HRA Approvers Quick Guide

This *HRA Approvers Quick Guide* provides step by step instructions for Approving HRA's in Escape. It is intended for Hiring Managers and others who are involved in approving 1) New Position HRAs and 2) Position Change HRAs (e.g. hiring administrators, budget and human resources staff, etc).

"HRA" is short for Human Resources Authorization, which is a new tool within the district's HR and Budgeting software (Escape) for automating HR processes.

All HRA Approvers should already have access to Escape. If you do not yet have an account, do not remember your log in information, have access issues, or to report problems with software functionality, contact the Technology Services Help Desk (x9445) for assistance.

It is recommended that approvers log into Escape regularly to check for HRA's requiring their approval and to prevent bottlenecks.

Instructions: How to Approve New Position and Position Change HRAs

1. <u>Approver Logs in to Escape</u>: The Approver (e.g. Principal, department manager, etc) navigates to Escape Online and logs in using his/her unique user name and password.

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 Approver Views HRA's awaiting his/her approval: To view pending HRAs, the Approver navigates to "Activities", selects "HR / Payroll > HR Authorizations > Approves Authorizations". The software shows a count of "Pending Approvals". To open the list of pending approvals, push the "Go" button.



3. <u>Approver Views Approve Authorizations List and HRA details</u>: From the Approve Authorizations List, the Approver clicks on the "Open Link Item" icon to view the details of each pending HRA.

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The Approver reviews the HRA Authorizations Tab: Note: the "Effective As Of" date on the Authorization tab is the actual requested begin date of the transaction. This field may be used to backdate New Positions or Position Changes.

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The Approver reviews the HRA Item Tab: The Approver clicks on the "Items" tab, then clicks "open" to view the HRA item details.

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When review is complete, select "Close" to return to the Approve Authorizations Screen.

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4. Approver Approves the HRA(s): The Approver has two options to approve HRA's.

Option 1: Individual HRA's can be approved from within the HRA. This is a 3 click process. The Approver selects "Submit" from the "Action" drop-down menu, then clicks "Save/Close" to save the Item, then clicks "Save/Close" to save the HRA. All 3 steps must be completed in that order to successfully approve the HRA.

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Option 2: Multiple HRA's can be approved from the Approve Authorizations List. The Approver closes the HRA he/she is reviewing, and is returned to the Approve Authorizations List. The Approver selects "Approve" from the "Action" drop-down menu (or simply types "Approve) for each HRA he/she is approving, then clicks on the "Tasks" drop-down menu and selects "Post Approvals/Denials".

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The Approver receives a Verification dialogue box and selects "Yes" to post the Approval(s).

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