

CHRIS-HR

Classified Human Resources Information System

Welcome to the University of Wisconsin - Madison Classified Vacancy & Position Description Entry System.

Introduction

The Classified Human Resources Information System - HR (CHRIS-HR) system is a web-based application system built under the auspices of Classified Human Resources (CHR) within the Office of Human Resources at the University of Wisconsin - Madison.

The purpose of the CHRIS-HR system is to automate and facilitate entry, update, hiring and other processing of position descriptions for positions at the UW - Madison. The intent of developing and implementing this system is:

- to provide consistency in PD structure across campus.
- to allow all campus staff access to PDs created in any division for reference or to use as a template for creating similar positions.
- to expedite the processes of approving and filling positions, reclassifying positions, and updating position descriptions by reducing the paper flow between the various offices while making electronic versions of the information available to the approval staff immediately upon position description entry.
- to reduce the amount of paper generated during the lifecycle of position description creation and approval.
- to allow both current and prospective employees the ability to review position descriptions online for vacancies.

The primary users of the system are UW - Madison supervisors, department and division Human Resources staff, and CHR staff.

Overview of the Position Description System

1. MENUS

A. CHRIS-HR takes advantage of a menu bar at the top of the various screens. The design mimics the standard menu layout of Windows-based applications; e.g., Edit contains Create New, Save, Print, and Exit, among other options; Window displays all windows that are open and is helpful in locating windows that are hidden or minimized.

B. The various options are available depending on the screen that is displayed, the authorization of the person logged on, and the status of a given record.

C. System users should familiarize themselves with the various selections.

2. BUSINESS PROCESS

A. Workflow - the general workflow for a PD Package is as follows:

- A supervisor (or representative) logs on through the JEMS CHRIS or CHRIS-HR URL to create a new PD Package, either from a blank form or by copying an existing PD Package. At this time an HR Transaction number is generated to identify the PD package.

- Upon submittal by the supervisor, Department HR staff will be notified of the creation of the PD. (For most divisions, department level HR staff are not part of this process and submittals go directly to division HR staff).

NOTE: All HR staff access the Position Descriptions by logging on through CHRIS-HR.

- Upon review and approval by the Department HR staff, Division HR staff will be notified.

- Upon review and approval by the Division HR staff, the CHR is now the responsible group.

- If the UW does not have delegation for a title, review and approval by CHR staff will cause the PD to be sent to UW System Administration and/or the Office of State Employment Relations, in accordance with the UW-Madison delegation agreement for review and approval.

B. User Roles

1). Supervisor (or representative) - creates a PD package and submits it to employing unit HR staff for approval.

2). Department HR Staff - Reviews PD Package and modify and approve, or reject the transaction. (For most divisions, department level HR staff are not part of this process).

3). Division HR Staff - Reviews PD Package and modify and approve, or reject the transaction.

4). CHR Specialists - Reviews PD Package and modify and approve, or reject the transaction. Reviews and approves project position justification.

C. Business Rules The business rules followed during the lifecycle of the electronic PD are the same as for the prior paper process. The application is able to enforce those rules and supports the general workflow for PD and position vacancy processing.

D. Hard Copy Position Descriptions - With the implementation of CHRIS-HR, only two paper copies of the PD are required. The original signed copy should be sent to CHR for inclusion in the employee's official PFile. The duplicate should be given to the employee. Additional copies may be made in accordance with Divisional procedures.

3. APPLICATION SCREENS

The screens in the Position Description system are designed to display discrete functions or logical groups of data related to the PD process. Each tab represents one of those logical groups. In some cases those groups have sufficient data that they had to be broken into multiple screens; again tabs are used for access.

4. SPELL CHECKING

CHRIS and CHRIS-HR do have spell checking functionality however it can only spell check one cell at a time. An easier way to spell check your position description is to create your position description in Word and spell check the document within Word.

5. SAVING

Saving data on the Profile and Position Description screens is done in multiple ways:

- A. Select SAVE under the FILE option on the menu bar.
- B. Press the SAVE button where available.
- C. Clicking a tab to go to a different screen automatically does a save.
- D. Closing the window or exiting the system automatically does a save.

6. QUITTING A PARTICULAR SCREEN OR THE ENTIRE SYSTEM:

- A. Select CLOSE WINDOW under the FILE option on the menu bar to close a given window.
- B. Click on the 'X' in the upper right corner of the window to close a given window.
- C. If the window being closed in any of the above ways is the last PD window open, a message will ask if you want to close the window and leave the PD system.
- D. To close all windows and exit the PD system select EXIT PD SYSTEM under the FILE option on the menu bar. A confirmation screen will appear asking if you really want to exit the system.
- E. Appropriate error checks are done whenever closing a window where data can be entered.

HR Transaction

- A. Employees and supervisors should be aware of the purpose of the Position Description (PD) before completing the form. The PD is the key document in determining the appropriate classification and FLSA status of a position. It is descriptive of the major goals and worker activities of the position. It is not construed to limit or modify the power of the appointing authority and subordinate supervisors to assign work to employees. However, the appointing authority, subordinate supervisors and employees are responsible for assuring that the work assigned is the work actually performed and that PD's are reasonably current descriptions of the work. It is used as an information source for the development and implementation of an effective recruitment and selection plan if a position becomes vacant. Perhaps most important in the long run, an accurate PD helps the employee know what is expected by clearly defining the work to be performed in relation to the overall goals of the work unit. The PD can also be the basis for identifying training needs and a criteria for evaluating performance.
- B. The PD is usually to be filled out by the first-line supervisor or his/her designee. In some cases, the Department or Division HR staff. Most of the items on the PD are self-explanatory. If you have a question on an item, please contact your division HR office.
- C. **One Position Description Per Title** - For each title entered within the HR Transaction there must be one distinct set of PD summary, goals, activities, and knowledge and skills; each distinct set is one PD. The title for which these data apply is displayed at the top of their respective screens. Authorization to Hire information, organization chart, PD comments and exclusion forms apply to the entire HR Transaction, regardless of the number of titles entered. For LTE, Reclass, Update, and Reallocation Transactions only one title is allowed for the HR Transaction.
- D. There could potentially be more than one position description for a set of vacancy data. A position can be posted under more than one title/classification and there must be one PD per title as explained above. A Position Vacancy HR Transaction includes data specific to each position description included as well data common to all titles and PDs entered. (For simplification, in certain contexts in this Help document, 'PD' is used to refer to a 'HR Transaction')
- E. There currently are 5 types of HR Transactions that can process through the CHRIS/CHRIS-HR system. These are: **Permanent/Project Vacancy, LTE, Reclass, Update, and Reallocation.**
 - 1. **Permanent/Project Vacancy** is for creating position vacancies and will be used for posting and recruitment.
 - 2. **LTE** is used to create Limited Term Employment vacancies
 - 3. **Reclass** is used to request the reclassification of an employee. Some additional data are needed and the approval process can be more elaborate.
 - 4. **Update** is used to modify the PD of record for an employee because of changed duties.
 - 5. **Reallocation** is used to request the reallocation of an employee. Some additional data are needed and the approval process can be more elaborate.

1. Basic Instructions for Creating an HR Transaction

If creating a new HR Transaction, go to the main menu. Check the box next to the type of HR Transaction to Create (Permanent/Project Vacancy, LTE, Update, Reclass, or Reallocation) and then press the 'New Transaction' button. The Update, Reclass, and Reallocation PDs all require an Empl ID/Empl Rcd # for which the HR Transaction will be created. **NOTE:** If a Transaction already exists for the entered appointment, the system will copy the latest approved PD to be used as a template for the new PD requested.

UW-Madison Classified Hiring & Recruitment Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

CHRIS Main Menu for Human Resources Staff

The University of Wisconsin - Madison
Classified Human Resources Information System
CHRIS - HR

How would you like to proceed?

HR Transaction Type:
☒ Permanent/Project Vacancy ☐ LTE ☐ Reclass ☐ Update PD ☐ Reallocation ☐ All Types
☐ Include Positions on Hold (vacancies only)

List My Unit's HR Transactions:
 ** Select One or More HR Transaction Types Above
 Transactions I Must Review/Approve
 Transactions in Process

Process Applicant(s): (prior CHRIS Main Menu)
 Permanent/Project Applicant Processing

**** Vacancy Transactions at least Division approved**

Edit/View HR Transaction: Tran ID []
 Edit HR Tran View HR Tran

Search HR Transactions:
 Search All HR Transactions

Create an HR Transaction:
 ** Select One HR Transaction Type Above
 New Transaction
 Copy from Existing Transaction

Supervisor: Shinners, Kevin Creator: Spahn, Pamela L
 Working Title: INSTRUMENT MAKER-ENTR HR Transaction ID: 0000085506
 Edit HR Tran View HR Tran Display/Print HR Tran Documents Copy HR Tran To New Tran Refresh Query

After creating a new blank HR Transaction or copying from an existing Transaction, do the following:

- A. Enter all of the required information (items in blue and have an asterisk*) on ['Page 1'](#) of the Authorization to Hire.
- B. Press the ['Page 2'](#) Tab towards the top of the page. Fill out all of the required information on that page.
 - B1. If the Transaction is a Reclass, Press the ['Reclass Details'](#) Tab. Fill out all of the required information on that page.
 - B2. If the Transaction is an LTE, Press the ['LTE Applicant'](#) Tab. Fill out all of the required information on that page if and when an applicant exists. If the applicant already has/had a position with the university, please also fill out the ['LTE Applicant History'](#) tab.
- C. Press the ['Goals Activities'](#) Tab. Enter the PD Summary, Goals, and the Activities for each Goal.
- D. Press the ['Knowledge Skills'](#) Tab. If needed, enter Knowledge and Skills required.
NOTE: One set of PD Summary, Goals, Activities, and Knowledge and Skills is needed for each title entered on Page 1 of the Authorization to Hire.
- E. Press the ['Org Chart'](#) Tab. Create the Org Chart (not required for LTEs).

F. When all of these steps are completed, go to the menu bar, and under [Tools](#), select 'Error Check Entire HR Transaction'. This will check for any errors that have to be fixed before continuing. Fix everything that needs to be changed. Continue until no more errors.

G. When the error check returns with no errors, you are now ready to submit the HR transaction to the next level for approval. To do this, press 'Submit' under the [Action](#) menu item at the top of the screen. This will send the Transaction to the next level for approval.

H. To keep track of the status of your HR Transaction, go into the Transaction and select the [History](#) tab.

2. Error Checking

A. Error Results Lists – when you've completed the HR Transaction or would like to see what yet needs to be completed, select 'Error Check Entire HR Transaction' under [Tools](#) on the menu bar. If data is missing or inconsistent, a window will appear listing all of the errors. There are a few edits that apply only for HR staff approving a PD that are not checked at submittal time.

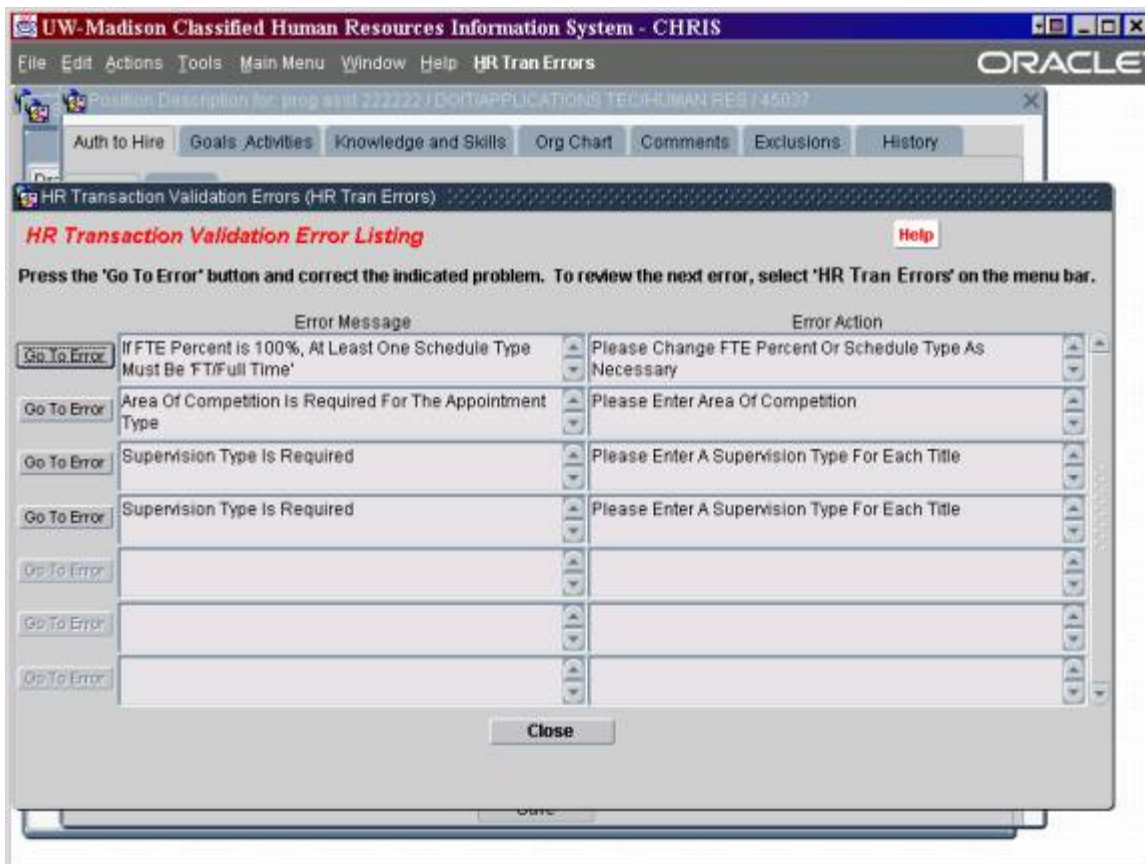
B. Fixing Errors – Press the 'Go To Error' button to display the field that needs to be corrected. Correct the error and select 'PD Errors' which now appears on the menu bar. The edits will be done again and display any remaining errors.

3. Submission, Rejection and Approval

Note: Submission, Rejection and Approval are only available when the HR Transaction is open in Edit mode. The descriptions below apply to Position Vacancy and LTE type Transactions. The processes for Reclass, Update, and Survey PDs are similar; however, for these a CHRIS record is never created.

A. If you are a supervisor or representative submitting a HR Transaction or HR staff approving or rejecting a HR Transaction, make the appropriate selection under [Actions](#).

B. The same edits will be done as when selecting 'Error Check Entire HR Transaction' before the submittal, approval or rejection is accepted.



C. Transaction Submittal - Upon successful submittal, an email is sent to the next level HR staff listed in the CHRIS system; in most cases, this will be the Division HR staff. In some cases, it will be the Department HR staff. Only that level person or higher can edit the HR Transaction. The supervisor who submitted the Transaction and her/his proxies can only view the data at this point.

D. Transaction Approval - If the HR person reviewing the HR Transaction accepts the PD or can make small changes to make it acceptable, s/he can approve it.

E. Approval sends it to then next level HR staff. An email is sent unless the next level is CPO. People at the level at which the approval was done can only view the data, except in the case of CPO.

F. If the approving office is at the division level, a CHRIS position vacancy record is created from the PD data.

G. Furthermore, if that division has delegation for the given title(s), the CHRIS record is automatically approved for classification.

K. LTE Approval - If the LTE Applicant is entered after the Transaction is originally submitted, the applicant has to be submitted separately and go through a separate approval process. Please see [Special Instructions for LTE Positions](#) and [LTE Actions](#).

4. Who can view and update an HR Transaction?

A. Before an HR Transaction is Division Approved, only the creator, proxies for the creator, department and division HR staff for the UDDS assigned to the Transaction, and CPO staff. This same group can update the Transaction while it is in Draft status.

B. After submittal the creator of the Transaction and her/his proxies can only view the data.

C. After Division Approval, anyone with access to the CHRIS/CHRIS-HR system can view the Transaction. However, Tran Comments can only be viewed by the same group listed in 1. above.

D. See '[Submission, Rejection and Approval](#)' above on who has update authority at a particular point in the lifecycle of the Transaction and position vacancy.

Permanent/Project Vacancy Creation

Creating an HR Transaction

To create a new Permanent/Project vacancy, go to the main menu. Check the box next to 'Permanent/Project Vacancy' and then press the 'New Transaction' button.

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

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CHRIS Main Menu for Human Resources Staff

The University of Wisconsin - Madison
Classified Human Resources Information System
CHRIS - HR

How would you like to proceed?

Help System Changes

HR Transaction Type:

☒ Permanent/Project Vacancy ☐ LTE ☐ Reclass ☐ Update PD ☐ Reallocation ☐ All Types

☐ Include Positions on Hold (vacancies only)

List My Unit's HR Transactions:

** Select One or More HR Transaction Types Above

Transactions I Must Review/Approve

Transactions in Process

Process Applicant(s): (prior CHRIS Main Menu)

Permanent/Project Applicant Processing

** Vacancy Transactions at least Division approved

Edit/View HR Transaction: Tran ID

Edit HR Tran View HR Tran

Search HR Transactions:

Search All HR Transactions

Create an HR Transaction:

** Select One HR Transaction Type Above

New Transaction

Copy from Existing Transaction

Edit Profile Exit CHRIS

Forms Services

This will open up a blank HR Transaction set of screens.

HR Transaction General Information: Page 1

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

ORACLE

HR Transaction: UW - Madison Classified Human Resources Information System

Auth to Hire Goals Activities Knowledge and Skills Org Chart Comments Exclusions History

Page 1 Page 2 Essential Justification

HR Transaction General Information: Page 1

Employee: **Help**

Please Read: - An item with a blue label and an asterisk (*) is required.
- Only fields with white backgrounds can be key entered.

Debug: Turn Msg On
Debug: Turn Msg Off

UDDS*: **Status:** **Tran Comments**

Code **Classification** **Barg Unit** **Supervision Type***

Title(s)*: **More Titles**

Supervisor: **Last Name*** **First Name** **Title***

Supervisor's Email Address*:

Employees With Similar Duties

Last Name **First Name** **Title** **More**

Required Exclusion Forms: **Confidential** ☐ **Management** ☐ **Supervisory** ☐

PD Discussion Date: **Position #:** **HR Transaction ID:**

Date Duties Began: **PD/LTE Eff Date:** **Cert Number:**

Last PD-of-Record Date: **Empl ID / Empl Rcd:** / **HR Transaction Type:** Position Vacancy

Cancel New HR Trans **Save**

**NOTE: Fields that are REQUIRED to be completed have a BLUE field label and an asterisk(*).
Many other fields are conditionally required, based on appointment type, applicant type, etc.
Colors may vary depending on your local machine/browser setup**

UDDS - Enter 7 character UDDS or press [▼], enter the first three alpha/numeric for the UDDS desired, press [FIND], highlight the UDDS desired and press [O.K.].

Status - Not enterable. Status of current vacancy.

Tran Comments - Press the button to enter comments about the PD (these are not printed and are viewable only by the creator, proxies, HR staff for the PD's employing unit, and CHR staff). The button will be white if there are existing comments.

Title(s) - Enter title code, if known. If unknown press [▼], enter the first letters of the title you are seeking, press [FIND], then highlight the title to select and press the [O.K.].

Bargaining Unit - Not enterable. Bargaining Unit is automatically filled in when you enter a title.

Supervision Type - Enter Supervision Type, if known. If unknown press [▼], choose the requested type and press the [O.K.].

'*Close Supervision*' implies that the work is performed according to detailed instructions and that supervision is available on short notice.

'*Limited Supervision*' implies that the incumbent proceeds on his/her own initiative while complying with policies, practices and procedures prescribed by the supervisor. The supervisor generally answers questions only on the more important phases of the work.

'*General Supervision*' implies that the work is performed independently. The incumbent seldom refers matters to supervisor except for clarification of policy.

More Titles – If you are recruiting for one position at multiple levels, press this button to add the additional title(s). Note: Each title must have its own set of Goals and Activities. Pressing this button will open the Entering Titles screen below.

Enter All Titles Under Which The Position Is To Be Posted:

*** One set of goals, activities, and knowledges (and skills) must be entered for each title

Title Code*	Classification	Barg Unit	Supervision Type*	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

Next Record Close

Supervisor Last Name - Enter the Supervisor's Last Name for the position to be created.

Supervisor First Name - Enter the Supervisor's First Name for the position to be created.

Supervisor Title - Enter the Supervisor's Title for the position to be created.

Supervisor's Email Address – Enter the Supervisor's email address.

Employees With Similar Duties Last Name - Enter the last name(s) of employees with similar duties

Employees With Similar Duties First Name - Enter the first name(s) of employees with similar duties

Employees With Similar Duties Title - Enter the title for the employee(s) with similar duties

More - Press this button to enter more Employees With Similar Duties.

Required Exclusion Forms - Indicators automatically fill in after the Position Description is submitted.

NOTE: If the position being described is considered to be 'confidential,' 'managerial,' or 'supervisory' in nature for collective bargaining purposes, you should insure that the goals and worker activities listed explicitly describe this nature of work. The required forms need to be completed within the electronic PD package before Division HR staff approval.

Confidential Exclusion Form Indicator - Programmatically determined based on the bargaining unit for the title(s) for the PD. This can then be modified by the division or CHR staff.

Management Exclusion Form Indicator - Defaults to 'N' but can then be modified by the division or CHR staff.

Supervisory Exclusion Form Indicator - Programmatically determined based on the bargaining unit for the title(s) for the PD. This can only be modified by CHR. **Contact CPO before transaction submittal if it is felt that the Supervisory Exclusion Form should not be required.**

PD Discussion Date - For Reclass, Update and Survey PD's, the date the supervisor discussed the PD with the Employee.

Position # - HRS Appointment ID. Automatically filled in.

HR Transaction ID - Automatically fills in after the screen is completed and saved.

Date Duties Began - For Reclass, Update and Survey PD's, the date that the employee began the duties described in the PD.

PD/LTE Effective Date - PD Effective Date is Appt Begin Date for Vacancy PD's, and final approval date for other PD types.

Cert(ification)Number - Automatically fills in after the Position Description is Division Approved. This is the same as the CHRIS Position Vacancy ID and is the identifier used by the University and DER to track a particular vacancy.

Last PD of Record Date - The last date that a PD was set as the PD of record.

Empl ID/Empl Rcd: Automatically populates

Position Description Type - Position Description Package Type (Position Vacancy, Reclassification, Update, Survey).

Press [SAVE], then [Yes] to save new or modified data.

HR Transaction General Information: Page 2

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

ORACLE

Position Description for: UNIV SERVICES ASSOC 2 / G SERV/HUMAN RES/CLASSFD HR / 85574

Auth to Hire Goals Activities Knowledge and Skills Org Chart Comments Exclusions History

Page 1 Page 2 Essential Justification

HR Transaction General Information: Page 2 [Help](#)

Working Title: UNIV SERVICES ASSOC 2 Appt Type: FTE: 1.000

New/Replace/Ch: Fund: Act: More Area Of Comp:

Prior Incumbent: Prior Title Code: Project Justification

Career Executive: ☐

Converted from LTE ID: None More

Job Address:

Building Code: A1078 County: Dane

PARK ST N 21 Room:

21 N PARK ST Mail Drop:

City: MADISON State: WI Zip Code: 53715-1218

Contact: Meghan Owens

Phone: 608-262-2346 TTY Phone: 711 Info

Email: mowens@ohr.wisc.edu Building Code:

Address: 21 N Park St

Suite 5101

City: Madison State: WI Zip Code: 53715

Work Schedule: More Schedule Comment: Edit

Requirements: More Add'l Req: Edit

Related Web Link: www.ohr.wisc.edu Link Application Deadline Date: Post On Web: Y

Under Caregiver Law: ☐ Yes ☐ No Bypass Posting: ☐ Bypass Posting Text

Save

Working Title - Defaults to match Title. May be overwritten to reflect subtitle. If there is more than one title for the vacancy, Working Title should be a value generalized to reflect all titles entered.

Appt (Appointment) Type - Press [▼] and highlight to make selection for Appointment Type or enter value if known.

FTE - Defaults to 1.000. Must match [Work Schedule]. Overwrite if necessary.

New/Replace/Ch(ange) - Press [▼] and highlight to make selection or enter value.

Fund - Enter a three-digit funding source for the position (i.e., 101, 144).

Act - Enter the 1-digit activity code associated with the funding source.

If more than one funding source/activity code is desired, press [MORE], click on a blank field and enter next funding source and activity code, press close.

Area of Comp(etition) - Press [▼] for list of values and select by highlighting and press [O.K.] or enter value if known. Area of Competition does not apply to and cannot be entered for project positions.

Prior Incumbent - Mandatory field if [New/Replace/Ch] equals [Replace] or [Change]. Enter First Name first, then Last Name, of the prior incumbent. If [New], this field will be bypassed.

Prior Title Code - Title code of prior incumbent. If vacancy is [Replace] or [Change], the title code must be entered.

Project Justification (available only for Project Positions) - Press button to open the Project Justification screen. *See description at end of section.*

Career Executive Positions - When a vacancy is created for a title identified as a Career Executive position, the indicator will be set. For those titles that are not mandatorily Career Executive positions (positions in 70-02 and 81-02) the indicator will need to be manually changed. This indicator will be displayed on the web posting:

Converted from LTE ID – If this is a position that was previously an LTE position identified for conversion, select the current LTE position or positions that are being converted.

Building Code - The address where the position is located. Press [▼] and highlight to make selection or enter value if known.

County - Defaults to 13:Dane. If employment area is other than 13, press [▼] for list of values or enter value if known.

Contact – Defaults to information found in profile of the PD creator. Can be changed.

TTY Phone - Will default to a central number. If you have a TTY telephone, enter the number here.

Work Schedule - Must match [FTE]. Press [▼] and make selection or enter value if known. Multiple schedules allowed. Press [MORE] and [TAB] to a blank field and enter value if known. If unknown, press [▼] highlight to make selection, press [O.K.] then [CLOSE]. The [MORE] button will be highlighted to indicate multiple entries.

Schedule Comment – Mandatory field. Must include information on the work schedule. This is a free form field.

Requirements - Not mandatory. Press [▼] and make selection or enter value if known. If more than one entry desired, press [MORE] button, [TAB] to a blank field, press [▼] button and make selection. The [MORE] button will be highlighted to indicate multiple entries.

Additional Requirements - Mandatory. Default language states the following:

“The application information below is only for applicants eligible to apply as a transfer, reinstatement or demotion candidate.”

Department/Divisional rep should then enter additional information such as: Who to contact and how (e.g., Jane Doe at jdoe@wisc.edu or 770-9999), what information candidates need to submit (e.g., resume and cover letter, supplemental application that can be picked up at specific address, name and contact information, references), and deadline for being guaranteed consideration.

Related Web Link - A complete URL (including http:// if appropriate) to a website with information related to the vacancy (use forward slashes).

Application Deadline Date: Not editable unless it is an LTE transaction. Remains blank.

Post on Web - Indicates whether this vacancy should be posted on the web page.

Under Caregiver Law - Indicates if the position is under the Wisconsin Caregiver Background Check Law.

1. Project Justification Field

Oracle Developer Forms Runtime - Web

File Edit Actions Tools Window Help

ORACLE

Position Description for: IS SYS DEV SERV PROF / DOIT/APPLICATIONS TEC/HUMAN RES / 102

Auth to Hire PD Goals Activities Knowledge Skills Org Chart PD Comments Exclusions PD History

Page 1 Page 2

Auth Project Position Data

Please enter: Project funding source, project duration, continuity status (Is this a new project or the continuation of an existing project?) and project justification.

Close

Work Schedule: [More] SCHEDULE CONTINUED: 7:40 PM - 3:00 PM [More]

Requirements: Driver's License [More] Add'l Req: Must have extensive [Edit]

Related Web Link: www.wisc.edu/doit [Go]

Record: 1/1 <OSC>

This is a free form field. Please enter: Project funding source, project duration, continuity status (Is this a new project or the continuation of an existing project?) and project justification.

HR Transaction Essential Justification

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' window. The 'Essential Justification' tab is active, showing instructions and form fields for justifying the filling of a GPR/Tuition funded position. The form includes a 'Chancellor's Memo' button, a 'Help' button, and a 'Save' button at the bottom.

HR Transaction Essential Justification Help

Based on the hiring restriction UW-Madison has implemented, divisions need to provide justification for filling positions that are GPR/Tuition funded. This position is in one of these identified funding sources. Please provide information in the below three areas. If you determine this position is not essential, based on the criteria, please check the "Place On Hold" indicator below.

Is the filling of this GPR/Tuition funded position essential? ☐ Yes ☐ Place On Hold ☒ Not GPR Funded

What type of essential function does this position carry out?

Explain how this position is essential in the above selected category:

Save

This tab must be completed for any position on GPR/Tuition funds.

Is the filling of this GPR/Tuition funded position essential – Fill in the appropriate button. If the position is not GPR funded, you can stop here.

What type of essential function does this position carryout - Press [▼] and make appropriate selection.

Explain how this position is essential in the above selected category - This is a free form field. Provide information on how this position performs an essential function.

Goals and Activities

For each title entered within the HR Transaction there must be one distinct set of PD summary, goals, activities, and knowledge and skills. The title for which these data apply is displayed at the top of their respective screens.

HR Transaction General Information, Organization chart, Tran comments and exclusion forms apply to the entire HR transaction, regardless of the number of titles entered.

1. Goals, Activities

The screenshot displays the 'Goals, Activities' tab within the 'Position Description for: Univ Services Assoc 2 / COL OF LETTERS & SCIENCE/COMPUTER SCI/COMP SCI/ 84153' window. The interface includes a menu bar (File, Edit, Actions, Tools, Main Menu, Window, Help) and a toolbar with buttons for 'Auth to Hire', 'Goals, Activities', 'Knowledge and Skills', 'Org Chart', 'Comments', 'Exclusions', and 'History'. A 'Help' button is also present.

Goals for Title: UNIV SERVICES ASSOC 2. Buttons: 'View Different Title', 'Copy Goals, etc. from other Title in this Tran'.

PD Summary*: As first point of contact in the department, provide program assistance to the faculty. Buttons: 'Edit', 'Spell Check'.

Select the Goal (with its Activities) you want to Enter, Update or View

Alphabetical selection buttons: A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z. Buttons: 'Press To Switch Current Goal With Goal >>>', 'Refresh Goals'.

Goal At least 1 goal must be entered for a Position Description. Button: 'Spell Check'.

Letter*	%*	Goal Statement*
A	30	General Office & Receptionist Responsibilities

Buttons: 'Edit', 'Delete'.

Activities At least 1 activity must be entered for each goal. Numbers are 1 through 99: Button: 'Spell Check'.

Number*	%	Activity Description*
1		Manage the main phone for the department. Answer questions and distribute messages as needed.
2		Coordinate with department IT support staff, overseeing maintenance and trouble shooting of department fax and copy machines.
3		Release portable projectors, conference telephone and accessories to faculty and staff as requested. Hold identification cards until equipment is returned. Validate return of equipment within 24 hours.
4		Order, distribute and maintain electronic record of keys and key holders for department. Order new keys and replacement keys as needed. Retrieve keys when staff terminate.

Buttons: 'Edit', 'Delete' for each activity.

Bottom buttons: 'Next Record', 'Save', 'Refresh Activities'.

Goals For Title - Automatically filled in with the Title Code Requested to View/Edit. This is the title to which the displayed PD summary, goals, and activities apply.

View Different Title - Press the Button to change the PD summary, goals, and activities to a different title, if more titles exist on the HR Transaction. *See Viewing Data for a Given Title section.*

Copy Goals, etc. from other Title in this HR Tran - Press the button to copy all the Goals, Activities, Knowledge and Skills and PD Summary from another Title in this HR Transaction if one exists. *See Copy Goals, etc. From Another Title.*

PD Summary - Enter the PD Summary for the Position Description. For a larger typing area, press [EDIT] button. Press [O.K.] when done.

This is a summary or synopsis of the position's goals plus additional information that applies to the entire position such as the level of supervision, the physical location, or the context (i.e., position in the process flow, formal name and nature of the program, nature of the organization, etc.).

Select the Goal – Select the Letter for the Goals and Activities you wish to enter. See *Select the Goal section*.

Press To Switch Current Goal With Goal >>> - Press the button to switch the goal letter that is currently viewed with the letter entered in the field next to the button. (e.g., If Goal B is currently viewed and a 'D' is entered in the field next to the button, when the button is pressed, goal and activity statements in Goal B will be moved to Goal D and those in Goal D will be Moved to Goal B.).

Refresh Goals - Press to save and re-display changes made when goal letters are switched.

Goal Letter - Automatically filled in by picking a Letter Button. The goal letter will correspond to the button pressed. Also see *Goal Entry section*.

Goal Percent - Enter the Goal Percent for the goal listed in the Goal Letter.

% Time is the proportion of the employee's total work time spent on a goal. Total percentage of goals for a given title should add up to 100% regardless of FTE level.

Goal Statement - Enter the Goal Statement for the goal listed in the Goal Letter. For a larger edit area, press [EDIT] button. Press [O.K.] when done.

Goals are the expected results of each employee's work. They are the expected accomplishments, product or output that results from the work activities of the employee. Each PD will usually contain between two and six goals.

Delete (Goal) - Deletes the Goal Letter, Percent and Statement and ALL corresponding Activities for the Goal.

Activity Number - Enter the Activity Number to be created. (Note that the printed PD will display the goal letter with the activity number, e.g., 'B.2'. See **Activity Statement** below regarding sub-activities. Also See *Activities Entry section*.

Activity Percent - (Optional) Enter the Activity Percent for the activity listed in the Activity Number. (Optional) Estimate the percentage of time spent on each worker activity, particularly ones constituting 10% or more of the total workload.

Activity Statement - Enter the Activity Statement for the activity listed in the Activity Number. For a larger edit area, press [EDIT] button. Press [O.K.] when done.

Worker Activities are the specific tasks the employee performs to accomplish the goals. Worker Activity statements describe what a worker actually does. It is important the description of the worker activities contain sufficient information to make them understandable to a person not familiar with the field of work performed. Avoid indefinite terms such as 'handle', 'assist', or 'process.' Generally, there will be an average of five worker activities per goal, but there may be as few as two or as many as necessary. The system does not provide for sub-activities and it is generally not recommended. If it is felt that sub-activities are needed, they can be typed in manually within a given activity statement area (e.g., B.2.a, B.2.b, etc.). No edits will validate this type of entry.

Delete (Activity) - Deletes the Activity Number, Percent and Statement.

Next Record - Goes to the next line of activities.

Refresh Activities- Press to save and re-display changes made when activity numbers are switched.

2. Viewing Data for a Given Title

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Position Description for: PRG ASST CONF / GENERAL SERVICES/MC FOR UNIV RELATIONS/MC/UR / 83563

Auth to Hire Goals Activities Knowledge and Skills Org Chart Comments Exclusions History

Goals for Title: PRG ASST ADV CONF View Different Title Copy Goals, etc. from other Title in this Tran Help

PD Summary Please highlight the title that you would like to view.

Title Code	Title Name
16410	PRG ASST ADV CONF
16310	PRG ASST CONF

Close

Office of University Relations and is Edit Spell Check

You want to Enter, Update or View

Q P Q R S T U V W X Y Z Refresh Goals

Description. Spell Check

r and other University Relations staff Delete

I. Numbers are 1 through 99: Spell Check

Number*	%	Activity description
1		Maintain and coordinate the calendars of the University Relations staff, arrange and prioritize meetings and appointments; coordinate meeting schedules with senior administrators, Deans and Directors, Edit Delete
2		Coordinate and prepare detailed travel itineraries for the University Relations staff. This necessitates knowledge of current state rules and regulations. Recommend best travel methods, schedule and Edit Delete
3		Coordinate University Relations staff responses to/for the Chancellor, senior university administrators, regents, deans, and directors concerning university policies and programs. Edit Delete
4		Assist in planning and organizing agendas, data, policy and program information for the development of reports for meetings, committees and task forces chaired or attended by University Relations staff. Edit Delete

Next Record Save Refresh Activities

If more than one Title is created in the HR Transaction, and you would like to view the Goals and Activities from another title in the transaction, press the 'View Different Title' button and select the title that you would like to view.

3. Copy Goals, etc. From Another Title

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' interface. The main window is titled 'Position Description for: IS SYS DEV SERV PROF22 / DOIT/APPLICATIONS TEC/HUMAN RES / 583'. The 'Goals' tab is active, showing 'Goals for Title: IS CONSULTANT MGT'. A 'Copy Goals' dialog box is open, prompting the user to 'Please select the title that you would like to copy from.' The dialog box contains a table with columns 'Title Code' and 'Title Name'. The first row is selected, showing '16811' as the Title Code and 'IS SPECIALIST MGT' as the Title Name. The dialog box also has 'OK' and 'Cancel' buttons. In the background, the 'Activities' section is visible, with a note: 'At least 1 activity must be entered for each goal. Numbers are 1 through 99:'. The 'Activities' table has columns 'Number' and 'Activity Description'.

Title Code	Title Name
16811	IS SPECIALIST MGT

If more than one Title is created in the HR Transaction, and you would like to copy the Goals, Activities and Knowledge from another title in the package, make sure you are on the title that you want to copy the other one to and press the 'Copy Goals, etc. from other Title in this HR Tran' button and select the title that you would like to copy the data from. This will copy all of the goals and activities from one title to the other.

4. Select the Goals

To select another goal to view or edit, press the buttons labeled A-Z. If the button is white, there is already some information created for that goal or its associated activities. If it is gray, then there is no information entered for it.

5. Goal Entry

- Select the Goal that is to be entered by pressing the associated button labeled A-Z. The goal will open with the Goal letter already filled in.
 - Enter the Goal Percent for the associated Goal.
 - Enter the Goal Statement for the associated Goal (this is a free form field).
 - Enter all the Activities for the associated Goal (see Activities Entry).
 - Continue the process until all the goals have been entered along with their associated Activities.
 - Delete any Goals that are not needed by using the Delete button.
- NOTE: Deleting a Goal deletes all associated Activities.**

6. Activities Entry

A. Enter the Activity Number using only numbers from 1-999.

NOTE: Do not enter characters or symbols into the field.

B. Enter the Activity Percent (Optional)

C. Enter the Activity Statement (this is a free form field).

D. Continue until all activities are entered for the Goal.

E. Delete any Activities that are not needed by using the Delete button next to the activity that you want to delete.

F. To change the order of activities for a given goal, simply change the activity numbers as desired and press Refresh Activities.

Organization Chart

The organization chart capability built in to the CHRIS/CHRIS-HR system is meant to provide information in relation to where the position is located within the organization. This chart can depict several organizational layers and a great deal of complexity or can be quite simple. It is up to the college or division to decide how much detail is needed while creating the chart.

The following components are essential for any organizational charts being attached to an HR Transaction:

1. An entry identifying the vacancy (i.e., classification, working title, etc.).
2. An entry identifying the position (supervisoraaa) to which the vacancy/employee reports.
3. An entry or entries identifying subordinate positions the vacancy/employee supervises (if applicable).
4. An entry or entries identifying similar positions in the unit (e.g., other Program Assistant 4s, other Confidential positions, etc.)

These points will suffice for many of the HR Transactions being reviewed, but there will be situations in which more detail is needed. If an employee has a lead responsibility over other staff, the supervisory box should be used with the word 'lead' inserted into the box. We have designed the Org. Chart component of CHRIS/CHRIS-HR to allow organizations the ability to provide as much or as little information as needed.

1. Default Org Chart

The screenshot displays the 'UW-Madison Classified Human Resources Information System - CHRIS' interface. The main window is titled 'Enter The Related Organization Chart' and is for 'Position Description for: prog aesi 22222 / D:OIT/APPLICATIONS TECH/HUMAN RES / 45037'. The 'HR Transaction ID' is 000045037.

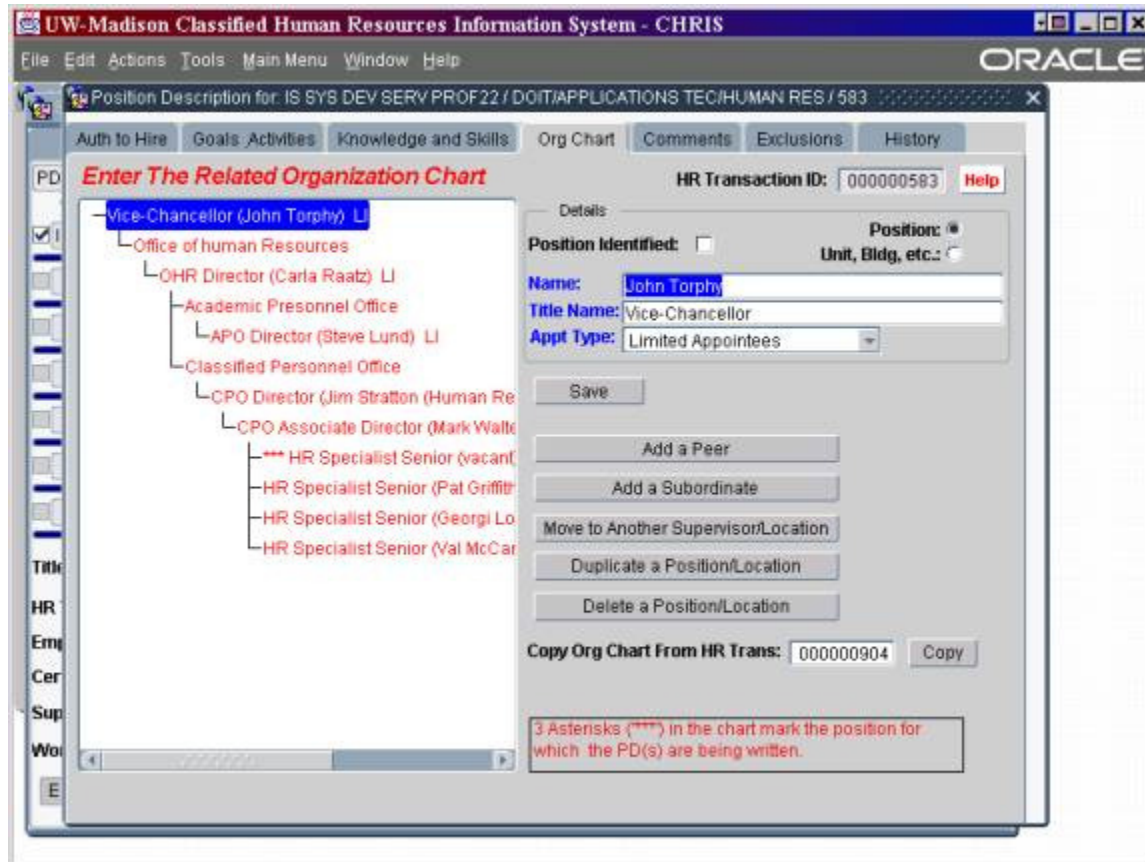
On the left, a tree structure shows the organization chart. The root is 'SupervisorTitleName1 (SupervisorName1) CP'. It has two subordinates: 'SupervisorTitleName2 (SupervisorName2) CP' and '*** SubordinateTitleName1 (SubordinateName1) CP'. The latter has a further subordinate: 'SubordinateTitleName2 (SubordinateName2) CP'.

On the right, the 'Details' form for the selected position is visible. It includes fields for 'Name' (SupervisorName1), 'Title Name' (SupervisorTitleName1), and 'Appt Type' (Permanent - Classified). There are buttons for 'Save', 'Add a Peer', 'Add a Subordinate', 'Move to Another Supervisor/Location', 'Duplicate a Position/Location', and 'Delete a Position/Location'. A 'Copy Org Chart From HR Trans:' field with a 'Copy' button is also present.

A red note at the bottom states: '3 Asterisks (***) in the chart mark the position for which the PD(s) are being written.'

A default template is provided as a starting point for a new org chart. The template includes 2 levels of supervisors for the vacancy and one peer. These may be modified, deleted, and/or added to using the functionality described below.

2. Org Chart Entry



3. Detail Entry

A. Name (or note), Title Name, and Appointment Type are required for all positions. 'Vacant' should be entered as the Name for the position currently being filled and for other vacant positions. There is a dropdown selection box for Appointment Type.

B. Check 'Position Being Filled' for the position described by the current HR Transaction. This position is displayed on the Org Chart with 3 asterisks. More than one position can be checked this way if the vacancy needs to appear in more than one place in the Org Chart.

4. Manipulating the Org Chart

The Org Chart may be modified using the following 5 functions:

A. **Add a Peer** - Press to create a position at the same level under the same supervisor as the position that is currently highlighted on the Org Chart.

B. **Add a Subordinate** - Press to create a position subordinate to the position that is currently highlighted.

C. **Move to Another Supervisor** - Press to move the highlighted position and all of its subordinates from the current supervisor. Subsequently, 'OK' and 'Cancel' buttons will appear. Highlight the position

under which you would like to move the selected position and press 'OK'. Press 'Cancel' if you decide you don't want to make the move.

D. Duplicate a Person/Position - Press to create another person/position as that which is currently highlighted on the Org Chart. The new position will be created at the same level under the same supervisor. This duplicate person/position can then be moved under another supervisor.

E. Delete a Person/Position - Press to delete the position that is currently highlighted. If the position has subordinates, they must first be deleted or moved under another supervisor.

HINT: To add a supervisor (sup1) above the current top-level supervisor (sup2): Add sup1 as a peer to sup2. Then move sup2 under sup1 using 'Move To Another Supervisor'.

Ex. Sample Org Charts

Figure 4.1

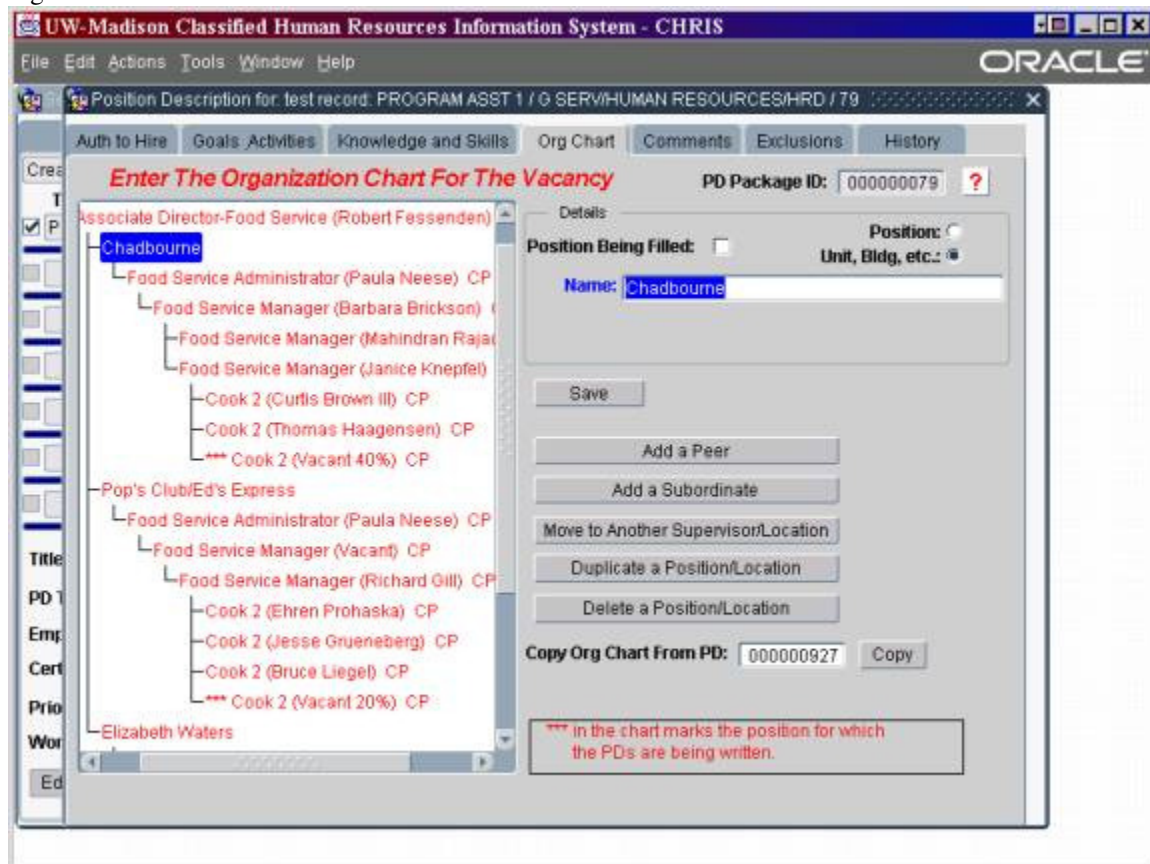


Figure 4.2

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Window Help ORACLE

Position Description for: testrecord: PROGRAM ASST 1 / G SERV/HUMAN RESOURCES/HRD / T9

Enter The Organization Chart For The Vacancy PD Package ID: 000000079 ?

Details:

Position Being Filled: ☐ Position: *
Unit, Bldg, etc.: *

Name: Paula Neese
Title Name: Food Service Administrator
Appt Type: Permanent - Classified

Save

Add a Peer
Add a Subordinate
Move to Another Supervisor/Location
Duplicate a Position/Location
Delete a Position/Location

Copy Org Chart From PD: 000000927 Copy

*** in the chart marks the position for which the PDs are being written.

Org Chart:

- Associate Director-Food Service (Robert Fessenden)
 - Chadbourne
 - Food Service Administrator (Paula Neese) CP
 - Food Service Manager (Barbara Brickson) CP
 - Food Service Manager (Mahindran Rajakumar) CP
 - Food Service Manager (Janice Knepfel) CP
 - Cook 2 (Curtis Brown III) CP
 - Cook 2 (Thomas Haagensen) CP
 - *** Cook 2 (Vacant 40%) CP
 - Pop's Club/Ed's Express
 - Food Service Administrator (Paula Neese) CP
 - Food Service Manager (Vacant) CP
 - Food Service Manager (Richard Gill) CP
 - Cook 2 (Ehren Prohaska) CP
 - Cook 2 (Jesse Grueneberg) CP
 - Cook 2 (Bruce Liegel) CP
 - *** Cook 2 (Vacant 20%) CP
 - Elizabeth Waters

5. Copy Org Chart From HR Trans:

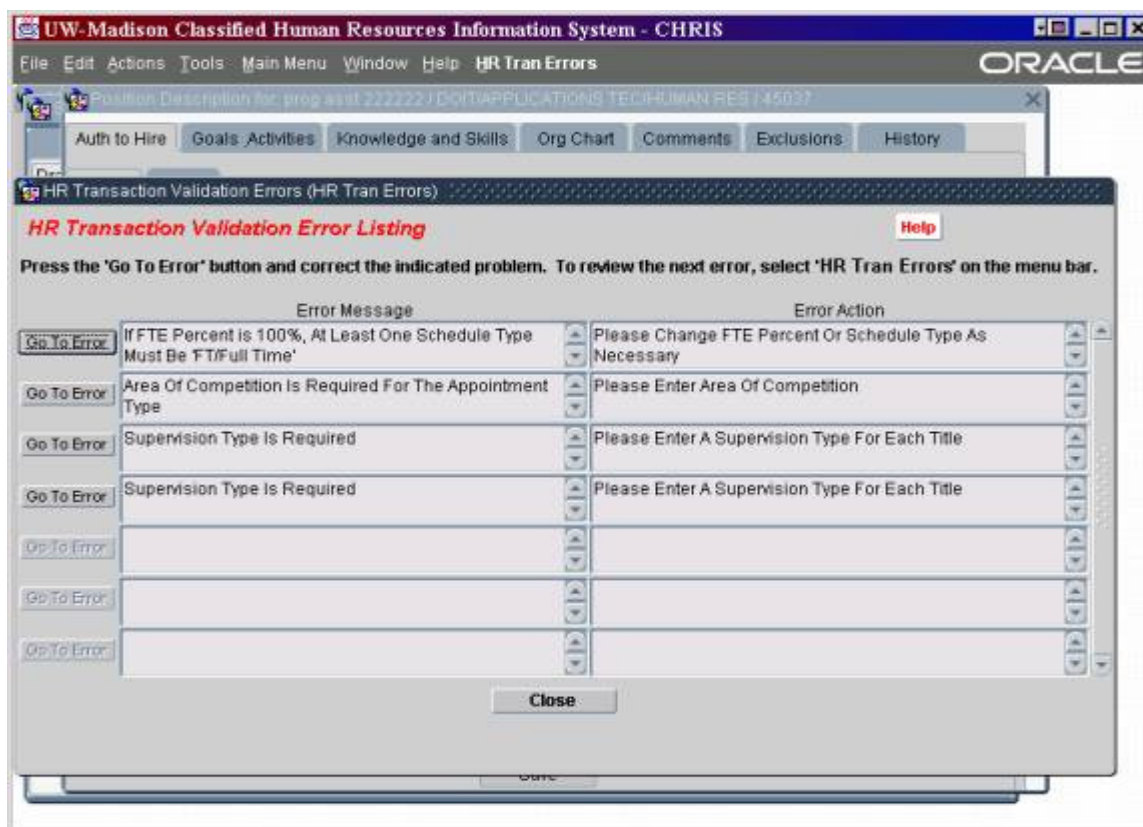
Once an Org Chart is created, it can be copied to an existing HR Transaction. Enter the HR Transaction ID of the HR Transaction with the good Org Chart into the 'Copy Org Chart From PD:' field. This must be done while in the HR Transaction that you would like to copy the Org Chart into. **NOTE:** This will **DELETE** the existing Org Chart and replace it with the Org Chart on the PD that you entered.

Completing the HR Transaction

1. Error Checking

Once the main components of the position description have been entered, go to the menu bar, and under 'Tools' select 'Error Check Entire HR Transaction'. This will check for any errors that have to be fixed before continuing. Fix everything that needs to be changed. Continue until no more errors.

Error Results Lists –If data is missing or inconsistent, a window will appear listing all of the errors. There are a few edits that apply only for HR staff approving a PD that are not checked at submittal time.



Fixing Errors – Press the 'Go To Error' button to display the field that needs to be corrected. Correct the error and select 'PD Errors' which now appears on the menu bar. The edits will be done again and display any remaining errors.

2. When the error check returns with no errors, you are now ready to submit the HR transaction to the next level for approval. To do this, press 'Submit' under the 'Action' menu item at the top of the screen. This will send the Transaction to the next level for approval.

3. To keep track of the status of your HR Transaction, go into the Transaction and select the 'History' tab.

2. Submission, Rejection and Approval

Note: Submission, Rejection and Approval are only available when the HR Transaction is open in Edit mode.

A. Transaction Submittal - Upon successful submittal, an email is sent to the next level HR staff listed in the CHRIS system; in most cases, this will be the Division HR staff. In some cases, it will be the Department HR staff. Only that level person or higher can edit the HR Transaction. The supervisor who submitted the Transaction and her/his proxies can only view the data at this point.

B. Transaction Approval - If the HR person reviewing the HR Transaction accepts the PD or can make small changes to make it acceptable, s/he can approve it.

Approval sends it to the next level HR staff. An email is sent unless the next level is CHR. People at the level at which the approval was done can only view the data, except in the case of CHR.

If the approving office is at the division level, a CHRIS position vacancy record is created from the PD data. Furthermore, if that division has delegation for the given title(s), the CHRIS record is automatically approved for classification.

C. Transaction Rejection - If the HR person reviewing the HR Transaction feels that significant enough changes are needed to make it acceptable, s/he can reject it. The staff at the level below the rejecting authority will again be able to update the data. The reason for the rejection must be noted in the Comments tab.

D. Project Approval - If the CHR HR specialist reviewing the HR Transaction accepts the project justification, duration, continuity status and funding source, or can make small changes to make it acceptable, s/he can approve it. This action is available only to CHR HR staff and only for Transactions entered for project positions.

Copy HR Transactions

An existing HR Transaction can be used as a template for creating a new HR Transaction. A system user can get to this function in various ways:

- Selecting (checking the box) next to an HR Transaction on a search results list and then pressing the 'Copy HR Tran to New Tran' button at the bottom of the screen.
- Selecting (checking the box) next to an HR Transaction on a search results list and then selecting Edit and then the 'Copy HR Transaction' option on the menu bar at the top of the screen.
- Editing or viewing an HR Transaction and then selecting Edit and then the 'Copy HR Transaction' option on the menu bar at the top of the screen.

Once you have selected 'Copy HR Transaction,' the following menu appears:

The screenshot shows the Oracle HR Transaction Copy dialog box. The dialog box has a title bar that reads "UW-Madison Classified Human Resources Information System - CHRIS". The main window has a menu bar with "File", "Edit", "Actions", "Tools", "Main Menu", "Window", and "Help". The dialog box is titled "Copy Information For Permanent/Project Vacancies" and contains a "Help" button. Below the title, it says "Please Select the Items that you would like to copy." and lists four items with checkboxes: "Copy Authorization to Hire Information", "Copy Goals, Activities and Knowledges", "Copy Organization Chart", and "Copy Exclusion Forms". At the bottom of the dialog box are "Copy" and "Cancel" buttons. The background window shows the "UW-Madison Classified Vacancy & Position Description Entry System" with a search results list. The list includes columns for "Employee", "Prior Employee", "Cert Number", "Position #", "Effective Date", "Supervisor", "Creator", "Working Title", and "HR Transaction ID". The current record is for Denise Whitford, with a cert number of 00079756, position # 02024266, effective date 11/07/2011, supervisor Hoslet, Charles, creator Van Wey, Elizabeth j, working title PRG ASST ADV CONF, and HR Transaction ID 0000079756. At the bottom of the window are buttons for "Edit HR Tran", "View HR Tran", "Display/Print HR Tran Documents", "Copy HR Tran To New Tran", and "Refresh Query".

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Search HR Transactions: UW - Madison Classified Human Resources Information System

Copy for Permanent/Project Copy for LTE Copy for Reclass Copy for Update Copy for Reallocation

Copy Information For Permanent/Project Vacancies Help

Please Select the Items that you would like to copy.

☒ Copy Authorization to Hire Information

☒ Copy Goals, Activities and Knowledges

☒ Copy Organization Chart

☒ Copy Exclusion Forms

Copy Cancel

Employee: DENISE WHITFORD Prior Employee: Pamela Munoz

Cert Number: 00079756 Go to CHRIS Vacancy Record Position #: 02024266 Effective Date: 11/07/2011

Supervisor: Hoslet, Charles Creator: Van Wey, Elizabeth j

Working Title: PRG ASST ADV CONF HR Transaction ID: 0000079756

Edit HR Tran View HR Tran Display/Print HR Tran Documents Copy HR Tran To New Tran Refresh Query

Record: 1/1 ... <OSC>

1. Copy for Permanent/Project

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' interface. A dialog box titled 'UW - Madison Classified Vacancy & Position Description Entry System' is open, displaying the 'Copy Information For Permanent/Project Vacancies' screen. The dialog box has a menu bar with 'File', 'Edit', 'Options', 'Tools', 'Main Menu', 'Window', and 'Help'. The main area contains a list of checkboxes for items to copy: 'Copy Authorization to Hire Information', 'Copy Goals, Activities and Knowledges', 'Copy Organization Chart', and 'Copy Exclusion Forms'. All four are checked. There are 'Copy' and 'Cancel' buttons at the bottom. The background shows a search results screen with a table of HR transactions and a form for a selected transaction.

All Boxes Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. Also, defaults for UDDS, etc., set in the user's profile, overlay the like fields in the new PD.

'Copy Authorization to Hire Information' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original Auth to Hire tabs are used in the creation of the new HR Transaction. Also, defaults for UDDS, etc., set in the user's profile, overlay the like fields in the new HR Transaction.

'Copy Goals, Activities and Knowledges' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the goals, activities and knowledges tabs, including the associated titles, are used in the creation of the new HR Transaction.

'Copy Organization Chart' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the Org Chart Tab are used in the creation of the new HR Transaction.

'Copy Exclusion Forms' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the Exclusions Tabs are used in the creation of the new HR Transaction.

Copy - Copies the selected HR Transaction to a new Permanent/Project HR Transaction using the criteria associated with the check boxes.

Cancel - Closes the 'Copy' screen and returns to the calling screen.

2. Copy for LTE

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' window. A modal dialog box titled 'Copy Information For Limited Term Employment Vacancies' is open. The dialog has a title bar with 'UW - Madison Classified Vacancy & Position Description Entry System'. Inside the dialog, there are tabs: 'Copy for Permanent/Project', 'Copy for LTE' (which is selected), 'Copy for Reclass', 'Copy for Update', and 'Copy for Survey'. Below the tabs, the text reads 'Please Select the Items that you would like to copy.' There are three checked checkboxes: 'Copy Authorization to Hire Information', 'Copy Goals, Activities and Knowledges', and 'Copy Organization Chart'. At the bottom of the dialog are 'Copy' and 'Cancel' buttons. In the background, the main window shows a list of HR transactions with columns for Title, Approved, and HR Tran T. The 'Title' column has a dropdown menu with options like 'PROG...', 'IS SUP...', 'PROG...', 'ULTRA...', and 'PROG...'. The 'Approved' column has a dropdown menu with options like '16', '17', '18', '19', '20', '21', '22', '23', '24', '25', '26', '27', '28', '29', '30', '31', '32', '33', '34', '35', '36', '37', '38', '39', '40', '41', '42', '43', '44', '45', '46', '47', '48', '49', '50', '51', '52', '53', '54', '55', '56', '57', '58', '59', '60', '61', '62', '63', '64', '65', '66', '67', '68', '69', '70', '71', '72', '73', '74', '75', '76', '77', '78', '79', '80', '81', '82', '83', '84', '85', '86', '87', '88', '89', '90', '91', '92', '93', '94', '95', '96', '97', '98', '99', '00'. The 'HR Tran T' column has a dropdown menu with options like '16', '17', '18', '19', '20', '21', '22', '23', '24', '25', '26', '27', '28', '29', '30', '31', '32', '33', '34', '35', '36', '37', '38', '39', '40', '41', '42', '43', '44', '45', '46', '47', '48', '49', '50', '51', '52', '53', '54', '55', '56', '57', '58', '59', '60', '61', '62', '63', '64', '65', '66', '67', '68', '69', '70', '71', '72', '73', '74', '75', '76', '77', '78', '79', '80', '81', '82', '83', '84', '85', '86', '87', '88', '89', '90', '91', '92', '93', '94', '95', '96', '97', '98', '99', '00'. The 'Employee' column has a dropdown menu with options like '16', '17', '18', '19', '20', '21', '22', '23', '24', '25', '26', '27', '28', '29', '30', '31', '32', '33', '34', '35', '36', '37', '38', '39', '40', '41', '42', '43', '44', '45', '46', '47', '48', '49', '50', '51', '52', '53', '54', '55', '56', '57', '58', '59', '60', '61', '62', '63', '64', '65', '66', '67', '68', '69', '70', '71', '72', '73', '74', '75', '76', '77', '78', '79', '80', '81', '82', '83', '84', '85', '86', '87', '88', '89', '90', '91', '92', '93', '94', '95', '96', '97', '98', '99', '00'. The 'Cert Number' field is '00040494'. The 'Go to CHRIS Vacancy Record' button is visible. The 'Appt. ID' field is empty. The 'Effective Date' field is empty. The 'Supervisor' field is 'Mayville, Bob'. The 'Creator' field is 'Zimmermann, Brian S'. The 'Working Title' field is 'PROGRAM ASST 3'. The 'HR Transaction ID' field is '0000000971'. At the bottom of the main window are buttons: 'Edit HR Tran', 'View HR Tran', 'Display/Print HR Tran Documents', 'Copy HR Tran To New Tran', and 'Refresh Query'.

'Copy Authorization to Hire Information' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original Auth to Hire tabs are used in the creation of the new HR Transaction. **Also, defaults for UDDS, etc., set in the user's profile, overlay the like fields in the new HR Transaction.**

'Copy Goals, Activities and Knowledges' Box Checked- The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the goals, activities and knowledges tabs, including the associated titles, are used in the creation of the new HR Transaction.

'Copy Organization Chart' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the Org Chart Tab are used in the creation of the new HR Transaction.

Copy - Copies the selected HR Transaction to a new LTE HR Transaction using the criteria associated with the check boxes.

Cancel - Closes the 'Copy' screen and returns to the calling screen.

3. Copy for Reclass, Copy for Update and Copy for Reallocation

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Search HR Transactions: UW - Madison Classified Human Resources Information System

UW - Madison Classified Vacancy & Position Description Entry System

Copy for Permanent/Project Copy for LTE Copy for Reclass Copy for Update Copy for Reallocation

Copy Information For Reclass Help

Please Select the Items that you would like to copy.

- ☒ Copy Authorization to Hire Information
- ☒ Copy Goals, Activities and Knowledges
- ☒ Copy Organization Chart
- ☒ Copy Exclusion Forms

Should the PD be created for the Same Empl ID/Empl Rcd or a Different One?

Cannot copy an HR Transaction for the same Empl ID/Empl Rcd if it is a position vacancy that is not CLOSED

Empl ID Empl Rcd

☐ Same Empl ID/Empl Rcd ☒ Different Empl ID/Empl Rcd: Find Empl ID By Name

Copy Cancel

Employee: DENISE WHITFORD Prior Employee: Pamela Munoz

Cert Number: 00079756 Go to CHRIS Vacancy Record Position #: 02024266 Effective Date: 11/07/2011

Supervisor: Hoslet, Charles Creator: Van Wey, Elizabeth j

Working Title: PRG ASST ADV CONF HR Transaction ID: 0000079756

Edit HR Tran View HR Tran Display/Print HR Tran Documents Copy HR Tran To New Tran Refresh Query

Record: 1/1 <OSC>

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Search HR Transactions: UW - Madison Classified Human Resources Information System

UW - Madison Classified Vacancy & Position Description Entry System

Copy for Permanent/Project Copy for LTE Copy for Reclass Copy for Update Copy for Reallocation

Copy Information For Update Help

Please Select the Items that you would like to copy.

- ☒ Copy Authorization to Hire Information
- ☒ Copy Goals, Activities and Knowledges
- ☒ Copy Organization Chart
- ☒ Copy Exclusion Forms

Should the PD be created for the Same Empl ID/Empl Rcd or a Different One?

Cannot copy an HR Transaction for the same Empl ID/Empl Rcd if it is a position vacancy that is not CLOSED

Empl ID Empl Rcd

☐ Same Empl ID/Empl Rcd ☒ Different Empl ID/Empl Rcd: Find Empl ID By Name

Copy Cancel

Employee: DENISE WHITFORD Prior Employee: Pamela Munoz

Cert Number: 00079756 Go to CHRIS Vacancy Record Position #: 02024266 Effective Date: 11/07/2011

Supervisor: Hoslet, Charles Creator: Van Wey, Elizabeth j

Working Title: PRG ASST ADV CONF HR Transaction ID: 0000079756

Edit HR Tran View HR Tran Display/Print HR Tran Documents Copy HR Tran To New Tran Refresh Query

Record: 1/1 <OSC>

'Copy Authorization to Hire Information' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original Auth to Hire tabs are used in the creation of the new HR Transaction. **Also, defaults for UDDS, etc., set in the user's profile, overlay the like fields in the new HR Transaction.**

'Copy Goals, Activities and Knowledges' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the goals, activities and knowledges tabs, including the associated titles, are used in the creation of the new HR Transaction.

'Copy Organization Chart' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the Org Chart Tab are used in the creation of the new HR Transaction.

'Copy Exclusion Forms' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the Exclusions Tabs are used in the creation of the new HR Transaction

Should the PD be created for the Same Empl ID/Empl Rcd or a Different One? - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction is used in the creation of the new HR Transaction. This option is only available for Position Vacancy HR Transactions that have a status of 'Closed.'

If the HR Transaction is for the same person as the original HR Transaction, select "Same Empl ID/Empl Rcd." If the HR Transaction is for a different person, select "Different Empl ID/Empl Rcd" and enter the individual's Empl ID/Empl Rcd.

Copy - Copies the selected HR Transaction to a new Reclass HR Transaction using the criteria associated with the check boxes.

Cancel - Closes the 'Copy' screen and returns to the calling screen.

Creating a Reclassification Transaction

Creating a Reclassification Transaction

To create a new Reclassification, go to the main menu. Check the box next to 'Reclass' and then press the 'New Transaction' button.

The screenshot displays the 'UW-Madison Classified Human Resources Information System - CHRIS' main menu. The interface includes a menu bar (File, Edit, Actions, Tools, Main Menu, Window, Help) and the Oracle logo. The main content area is titled 'CHRIS Main Menu for Human Resources Staff' and features the University of Wisconsin-Madison logo and the text 'The University of Wisconsin - Madison Classified Human Resources Information System CHRIS - HR'. A 'Help' button and a 'System Changes' link are also present.

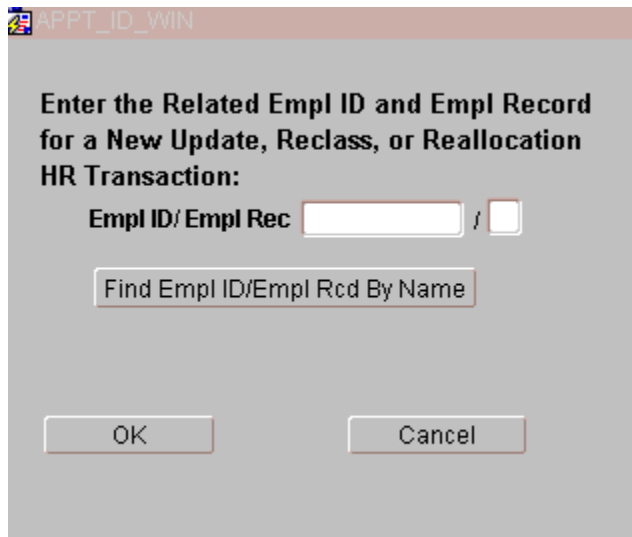
The 'How would you like to proceed?' section contains the 'HR Transaction Type:' section, which has several checkboxes: 'Permanent/Project Vacancy', 'LTE', 'Reclass' (checked), 'Update PD', 'Reallocation', and 'All Types'. There is also an option to 'Include Positions on Hold (vacancies only)'.

Below this, the 'List My Unit's HR Transactions:' section allows users to 'Select One or More HR Transaction Types Above' with buttons for 'Transactions I Must Review/Approve' and 'Transactions in Process'. The 'Process Applicant(s): (prior CHRIS Main Menu)' section has a button for 'Permanent/Project Applicant Processing' and a note that 'Vacancy Transactions at least Division approved'.

The 'Edit/View HR Transaction:' section includes a 'Tran ID' input field and buttons for 'Edit HR Tran' and 'View HR Tran'. The 'Search HR Transactions:' section has a 'Search All HR Transactions' button. The 'Create an HR Transaction:' section allows users to 'Select One HR Transaction Type Above' with buttons for 'New Transaction' and 'Copy from Existing Transaction'.

At the bottom, there are buttons for 'Edit Profile' and 'Exit CHRIS'. A large, semi-transparent 'Forms Services' watermark is visible across the bottom half of the screen.

This will bring up the following prompt:

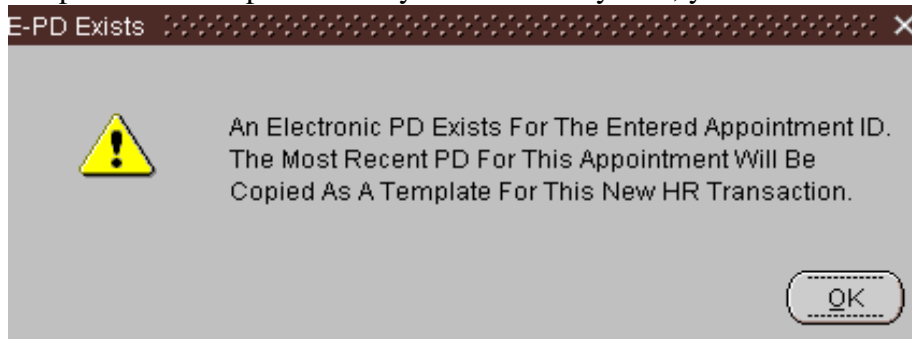


APPT_ID_WIN

**Enter the Related Empl ID and Empl Record
for a New Update, Reclass, or Reallocation
HR Transaction:**

Empl ID/ Empl Rec /

If a position description already exists in the system, you will receive the following message:



After clicking “OK,” the screen below will come up.

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

ORACLE

HR Transaction: UW - Madison Classified Human Resources Information System

General Data Goals, Activities Knowledge and Skills Org Chart Comments Exclusions History

Page 1 Page 2 Reclass Detail

HR Transaction General Information: Page 1 Employee: PHYLLIS M GALLMAN Help

Please Read: - An item with a blue label and an asterisk (*) is required.
- Only fields with white backgrounds can be key entered.

Debug: Turn Msg On
Debug: Turn Msg Off

UDDS*: A718320 FACILITIES PLNG AND MGMT/TRANS Status: Tran Comments

Code Classification Barg Unit Supervision Type*

Title(s)*: 16000 OFFICE ASSOCIATE 02

Supervisor: Last Name* First Name Title*

Owens Kenneth Program Assistant Supervisor

Supervisor's Email Address*:

Employees With Similar Duties

Last Name First Name Title More

Required Exclusion Forms: Confidential Management Supervisory

PD Discussion Date: Position #: 02024118 HR Transaction ID: 000085591

Date Duties Began: PD/LTE Eff Date: Cert Number:

Last PD-of-Record Date: Empl ID / Empl Rcd: 00503224 / 0 HR Transaction Type: Reclassification

Cancel New HR Trans Save Page 1 Changed:

Update Page 1, Page 2, Goals/Activities, Knowledge and Skills and the Org Chart as necessary. Then complete the Reclass Detail tab.

2. Reclass Detail

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

ORACLE

Position Description for: OFFICE ASSOCIATE / FACILITIES PLNG AND MGMT/TRANS SERV/PARK STRCT / 85591

General Data Goals Activities Knowledge and Skills Org Chart Comments Exclusions History

Page 1 Page 2 Reclass Detail

Reclassification Data

Current or Prior Title: 16000 OFFICE ASSOCIATE Sched-Range: 02-09 Current FLSA: N Date Began in Current Title: 10/23/2011 Date Began Current Duties: [Help](#)

Proposed Title: Working Title: OFFICE ASSOCIATE

Proposed Effective Date: 09/23/2012

Date Materials Received By Div: Career Executive: N

Date Materials Received By CHR: FLSA Status: ☐

Reclass Effective Date:

Approved Title Code: Sched-Range:

Current Rate: \$13.281 Rate Adjustment: New Rate:

Logical & Gradual Changes: [Edit](#)

Class Specification Language: [DER Title Specs](#) [Edit](#)

Reclass Summary: [Edit](#)

Positions Used For Comparison: [Edit](#)

[Denial Comments](#) [Convert to Reallocation](#) [Save](#) [Reclass Paper Flow](#)

1. Reclassification Data

Current Title – (Automatically filled) The Title Classification of the employee at the time the Reclass was requested.

Sched-Range (Automatically Filled) - The Schedule & Range of Title Classification of the employee at the time the Reclass was requested.

Date Began In Current Title – (Automatically Filled) The Date the employee began in the "Current" Title Classification.

Date Began Current Duties - For Reclass, Update & Reallocation Transactions, the Date that the Employee Began the Duties Described in the PD.

Proposed Title – Enter title code for the title to which the creator originally suggested the employee be reclassified. If unknown press [▼], enter the first letters of the title you are seeking, press [FIND], then highlight the title to select and press the [O.K.].

Sched-Range (Proposed Title) – The Schedule & Range of the "Proposed" title. Automatically fills in once the Proposed Title is selected.

Proposed Effective Date - The Proposed Effective Date for the employee to begin in the reclassified title.

Working Title - The Working Title for the position

Career Executive - Indicator of whether the Reclass is for a career executive position.

Date Materials Received By Div - The date the Reclass Transaction and supporting documents were submitted to the Division HR office.

Date Materials Received By CHR - The date the Reclass Transaction and supporting documents were submitted to CPO

FLSA Status – Indicates whether proposed title is non-exempt or exempt. Automatically fills in once proposed title is selected.

Reclass Effective Date - Effective Date is initially set to the first day of the next pay period after Div HR or CHR received the reclass materials (depending on delegation).

Approved Title Code - The title which was finally approved for the Reclass request.

Sched-Range (Approved Title) – (Automatically filled) The Schedule & Range of the "Approved" Title.

Current Rate - The Pay Rate of the employee at the time the Reclass was requested. Automatically populated from HRS.

Rate Adjustment - The Pay Rate Adjustment implemented with the approved reclass.

New Rate - The pay rate implemented as a result of the approved reclass.

Logical & Gradual Changes - Logical & Gradual changes in the employees duties which may justify a reclass.

A. Description of Logical and Gradual Changes

Include a brief summary of the former position's duties and responsibilities. Identify the changes that have impacted on the level of the position (include when, why and how the changes occurred).

Identify the position's level of decision-making, discretion, independence of action, complexity, consequence of error, and impact on the unit or organization.

Logical Changes - changes that are reasonably related to the previous duties or responsibilities of the position.

Gradual Changes - if the duties that constitute the reason for the class level change was at least 26% of the position, the change to 51% of the total position is considered gradual.

** For those reclassifications that are identified as a progression within the specification, requestor only needs to identify how long the employee has been in the current classification (rule of thumb is approximately a year), whether the employee has attained the necessary training/experience, and if the supervisor agrees with the request.

Class Specification Language - Appropriate Class Specification Language & Allocation Patterns - See OSER's title website.

DER Title Specs - Press to see OSER's Title Specification website

Reclass Summary - A summary of how the position relates to specifications of the higher-level position.

Positions Used For Comparison - Name, classification, employing unit and duties of employees in comparable positions.

Denial Comments - Press to see any comments related to a denial of the reclass.

Convert to Reallocation – Converts HR Transaction from a reclass to a reallocation.

Reclass Paper Flow - Press to open a PDF of the paper flow process associated with reclasses.

3. Reclass Status History

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' interface. The main window is titled 'Position Description for: PROGRAM ASST 3 / DOIT/APPLICATIONS TEC/HUMAN RES / 995'. The 'History' tab is selected, displaying the 'Reclass Status History' section. The table below lists the history of reclassification events.

Event	Reclass Status	Status Date/Time	Status Set By (Name Or Logon ID)
CPO Approved	Reclass Approved	08/29/2002-08:17:36	B1Z
Appealed by Employee	DER Appeal Review	08/29/2002-08:17:05	B1Z
Denied by CPO	Denied	08/29/2002-08:16:28	B1Z
Div Approved	CPO Review	08/29/2002-08:14:06	B1Z
Submitted	Dept HR Review	08/29/2002-08:14:05	B1Z
Created	Draft	08/29/2002-08:11:44	B1Z

Event - The event that happened to place the reclassification into the listed status.

Reclass Status - The status that the reclassification has been in.

Status Date/Time - The date and time that the reclassification was placed into the listed status.

Status Set By (Name Or Logon ID) - The name or logon ID of the person who placed the reclassification into the listed status.

Searching HR Transactions

The Search facility gives you the opportunity to list HR Transactions that you or others have created. Depending on the owners of the transaction and your authorization level, transactions listed can be updated, viewed, printed, or used as templates for a new transaction.

In most cases the basic Search screen will provide all you need to find the HR Transactions you want to see. Advanced Search provides a more elaborate means to select a group of transactions.

1. Basic Search

NOTE: The more search criteria you choose, the narrower your search will become, but at least one search criteria is required. HR Transactions that are not Class Approved are displayed only for the creator, assigned proxies, and responsible HR staff.

Mine (checkbox) - Check this box to search for all HR Transactions created by you.

Proxied to me (checkbox) - Check this box to search for all HR Transactions for which you have Proxy rights (i.e. someone else has set you up to be able to look at or update their Transactions that they have created).

Draft (checkbox) - Check this box to search for HR Transactions that are in 'Draft' Status for which you are the creator, proxy, or responsible HR staff.

Under HR Review (checkbox) - Check this box to search for HR Transactions that are in 'Dept Review', 'Div Review', or 'CPO Review' Status for which you are the creator, proxy, or responsible HR staff.

Class Approved (checkbox) - Check this box to search for HR Transactions that are in 'Class Approved' Status.

Filled Positions (checkbox) - Check this box to search for HR Transactions that are in 'Filled' Status (any status after an Applicant has been Selected).

Title - Enter title code, if known. If unknown press [▼], enter the first letters of the title you are seeking, press [FIND], then highlight the title to select and press the [O.K.].

UDDS - Enter up to 7 characters of a UDDS or press [▼], enter the first three alpha/numeric for the UDDS desired, press [FIND], highlight the UDDS desired and press [O.K.]. Multiple UDDS values can be entered for search.

Execute Query - Runs the query with the search criteria selected and takes you to the Search Results screen.

Clear All Fields - Clears all the fields of any search criteria chosen.

**** Note:** HR Transactions that are not Class Approved are displayed only for the creator, assigned proxies, and responsible HR staff.

2. Advanced Search

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Search HR Transactions: UW - Madison Classified Human Resources Information System

Search Advanced Search Results by Dept Results by Type

Enter criteria of the HR Transactions you wish to view & press the Execute Query Button [Help](#)

* At least one search limiting value must be entered. Press a dropdown button for a list of valid values.

☐ Mine ☐ Proxied to me ☐ Draft ☐ Under HR Review ☐ Approved ☐ Filled Positions

Job Code:

Appointment Type:

Title Prior to Realloc:

HR Transaction Type:

>> More than one UDDS may be entered

Department:

or

or

Working Title:

Creator

Last Name:

First Name:

Logon Name:

Employee Hired Into The Position

Last Name:

First Name:

Prior Employee

Last Name:

First Name:

PD/Appt Effective Date Between: And

HR Transaction ID (Cert): **NOTE: Please Choose only one of the ID's to search by. All other search criteria will be ignored.**

Empl ID:

Position Number:

Execute Query

Clear All Fields

**** Note:** HR Transactions that are not Class Approved are displayed only for the creator, proxies, and responsible HR staff.

NOTE: The more search criteria you choose, the narrower you search will become, but at least one search criteria is required. HR Transactions that are not Class Approved are displayed only for the creator, assigned proxies, and responsible HR staff.

Mine (checkbox) - Check this box to search for all HR Transactions created by you.

Proxied to me (checkbox) - Check this box to search for all HR Transactions for which you have Proxy rights (i.e. someone else has set you up to be able to look at or update their HR Transactions that they have created).

Draft (checkbox) - Check this box to search for HR Transactions that are in 'Draft' Status for which you are the creator, proxy, or responsible HR staff.

Under HR Review (checkbox) - Check this box to search for HR Transactions that are in 'Dept Review', 'Div Review', or 'CPO Review' Status for which you are the creator, proxy, or responsible HR staff.

Class Approved (checkbox) - Check this box to search for HR Transactions that are in 'Class Approved' Status.

Filled Positions (checkbox) - Check this box to search for HR Transactions that are in 'Filled' Status (any status after an Applicant has been Selected).

Title - Enter title code, if known. If unknown press [▼], enter the first letters of the title you are seeking, press [FIND], then highlight the title to select and press the [O.K.].

UDDS - Enter partial or full 7 character UDDS or press [▼], enter the first three alphanumeric characters for the UW division desired, press [FIND], highlight the UDDS desired and press [O.K.]. Multiple UDDS values can be entered for search.

Creator Last Name - Enter the Last Name of the Creator of the HR Transactions to search for.

Creator First Name - Enter the First Name of the Creator of the HR Transactions to search for.

Logon Name - Enter the Logon Name of the Creator of the HR Transactions to search for.

HR Transaction ID (Cert) - Enter the HR Transaction ID of the HR Transaction to search for. No other search criteria will be checked because only one HR Transaction will be returned in the search results.

Empl ID - Enter the Employee ID number for the individual associated with the HR Transaction to search for.

Position Number - Enter the Position Number associated with the HR Transaction to search for. No other search criteria will be checked because only one HR Transaction will be returned in the search results.

Appointment Type - Choose the Appointment Type to search for (Classified Permanent, Classified Project, Limited Term Employment).

HR Transaction Type - Choose the HR Transactions Type to search for.

Employee Hired Into the Position Last Name - Enter the Last Name of the Employee Associated with a HR Transaction to search for.

Employee Hired Into the Position First Name - Enter the First Name of the Employee Associated with a HR Transaction to search for.

Prior Employee Last Name - Enter the Last Name of the Prior Employee Associated with a HR Transaction to search for.

Prior Employee First Name - Enter the First Name of the Prior Employee Associated with a HR Transaction to search for.

Appointment Effective Date Between - Enter a Date Range that the Appointment Effective Date falls between.

Execute Query - Runs the query with the search criteria selected and takes you to the Search Results screen.

Clear All Fields - Clears all the fields of any search criteria chosen.

*** Note:** HR Transactions that are not Class Approved are displayed only for the creator, assigned proxies, and responsible HR staff.

3. Search Results View1

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Search HR Transactions: UW - Madison Classified Human Resources Information System

Search Advanced Search Results by Dept Results by Type

Job Code = '08500'; Department = A48;

Help

Title	Div/Dept	HR Tran Status	Employee Name (or 'Note')	Type
<input type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Recruiting		CP
<input checked="" type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Closed	RORI K COSTELLO	CP
<input type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Closed	KATHERINE CUNNINGHAM	LTE
<input type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Closed	ANN R KNOL	CP
<input type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Closed	BONNIE M BRZEZINSKI	CP
<input type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Reclass Approved	NANCY J MUSTAPICH	RCL
<input type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Reallocation Approved	SARAH K MORTON	REA

Print Results

Title: 08500 UNIV SVC PRG ASSOC UDDS: A482200 COL OF LETTERS & SCIENCE/ECONOMICS/E

HR Tran Type: Position Vacancy Status Date: 07/19/2012-18:20:12 Tran Status: Closed

Employee: RORI K COSTELLO Prior Employee: Susan Hering

Cert Number: 00083225 Go to CHRIS Vacancy Record Position #: 02040566 Effective Date: 07/19/2012

Supervisor: Ellis, Mary Beth Creator: Ellis, Mary Beth

Working Title: UNDERGRADUATE OFFICE COORD HR Transaction ID: 0000083225

Edit HR Tran View HR Tran Display/Print HR Tran Documents Copy HR Tran To New Tran Refresh Query

Title - Title for the HR Transaction.

Div/Dept - Division/Department for the HR Transaction.

HR Tran Status - Current Status of the HR Transaction.

Employee Name (or 'Note') - Name of the Employee assigned to the HR Transaction or a 'Note' about the transaction.

Type - Type of HR Transaction that was created (Position Vacancy, Reclassification, Update, Reallocation, LTE). CP=permanent vacancy, CJ=project vacancy, LTE=LTE, RCL=reclass, UPD=update, REA=reallocation, PV=vacancy types where no type (CP,CJ) was selected.

Title - Title for the HR Transaction.

UDDS - UDDS for the HR Transaction.

HR Tran Type - Type of HR Transaction that was created (Position Vacancy, Reclassification, Update, Reallocation, LTE).

Status Date - Date and time that the HR Transaction has been put into the current Status.

Tran Status - Current Status of the HR Transaction.

Employee - Name of the Employee assigned to the HR Transaction.

Prior Employee - Prior employee of the position.

Cert Number - Certification Number associated to the HR Transaction.

Go to CHRIS Vacancy Record - Press the button to go to the associated CHRIS vacancy. Available only for authorized personnel.

Position # - Position number of the position associated with the HR Transaction.

Effective Date - Date that the HR Transaction is effective.

Supervisor - Designated supervisor of the position.

Creator - Name of the person who created the HR Transaction.

Working Title - Working Title for the HR Transaction.

HR Transaction ID - Identifier assigned to the HR Transaction.

Edit HR Tran - Press button to open the HR Transaction in Edit mode. It will allow you to make changes to the HR Transaction if you are authorized. If you are not authorized, it will take you to the HR Transaction in View mode.

View HR Tran - Press button to open the HR Transaction in View mode. It will allow you to look at the HR Transaction, but not make any changes.

Display/Print HR Tran Documents - Press button to bring up the Print screen with possible reports to print.

Copy HR Tran To New Tran - Press button to bring up the Copy Screen with possible copy options.

Refresh Query - Runs the query with the search criteria selected and refreshes the Search Results screen with any updated data.

4. Search Results View2

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Search HR Transactions: UW - Madison Classified Human Resources Information System

Search Advanced Search Results by Dept Results by Type

Help

Title	UDDS	HR Tran Status	HR Tran Type	Appt ID	Tran Eff Date
<input type="checkbox"/> UNIV SVC PRG ASSOC	A484400	Recruiting	Position Vacancy		
<input checked="" type="checkbox"/> UNIV SVC PRG ASSOC	A482200	Closed	Position Vacancy	02040566	07/19/2012
<input type="checkbox"/> UNIV SVC PRG ASSOC	A481500	Closed	Limited Term Em	02041682	07/13/2012
<input type="checkbox"/> UNIV SVC PRG ASSOC	A484400	Closed	Position Vacancy	02041697	07/15/2012
<input type="checkbox"/> UNIV SVC PRG ASSOC	A486000	Closed	Position Vacancy	02038714	06/18/2012
<input type="checkbox"/> UNIV SVC PRG ASSOC	A482300	Reclass Approved	Reclassification	00589126	03/25/2012
<input type="checkbox"/> UNIV SVC PRG ASSOC	A480200	Reallocation Approved	Reallocation	02000346	04/08/2012

Print Results

Prev Rec Next Rec

Title: 08500 UNIV SVC PRG ASSOC UDDS: A482200 COL OF LETTERS & SCIENCE/ECONOMICS/E

HR Tran Type: Position Vacancy Status Date: 07/19/2012-18:20:12 Tran Status: Closed

Employee: RORI K COSTELLO LTE Applicant Status:

Cert Number: 00083225 Go to CHRIS Vacancy Record Position #: 02040566 Effective Date: 07/19/2012

Title Prior to Reclass/Realloc: Creator: Ellis, Mary Beth

Working Title: UNDERGRADUATE OFFICE COORC HR Transaction ID: 0000083225

Edit HR Tran View HR Tran Display/Print HR Tran Documents Copy HR Tran To New Tran Refresh Query

Title - Title for the HR Transaction.

UDDS - Division/Department for the HR Transaction.

HR Tran Status - Current Status of the HR Transaction.

HR Tran Type - Type of HR Transaction that was created (Position Vacancy, Reclassification, Update, Survey, LTE).

Appt ID - Appointment ID of the person associated with the HR Transaction.

Tran Eff Date - Date that the HR Transaction is effective.

Title - Title for the HR Transaction.

UDDS - UDDS for the HR Transaction.

HR Tran Type - Type of HR Transaction that was created (Position Vacancy, Reclassification, Update, Survey, LTE).

Status Date - Date and time that the HR Transaction has been put into the current Status.

Tran Status - Current Status of the HR Transaction.

Employee - Name of the Employee assigned to the HR Transaction.

LTE Applicant Status – Status of the LTE applicant.

Cert Number - Certification Number associated to the HR Transaction.

Display CHRIS Record - Press the button to go to the associated CHRIS vacancy. Available only for authorized personnel.

Position #- Position number of the position associated with the HR Transaction.

Effective Date - Date that the Position Description is effective.

Title Prior to Reclass - Prior employee of the position.

Creator - Name of the person who created the HR Transaction.

Working Title - Working Title for the HR Transaction.

HR Transaction ID - Identifier assigned to the HR Transaction.

Edit HR Tran - Press button to open the HR Transaction in Edit mode. It will allow you to make changes to the HR Transaction if you are authorized. If you are not authorized, it will take you to the HR Transaction in View mode.

View HR Tran - Press button to open the HR Transaction in View mode. It will allow you to look at the HR Transaction, but not make any changes.

Display/Print HR Tran Documents - Press button to bring up the Print screen with possible reports to print.

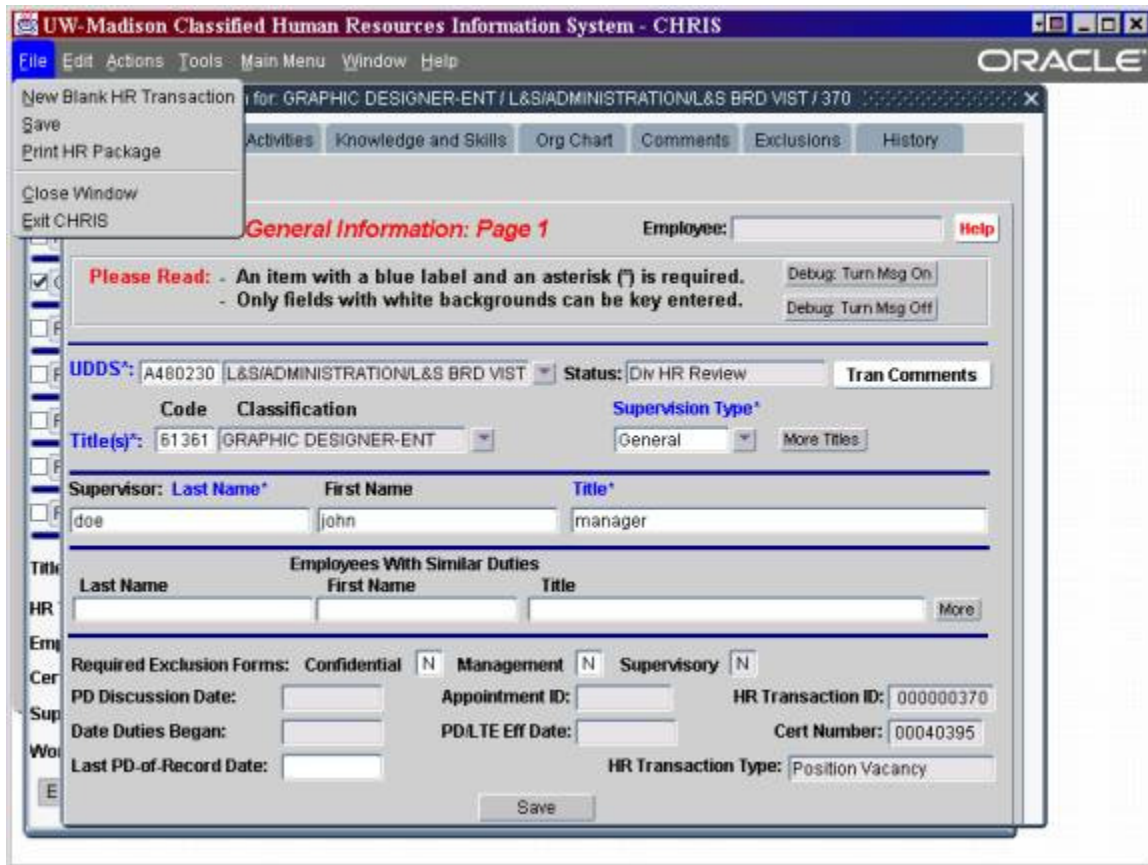
Copy HR Tran To New Tran - Press button to bring up the Copy Screen with possible copy options.

Refresh Query - Runs the query with the search criteria selected and refreshes the Search Results screen with any updated data.

Menus

The menu bar at the top of CHRIS/CHRIS-HR screens is similar to the standard Windows menu. The sub-menus have some standard selections and some selections unique to CHRIS/CHRIS-HR. The selections that are available on a certain screen depend on that screen, on the status of the displayed data, and on the authorization of the current user. The active selections on the sub-menus are in black font, while the inactive selections are in a dull gray color.

1. File Menu



New Blank HR Transaction - Opens a new blank HR Transaction screen for entry of a new transaction.

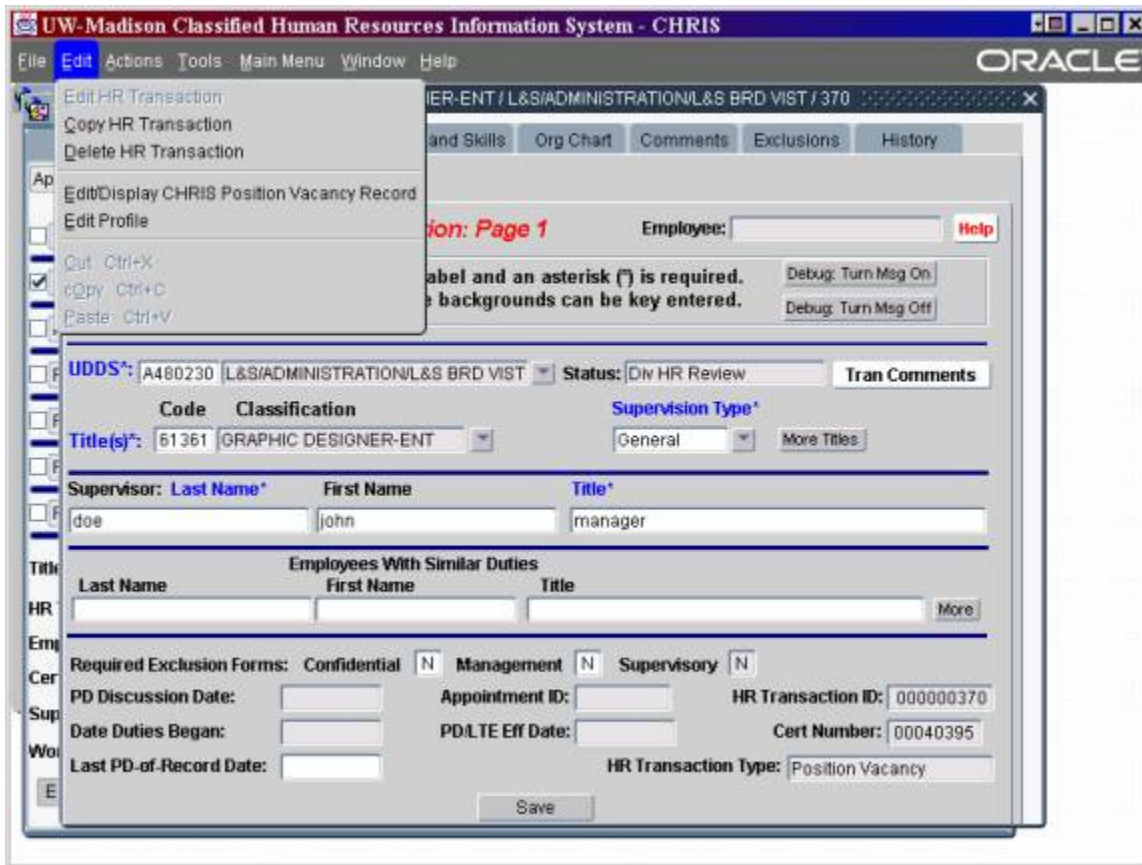
Save - Saves the current data. Only available on the HR Transaction screens and the Profile screens.

Print HR Package - Opens the Print screen which has options to print different reports. Only available on the Search Results screen or the HR Transaction screens.

Close Window - Closes the current screen.

Exit CHRIS - Closes all the windows in the Entire HR Transaction System.

2. Edit Menu



Edit HR Transaction - Opens the Position Description Package in Edit mode. It will allow you to make changes to the Position Description Package if you are authorized. If you are not authorized, it will take you to the Position Description Package in View Only mode.

Copy HR Transaction - Opens the Copy screen that has possible copy options. Only available on the Search Results screen or the PD Package screens.

Delete HR Transaction - Deletes the PD Package from the system. Only available on the Search Results screen or the HR Transaction screens.

Edit/Display CHRIS Position Vacancy record - Press the button to go to the associated position vacancy. Available only for authorized personnel.

Edit Profile - Opens the Profile screen associated with the user for adding or updating to the profile. Only available on the Search Results screen or the HR Transaction screens.

Cut - Cuts out the highlighted text and saves it on the clipboard. Only available on the HR Transaction screens.

Copy - Copies the highlighted text and saves it on the clipboard. Only available on the HR Transaction screens.

Paste - Pastes the text on the clipboard to the position designated. Only available on the HR Transaction screens. This option is only available if the Cut or Copy was done using the CHRIS/CHRIS-HR system itself. If the Cut or Copy was made from an external document, use **Control+V**, the standard Windows command, to do a paste. Note: If the text to be pasted is more than the receiving field can accept, only

the text that will fit will text. You will have to reduce the text length until it is within the limit for the receiving item.

CAUTION: When copying from Word and pasting into a HR Transaction the single quote (apostrophe) is sometimes converted into a question mark (?). It seems to be those in the middle of a word (e.g., don't) or end of a word that are converted. Other special characters such as a hyphen are sometimes converted too. These conversions do not occur until the data is saved so you may not notice it immediately. These all can be typed over and restored to the correct character by anyone with authorization to submit or approve the HR Transaction. You may want to review the large text fields in the HR Transactions you have not yet submitted or approved if you suspect you did a copy and paste of text that had quotes or other special characters.

3a. Actions Menu (Position Vacancy, Update)

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' interface. The 'Actions' menu is open, displaying the following options: 'Submit HR Transaction', 'Approve HR Transaction', 'Approve Project Position Justification', and 'Reject HR Transaction'. The main form is titled 'HR Transaction General Information: Page 1' and is for Employee 'L&S/ADMINISTRATION/L&S BRD VIST / 370'. The form includes a 'Please Read' section with instructions: 'An item with a blue label and an asterisk (*) is required.' and 'Only fields with white backgrounds can be key entered.' Below this, there are fields for 'UDDS*', 'Code', 'Classification', 'Supervision Type*', and 'Title(s)*'. The 'Supervisor' section shows 'Last Name' as 'doe', 'First Name' as 'john', and 'Title' as 'manager'. There is a section for 'Employees With Similar Duties' with columns for 'Last Name', 'First Name', and 'Title'. At the bottom, there are fields for 'Required Exclusion Forms' (Confidential, Management, Supervisory), 'PD Discussion Date', 'Appointment ID', 'HR Transaction ID', 'Date Duties Began', 'PD/LTE Eff Date', 'Cert Number', 'Last PD-of-Record Date', and 'HR Transaction Type' (set to 'Position Vacancy'). A 'Save' button is at the bottom.

Note: Submission, Rejection and Approval are only available when the HR Transaction is open in Edit mode.

Submit HR Transaction - Submits the HR Transaction to the Dept/Div HR for approval. Available only for HR Transaction in Draft status.

Approve HR Transaction - Approves the PD Package to the Div HR/CPO staff for additional verification. Available only for PD Packages not in Draft status.

Approve Project Position Justification - Opens the Project View form and checks for all the project positions beginning in the last five years for the specific department. Approves the Project portion of project position vacancies if the approval is requested. Available only for Project positions.

Reject HR Transaction - Rejects the HR Transaction to the previous level of approval.

Create New Limited Term Employment Transactions

Instructions for LTE Positions - Most of the LTE process will be the same as for other HR Transaction types. Here are some differences:

1. Though only one goal (and related activities) is required, the PD Summary is optional.
2. Some items that do not apply to LTEs are protected or removed, while others, such as Hourly Rate if posting on the web, are required.
3. If there is no Applicant entered, you can choose whether the position should be posted on the web in the nightly automated process.
4. An Organizational Chart is optional.
5. A selected applicant can be entered before the original submittal of the LTE Transaction, or after. If after, only applicant data will be allowed to be updated. Then the applicant is submitted separately for approval. HR staff can then approve or reject the applicant together with or separately from the Transaction.
6. The Applicant status will display separately from the LTE Transaction status on the Search Results screen. The Applicant status will display with the detail data on the lower part of the screen.
7. An Applicant hired through this process cannot be pushed into HRS until the LTE Transaction is Class Approved by Division HR staff (if the title is delegated) or CHR.

Begin by logging into CHRIS-HR. On the Main Menu screen, for the HR Transaction Type, click 'LTE' and for the Create an HR Transaction, click 'New Transaction'

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

CHRIS Main Menu for Human Resources Staff

The University of Wisconsin - Madison
Classified Human Resources Information System
CHRIS - HR

How would you like to proceed?

HR Transaction Type:
☐ Permanent/Project Vacancy ☒ LTE ☐ Reclass ☐ Update PD ☐ Reallocation ☐ All Types
☐ Include Positions on Hold (vacancies only)

List My Unit's HR Transactions:
 ** Select One or More HR Transaction Types Above
 Transactions I Must Review/Approve
 Transactions in Process

Process Applicant(s): (prior CHRIS Main Menu)
 Permanent/Project Applicant Processing

**** Vacancy Transactions at least Division approved**

Edit/View HR Transaction: Tran ID
 Edit HR Tran View HR Tran

Search HR Transactions:
 Search All HR Transactions

Create an HR Transaction:
 ** Select One HR Transaction Type Above
 New Transaction
 Copy from Existing Transaction

PD Discussion Date: Position #: HR Transaction ID: 000085563
 Date Duties Began: PD/LTE Eff Date: Cert Number: 00085563
 Last PD-of-Record Date: Empl ID / Empl Rcd: HR Transaction Type: Limited Term Employee

Save

LTE General Information – Page 1

Creating a New Transaction will bring up the HR Transaction General Information: Page 1. This should be completed in the same manner as completing this screen for a permanent position.

The screenshot shows the 'HR Transaction: LW - Madison Classified Human Resources Information System' window. The title bar includes 'File Edit Actions Tools Main Menu Window Help' and the 'ORACLE' logo. The main content area is titled 'HR Transaction General Information: Page 1' and features a sidebar with 'General Data', 'Goals Activities', 'Knowledge and Skills', 'Org Chart', 'Comments', and 'History'. The 'General Data' tab is active, showing fields for 'Employee:', 'Status: Draft', 'Tran Comments', 'UDDS*', 'Code', 'Classification', 'Title(s)*', 'Applicant Status', 'Supervisor: Last Name*', 'First Name', 'Title*', 'Supervisor's Email Address*', and a section for 'Employees With Similar Duties' with fields for 'Last Name', 'First Name', 'Title', and a 'More' button. At the bottom, there are checkboxes for 'Required Exclusion Forms: Confidential', 'Management', and 'Supervisory', along with fields for 'PD Discussion Date', 'Position #', 'HR Transaction ID', 'Date Duties Began', 'PD/LTE Eff Date', 'Cert Number', 'Last PD-of-Record Date', 'Empl ID / Empl Rcd', and 'HR Transaction Type: Limited Term Employee'. 'Cancel New HR Trans' and 'Save' buttons are at the bottom.

Once completed, click “Save” and proceed to Page 2.

LTE General Information – Page 2

UW-Madison Classified Human Resources Information System - CHRIS

File Edit Actions Tools Main Menu Window Help

Position Description for: No Working Title / G-SERVIHUMAN RES/CLASSFD HR / 85586

General Data Goals Activities Knowledge and Skills Org Chart Comments History

Page 1 Page 2 Essential Justification LTE Detail LTE Appt History

HR Transaction General Information: Page 2 Help

Working Title: Appt Type: Limited Term - Classified

Fund: Act: More Hourly Rate for Posting: ☒ Rate Range ☐ Fixed Rate

LTE Function: LTE Policy Hourly Rate Range From: To:

Justification:

Add'l Justification: Edit Estimated Duration: Hours: OR Date:

Job Address:

Building Code: A1078 County: Dane

PARK ST N 21 Room:

21 N PARK ST Mail Drop:

City: MADISON State: WI Zip Code: 53715-1218

Contact: Meghan Owens

Phone: 608-262-2346 TTY Phone: 711 Info

Email: mowens@ohr.wisc.edu Building Code:

Address: 21 N Park St

Suite 5101

City: Madison State: WI Zip Code: 53715

Work Schedule: More Schedule Comment: Edit

Requirements: More Add'l Req: Edit

Related Web Link: www.ohr.wisc.edu Link Application Deadline Date: Post On Web: ☐

Under Caregiver Law: ☐ Yes ☐ No

LTE 'How To Apply' Information: Edit

Save

Working Title – Enter classified title for LTE vacancy

Appointment Type – Defaults to Limited Term – Classified

Fund – Act(ivity) – Enter funding source and activity code

Hourly Rate for Posting – Select either Rate Range or Fixed Rate

Hourly Rate Range From: If Rate Range is selected, enter the salary range the position will be hired at. If Fixed Rate is selected, enter the hiring rate.

LTE Function – Press ▼ and select Future Conversion, Irregular or Seasonal. For information regarding LTE function definitions click on “LTE Policy” which will link you to the policy

Justification – Press ▼ and select one of the justifications listed for the various sub-categories **OR** select “other” and complete the **Additional Justification** field.

Additional Justification – Use this field to justify “Future Conversion” LTE positions **OR** to justify the selection of “other” for the sub-category.

Estimated Duration – Enter number of hours the LTE is expected to work **OR** the end date of the LTE appointment.

Building Code - The address where the position is located. Press [▼] and highlight to make selection or enter value if known.

County - Defaults to 13:Dane. If employment area is other than 13, press [▼] for list of values or enter value if known.

Contact – Defaults to information found in profile of the PD creator. Can be changed.

TTY Phone - Will default to a central number. If you have a TTY telephone, enter the number here.

Work Schedule - Press [▼] and make selection or enter value if known. Multiple schedules allowed. Press [MORE] and [TAB] to a blank field and enter value if known. If unknown, press [▼] highlight to make selection, press [O.K.] then [CLOSE]. The [MORE] button will be highlighted to indicate multiple entries.

Schedule Comment –Enter information on the work schedule. This is a free form field.

Requirements - Press [▼] and make selection or enter value if known. If more than one entry desired, press [MORE] button, [TAB] to a blank field, press [▼] button and make selection. The [MORE] button will be highlighted to indicate multiple entries.

Additional Requirements – Enter any additional requirements information

Related Web Link - A complete URL (including http:// if appropriate) to a website with information related to the vacancy (use forward slashes).

Application Deadline Date: Enter the application deadline date.

Post on Web - Indicates whether this vacancy should be posted on the web page.

Under Caregiver Law - Indicates if the position is under the Wisconsin Caregiver Background Check Law.

LTE ‘How To Apply’ Information – If position is posted on the web, include information on how individuals should apply.

HR Transaction Essential Justification

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' window. The title bar indicates the position description is for 'No Working Title / G SERV/HUMAN RES/CLASSFD HR / 85586'. The interface includes a menu bar (File, Edit, Actions, Tools, Main Menu, Window, Help) and an Oracle logo. The main content area has several tabs: General Data, Goals Activities, Knowledge and Skills, Org Chart, Comments, History, Page 1, Page 2, Essential Justification (selected), LTE Detail, and LTE Appt History. The 'Essential Justification' tab is active, displaying the title 'HR Transaction Essential Justification' and a 'Help' button. The text explains that divisions need to provide justification for filling positions that are GPR/Tuition funded. It asks the user to provide information in three areas: whether the filling is essential, the type of essential function, and an explanation of how the position is essential. The form includes radio buttons for 'Yes', 'Place On Hold', and 'Not GPR Funded', a dropdown menu for the type of essential function, and a large text area for the explanation. A 'Save' button is at the bottom.

This tab must be completed for any position on GPR/Tuition funds.

Is the filling of this GPR/Tuition funded position essential – Fill in the appropriate button. If the position is not GPR funded, you can stop here.

What type of essential function does this position carryout - Press [▼] and make appropriate selection.

Explain how this position is essential in the above selected category - This is a free form field. Provide information on how this position performs an essential function.

REMAINING TABS:

The Goals Activities, Knowledge and Skills, Org Chart, Comments and History tabs function in the same manner as they do when completing an HR Transaction for a permanent/project vacancy. Once completed the HR Transaction should be submitted to CHR by choosing 'Submit HR Transaction' from the Actions menu.

Hiring an Applicant into an LTE Position

Select the HR Transaction to Hire into

You can search for the appropriate HR Transaction or enter the Trans ID directly on the Main Menu page.

CHRIS Main Menu for Human Resources Staff

The University of Wisconsin - Madison
Classified Human Resources Information System
CHRIS - HR

How would you like to proceed?

HR Transaction Type:

☐ Permanent/Project Vacancy ☒ **LTE** ☐ Reclass ☐ Update PD ☐ Reallocation ☐ All Types

☐ Include Positions on Hold (vacancies only)

List My Unit's HR Transactions:

** Select One or More HR Transaction Types Above

Transactions I Must Review/Approve

Transactions in Process

Process Applicant(s): (prior CHRIS Main Menu)

Permanent/Project Applicant Processing

** Vacancy Transactions at least Division approved

Edit/View HR Transaction: Tran ID

Edit HR Tran View HR Tran

Search HR Transactions:

Search All HR Transactions

Create an HR Transaction:

** Select One HR Transaction Type Above

New Transaction

Copy from Existing Transaction

Edit Profile Exit CHRIS

Search Advanced Search Results by Dept Results by Type Help

Needs CHR Class or Project Approval; No Division HR Users; For Unit(s): ; Type(s): LTE

Title	Div/Dept	HR Tran Status	Employee Name (or *Note)	Type
<input type="checkbox"/> COMM SERV TECH	NUR/RESEARCH/RESEARC	Draft		LTE
<input type="checkbox"/> SPEC ACT HELPER-LTE	L&S/CHAZEN MUSEUM/CHA	Selected	Emily Bushman	LTE
<input checked="" type="checkbox"/> UNIV SERVICES ASSOC 2	ENGR/INDUSTRIAL ENGR/IN	Selected	MARY S HOELL	LTE
<input type="checkbox"/> RESEARCH GARDENER	AG&LSC/GENETICS/GENETI	Selected	David W Heller	LTE
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Title: 16660 UNIV SERVICES ASSOC 2 **UDDS:** A195000 ENGR/INDUSTRIAL ENGR/INDUS ENGR

HR Tran Type: Limited Term Employ **Status Date:** 08/05/2010-14:36:05 **Tran Status:** Selected

Employee: MARY S HOELL **LTE Applicant Status:** LTE Applicant Approved

Cert Number: 00077098 [Go to CHRIS Vacancy Record](#) **Appt. ID:** **Effective Date:** 08/02/2010

Supervisor: Krueger, Carol Anne **Creator:** Severson-Hetzel, Debra K

Working Title: USA 2 **HR Transaction ID:** 0000077098

[Edit HR Tran](#) [View HR Tran](#) [Display/Print HR Tran Documents](#) [Copy HR Tran To New Tran](#) [Refresh Query](#)

STEP	FIELD	ACTION
1	HR Transaction Type	Open LTE transactions that need approval by clicking on LTE at the <HR Transaction Type>
2	Transactions I Must Review/Approve	Press <Transactions I Must Review/Approve>
3	Results by Dept	Select transaction and Press <Edit HR Trans>
4	Edit/View HR Transactions	To go directly to transaction: To enter hire for LTE transaction already approved enter cert # and press <Edit HR Tran>

Once selected, go to the LTE Detail tab to enter the hire information.

LTE Detail

Screen is used to hire an applicant into the LTE position.

General Data Goals Activities Knowledge and Skills Org Chart Comments History

Page 1 Page 2 Essential Justification **LTE Detail** LTE Appt History

Details for Selected LTE Applicant *Note: Only 1 Applicant Can Be Entered for a Given Vacancy* [Help](#)

Title: 37401 DIETITIAN CLINICAL Sched-Range: 11 - 08 LTE Max Rate: \$21.851

Soc Sec #: 5 [Change, Modify, Delete Selected Applicant](#) [Add Selected Applicant: Unknown SSN](#)

Name: Last*: 6 Address*: 14

First*: 7 Middle: 8 14

Home Phone: 9 Work Phone: 10 City*: 15 State*: 16

Email: 11 Zip*: 17 County: 18

Birth Date*: 12 Adj Cont Service Date: 13 Country*: 19 Release Home Address*: 20

Gender*: 22 Ethnicity: 21 NO TEXT FOUND

Hire Type: 23 Empl Rec#: 26 LTE Begin Date*: 27

24 Hourly Rate*: 28 CBC Status Date: 29

Action Reason: 25 Continuity/Duration*: 30

Rehired Annuitant: No 31 Std. Out-of-state Plan: 32 Foreign National: 33 Eligible for Full Time State Rate: 39

Above LTE Maximum: ☐ Yes ☐ No Justification: 34 [Edit](#)

Out of State: ☐ Yes ☐ No Justification: 35 [Edit](#)

Overload: 38 ☐ Yes ☐ No [Employment Overload Form](#) Living Wage Exception: 36

LTE Comments (e.g., Out of State hire or Title Not Usual for the UW): 37 [Edit](#)

[Save](#)

Field #	Description	Action
5	Soc Sec #	Enter Social Security# or if unknown add 999-99-9999 in Social Security field
6	Last Name (Required)	Enter last name-If current or former employee person information will populate fields. Cannot edit Name fields
7	First Name (Required)	Enter first name
8	Middle Initial	Enter middle initial
9	Home Phone	Enter home phone number
10	Work Phone	Enter work phone
11	Email Address	Enter e-mail address

12	Date Of Birth (Required)	Enter date of birth-if populated cannot edit <Date of Birth> field
13	Adjusted Continuous Service Date	Not required with LTE appointment Do not populate or edit.
14	Address (Required)	Enter address - If current or former employee person information will populate fields. Edit address fields with updates as necessary.
15	City (Required)	Enter city of residence
16	State (Required)	Enter state of residence
17	Zip Code (Required)	Enter zip code of residence
18	County	Defaults no entry needed
19	Country (Required)	Defaults to United States- Select from dropdown list if not United States
20	Release Home Address (Required)	Select “Y” or “N”-If left blank defaults to “N” in HRS
21	Ethnicity (Required)	Select from Dropdown List
22	Gender (Required)	Select from dropdown list
23	Type (Required)	Select from Dropdown List
24	Action	Defaults no entry needed
25	Action reason (Required)	Select from dropdown list
26	Empl Rec#	Select if current or former employee in HRS
27	LTE Begin Date (Required)	Enter date
28	Hourly Rate (Required)	Enter Rate
29	CBC Status Date	Enter date (If CBC is required)
30	Continuity/Duration (Required)	Select from dropdown list. If 02A, 02B, 02C, end date is required.
31	Rehired Annuitant	Defaults to “No” – select from dropdown field
32	Std. Out-of-state plan	Press if employee will be working out of state
33	Foreign National	Press if employee is a foreign national
34	Above LTE maximum	Defaults to “No”
35	Out of state	Defaults to “No”
36	Living Wage Exception	Select from dropdown list. Defaults to blank
37	LTE Comments	Free text field
38	Overload	Defaults to “No”. Press <Employment Overload Form> if transaction generates an overload.
39	Eligible for full time state rate	Select from dropdown list. Defaults to blank
40	Save	Press <Save>

LTE Appointment History

Leave this screen blank even if the applicant has appointment history.

Approving LTE Hire

Go to the Actions Menu and select 'LTE Action'

File Edit **Actions** Tools Main Menu Window Help

Position Description for: UNIV SVC PRG ASSOC / COL OF LETTERS & SCIENCE/ANTHROPOLOGY/ANTHRO / 78776

General Data Goals Activities Knowledge and Skills Org Chart Comments History

Page 1 Page 2 Essential Justification LTE Detail **LTE Appt History**

Details for Selected LTE Applicant Note: Only 1 Applicant Can Be Entered for a Given Vacancy [Help](#)

Title: 08500 UNIV SVC PRG ASSOC Sched-Range: 02 - 11 LTE Max Rate: \$15,106

Soc Sec # _____ EmplID _____ [Change, Modify, Delete Selected Applicant](#)

Name: Last* _____ Address*: _____
 First* _____ Middle _____
 Home Phone*: _____ Work Phone: _____ City*: _____ State*: _____
 Email: _____ Zip*: _____ County: _____
 Birth Date*: _____ Adj Cont Service Date: _____ Country*: _____ Release Home Address*: _____
 Gender*: _____ Ethnicity: _____ NO TEXT FOUND

Hire Type: _____ Empl Rec#: _____ LTE Begin Date*: _____
 _____ Hourly Rate*: _____ CBC Status Date: _____
 Action Reason: _____ Continuity/Duration*: _____

Rehired Annuitant: No Std. Out-of-state Plan: Foreign National: Eligible for Full Time State Rate: _____

Above LTE Maximum: Yes No Justification: _____ [Edit](#)
 Out of State: Yes No Justification: _____ [Edit](#)
 Overload: Yes No [Employment Overload Form](#) Living Wage Exception: _____
 LTE Comments (e.g., Out of State hire or Title Not Usual for the UW): _____ [Edit](#)

[Save](#)

LTE Action Screen

Approve/Reject LTE

How would you like to proceed with the LTE Transaction and Applicant?

Latest LTE Transaction Event/Status
 Applicant Un-selected/Recruiting **Help**

Latest LTE Applicant Event/Status
 LTE Applicant Rejected/LTE Applicant Div Review

Notify Transaction Creator on Final Approval: ☐

If approved, select 'Approve LTE Applicant' which will bring up the following screens. Clicking "OK" on the last screen will initiate the load into HRS.

Approve/Reject LTE


How would you like to proceed with the LTE Transaction and Applicant?

Latest LTE Transaction Event/Status
 CHR Approved/Class Approved **Help**

Latest LTE Applicant Event/Status
 LTE Applicant Created/LTE Applicant Entered

Notify Transaction Creator on Final Approval: ☐

Approve Package X

 Would you like to Save your data and Approve the Selected Applicant for the LTE Position?

Approve/Reject LTE

How would you like to proceed with the LTE Transaction and Applicant?

Latest LTE Transaction Event/Status
CHR Approved/Class Approved Help

Latest LTE Applicant Event/Status
LTE Applicant Created/LTE Applicant Entered

Notify Transaction Creator on Final Approval: ☐

Approve LTE Trans and Applicant

Approve LTE Trans Only

Approve LTE Applicant Only

Approve LTE bu

Cancel

PD Data Has No Errors

No Errors Were Found In The HR Transaction.

OK

Approve/Reject LTE

How would you like to proceed with the LTE Transaction and Applicant?

Latest LTE Transaction Event/Status
CHR Approved/Class Approved Help

Latest LTE Applicant Event/Status
LTE Applicant Created/LTE Applicant Entered

Notify Transaction Creator on Final Approval: ☐

Approve LTE Trans and Applicant

Approve LTE Trans Only

Approve LTE Applicant Only

Approve LTE

Cancel

Approval Successful

Your Approval Has Been Registered For This HR Transaction.

OK