac City Quick Start here | Search | | - |
| Finance HR / Payroll | Search Criteria - Authorizations | s * | |
| Credentials Employment HR Authorizations | 1 - Authorization Information List Type HRA Id | Authorization Information | |
| Authorizations Approve Authorizations Timesheet Hours Import | Date Range Location Division | | |

You can use this activity to access any existing HRA at any time during or after the process. Below are some ideas to help you with how to find the exact HRA you are looking for...

**From the Message Center or email notification, take note of the HRA# and search for that HRA Id.



**From the notification Message Center (double-click on the envelope from bottom right of screen), open the message and use the quick link to go directly to the appropriate HRA.

| C · Hom | e Page | 12 August |
|----------------|------------------------------------|--------------------------------|
| e-secty []] | | Escape-TEST-03 |
| CUSD Resources | | Escape Online5 Version: 23.1 |
| Sacra | mento City Unified School District | Escape Service Pack Version: |
| | | Escape Report Release Version: |
| | | Test Refresh Date:*** |
| | * | |
| | Welcome to the TEST | HRA System |
| | 5 | |
| | | |
| | | |
| EST HRA | | |
| | | |
| | | |
| TOP | | |
| STOP | | |
| STOP | | |



**Search for HRAs using specific criteria or favorites to find YOUR HRAs. To the right is an example of how you can search for YOUR incoming HRAs all at once (those you have not worked on yet). Remember that this search criteria will vary depending on your place and role in the process so, modify as appropriate!

| earch List | |
|----------------------------------|---------------------------------------|
| 🔄 Go 📮 Clear 🏼 New 🍲 Favorite | s 🔻 |
| | |
| Search Criteria - Authorizations | |
| 1 - Authorization Information | |
| List Type | Authorization Information |
| HBA Id | |
| Date Range | |
| Location | |
| Division | |
| Academic Department | |
| Status | Open (This HR Authorization is open |
| Package Type | EmpNew (Employee Onboarding) |
| Comment | |
| On Hold | |
| On Hold Message | |
| Entered By | |
| Entered Date | |
| Note Containe | |
| 2 Item Information | |
| Services Id | |
| Employee Id | |
| Supervisor id | |
| Position | |
| Effective / Start Date | |
| End Date | |
| Work Type | AngeeGo (Angee Gonzalez - Cert. |
| Position Type | |
| Job Category | |
| Job Class | |
| Location | |
| Division | |
| Academic Department | |
| Last Name | |
| First Name | |
| Туре | EmpNew {New Employee} |
| Status | Open {Item is open for editing before |
| Comment | |
| On Hold | No |
| Action Comment | |
| Entered By | |
| Entered Date | |
| Description | |
| lune and a set of the set | |

To save search criteria to a FAVORITE for easy and repeatable search access, set the criteria you want saved and select the Favorites task – then select Manage. From the Manage Favorites box, select +Add then give your favorite a Name then Apply Change and then Save. You will now be able to call this favorite up to search on all your incoming Onboarding HRAs.

| arch List Go 🔍 Clear 🖄 New 🙀 Fave 11 1 | vites Ay New Onboards | Favorites | ooards | | Details |
|---|--|--------------|---------------|-----------|---|
| Search Criteria - Authorizz f2 M 1 - Authorization Info List Type | Ay Onboards in Progress | 2 My Onboard | s in Progress | | My New Onboards |
| Date Range Location Division Academic Department Status Package Type Comment Ontoid Message Entered Date Note Contains Note Contains 2 e - tem Information Employee Id Supervisor Id | Open {This HR Authorization is ope EmpNew (Employee Onboarding) | | | 1 | Auto Go Default Favorite Cogin Auto Launch Values List Type = Authorization Information Status = Open Package Type = EmpNew Work Type = AngeeGo |
| Effective / Start Date End Date Work Type Position Type | AngeeGo (Angee Gonzalez - Cert. 5 | + Add | X Remove | C Replace | Type = EmpNew Status = Open On Hold = No |
| Job Class Location Division | | ⊮⊃ Undo | ⇔ Redo | | Cancel Change Apply Change |
| Academic Department Last Name First Name Type | EmpNew (New Employee) | | | | Cancel Save |

Searching from the Authorizations Activity:

There are several ways to search for authorizations. You can search by package, item, or approvals and more. The ability to switch between searching on Authorization information and Item information is unique to the Authorizations activity. See the List Type information below for more details...

- Click on the **HR Authorizations** group activity. Click on the **Authorizations** activity. This will open the search page in the
- workspace.
- Enter in the search criteria.
- Select Go to begin Search!



Authorization Information

- List Type Use the lookup to define your list as an authorization information (package) list or an item list.
- HRA ID Enter an HRA ID (package) or a range. For example, enter 40.. to get all HRAs with an ID of 40 or greater.
- Date Range Enter a date or a date range to get a list of authorizations with this effective date.
- Location Use the lookup to select one or more locations to get a list of authorizations with the location(s) specified.
- Status Use the lookup window to select the status to get a list of authorizations with that status.
- Package Type Use the lookup to select a type to limit your list to only packages of that type.
- Comment Enter partial or complete comment to get a list of all authorizations with those letters or phrase in the Comment field for the package. Please note that this type of search could take some time. It is always best to use other criteria along with this type of search to speed up the search time.
- On Hold Enter Yes or No to filter your list of authorizations by the On Hold flag.
- On Hold Message Enter partial or complete message. For example, you could enter "board approval" to generate a list of all authorizations with an On Hold Message that contains the letters "board approval" (e.g., Holding for board approval).
- Entered By Use a lookup to find all authorizations created by that user.
- Entered Date Enter a date (or range) to find all authorizations created on that date.
- Note Contains Enter a word or phrase to get a list of packages with notes for packages and/or items that contain that word or phrase. Please note that this type of search could take some time. It is always best to use other criteria along with this type of search to speed up the search time.

Item Information

- Employee ID Enter an employee ID or use the lookup window to get a list of authorizations that contain at least one line item for that employee. You may also enter a list of employee IDs, separated by commas. (Remember, to use the lookup, you must enter at least two characters. You can enter the first two characters of the employee's last name or the first two numbers of the employee ID.)
- **Supervisor ID** Use the lookup to get a list of authorizations that contain at least one line item for that supervisor. You may also enter a list of employee IDs, separated by commas. (Remember, to use the lookup, you must enter at least two characters. You
 - can enter the first two characters of the employee's last name or the first two numbers of the employee ID.)
- **Position** Use the lookup to select a position to get a list of authorizations that contain at least one line item for that position.

- Effective / Start Date Enter a start date (or range) to get a list of authorizations that contain at least one line item (including vacancies) with a Start Date field with this date (or within this range). This searches for item types.
- End Date Enter an end date (or range) to get a list of authorizations that contain at least one line item with an End Date field with this date (or within this range). This searches for item types.
- Work Type Use the lookup to select one or more work types to get a list of authorizations with the work type(s) specified.
- **Position Type** Use the lookup to get a list of authorizations that contain at least one line item for that position type.
- Job Category Use the lookup to select a job category. You may also enter multiple using commas or the lookup.
- Job Class Use the lookup to select a job class. You may also enter multiple using commas or the lookup. If you selected a job category, only those classes for that category will be displayed in the lookup window. However, if you entered multiple job categories, you cannot enter any job classes.
- Location Use the lookup to select one or more locations to get a list of authorizations with the location(s) specified.
- **Division** Use the lookup to select a division to get a list of authorizations for this division.
- Academic Department Use the lookup to select an academic department to get a list of authorizations for this academic department.
- Last Name Enter partial, complete, multiple or range of last names. For example, you could enter B. to generate a list of authorizations with at least one item containing a last name that starts with B.
- **First Name** Enter partial, complete or range of first names. For example, you could enter Mic. to generate a list of authorizations with at least one item containing a first name that starts with Mic (e.g., Michele, Michael).
- **Type** Use the lookup to select a type to limit your list to only authorizations that contain at least one line item of this type.
- **Status** Use the lookup window to select the status to get a list of authorizations that contain at least one line item with this status.
- **Comment** Enter partial or complete comment to get a list of all authorizations at least one line item with those letters or phrase in the Comment field. Please note that this type of search could take some time. It is always best to use other criteria along with this type of search to speed up the search time.
- **On Hold** Enter Yes to get a list of authorizations with at least one item that is on hold.

- Action Comment Enter partial or complete comment to get a list of all authorizations at least one line item with those letters or phrase in the Action Comment field, or with those letters in a history record for a previous Action Comment.
- Entered By Use a lookup to select a user to get a list of all authorizations with at least one line item created by that user.
- Entered Date Enter a date (or range) to get a list of all authorizations with at least one line item created on that date.
- **Description** Enter partial or complete phrase to get a list of all authorizations at least one line item with those letters or phrase in the Description field.
- Justification Enter partial or complete phrase to get a list of all authorizations at least one line item with those letters or phrase in the Justification field.

Item To-Do Task Information

- **Pending Tasks** Displays the number of To Do tasks assigned to you (as a user, proxy or member of a workflow group). Note that the number of tasks on your list may be different, because users may have created or completed tasks since you opened the activity and generated the list.
- Assigned To User Use the lookup to select a user to get a list of items with To Dos assigned to this user.
- Assigned To Workflow Role Use the lookup to select a workflow role to get a list of items with To Dos assigned to this role.
- List Item Name Use the lookup to select the To Do to get a list of items associated with those To Do tasks.
- Task Complete Select No to exclude completed tasks from your list.
- **Task Status** Use the lookup to select a status to limit your list to items associated with To Do tasks in that status.
- **Status Change Date** Enter a date or a range of dates to get a list of tasks that changed status on that date or within that range of dates.

Approval Information

- **Pending Approvals** Displays the number of authorization items awaiting your approval at the time the search page is opened. Note that the number of authorizations on your list may be different, because users may have submitted or approved authorizations since you opened the activity and generated the list.
- **Approval Level** Use the lookup to limit your list to only those approvals that you can approve at the current level or any level (see all of your approvals).
- Approval Needed By Use the lookup to select a user to get a list of authorizations with at least one line item awaiting that user's approval.

Accounts

• Fiscal Year (for the account) – Use the lookup window to select a fiscal year for the HRA accounts.

• Account Components – Use the lookup or enter a mask in each of the component fields to get a list of authorizations with accounts that match the account mask entered.

The ability to search for accounts only works with new position and position change requests that include account changes, extra work requests, and school business requests.

Running Authorization and Item Snapshots:

You can print a copy of any package or individual item. We refer to these "printed copies" as snapshots. This is better than a print screen, because the snapshot is nicely formatted and displays information from several tabs. There are two styles to choose from:

- Full When selected for the package, prints an overview of the package, then for each item: overview, item data, To Do lists, approvals, notes, history, and attachment information. When selected for the item, prints the same information minus the package overview.
- Brief Prints the same information as a full snapshot, minus the notes, history and attachment sections.

All package and item types support snapshots.

- 1. Highlight or open the desired package or item.
- 2. Click Print Preview and select which type of snapshot to create. The snapshot will open in the Report tab.
- 3. View on screen or print the snapshot from the viewer.

Create New Position Request

All Position Requests (e.g., new positions, position changes, position ends) submitted be submitted at least 4 weeks in advance of the intended effective date.

A New Position Request includes a recruitment request that will be used by HR to advertise for your vacancy.

Only use New Position Request when a *new* the job class already exists. A New Position Request cannot be created without a job class.

• Go to HR/Payroll -> HR Authorizations -> Authorizations.

Enter New HRA Request

1. Click on NEW and then select New Position Request.



Once the request is created, you will be on the Authorization Tab of the new record. Verify that your package type is correct (cannot be changed). Also notice that your location will default into the Location field. Requests can only be entered for your location and account. You must select the correct location for which you are entering the new position for.

| earch List Form | | |
|-------------------------------------|--------------------------------------|-------|
| 🗟 💌 📋 Delete 🏾 🍙 Prev 🖉 Next | 🖆 Save/Close 🔍 Cancel 😨 Tasks 👻 | |
| | | New A |
| Authorization Items:1 To-Do Tasks A | pprovals Attachments Notes History | |
| Authorization Information | | |
| 1 - Authorization Information | | |
| Package Type | Position New | |
| Effective Date | 5/12/2023 | |
| Comment | A A A QUALET Y A | |
| Location | 0410 {ALBERT EINSTEIN MIDDLE SCHOOL} | ~ |
| Division | | |
| Academic Department | | |
| Date Board Mtg | | |
| | | |

2. Click on the Items tab and OPEN your Position New item to complete your request.

| Search List | Form | | | | | | |
|---------------|------------|-------------|-----------|-------------|--------|-----------|------|
| 🗟 🕶 📗 D | elete 🍙 | Prev 🍙 Ne | ext 💋 Sav | ve/Close 🝳 | Cancel | 🖉 Tasks | * |
| | | | | | | | |
| Authorization | Items:1 | To-Do Tasks | Approvals | Attachments | Notes | History | |
| Car Open | 🔁 Export | 🙋 🕶 🖸 Ta | isks 🔻 | | | | |
| ltem 🛈 | Ту | pe | Status | Action | Actio | n Comment | Aprv |
| 1 N | ew Positio | n | Open | | | | |
| | | | | | | | |

3. Complete the fields within the request. Required fields are represented by a red circle and must be completed before you will be allowed to save or submit your request. Complete as many fields as possible using the lookups available for each field. In section 98 Item Handling -> Create Additional Items, PosRecruit is selected for you, if position is approved this will notify HR to recruit for position. If you do not want to recruit for this position, change it to N/A.

| Authorization Rems: 1 To-Do | alasks Approvals Attachments Notes History | |
|-----------------------------|--|--|
| Bullen marchport | Delete Prev Nex Psave/Lisse Q Cancel V Iasks | |
| | | |
| 3 0 - Status | | 0 - Action |
| Туре | New Postion | Delay Posting Until |
| Status | Open | Action |
| On Hold | A No | Action Comment |
| 1 - Item | | B 3 - Position Accounts |
| Posted Position Id | <u>a</u> | Total Account Percentage 40 0.00 |
| Begin Date | 8 | Account 01 |
| End Date | | Account 01 Percentage |
| Position Type | 0 | Account 02 |
| Date Approved | | Account 02 Percentage |
| Previous Position | | Account 03 |
| Work Type | | Account 03 Percentage |
| Description | | # 4 - Additional Position Accounts |
| Justification | 0 | E 5 - Job Class Information |
| Comment | 0 | Bargaining Unit 80 |
| 2 - Position Detail | | Hours Per Day & |
| Job Category | | Salary Schedule & |
| Job Class | 0 | Salary Schedule Range & |
| FTE Authorized | 0 | Estimated Position Benefits Cost a 0.00 |
| Location | 0 | Estimated Position Total Cost for FTE relix 0.00 |
| Division | | Salary Extra Pay Info |
| 628ademic Department | | Calendar |
| Supervisor | | Paid Days + Holidays |
| Supervisor Position | | B 98 - tem Handling |
| Detail Comment | | Create Additional Item(s)? PosRecruit (Positi |
| | | Complete Without Posting? No |
| | | P 99 - Add/I bdata Information |

- Begin Date
- Position Type
- Description
- Justification
- Comment
- Job Category
- Job Class
- FTE Authorized
- Location
- Division. The divisions are broken down by the Chief officer's role and will be used to route the approvals.

| Code | Description A |
|------|---------------------------------------|
| CAO | Chief Academic Officer |
| CBO | Chief Business and Operations Officer |
| CCO | Chief Communications Officer |
| CHRO | Chief Human Resources Officer |
| CIO | Chief Information Officer |
| CLC | Chief Legal Counsel |
| DS | Deputy Superintendent |

Note: If necessary, you can Save/Close the Item and HRA as you go as needed.

4. Once you have completed all appropriate fields, Click on the **Action** field, select **Submit** and then **Save/Close** the item.

| € → • 026 - M | USD HR / Payroll - HR Authorizations - Author | izations | Tools 🝷 🔀 |
|-------------------------|--|--|-----------|
| Search List Form | | | |
| 🗟 🕶 📋 Delete 🍙 Pre | w 🌇 Next 🍺 Save/Close 💐 Cancel 😨 Tasks 🔻 | | |
| | New Au | thorization | |
| Authorization Items:1 T | o-Do Tasks Approvals Attachments Notes History | | |
| Open 🔛 Export 🖟 | 👌 🕶 🔳 Delete 🏾 🖀 Prev 🕋 Next 🛃 Save/Close 💟 Cancel 🟹 1 | Tasks 💌 | |
| | | | |
| | | | |
| 0 - Status | | 0 - Action | |
| Type | Position New | Delay Posting Until | |
| Status | a Open | Action Submit | |
| | " NO | D 2 Depition Accounts | |
| Dested Position Id | | 5 - Position Accounts | |
| Posted Posteon III | 1/1/2020 | E Account 01 8 0100 00000 0 0000 2150 2101 00 260 5100 | |
| End Date | 1/1/2020 | Account 01 Percentage 100 00 | |
| Position Tuno | | E Account 02 | |
| Date Approved | CE (CERTIFICATED) | Account 02 Percentage | |
| Previous Position | | E Account 03 | |
| Work Type | | Account 03 Percentage | |
| Description | | Fi 4 - Additional Position Accounts | |
| Justification | | E 5 - Job Class Information | |
| Comment | New school opening requires additional staff | Bargaining Init #9 MI ITA (CERTIFICATED) | |
| 2 - Position Detail | now series opening requires dualitional start | Hours Per Day # 7 50000 | |
| Job Category | 9 CE (CERTIFICATED) | Salary Schedule BCE (CERTIFICATED SALARY SCHEDULE) | |
| Job Class | 9 TCHR (TEACHER) | Salary Schedule Range BCE 1/Lthru 14/VIL (\$182.41 - \$478.78 Daily) | |
| ETE Authorized | 1 00000 {7 500 Hours} | Salary Extra Pay Info ii | |
| Location | 052 (52 SIERRA VISTA) | Calendar CE183 (Certificated Teacher) | |
| Division | | Paid Days + Holidays # 183.00 | |
| Academic Department | | 98 - Item Handling | |
| Supervisor | 005766 (Albertson, Kent) | Create Additional Item PosRecruit (Position Recruit) | ~ |
| Supervisor Position | 2313 (ML/CHIEF HR (027) FTE 0.000) | Complete Without Post No | |

5. After saving your item, **Save/Close** the full HRA. This will take you back to the list where you started and send the request on its way to be approved.



Create Position Change Request

All Position Requests (e.g., new positions, position changes, position ends) submitted be submitted at least 4 weeks in advance of the intended effective date.

Note: The extend position option is no longer available. If a position is ending and needs to continue, a new position must be created after the end date of the prior position. For all positions funded with one-time grants or grants with an expiration date, the position must have an end date.

Attention: For Change Position with split budget codes, please contact Budget Services to input budget code(s) outside of your department or site. Users are limited to department/site budget code only.

Initiate a Position Change with the following steps.

- 1. Navigate to HR/Payroll HR Authorizations Authorizations
- 2. Click New Change Position

| Search | | | |
|-----------------|-----------------------|--------------------------|---|
| 🔄 Go 🔍 Clear [| 🖞 New 🔻 🙀 Favorites 👻 | | |
| | Change Position | | |
| Search Criteria | Emp Separation | - Y- | _ |
| 🗆 1 - Authoriza | Employee Onboarding | | |
| List Type | End Position | uthorization Information | |
| HRA Id | NL D. D. | | |
| Date Bange | New Position | | |

3. From the Main HRA screen, click on the items tab.

| arch List Form | | |
|--|---------|-------------------------|
| | New Aut | horization |
| uthorization Items:1 To-Do Tasks Approvals Attachments Notes History | | |
| Authorization Information | | Status Information |
| I - Authorization Information | | 🗉 2 - Status Informatio |
| Package Type Position Change | | Status |
| Effective Date 6/20/2023 | | Status Comment |
| Comment | | On Hold |
| Location | | On Hold Message |
| Division | | Completed |
| Academic Department | | Cancelled |
| Date Board Mtg | | Cancelled By |
| Board Description | | Denied |
| | | Denied By |
| | | T |

4. Open the change position item.

| Item î | Ту | /pe | Status | |
|--------|----|-----|--------|--|
|--------|----|-----|--------|--|

- 5. Fill out the;
 - Effective Date
 - Position Number
 - Description
 - Comment
 - Division
 - Section 2 and Section 3 are for the change(s) being made.
 - Section 2 is dedicated to the position detail record within the position.
 - Section 3 is dedicated to the account record within the position.

• Section 4 is dedicated to the current Position information.

| | | | | _ |
|--------------------------|-----------------|-----|------------------------------|---|
| | | | | |
| 0 - Status | | | 0 - Action | |
| lype | Change Position | | Delay Posting Until | |
| Status | a Open | | Action | |
| On Hold | 4 No | | Action Comment | |
| <u>і - пет</u> | | | E 4 - Current Position Info | |
| Effective Date | | - m | Position Type | |
| Position Number | 0 | | Job Category | |
| Description | | | Demoising Line | |
| Comment | | | ETE A thoread | - |
| 2 - Position Datail | | | ETE Llaad | |
| FTF Authorized | | | Division | - |
| Job Category | | | Academic Dent | - |
| Job Class | | | Location | |
| Supervisor | | | Current Account Distribution | 6 |
| Supervisor Position | | | Current Assignments | 6 |
| Location | | | Salary Schedule | 6 |
| Division | | | Salary Schedule Bange | 6 |
| Academic Department | | | Supervisor | 6 |
| 3 - Position Accounts | | | Supervisor Phone | 6 |
| Total Account Percentage | 8 | | Supervisor Email | 6 |
| Account 1 | | | E 98 - Item Handling | |
| Account 1 Percentage | | | 39 - Add/Update Informatio | n |
| Account 2 | | | | |
| Account 2 Percentage | | | | |
| Account 3 | | | | |
| Account 3 Percentage | | | | |
| Account 4 | | | | |
| Account 4 Percentage | | | | |
| Account 5 | | | | |
| Account 5 Percentage | | | | |
| Account 6 | | | | |
| Account 6 Percentage | | | | |
| Account 7 | | | | |
| Account / Percentage | | | | |
| Account 8 | | | | |
| Account 8 Percentage | | | | |
| Account 9 | | | | |
| Account 9 Percentage | | | | |
| Account 10 | | | | |

Please Note: As an example, if you want to change the FTE to .5, you would enter .5 FTE in the FTE authorized field. You only need to enter the data you want to change. You can compare your changes with the current setup, which can be viewed in section 4 on the right.

6. Once you have made the changes desired to the position, go to the action section, and submit the item.

| O - Action | | |
|-----------------------|---------|--|
| Delay Posting Until | 3 | |
| Action | | Action 🛛 🛛 🔀 |
| Action Comment | | |
| 🗆 4 - Current Positio | on Info | - |
| Position Type | 8 | Description A |
| Job Category | 8 | |
| Job Class | 8 | Approval Override |
| Bargaining Unit | 8 | Cancel |
| FTE Authorized | 8 | Put on Hold |
| FTE Used | 8 | Submit |
| Division | 8 | Restaura de la companya de la compan |
| | | |

- 7. Save/Close the Item.
- 8. Save/Close the HRA.

Create Position End Request

All Position Requests (e.g., new positions, position changes, position ends) submitted be submitted at least 4 weeks in advance of the intended effective date.

Initiate a Position End with the following steps.

Note: The extend position option is no longer available. If a position is ending and needs to continue, a new position must be created after the end date of the prior position. For all positions funded with one-time grants or grants with an expiration date, the position must have an end date.

1. Navigate to HR/Payroll – HR Authorizations - Authorizations Click on New, End Position.



2. Once in the HRA, open the items tab and open the Position End Item

| Authorization | Items:1 | To-Do Tasks | Approvals | Attachments | Notes History | |
|---------------|------------|-------------|-----------|-------------|----------------|----------------|
| 🔄 Open [| Export | 🙋 🕶 🗹 Ta | asks 🔻 | | | |
| Item û | Ty | ype | Status | Action | Action Comment | Aprvl Lvl Hold |
| 1 P | osition En | d | Open | | l) — D | 0 No |
| | | | | | | |
| | | | | | | |
| | | | | | | |

- 3. Fill out the following;
 - Position Number
 - End Date
 - Description
 - Comment
- 4. After that information is filled out, go to action and submit.



- 5. Save/Close the Item.
- 6. Save/Close the HRA.

Approve New/Change/End Position Request

The identified approval path for all HRAs will be noted in the APPROVALS tab of the HRA where you can see all those that need to review/approve the request as well as which have already approved it and where it is currently.

The approval path identified for New Position Requests is as follows:

- 1. Principal/Department Manager
- 2. Budget Fund Specialist
- 3. Instructional/Assistant Superintendent or department Director
- 4. Chief Officer
- 5. PRC or Purchase Review Committee
- 6. Cabinet
- 7. Position Control Manager

Note: HR and Budget Fund Specialist will be notified when the item is fully approved.

Approving authorizations is easy to do because there is a single activity dedicated to this task. You will know if you have approvals waiting by the number listed in the Pending approvals field on the search form.

Go to HR/Payroll -> HR Authorizations -> Approve Authorizations.

1. Enter the authorization number or just click GO to get a list of authorizations pending your approval.



2. Review any authorizations by clicking on the quick link or viewing a snapshot report.

| $\langle \boldsymbol{\leftarrow} \boldsymbol{\rightarrow}$ | HR / Payroll | - HR A | Authoriza | tions - A | Approve Authorization | s |
|--|--------------------|--------|----------------|-----------|-------------------------------|---------|
| Search L | ist | | | | | |
| HRA Id | 🖄 Туре | Item # | ۵ Iten | п Туре | Description | A |
| 8.5 | 3 New Position Req | á – | 1 - Position N | ew | CE Position, Beginning 01/05/ | 2 Appro |
| | | | | | | |

3. Use the lookup in the **Action** column/field to change the highlighted authorization from Approve to Deny or Defer (if appropriate). Enter a **Comment** if desired (highly recommended if denying).

| €⋺ | HR | / Payroll · | HR Aı | thorizations | Approve Authorizations | | | | |
|-----------|---------|----------------|----------|--------------|--|---------|--------|---------|------|
| Search Li | st 👌 👻 | 🖗 Tasks 🔻 | | | | | | | |
| HRA Id | â | Туре | ltem # @ | Item Type | Description | Action | Result | Comment | |
| 8.9 | 3 • Nev | w Position Req | • 1 | Position New | CE Position, Beginning 01/05/2 | Approve | | | 12/2 |
| | | | | | | | | | |

4. Select **Post Approvals/Denials** option form the **Task** menu.

| 🗲 🍛 + HR / | ← ⋺ → HR / Payroll - HR Authorizations - Approve Authorizations | | | | | |
|--------------|---|-------|--------------------------------|---------|-----|--|
| Search List | | | | | | |
| 😤 Export 🗕 👻 | 🗹 Tasks 🔻 | | | | | |
| HRA Id 🗈 | Post Approvals/Denials | уре | Description | Action | | |
| ≥ 3 = New | Position media - i a costrol | n New | CE Position, Beginning 01/05/2 | Approve | i i | |
| | | | | | | |
| | | | | | | |

5. Click **Yes** to continue or **No** to return to the list.



New Position Approval Workflow



Position Change/End Approval Workflow

Please Note: The Position End will not contain Chief Officer Approver during the initial transition from paper to Escape HRA. As New Position records are created through the HRA process, the Chief Approval route will be added to Position End Requests.



Frequently Asked Questions (FAQ)

What is an HRA (Human Resource Authorization)?

An HRA is an electronic request form used to initiate, track, and approve HR-related changes like creating, changing, or ending positions, updating employee data, and managing recruitment. It eliminates paper-based forms and introduces a structured approval workflow.

What is an HRA Package?

An HRA package is like a digital folder containing one or more items (position or employee changes) related to a single HR action or event. Each item can follow its own approval workflow and logic, allowing flexible routing and task assignment across departments.

How do I create a new HRA?

Navigate to HR/Payroll \rightarrow HR Authorizations \rightarrow Authorizations. Click New, select the package type, complete the Authorization tab (Effective Date, Comment), save the package to generate the required item(s), then open and complete each item. Submit items when ready.

What are the statuses of an HRA package?

- Open Initial status; editable until an item is submitted.
- In Progress At least one item submitted; waiting for completion.
- Complete All items posted and approved.
- Cancelled All items canceled or still open, and the package was canceled.

What are common types of HRA items?

- New Position Used when creating a position.
- Position Change For changing job class, FTE, account codes, etc.
- Position End To close out an existing position.

What fields are required in a New Position Request?

Start Date, Position Type, Job Category / Job Class, Justification, Comment, FTE, Location, Division. Additional fields required are Account Code and Percentage.

How do HRA approvals work?

Each item follows a predefined approval path based on workflow rules. Approvals can be structured as ALL (all must approve) or ANY at a specific step (any one may approve). Once all required approvals are received, the item becomes ready to post.

Can I manually add an approver to an HRA?

Role specific – Please contact the Position Control Manager. If the item is in Open or Submitted status, go to the Items tab, select Add Approval, choose the approver and level (equal to or higher than the current level).

What are the item status types I should know?

Open, Submitted, Approved, Complete, Cancelled, Denied.

How do I put an HRA or item on hold?

For Packages: Set On Hold = Yes in the Authorization tab.

| Authorization Items:1 To-Do Ta | sks Approvals Attachments Notes History | | | |
|--------------------------------|---|---|----------------------------|---------|
| Authorization Information | | A | Status Information | |
| 1 - Authorization Informat | tion | | 2 - Status Information | |
| Package Type | Position New | | Status | Open |
| Effective Date | 6/13/2025 | | Status Comment | |
| Comment | | | On Hold | × |
| Location | | | On Hold Message | Value A |
| Division | | | Completeu | a No |
| Academic Department | | | Cancelled | |
| Date Board Mtg | | | Cancelled By | a Yes |
| Board Description | | | Denied | a |
| | | | Denied By | 8 |
| | | | 3 - Add/Update Information | |
| | | | | |

For Items: Change Action to Put on Hold and add a reason in the Action Comment.

| Authorization Items:1 To-E | horization Items:1 Tp-Do-Tecks Approvals Attachments Notes History | | | |
|----------------------------|--|--------------------|---|----------------------------------|
| 🐚 Open 🔛 Export 🧕 | - Delete - Free - Net - Save/Close | 🤇 Cancel 🖉 Tasks 🔻 | | |
| | | | - | |
| 0 - Status | | | | - Action |
| Туре | New Position | | | Delay Posung |
| Status | a Open | | | Action |
| On Hold | ≅ No | | | Action Comment |
| 1 - Item | | Action 🛛 | | S - Position Accounts |
| Posted Position Id | 8 | | | Total Account Be centage 40 0.00 |
| Begin Date | 0 | Description A | | Account 01 |
| End Date | | | | Account of Percentage |
| Position Type | 0 | | | count 02 |
| Date Approved | | | | Account 02 Percentage |
| Previous Position | | Cancel | | Account 03 |
| Work Type | | Put on Hold | | Account 03 Percentage |
| Description | | Submit | | 4 - Additional Position Accounts |
| Justification | • | | | 5 - Job Class Information |
| Comment | • | | | Bargaining Unit 🔒 🔍 |
| 2 - Position Detail | | | | Hours Per Day |
| Ioh Category | • | | | Salary Schedule 8 |

How do I take an item off hold?

Change the Action to Take Off Hold, Take Off Hold and Cancel, or Take Off Hold and Return to Open to resume workflow processing.

| Authorization Items:1 To | p-Do Tasks Approvals Attachments Notes History | |
|--------------------------|--|----------------------------------|
| Open 💾 Export 🚺 | 🗟 🕶 🕬 Rev 🍙 Next 🍈 Save/Close 💐 Cancel 🖉 Tasks 👻 | |
| | | |
| 0 - Status | | 🛛 0 - Action |
| Туре | New Position | Delay Posting Until |
| Status | Open | Action |
| On Hold | ê No | Action Comment |
| 1 - Item | | 3 - Position Accounts |
| Posted Position Id | 8 | Total Account Percentage as 0.00 |
| Bogin Dato | 0 | Account 01 |

Can I edit submitted items?

Yes, depending on your role. Some roles may edit all fields while the item is in Submitted. Most users can only edit Comments, Action, and Delay Posting Until unless returned to Open.

How do I cancel an item or an entire HRA?

To cancel an item: Set Action to Cancel and save. To cancel all open items: Use the Cancel Open Items task from the Items tab.

How do I search for specific HRAs?

Search using filters like HRA ID, Status, Date Range, Location, Employee ID, Approval Level, Comment, or On Hold Message.

What happens when an HRA item is denied?

If any approver denies the item, the process stops. The item must be returned to Open, edited, and re-submitted.

What if my Position Change request involves multiple departments or split funding?

For Change Position requests with split budget codes, please contact your dedicated budget technician to input budget code(s) outside your department or site. Users are limited to their assigned department/site budget code(s) only.

When should HRAs be submitted in relation to their effective dates?

All effective changes (e.g., new positions, position changes, position ends) should be submitted at least 4 weeks in advance of the intended effective date.