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Changing your Password

Capital HR requires that each user change their password every 90 days. Additionally, if a user does not log in within 90 days, their UserID becomes locked. If you forget your UserID/password, or your account becomes locked, contact your Capital HR Security Administrator. The following screen prints and instructions will assist you with changing your password.

Step 1: Logging into Capital HR

Log into Capital HR with the UserId and password you have been provided.

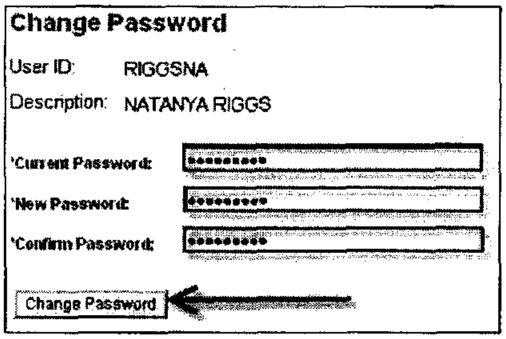
Step 2: Navigating to Change Password

Click on **Change My Password** in the Menu to the left of your screen

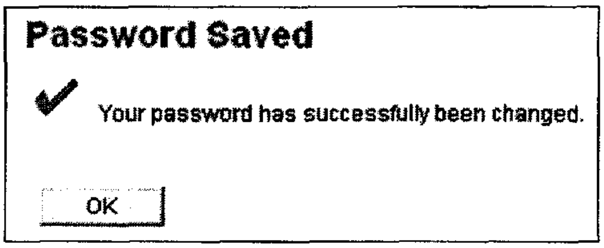
Step 3: Changing Your Password

Enter your **Current Password, New Password**, and **Confirm Your New Password.**

Note: Your password must be at least 8 characters in length <u>and</u> contain 1 special character <u>and</u> at least one number.



Once you have finished entering your new password and confirming it, Click **Change Password** and you will see this message.



You can now click **Home** at the top of the screen to return to the CHR Home Page.

Creating a Recruit Action (Requisition)

A recruit should be submitted any time that you need to fill ANY position (including an Emergency Hire, 30/60 day).

Step 1: Navigate to the Job Opening page

Path to create a new recruit:
Recruiting > Create New Job Opening

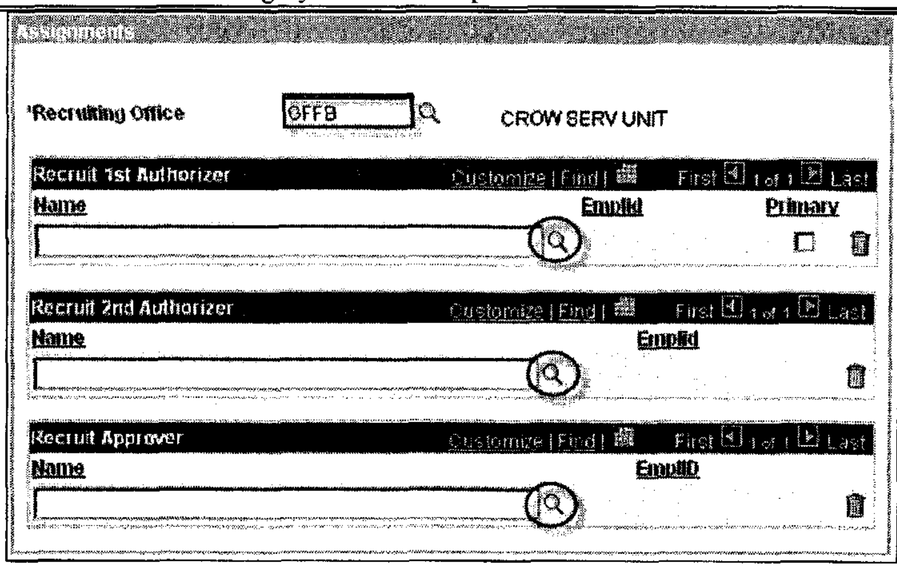
Step 2: Complete the Opening Information "block"

Job Opening Type: Defaults to Standard Requisition
Recruit Requestor: Defaults to your name as the requestor of the recruit
Date Opened: Defaults to today's date
Target Openings: Defaults to 1, you can change this if you need to recruit for more than one position with the same title, series, and grade(s).
Business Unit: Defaults to IHS00, do not change this
Position Number: Enter the 8 digit position number for the position that is to be filled. If you do not know the position number, please see Appendix A.
Note: If this is a brand new position that doesn't have a Position Number you can leave this field blank.
Job Code: This should default from the position data (after you enter the Position Number)
Company: This should default from the position data (after you enter the Position Number)
Department: This should default from the position data (after you enter the Position Number)
Location: This should default from the position data (after you enter the Position Number). If you don't populate the Position Number you MUST enter the Location code.

If you would like to add additional locations for recruitment click on Add Additional Locations. Use the feature to locate the location that you'd like to add.

Status code: Defaults to 005 Draft; the status will automatically change to 006 Pending Approval after you click Save and Submit. Once the requisition has finished the approvals process the status will change to 'Open'.
Desired Start Date: Enter a future date
Recruitment Type: Select Open Competition.
Area of Consideration: Internal ((DHHS or IHS wide only); Public (Open to all U.S. Citizens); Status (Merit Promotion and Excepted Service Examining Plan) Current permanent federal employees, reinstatement eligibles, Indian preference and those eligible for special appointing authorities.)
Staffing Specialist: Enter the Staffing Specialist's EmplId or use the feature to look up the name of your servicing Staffing Specialist
Selecting Official: Enter the Selecting Official's EmplId or use the feature to look up the name of the Selecting Official
Country: Defaults to USA

Click on the 🔍 feature to select the appropriate person from the list provided for each of the approving roles.



As the Requestor you have three options:

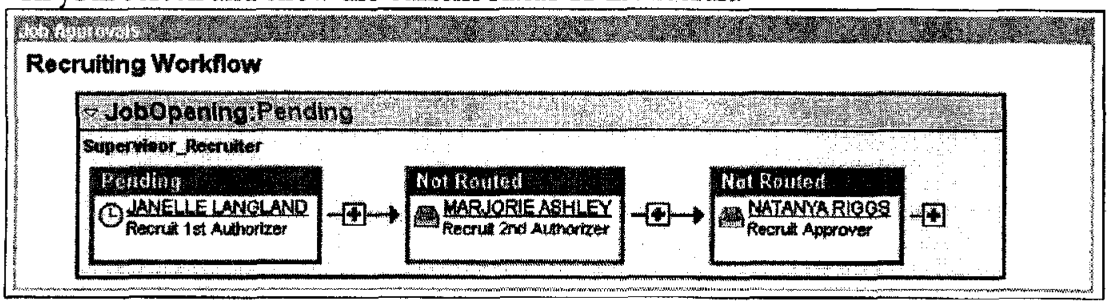
1. You can now click **Save and Submit**. The action will move forward in the approval process.

2. If you still need to complete some detail and wish to save the information you have and return at a later time you can select **Save as Draft**. Clicking this button saves the Job Opening in 005 Draft Status and the action does not move forward.

3. If you have been asked to cancel the recruit action as management has decided to cancel, you can select **Cancel**. By selecting the Cancel button you will discard any changes and reset the job opening status. You will not be able to retrieve the information after you click cancel.

Note: Only the Recruiting Office and the Recruit Approver are mandatory fields, however you need to **ensure the action is routed to every workflow user**. Contact your HR Regional Center if you have any questions about your department's workflow.

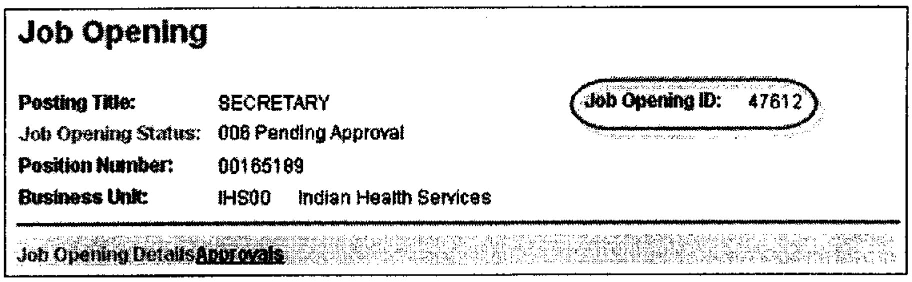
After you click the 'Save and Submit' button the Recruiting Workflow Monitor will appear on your screen and show the current status of the recruit.



Note: If you are also the 1st Authorizer you will be 'Skipped' and won't need to sign off as you have created the recruitment.

An e-mail will automatically be sent to the first person that needs to approve the recruit action.

After you click either **Save and Submit** or **Save as Draft** your Job Opening ID will be generated. Please note this number, which is located at the top of the page.



To monitor the status of your requisition please use the **How to Find Job Openings (Requisitions)** job aid.

Once you are in the requisition you will be able to click on **Approvals** to view the current status.

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Resubmitting a Denied Action

You can use this process to resubmit an action in your Worklist that has been Denied. You can change data in your recruit to reflect any changes that have taken place since the original submission of the recruit.

Step 1: Navigate to the Denied Action

Option 1: You will receive an e-mail when an action has been denied. You can click on the hyperlink in the e-mail you received and log into Capital HR. You will need your login ID and password.

Option 2: Accessing the action via your worklist. You will need your login ID and password. When you see the actions in your Worklist click on the Link and the system will bring you into the action to review it.

Step 2: Review 'Denied' Remarks

Click on the Approvals link.

Click View Comments and review the remarks **BEFORE** you proceed with resubmitting the action. Once you click the Resubmit button you will not be able to retrieve this information.

When you are finished reviewing the comments click Job Opening Details.

Step 3: Verify or Change the Opening Information "block"

Date Opened: This defaults to the original date the action was submitted
Status code: Defaults to 008 Denied, this will automatically change to 006 Pending Approval after you finish the resubmission process

Remarks: Complete remarks MUST be included or your action may be incomplete and returned to you for completion. Please see the section on How to Create a Recruit Action (Requisition) for a complete list of required remarks.

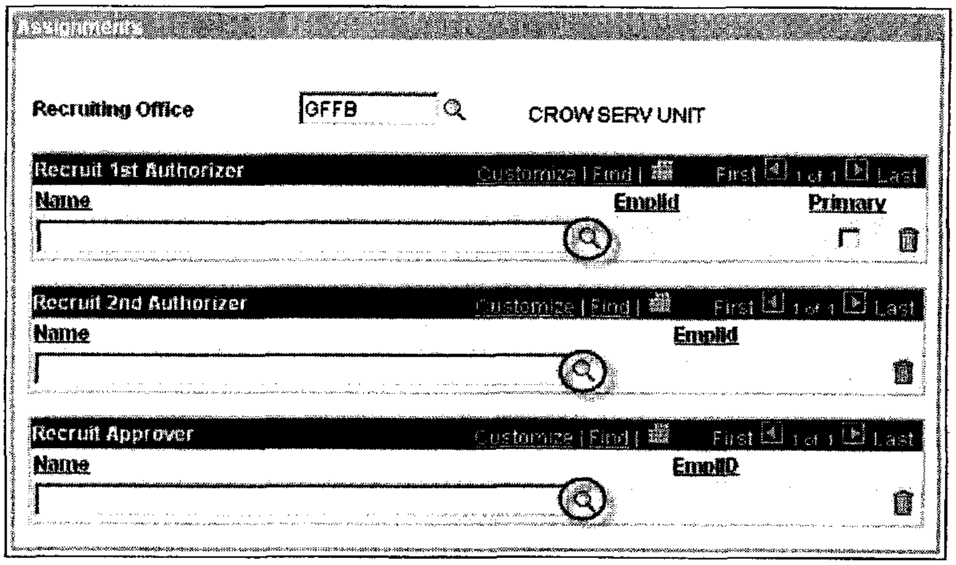
Employees Being Replaced: Verify or change the employee's name who is vacating the position. Enter the last name, first name (with no space between the comma and first name). You can also use the feature to look up the employee's name.

If more than one position is being filled you can click on [+] Add Employees Being Replaced to enter additional names of the employee's who are vacating the positions. If you need to remove one of the names you can click on the next to their name.

Step 4: Verify or Change Assignments (who will the action be routed to?)

Recruiting Office: Verify or change the Administrative Code or SAC for the position being filled.

Click on the feature if you need to change any of the approving officials.

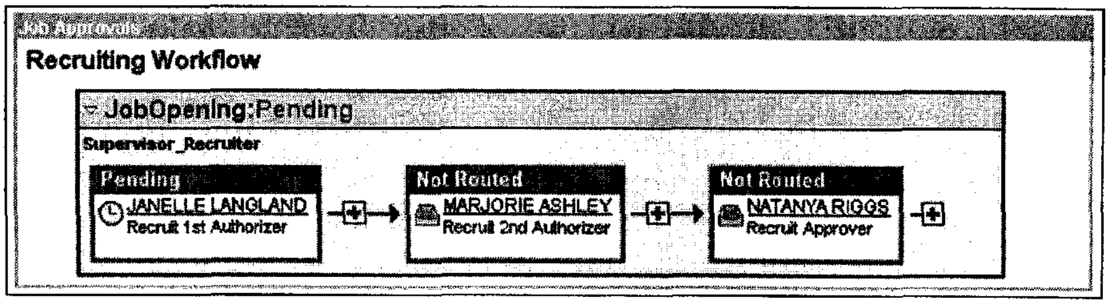


Step 5: Resubmitting the Action

Click on the **Approvals** link

Click the **Resubmit** button

After you click the 'Resubmit' button the Recruiting Workflow Monitor will appear on your screen and show the current status of the recruit.



An e-mail will automatically be sent to the first person that needs to approve the recruit action.

Creating a Personnel Action Request (PAR)

A Personnel Action Request (PAR) is a 52 that pertains to an individual already employed by the agency. Examples of PAR actions would be Promotions, Separations, and Extensions etc.

Step 1: Navigate to the Supervisor Request Page

Path to create a new PAR action:
Workforce Administration > Job Information > Supervisor Request USF

Step 2: Find the Employees Record

Enter the Search Criteria for the employee that you want to take action on. This could be EmplID, Last Name, First Name (with no space between the comma and the First Name), etc.

Click **Search**

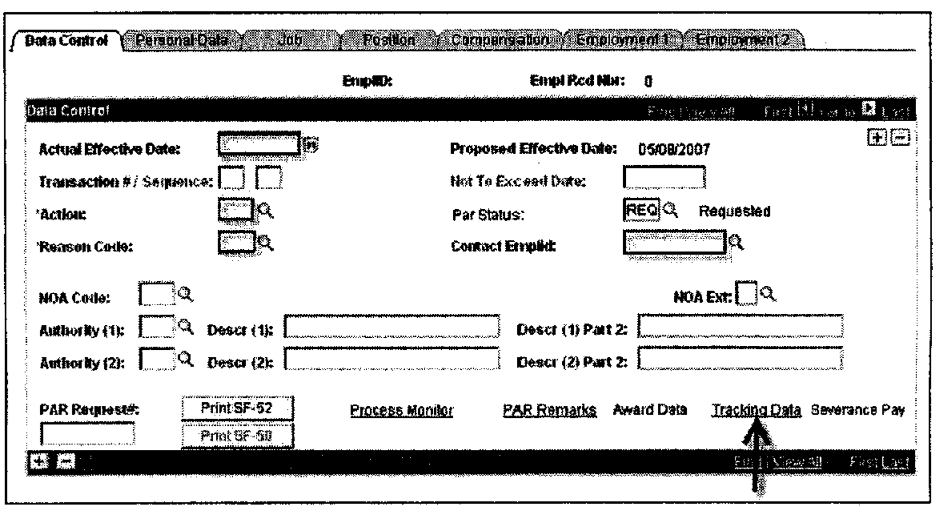
Step 3: Enter PAR Action

Click the + on the right hand side of the screen to add a new request

The following fields MUST be entered

- Actual Effective Date
- Action
- Reason Code
- Contact Employee ID (the supervisor's EmplId)
- Par Status will default to REQ
- Click on Tracking Data to enter comments

Note: A list of valid action and reason codes are in Appendix B.



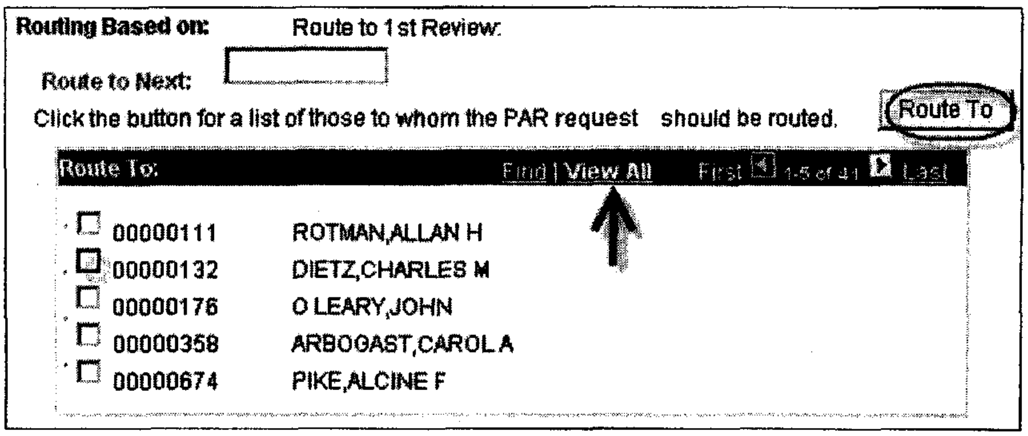
The tracking data page logs who has approved the action and when it was approved. Each user will receive a comment line by their name. The comment box is limited to 80 characters.

After you enter your comments, click **OK**. It will take you back to the data control page of the action.

Click **Save**.

Step 4: Route Your PAR Action

This takes you to the Routing page.



Click the **Route To** button and you will see a list of people that are available for routing the action to. The options are listed 5 at a time. If the person you are looking for doesn't appear

Click **View All** and you will see all available options.

Click the box next to the Name of the person you wish to route the action to. Wait for the screen to refresh then click **OK**.

At this point your action has been sent and you can **Sign Out** of Capital HR.

Accessing Actions

You will receive an e-mail once an action is ready for your review. As a workflow user you have two options in how to reach actions for review.

Option 1
You can click on the hyperlink in the e-mail you receive and log into Capital HR. You will need your login ID and password.

> Subject: Approval is Requested for Job Opening (47570) SECRETARY
> A Job Opening has been entered which requires your attention.
> Job Opening ID: 47570
> Posting Title: SECRETARY
> To view this Job Opening, visit:
> https://boa.cit.nih.gov/psp/chrprd89/EMPLOYEE/HRMS/c/HRS_HRPM.HRS_JOB_OPENING.GBL?Action=U&HRS_JOB_OPENING_ID=47570

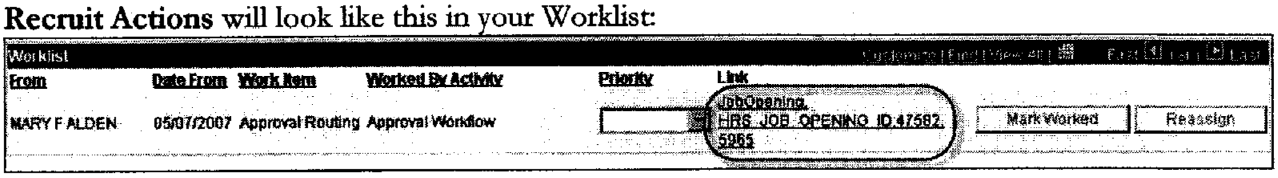
Note: The display above is for the training database and is only an example of what an e-mail will look like for recruit actions

Option 2
Accessing the action via your worklist, you will need your login ID and password.

After logging into Capital HR, click on Worklist:

You will see the actions in your Worklist: Click on the Link of the action to be reviewed, the system will bring you into the action to review it.

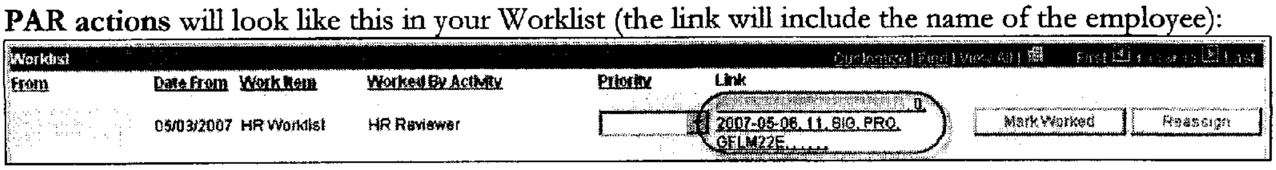
Recruit Actions will look like this in your Worklist:



Note: You will be able to modify these fields in a recruit action

- Position Number
- Job Code
- Remarks
- Comments (Authorization Comments)

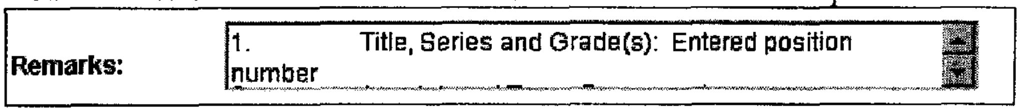
PAR actions will look like this in your Worklist (the link will include the name of the employee):



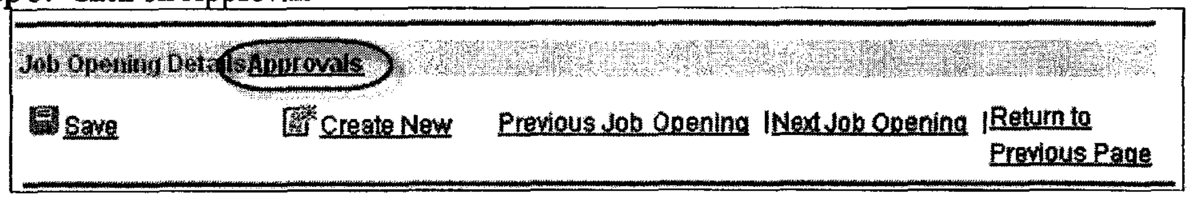
1st Authorizing a Recruit Action (Requisition)

Step 1: Review the action

Step 2: Enter any additional comments in the Remarks section. Be sure that you review the Remarks. You will need to use the scroll bar to be able to read all of the required remarks.

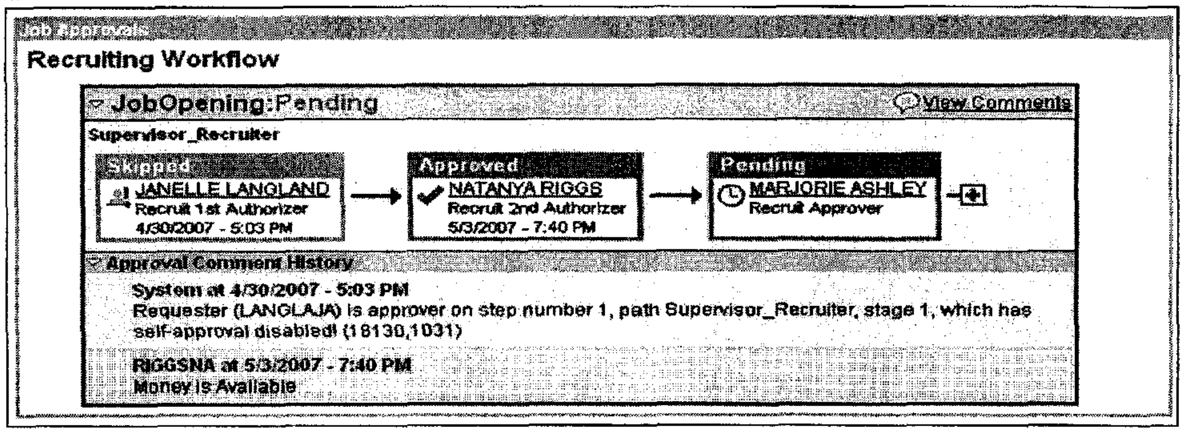


Step 3: Click on Approvals



Step 4: Click on Approve

Once you approve the action your window will look like this and show the current status of the recruit action.



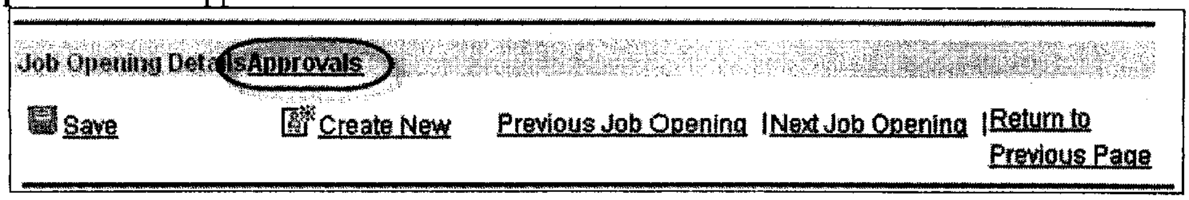
Note: When you Approve an action an e-mail will automatically be sent to the next person to approve the action.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Denying a Recruit Action (Requisition)

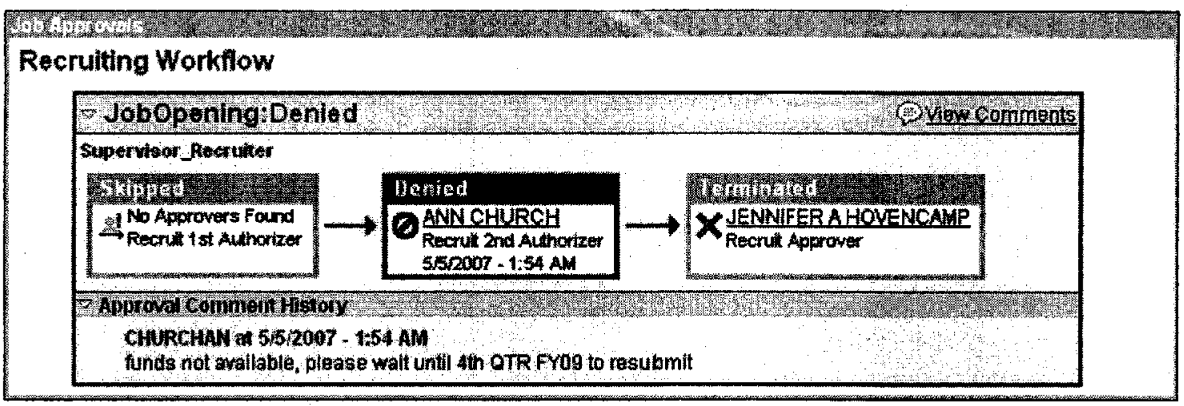
Step 1: Review the action

Step 2: Click on Approvals



Step 3: Complete the Comments box. This is **required** to ensure the Requestor knows why the recruit action is being returned.

Step 4: Click on Deny and the action status should display as such:



Note: When you Deny an action the Requestor receives an e-mail letting them know that it's been denied.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

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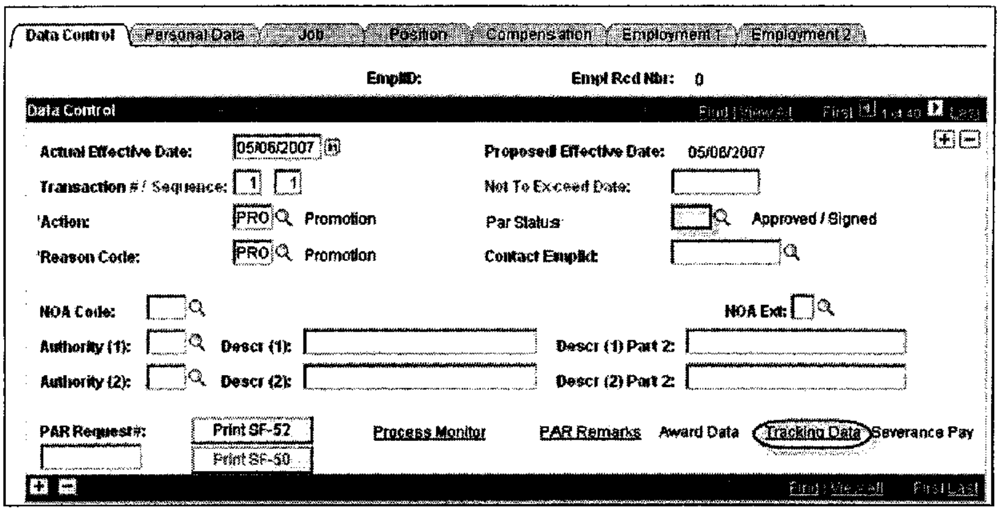
1st Authorizing a PAR Action



Step 1: Review the action

Step 2: Type '1ST' in the Par Status field

Step 3: If you have comments to add or want to review the routing history click Tracking Data

Note: The Tracking Data page logs who has approved the action and when it was approved. You can enter comments on this page. Each user will receive a comment line next to their name and it is limited to 80 characters.

Step 4: Click OK

Step 5: Click Save. This will automatically bring up the Routing Screen.

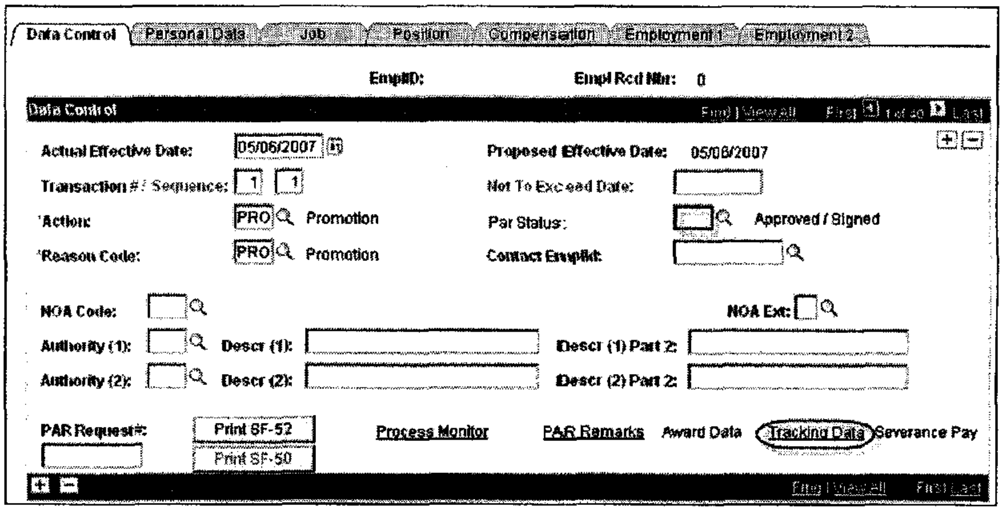
Step 6: Click the Route To button and it will show a list of people you can route the action to. The options are listed 5 at a time. If you don't see the person you need to route the action to click View All, and it will show all available options.

Step 7: Click the box next to the Name of the person you wish to route to.

Step 8: Wait for the screen to refresh then click OK. At this point your action has been sent and you can now Sign Out of Capital HR.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Returning a PAR Action



Step 1: Review the action

Step 2: Type 'RET' in the Par Status data field.

Step 3: Click Tracking Data and complete the Comments box. This is **required** to ensure the Requestor knows why the PAR action is being returned. Comments are limited to 80 characters.

Step 4: Click OK

Step 5: Click Save.

Note: When you Deny an action you need to **notify the Requestor** via the Notify feature.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Accessing Actions

You will receive an e-mail once an action is ready for your review. As a workflow user you have two options in how to reach actions for review.

Option 1
You can click on the hyperlink in the e-mail you receive and log into Capital HR. You will need your login ID and password.

> Subject: Approval is Requested for Job Opening (47570) SECRETARY
> A Job Opening has been entered which requires your attention.
> Job Opening ID: 47570
> Posting Title: SECRETARY
> To view this Job Opening, visit:
> https://boa.cit.nih.gov/psp/chrprd89/EMPLOYEE/HRMS/c/HRS_HRPM.HRS_JOB_OPENING.GBL?Action=U&HRS_JOB_OPENING_ID=47570

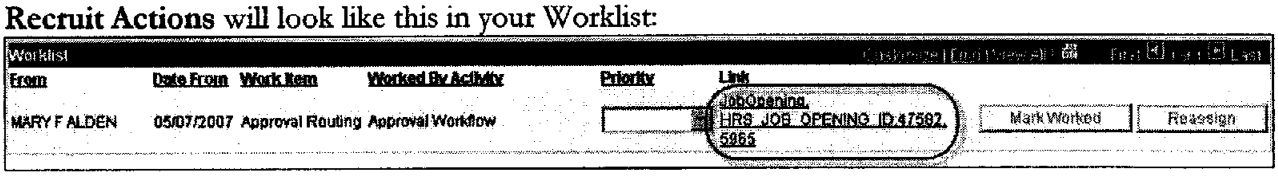
Note: The display above is for the training database and is only an example of what an e-mail will look like for recruit actions

Option 2
Accessing the action via your worklist, you will need your login ID and password.

After logging into Capital HR, click on Worklist:

You will see the actions in your Worklist: Click on the Link of the action to be reviewed, the system will bring you into the action to review it.

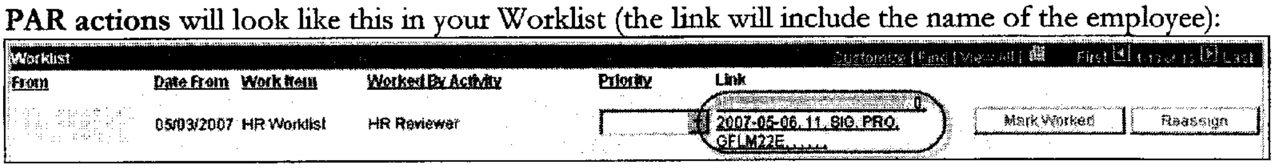
Recruit Actions will look like this in your Worklist:



Note: You will be able to modify these fields in a recruit action

- Position Number
- Job Code
- Remarks
- Comments (Authorization Comments)

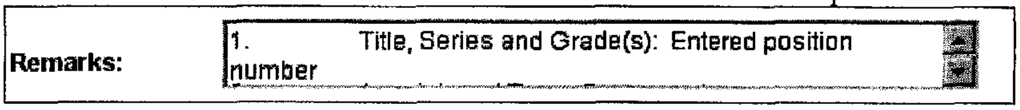
PAR actions will look like this in your Worklist (the link will include the name of the employee):



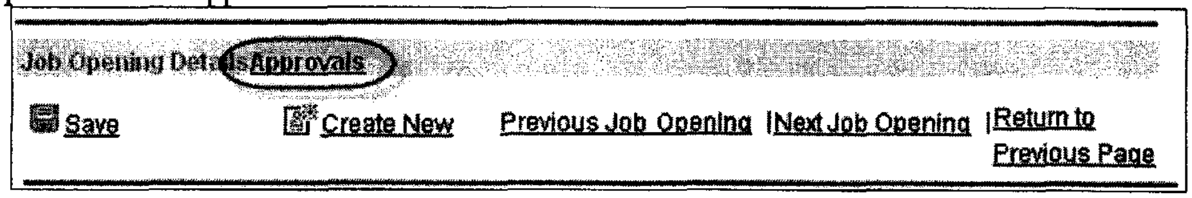
2nd Authorizing a Recruit Action (Requisition)

Step 1: Review the action

Step 2: Enter any additional comments in the Remarks section. Be sure that you review the Remarks. You will need to use the scroll bar to be able to read all of the required remarks.

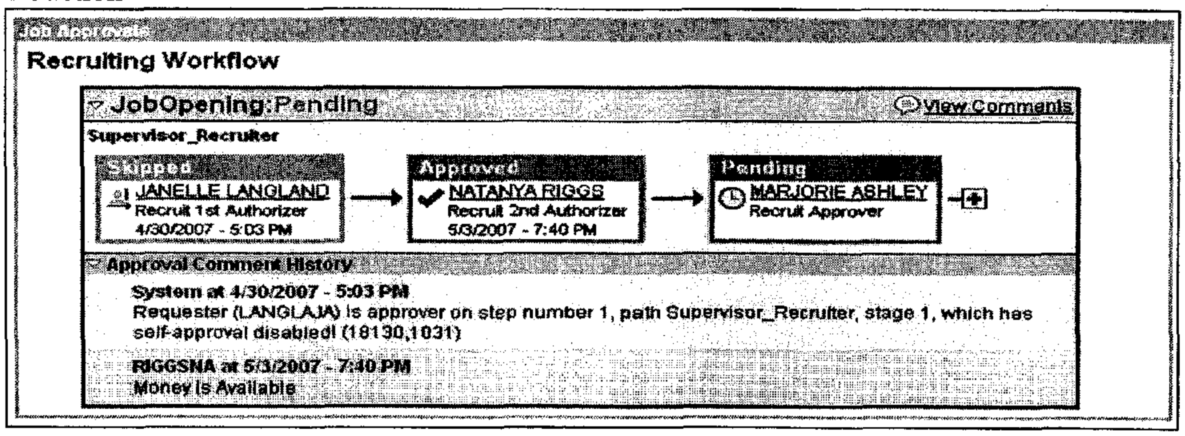


Step 3: Click on Approvals



Step 4: Click on Approve

Once you approve the action your window will look like this and show the current status of the recruit action.



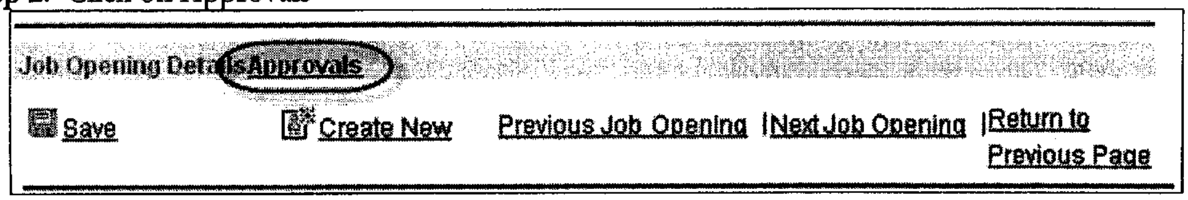
Note: When you Approve an action an e-mail will automatically be sent to the next person to approve the action.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Denying a Recruit Action (Requisition)

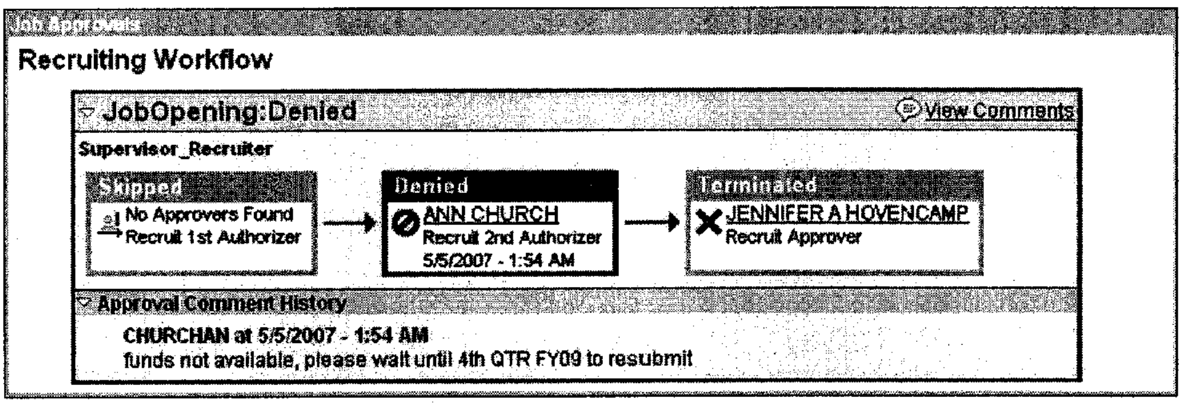
Step 1: Review the action

Step 2: Click on Approvals



Step 3: Complete the Comments box. This is **required** to ensure the Requestor knows why the recruit action is being returned.

Step 4: Click on Deny and the action status should display as such:



Note: When you Deny an action the Requestor receives an e-mail letting them know that it's been denied.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

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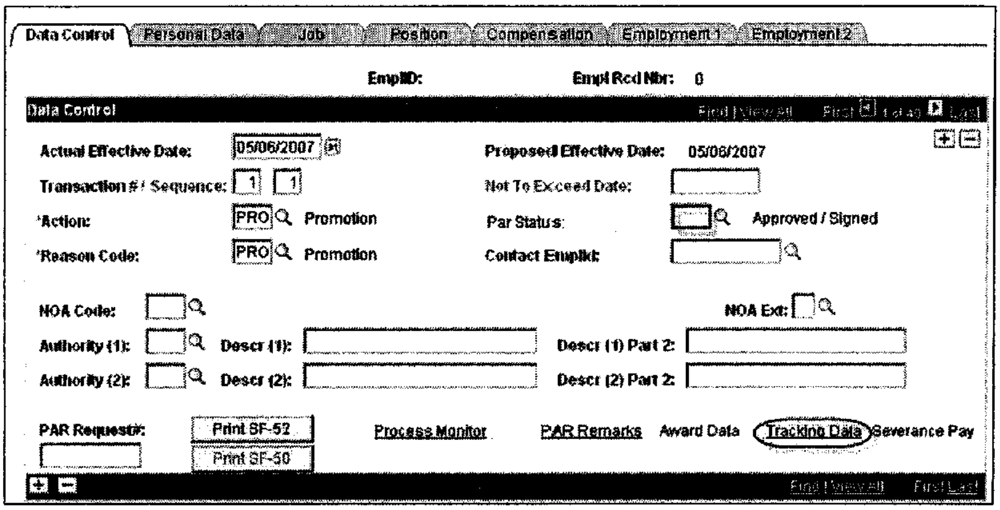
2nd Authorizing a PAR Action



Step 1: Review the action

Step 2: Type '2nd' in the Par Status field

Step 3: If you have comments to add or want to review the routing history click Tracking Data

Note: The Tracking Data page logs who has approved the action and when it was approved. You can enter comments on this page. Each user will receive a comment line next to their name and it is limited to 80 characters.

Step 4: Click OK

Step 5: Click Save. This will automatically bring up the Routing Screen.

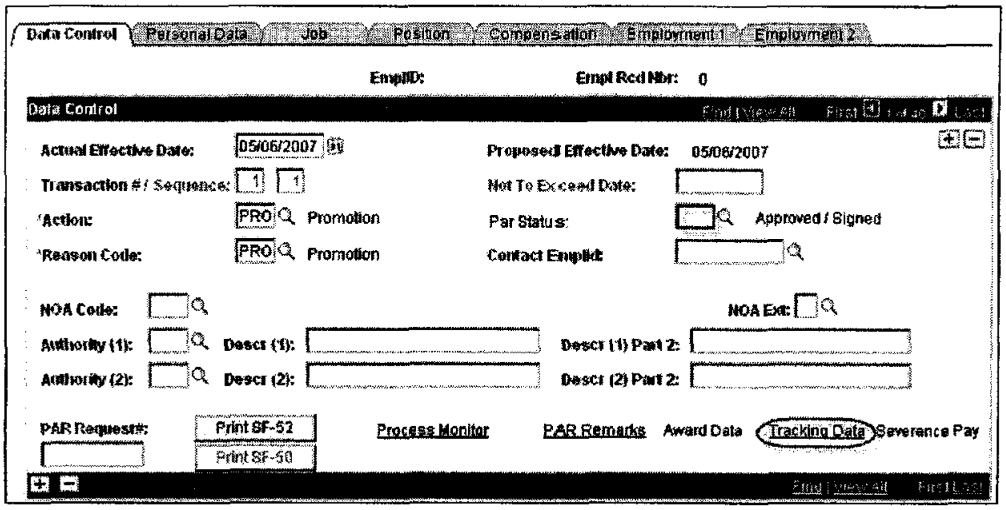
Step 6: Click the Route To button and it will show a list of people you can route the action to. The options are listed 5 at a time. If you don't see the person you need to route the action to click View All, and it will show all available options.

Step 7: Click the box next to the Name of the person you wish to route to.

Step 8: Wait for the screen to refresh then click OK. At this point your action has been sent and you can now Sign Out of Capital HR.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Returning a PAR Action



Step 1: Review the action

Step 2: Type 'RET' in the Par Status data field.

Step 3: Click Tracking Data and complete the Comments box. This is **required** to ensure the Requestor knows why the PAR action is being returned. Comments are limited to 80 characters.

Step 4: Click OK

Step 5: Click Save.

Note: When you Deny an action you need to **notify the Requestor** via the Notify feature.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Accessing Actions

You will receive an e-mail once an action is ready for your review. As a workflow user you have two options in how to reach actions for review.

Option 1
You can click on the hyperlink in the e-mail you receive and log into Capital HR. You will need your login ID and password.

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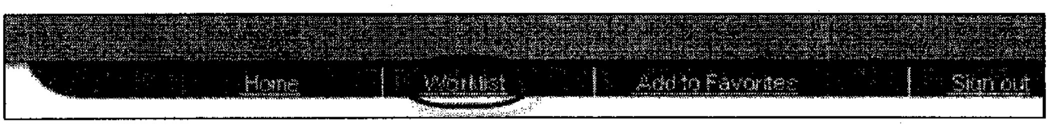
> A Job Opening has been entered which requires your attention.
> Job Opening ID: 47570
> Posting Title: SECRETARY
> To view this Job Opening, visit:
> https://boa.cit.nih.gov/psp/chrprd89/EMPLOYEE/HRMS/c/HRS_HRPM.HRS_JOB_OPENING.GBL?Action=U&HRS_JOB_OPENING_ID=47570

Note: The display above is for the training database and is only an example of what an e-mail will look like for recruit actions.

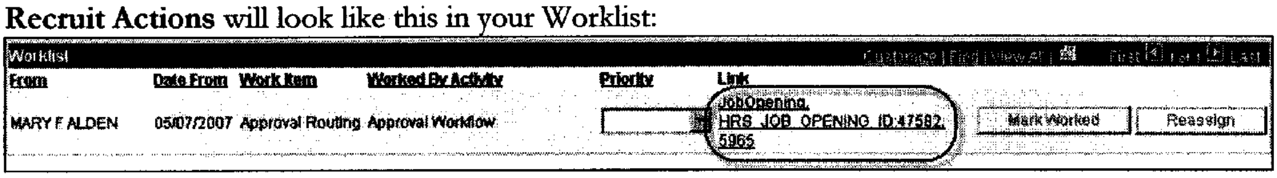
Option 2
Accessing the action via your worklist, you will need your login ID and password.

After logging into Capital HR, click on Worklist:



You will see the actions in your Worklist: Click on the Link of the action to be reviewed, the system will bring you into the action to review it.

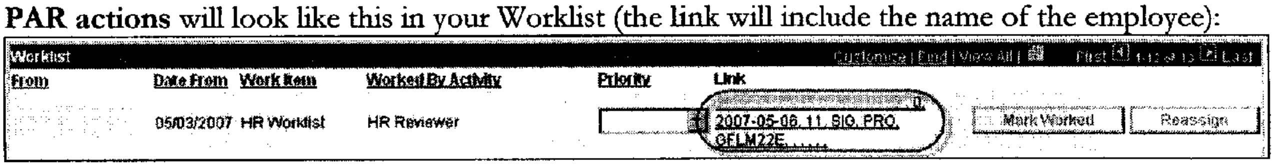
Recruit Actions will look like this in your Worklist:



Note: You will be able to modify these fields in a recruit action

- Position Number
- Job Code
- Remarks
- Comments (Authorization Comments)

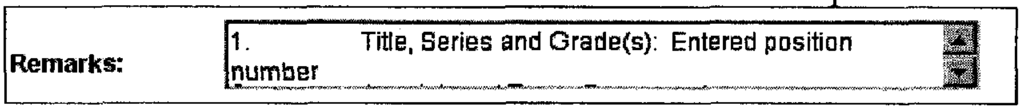
PAR actions will look like this in your Worklist (the link will include the name of the employee):



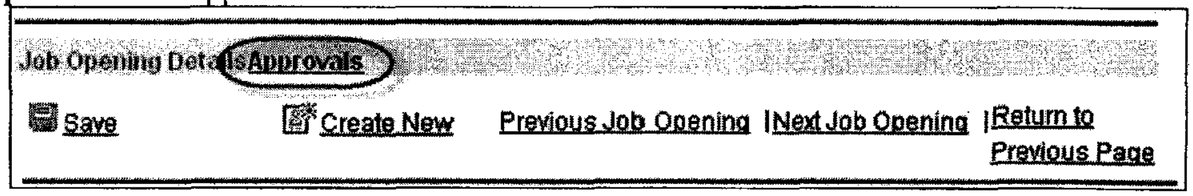
Approving a Recruit Action (Requisition)

Step 1: Review the action

Step 2: Enter any additional comments in the Remarks section. Be sure that you review the Remarks. You will need to use the scroll bar to be able to read all of the required remarks.

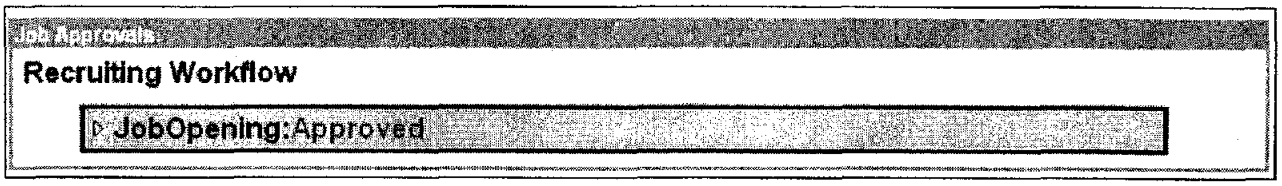


Step 3: Click on Approvals



Step 4: Click on 

Once you approve the action your window will look like this and show the current status of the recruit action.



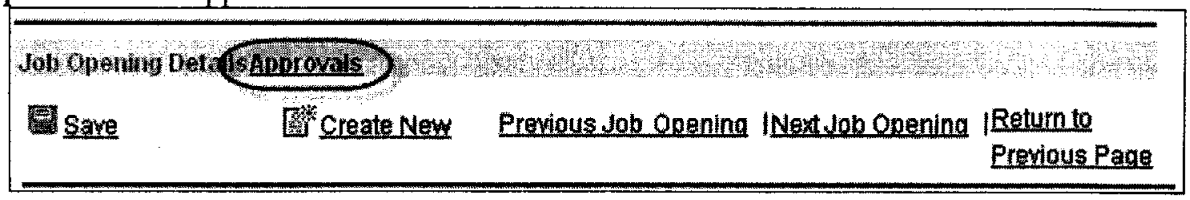
Note: When you Approve an action an e-mail will automatically be sent to the Requestor notifying them that the recruit has been approved.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Denying a Recruit Action (Requisition)

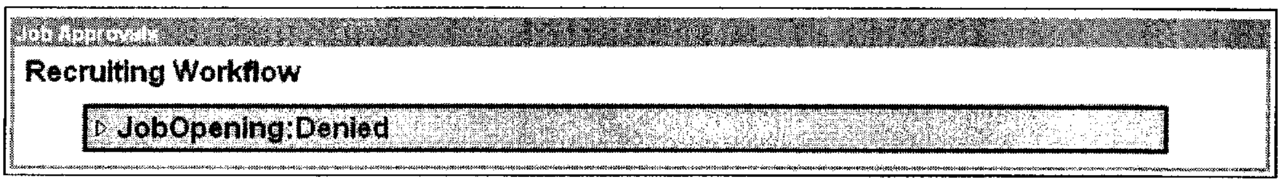
Step 1: Review the action

Step 2: Click on Approvals



Step 3: Complete the Comments box. This is **required** to ensure the Requestor knows why the recruit action is being returned.

Step 4: Click on Deny and the action status should display as such:

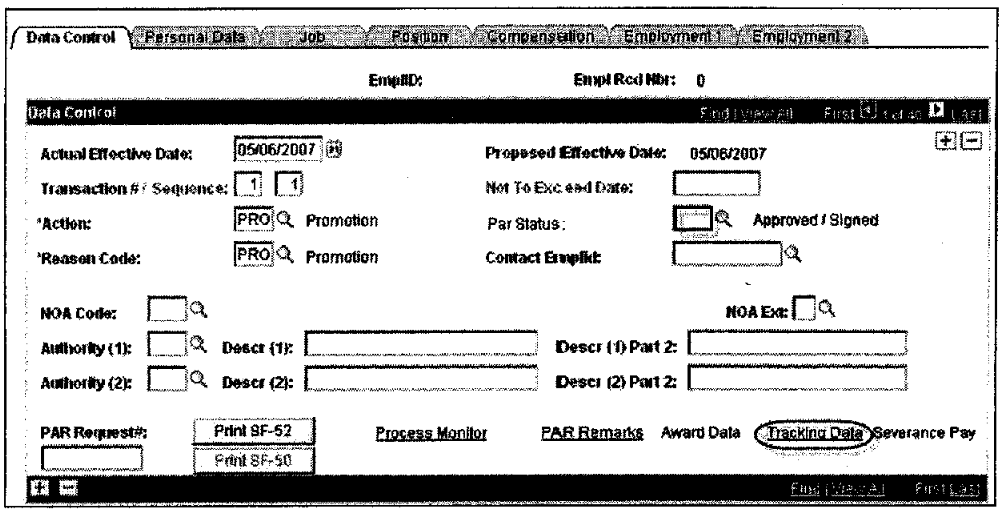


Note: When you Deny an action the Requestor receives an e-mail letting them know that it's been denied.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

This page intentionally left blank.

Approving a PAR Action



Step 1: Review the action

Step 2: Type 'SIG' in the Par Status field

Step 3: If you have comments to add or want to review the routing history click Tracking Data

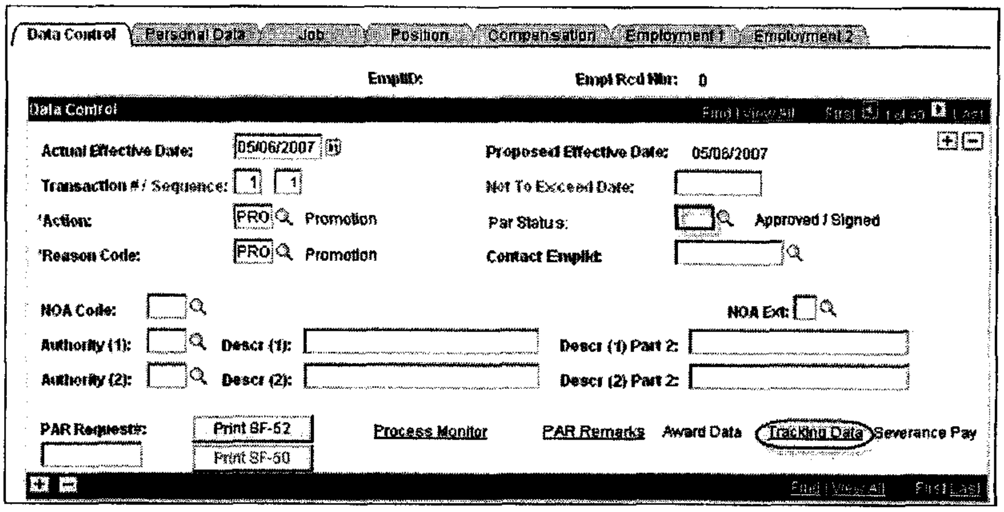
Note: The Tracking Data page logs who has approved the action and when it was approved. You can enter comments on this page. Each user will receive a comment line next to their name and it is limited to 80 characters.

Step 4: Click OK

Step 5: Click Save. This automatically routes the action to HR for processing.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

Returning a PAR Action



Step 1: Review the action

Step 2: Your options to select from and enter into the Par Status data field are:

DIS (Disapproved)
RET (Returned)
WTH (Withdrawn)

Step 3: Click Tracking Data and complete the Comments box. This is **required** to ensure the Requestor knows why the PAR action is being returned. Comments are limited to 80 characters.

Step 4: Click OK

Step 5: Click Save.

Note: When you Deny an action you need to **notify the Requestor** via the Notify feature.

To return to your worklist and review more actions, click Worklist at the top of your screen in the blue menu bar.

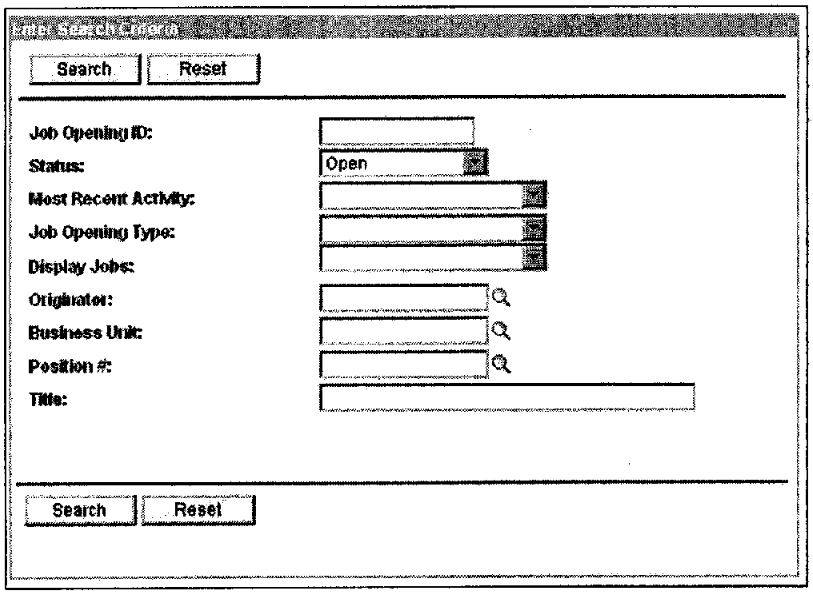
Finding Job Openings (Requisitions)

Step 1: Navigate to the Supervisor Request Page

Path to find an existing recruit action:
Recruiting > Find Job Openings

Step 2: Search Criteria

There are several ways to look up a recruit action that has been entered into Capital HR.



Job Opening ID: Enter the Recruit # if known, otherwise use the search tools available below. You may also get this number from the Requestor/originator of the action.

Status: Options are Canceled, Closed, Denied, Draft, Hold, Open, and Pending

Note: Actions that haven't completed the approval process have a Pending Status. Once an action has completed the approval process it's in an Open Status.

Note: The system defaults this field to 'Open'. You may select a different option or change it to "blank". If you change the drop down box "blank" then your results will show actions in all the listed "statuses" and you will see more actions.

Most Recent Activity: Options are Active within Last 2 Weeks, Active within Last 3 Days, Active within Last Month, Active within Last Week, Active within Last Year, Active within Today, Active within View All, and Active within Yesterday

Job Opening Type: Standard Requisition

Display Jobs: Options are All Jobs, Job Assigned to me, Job Associated to me, and Job Created by me

Originator: You can use the feature to identify a particular individual that would have created the action.

Business Unit: Indian Health Service = IHS00

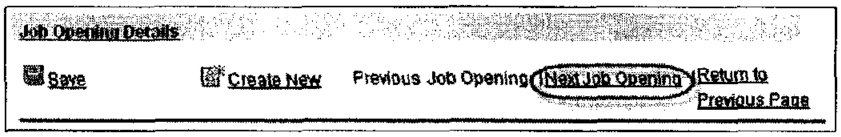
Position #: You can use the feature to identify the specific Position Number that you're looking for.

Title: You can search for actions using the title of a position.

Note: The Reset button clears all data fields on this page.

Once you've entered your search criteria click on **Search** to view actions that meet your criteria.

To scroll through more than one action, select the **Next Job Opening** hyperlink at the bottom of the screen.



Using the Notify/E-Mail Feature for PAR Actions

On the PAR Data Control page you have an opportunity to Notify person(s) that an action has been initiated and is ready for approval or is finished.

Step 1: Navigating to the Notify Feature

Path to use the Notify Feature:
Workforce Administration > Job Information > Supervisor Request USF

Step 2: Find the Employee

Enter the Search Criteria for the employee that you want to take action on. This could be EmplID, Last Name, First Name (with no space between the comma and the First Name), etc.

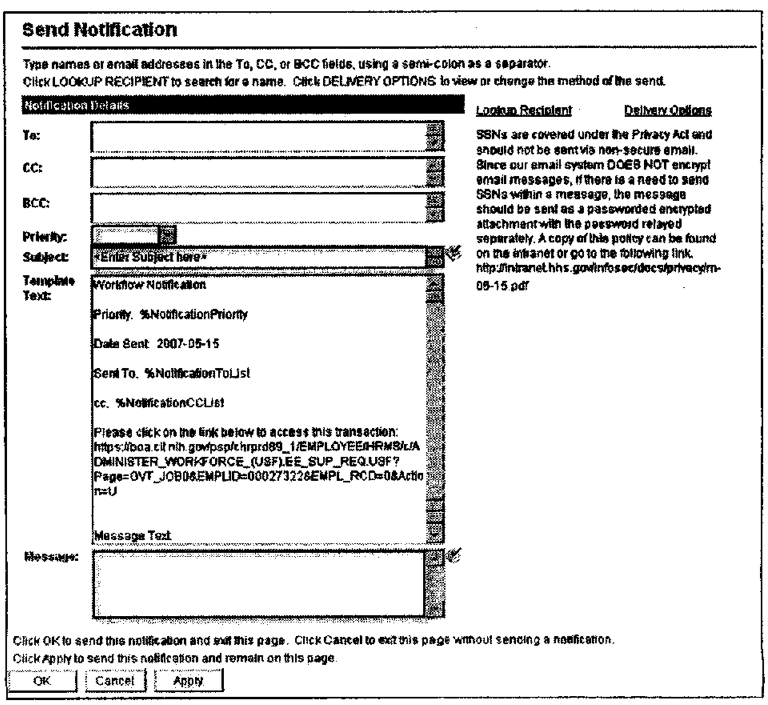
Click **Search**

Step 3: Using the Notify Feature

Click the Notify button located at the bottom of the screen

You need to complete the following fields on the notification page:

- **Priority**: Select High, Medium or Low
- **Subject**: Enter the subject of your notification
- **Message**: Enter information about your notification

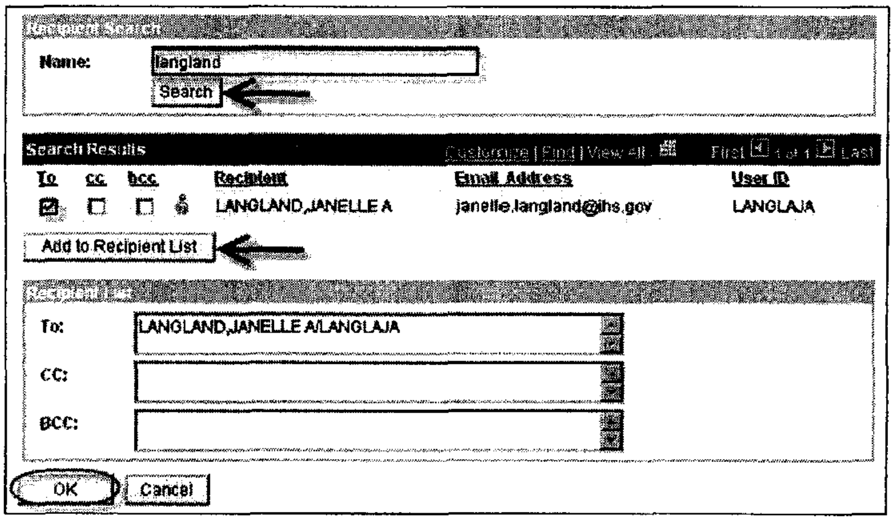


Step 4: Selecting Recipients

Click on the Lookup Recipient link

In the **Name** field enter the last name of the person that you want to notify. If the person that you want to notify isn't in the first 5 names listed click on **View All.**

Click **Search**



Click in the **To** box to the left of the name of the person that you want to notify.

Click **Add to Recipient List**. It will populate the Recipient List.

> Note: If you want to add names to **cc** and **bcc** you can follow the same steps starting with putting the recipient's last name in the Name field.

Click **OK** when you are finished adding your recipients.

Step 5: Sending your Notification

You have been returned to the Notification page. Verify that the information is complete and that there isn't any sensitive information in the notification.

Click **OK** to send your notification.

Reserved

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Automatic Actions

Automatic Actions should be reviewed each pay period.

Step 1: Navigational to the Automatic Actions Page

Navigational Path:
Home > Workforce Administration > Collective Processes > Within Grade Incr Notice USF

Step 2: Searching for Actions

You can search by Action Date, Automatic Action Type, Department, Empl Rcd Nbr, EmplId, and Name.

We suggest searching by EmplID due to the fact that all of the reports to position numbers have not been updated. Searching by EmplID will allow you to see particular automatic actions for each individual you choose.

Note: If the employee you review does not have an automatic action pending, for the type of action you chose, "No matching values were found" will appear below the Search button.

The different types of automatic actions that you can search for are:

Career Cond. TC Exceptions	SES Probation Termination
Career Cond. Tenure Conversion	Standard Probation Termination
Career TC Exception	Super. Probation Termination
Career Tenure Conversion	WGI Postponed or Denied
Manual WGI	WGI W/O Min. Performance
Retro-Active WGI	Within Grade Increase

There are 4 different types of WGI automatic actions, and their explanations are as follows

1. Within Grade Increase – These employees will receive an automatic WGI within 60 days.
2. Manual WGI – You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
3. Retroactive WGI – These employees have a WGI Status of *Waiting*, but were due a WGI in a previous pay period.
4. WGI W/O Min. Performance – These employees have an Overall Review Rating below *Satisfactory* or don't have a review within the last fifteen months.

If a **WGI is being denied by a supervisor**; the supervisor would enter a PAR to Deny the WGI. The **action code is DTA**, the **reason code is PRA**, and the **NOA code is 888**

If the supervisor approves the WGI, and the employee received a Fully Successful rating on their PMAP, the WGI will be processed automatically without the supervisor taking any action.

Printing With a Push Button

The following steps will show you how to print a Notification of Personnel Action, SF-50 or Request for Personnel Action, SF-52 using the push buttons on the **Data Control** page of the employee's record.

An SF-52 should be printed after the PAR has completed the approval process. An action isn't official until after it's been processed by Human Resources. You have the option to print the SF-52 but this is typically done by Human Resources so they can process the action.

An SF-50 should be printed after Human Resources have processed the action. This is the official notification that the action has been processed. This is the document that you will print the majority of the time for your records.

Step 1: Navigate to the Supervisor Request Page

Path to print an SF-50 or SF-52:
Workforce Administration > Job Information > Supervisor Request USF

Step 2: Find the Employees Record

Enter the Search Criteria for the employee that you want to print the action on. This could be EmplID, Last Name, First Name (with no space between the comma and the First Name), etc.

Click the box to **Include History** and then click **Search**

Step 3: Printing the Action

Locate the action that you want to print. If the action isn't the top row (the first action that you see when you get into the employee's record) click on **View All to** locate it.

Click the Print SF-50 or the Print SF-52 button, select document you want to print.

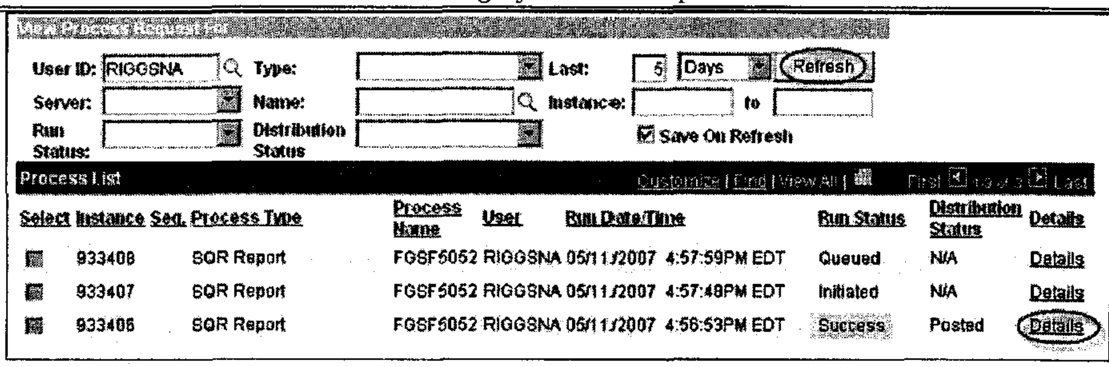
On the **Print Parameters** page click **OK**

Note: When you print an SF-52 you will get a message that says, "SF52 now posting to the Report Manager. (0,0)". When you get this message click **OK**.

Step 4: The Process Monitor

On the Data Control page of the employees record click Process Monitor.

Click the **Refresh** button until the **Run Status** says **Success**. You may need to do this several times until the run status shows Success.



View Process Request For

User ID: RIGGSNA Type: Last: 5 Days Refresh
Server: Name: Instance: to
Run Status: Distribution Status Save On Refresh

Process List

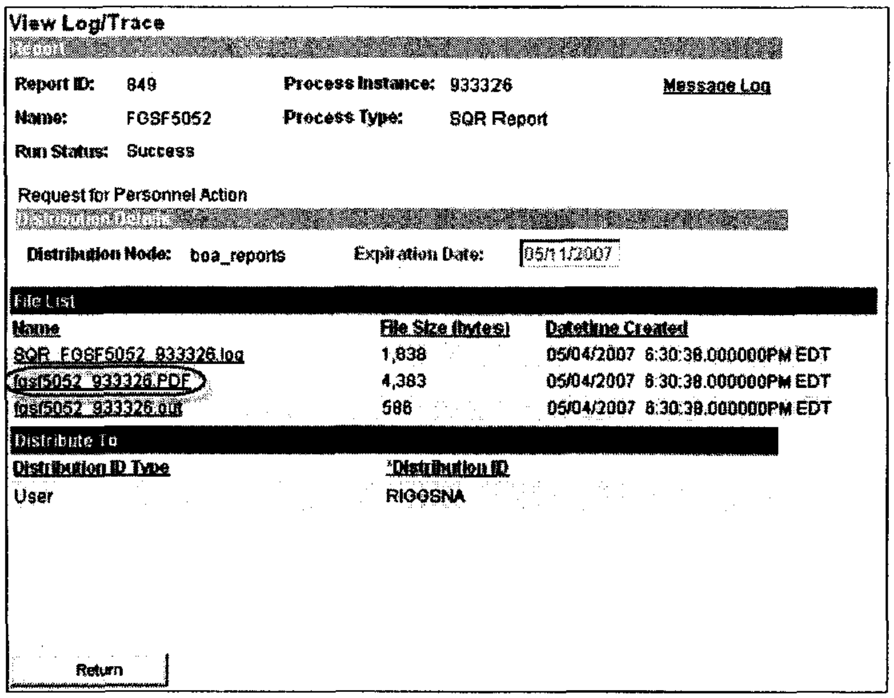
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
	933408		SQR Report	FGSF5052	RIGGSNA	05/11/2007 4:57:59PM EDT	Queued	N/A	Details
	933407		SQR Report	FGSF5052	RIGGSNA	05/11/2007 4:57:48PM EDT	Initiated	N/A	Details
	933406		SQR Report	FGSF5052	RIGGSNA	05/11/2007 4:56:53PM EDT	Success	Posted	Details

Once the Run status says Success click the Details Link.

Step 5: Printing the Action

On the **Process Detail** page click the View Log/Trace hyperlink.

When the **View Log/Trace** page opens click the **.PDF** link.



View Log/Trace

Report

Report ID: 849 Process Instance: 933326 Message Log
Name: FGSF5052 Process Type: SQR Report
Run Status: Success

Request for Personnel Action

Distribution Details

Distribution Node: boa_reports Expiration Date: 05/11/2007

File List

Name	File Size (bytes)	Datetime Created
SQR_FGSF5052_933326.log	1,838	05/04/2007 6:30:38.000000PM EDT
fgsf5052_933326.PDF	4,383	05/04/2007 6:30:38.000000PM EDT
fgsf5052_933326.out	586	05/04/2007 6:30:38.000000PM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	RIGGSNA

Return

The SF50 or SF52 will open in an Adobe Acrobat document. Click the in the adobe toolbar to print the SF50 or SF52.

Step 6: Returning to the Employee's Record

Once the action is printed you can out of the Adobe Acrobat window that's open.

In Capital HR click the Return button. In the next window click the Cancel button.

Click on Go back to Supervisor Request USF to return to the Supervisor Request USF search page.

Queries

There are many uses for running Queries. They can be used to track data, find the status of actions, and for organizational planning. You can view the many queries available by following the steps outlined below.

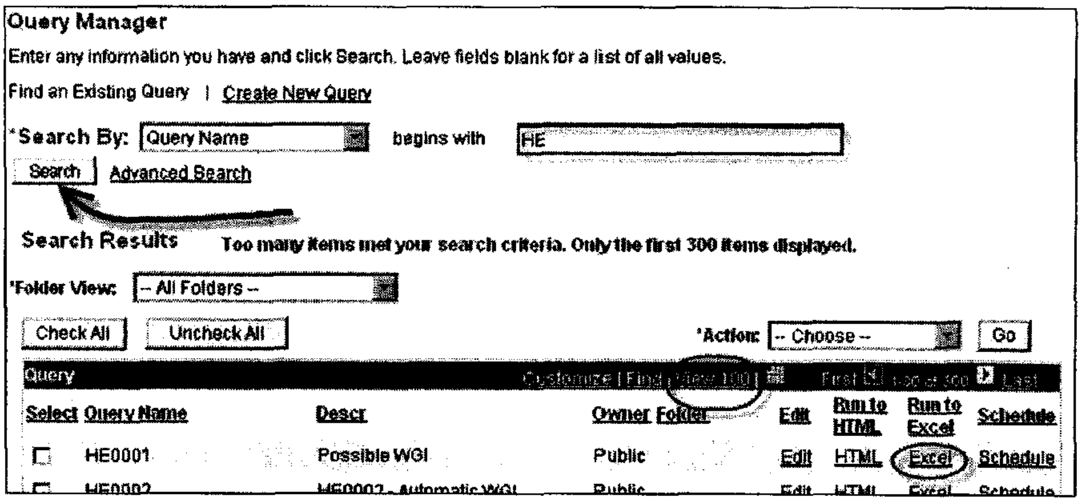
Step 1: Navigate to the Query Manager

Path to run a query:
Reporting > Query > Query Manager

Step 2: Search for Query to Run

Type in 'HE' and click on **Search**. If you know what the name of the query you'd like to run type it in the box rather than HE.

Note: Capital HR provides access to "Public Queries" as a form of reporting. All queries specifically made for HHS begin with **HE.**



You can click on **View 100** to search through 100 queries at a time rather than 30.

Once you locate the Query you want to run click on **Excel** and it will generate the query results in an Excel document for you to review.

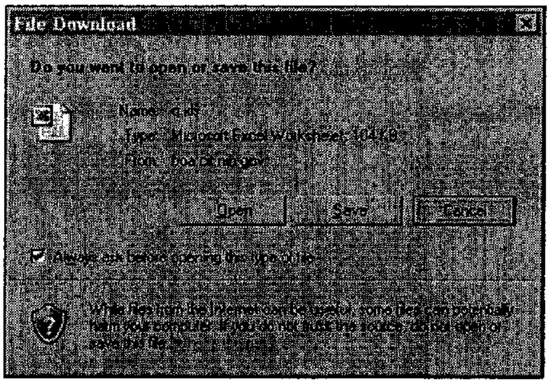
Step 3: Running the Query

Enter parameters to apply to your query: Common parameters data requirements include:
Business ID: IHS00
DeptId: Enter the appropriate Admin or SAC code (enter % for all within your row security)

Once you've entered the parameter data click View Results.

Step 4: Saving Your Query

At this prompt you can save the Query to your documents for further review and filtering.



Step 5: Adding a Frequently Used Query to Your Favorites

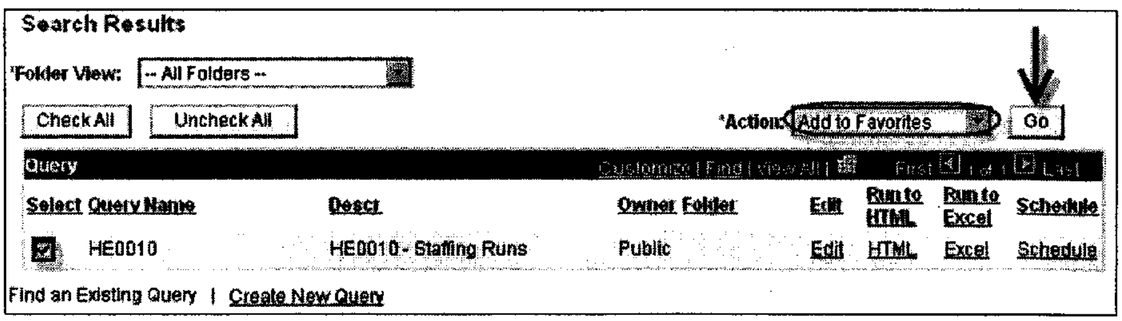
If this is a Query that you run often you can add it to your favorites.

Select the Query you'd like to add by clicking the box to the left of the Query

Click on the '**Action**' drop down menu

Click on '**Add to Favorites**'

Click on Go



Next time you run a query the search page will show your favorite queries.

Note: If you need a query that is not listed contact your HR Specialist and they will submit a request to the Program Support Center to have a public query created or to have a one-time use query generated that meets your business needs.

Appendix A - Finding the Position Number of an Employee

When entering a requisition for recruitment on an established position, you need to enter the position number of the previous incumbent. The Position Number is a system generated number from Capital HR that uniquely identifies a duty location and position. Each employee has a unique position number.

Note: The Position Number does not equal the Position Description identifier. There are four methods for locating and identifying the 8 digit position number.

Step 1: Navigate to the Supervisor Request Page

Path to view the Supervisor Request Page:
Workforce Administration > Job Information > Supervisor Request USF

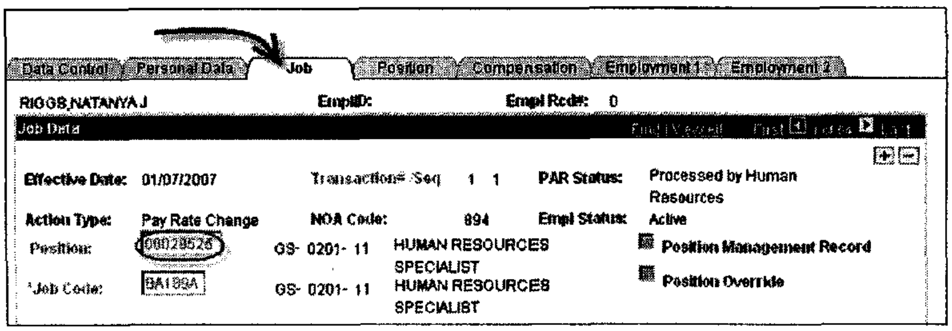
Step 2: Find the Employees Record

Enter the Search Criteria for the employee that you want to take action on. This could be EmplID, Last Name, First Name (with no space between the comma and the First Name), etc.

Click **Search**

Step 3: Locating the Position Number

Click the **Job** tab in the employee's record and you can see the position number on the left-hand side of the screen. This is the position number that the employee most recently encumbered. You will need to enter this in your recruit request.



Alternate Route to Locating Position Number

Step 1: Navigate to the Personal Data Page

Path to view Personal Data:
Workforce Administration > Job Information > Review Job Information > Personal Data USF

Step 2: Find the Employees Record

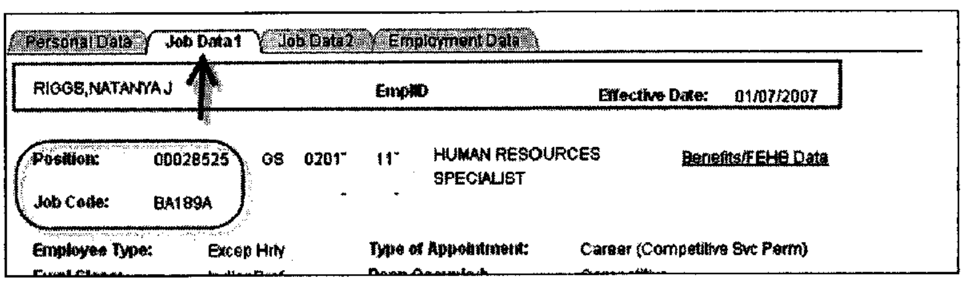
Enter the Search Criteria for the employee that you want to take action on. This could be EmplID, Last Name, First Name (with no space between the comma and the First Name), etc.

Click **Search**

Step 3: Locating the Position Number

Click on **Job Data1** tab

The Job Code and Position information are located on this tab to the left side of the page.



Using the SF-50 to Locate the Position Number

You can locate the Capital HR Job Code and Position Number on the employee's Notification of Personnel Action, SF-50.

In **Block 15** the Capital HR Job Code is shown as "PD" and the Capital HR Position Number is shown as "Position."

FIRST ACTION	SECOND ACTION
5-A. Code: 840 / 5-B. Nature of Action: Individual Cash	6-A. Code / 6-B. Nature of Action
5-C. Code / 5-D. Legal Authority	6-C. Code / 6-D. Legal Authority
5-E. Code / 5-F. Legal Authority	6-E. Code / 6-F. Legal Authority
7. FROM: Position Title and Number HUMAN RESOURCES SPECIALIST (INFO SYSTEMS) PD: 000005 Position: 00107976	15. TO: Position Title and Number HUMAN RESOURCES SPECIALIST (INFO SYSTEMS) PD: 000005 Position: 00107976
8. Pay Plan: GS / 9. Occ. CD: 0201 / 10. Grd/Lvl: 13 / 11. Step/Rate: 07 / 12. Tot. Salary: $92,820.00 / 13. Pay Basis: PA	16. Pay Plan: GS / 17. Occ. CD: 0201 / 18. Grd/Lvl: 13 / 19. Step/Rate: 07 / 20. Tot. Salary/Award: $1,000.00 / 21. Pay Basis
12A. Basic Pay: $78,996.00 / 12B. Locality Adj.: $13,824.00 / 12C. Adj. Basic Pay: $92,820.00 / 12D. Other Pay: $0	20A. Basic Pay: $78,996.00 / 20B. Locality Adj.: $13,824.00 / 20C. Adj. Basic Pay: $92,820.00 / 20D. Other Pay: $0
14. Name and Location of Position's Organization Program Support Center Human Resources Centers Human Resources Center, Baltimore Strategic Programs Division WOODLAWN MD USA	22. Name and Location of Position's Organization Program Support Center Human Resources Centers Human Resources Center, Baltimore Strategic Programs Division WOODLAWN MD USA

Viewing the Position History

Step 1: Navigate to the Position History Page

Path to Position History page:
Organizational Development > Review Position/Budget Info > Position History

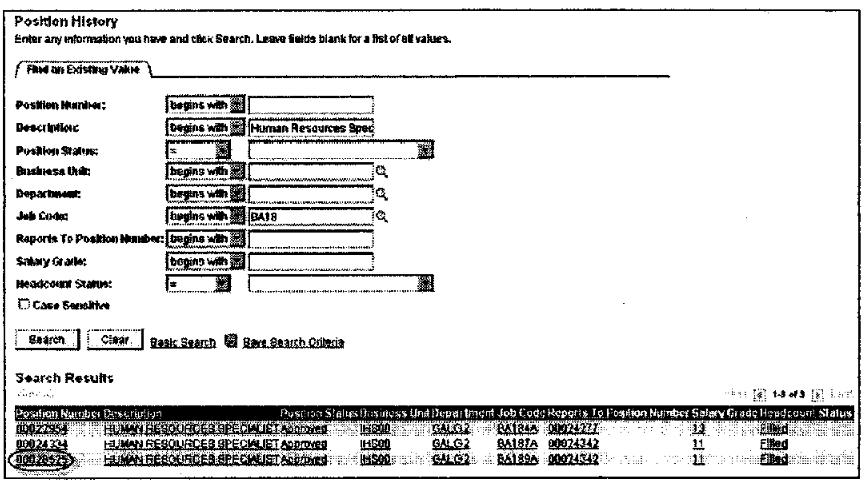
Step 2: Searching for the Position

There are several ways to find a position in Position History.

Position Number: Enter the Position Number
Description: Enter the title of the position
Position Status: Approved, Frozen, Proposed
Business Unit: IHS00
Department: Admin Code or SAC
Job Code: Enter the Job Code
Reports To Position Number: Enter the Position Number of the Supervisor
Salary Grade: Enter a value between 01 and 15
Headcount Status: Select Filled, Open, Overallocated, or Partially Filled

Note: If there is only one position associated with the Job Code the search results will take you directly to the Position information.

If there are multiple positions within a Job Code the search results screen will appear similar to the screen below. Each position number associated with the Job Code will be listed. Click on the first hyperlink under the Position Number column.



Click on "Current Incumbents." You can do this for each hyperlink on the Search Results screen until you find the position you are looking for.

Appendix B - Action and Reason Codes

Use the table below to determine the correct action code and reason code for the PAR action. The 3-character action code is the code entered in the **Action Code** field of the **Data Control** page. The next column provides a description of that abbreviated action code.

There may be a number of reason codes associated with one action code. The table also lists the 3-character reason code, which will be entered in the **Reason Code** field of the **Data Control** page. The final column provides a description of the reason codes. **It is critical for the manager to select the correct reason code to ensure HR processes the correct action.**

Action Code	Action Description	Reason Code	Reason Description
ADD		CON	Consultant
		EBM	Elected Board Member
		REP	Replacement of an Employee
		SEA	Seasonal Activity
ADL	Concurrent Appt	ADL	Additional Job
ASC	Int'l Assignment Completed	ASC	Assignment Completion
ASG	International Assignment	FEX	Foreign Expatriate Assignment
		FIN	Foreign Inpatriate Assignment
		FLA	Foreign Loan Assignment
		NAT	Third Country National
AWD	Award - Monetary	ESR	SES Rank Award
		IND	Individual Cash
		GRP	Group Cash
		SII	Individual Suggestion/Inventio
		SIG	Group Suggestion/Invention
		FOR	Foreign Language Award
		TSI	Travel Savings Incentive
		ESP	SES Performance Award
		AWD	Cash Award
		REF	Referral Bonus
		GSA	Gainsharing Award
		SUG	Suggestion Award
		INV	Invention Award
		SAS	Special Act or Service
AWH	Time Off Awards	TOI	Individual Time Off
		TOG	Group Time Off
BON	Bonus	REC	Recruitment Bonus
		REL	Relocation Bouns
		SEP	Separation Bonus

COM		BMC	Board Member Term Completed
		DEA	Death
		DIS	Disability
		EOA	End of Assignment
		INV	Involuntary
		RED	Staff Reduction
		RET	Retirement
		UNS	Unsatisfactory Performance
		VOL	Voluntary
DEM	Change to a lower grade	USP	Unsatisfactory Performance
		DEM	Change to a Lower Grade
DET	Detail	CRN	Career Enhancement
		DET	Detail
		EXT	Extension of Detail
		EDT	End of Detail
DTA	Data Change	CDP	Correction-Department
		CJC	Correction-Job Code
		CPR	Correction-Pay Rate
		RED	Redesignation
		STC	Status Change
		UKT	UK Tax Code Change
		PRA	Payroll Related Action
		DTA	Data Change
		WTW	Welfare toWork
		CON	Continuance Not to Exceed
		ERR	Exception to RIF – Release
		NCF	Name Change From
		CWS	Change in Work Schedule
		CHR	Change in Hours
		CDS	Change in Duty Station
		CDE	Change in Data Element
		CTG	Change in Tenure Group
		CSC	Change in Service Computation
		CVP	Change in Veteran's Preference
EXT	Extension of NTE date	EXT	Extension of NTE Date
		PRN	Promotion NTE
		LWN	Extension of LWOP NTE
		DTN	Extension of Detail NTE
		TAN	Term Appointment NTE

		APN	Appointment NTE
		SAN	SES Appointment NTE
		PCN	Extension of Position
			Change NTE
		FLN	Extension of Furlough
FSC	Family/Benefits change	DEA	Death
		DEP	Married Dependents
		DIV	Divorce
		MED	Medicare Entitlement
		FBC	Family/Benefit Change
HIR	Hire	HAF	Hired from Affiliate
		LNP	Loan from Parent Company
		NPS	New Position
		TMP	Temporary Assignment
		TRN	Trainee
		XFR	Transfer
		HIR	Hire
		CTE	Conversion to EHRP
INC	Incentive	REC	Recruitment Bonus
		REL	Relocation Bonus
		RET	Retention Bonus
JED		SSF	Split Shift
		TMP	Temporary Assignment
JRC	Job Reclassification	JRC	Job Reclassification
LOA	Leave without pay	EDU	Education
		FML	Family and Medical Leave Act
		HEA	Health Reasons
		MAT	Maternity/Paternity
		MIL	Military Service
		PTD	Partial/Total Disability
		USH	Unpaid Statutory Holiday
		LOA	Leave Without Pay
LOF	Furlough	RED	Staff Reduction
		SEA	Seasonal Closure
		SLO	Strike/Lock-out
		TMP	Temporary Closure
		LOF	Furlough
		RTD	Return to Duty
LTD	Long term disability with pay	LTD	Long Term Disability With Pay
LTO	Long term disability	LTO	Long Term Disability
PAY	Pay Rate Change	ADJ	Adjustment
		ATB	Across-The-Board
		CNV	Currency Conversion

		COL	Cost-of Living Adjustment
		MER	Merit
		OTH	Other
		PRO	Promotion
		REC	Job Reclassification
		SEN	Seniority Pay
		SPG	Step Progression
		XFR	Transfer
		PAY	Pay Rate Change
PLA	Leave without pay	LTD	Long-Term Disability
		MAT	Maternity/Paternity
		MIL	Military Service
		STD	Short-Term Disability
POS	Position Change	INA	Position Inactivated
		JRC	Job Re-Classification
		NEW	New Position
		REO	Re-Organization/Restructure
		STA	Position Status Change
		TTL	Title Change
		UPD	Position Data Update
		XFR	Transfer
		POS	Position Change
PRB	Probation	PRB	On Probation
PRC	Probation Completed	PRC	Probation Completed
PRO	Promotion	NCP	Normal Career Progression
		OPR	Outstanding Performance
		PRO	Promotion
		PRN	Promotion NTE
REC	Return from suspension or furlough	REC	Recall from Suspension/Layoff
REH	Rehire	REH	Rehire
RET	Retirement	CRE	Compulsory Retirement
		ERT	Early Retirement
		RAT	Retired from Affiliate
		RMT	Normal Retirement
		VRE	Voluntary Retirement
		RET	Retirement
RFD	Return from disability (LWP)	RFD	Return From Disability
RFL	Return from LWOP	AFC	Assignment Fully Completed
		RFL	Return From Leave
RNW	Replacement of an	REP	Replacement of an

	Employee		Employee
		SEA	Seasonal Activity
RWP	Retirement With Pay	RWP	Retirement With Pay
STD	Short term disability with pay	STD	Short Term Disability With Pay
STO	Short term disability	STO	Short Term Disability
SUS	Suspension	DAC	Disciplinary Action
		DSB	Disorderly Behavior
		ILA	Illegal Action
		SUS	Suspension
		RTD	Return to Duty
TER	Termination	ATC	Agreed Term. of Apprent of CDD
		ATT	Attendance
		CDE	Closing Down of Establishment
		CHI	Child/House Care
		CON	Misconduct
		DEA	Death
		DIS	Dishonesty
		DSC	Discharge
		EAB	Employer's Anticipated Breach
		EAC	End of Apprenticeship Contract
		EES	Dissatisfied w/Fellow Employee
		EFT	End of Fixed-Term Contract
		ELI	Elimination of Position
		EOD	End of Demand
		EPP	Employer's End Probation Time
		ERT	Early Retirement
		FAM	Family Reasons
		GMI	Gross Misconduct
		HEA	Health Reasons
		HRS	Dissatisfied with Hours
		ILL	Illness in Family
		INS	Insubordination
		JOB	Job Abandonment
		LOC	Dissatisfied with Location
		LTC	Legal Termination of Contract
		LVE	Failure to Return from Leave

		MAR	Marriage
		MIS	Misstatement on Application
		MUT	Mutual Consent
		OTP	Resignation-Other Position
		PAB	Payee's Anticipated Breach
		PAY	Dissatisfied with Pay
		PCD	Premises Closed
		PER	Personal Reasons
		POL	Dissatisfied w/Comp. Policies
		PPO	Pension Payee Off
		PPP	Payee's End Probation Time
		PRM	Dissatisfied w/Promotion Opps
		PTD	Partial/Total Disability
		RAT	Retired from Affiliate
		RED	Staff Reduction
		REF	Refused Transfer
		REL	Relocation
		RES	Resignation
		RET	Return to School
		RLS	Release
		RWU	Receivership or Wind-Up
		SUP	Dissatisfied with Supervision
		TAF	Transfer to Affiliate
		TAR	Tardiness
		TMP	End Temporary Employment
		TRA	Transportation Problems
		TYP	Dissatisfied w/Type of Work
		UFC	Unforeseen Circumstances
		UNS	Unsatisfactory Performance
		VIO	Violation of Rules
		VSP	Voluntary Separation Program
		WOR	Dissatisfied w/Work Conditions
		REM	Removal
		TER	Termination

		CFE	Conversion from EHRP
TWB	Terminated with benefits	TWB	Terminated With Benefits
TWP	Termination with pay	TWP	Termination With Pay
XFR	Reassignment/conversion	EER	Employee Request
		INT	Internal Recruitment
		MRR	Manager Request
		PRO	Promotion
		ROR	Reorganization
		TAF	Transfer to Affiliate
		CVR	Conversion
		XFR	Realignment

Glossary

Admin Code	Identifies the organizational element in which the employee is assigned. Also known as Department ID, DEPTID or SAC
Admin Code Description	Textual breakout of the Administrative Code, which Identifies the organizational element in which the employee is assigned.
Advertise at Grade(s)	Grade(s) advertised on the vacancy.
Appointment Duration	Type of appointment being advertised (Permanent, Term, Temporary, or Intermittent).
Area of Consideration	Area of consideration conveys the scope/size of the area (geographical or organizational) from which applicants can apply to an announcement. **Public** (Open to all U.S. Citizens) **Internal**(DHHS or IHS wide only) **Status** (Merit Promotion and Excepted Service Examining Plan) Current permanent federal employees, reinstatement eligibles, Indian preference and those eligible for special appointing authorities.
Business Unit	Indicates the HR Center that the action is associated with and for Indian Health Service the indicator = IHS00
CAN Code	Accounting identification number associated with appropriation under which funds have been allotted for a position.
Comment	Literal message AO's and HRS can use to for notes regarding this action.
Credit Check Required	Information forthcoming
Date Opened	Will default to today's date .
DE Name Request	Name of the person that a selecting official would be interested in considering for the position if advertising "Public" however the Indian Preference law will be applied to all vacancies.
Department ID	The Department ID is used to identify organizational components within HHS. The Department ID is what was formally known as the HHS Admin Code.
Capital HR	Capital HR System, previously known as *Capital HR*, is a web-based personnel management system that encompasses the following functional areas: Position Management, Personnel Action Request (PAR) Processing, Base Benefits and Pay Actions. It is driven by PeopleSoft technology.
Company	Peoplesoft term used to indicate Health and Human Services: HE
Data Row	Data rows contain the entries for each field in a table. To identify each data row uniquely, the system uses a key consisting of one or more fields in the table, (i.e., emplID).
Employee Being Replaced	Name of the person who previously occupied the position. (*Required for IHS if applicable*)
EmplID	EmplID is a unique identification code issued for all employees when they are hired into Capital HR System. This unique identifier is a key in the system and is used instead of the social security number to

	provide greater security (since Capital HR is a web-based database)
Excepted Service Examining Plan	This is the Indian Health Service (IHS) Excepted Service Examining Plan for employment under Schedule A authority 213.3116(b) (8). This plan states excepted service policy and procedures to be followed within the IHS for employment under Schedule A authority 213.3116(b) (8) of persons entitled to Indian preference. The plan supplements Code of Federal Regulations (CFR), Part 5, Section 302, Department of Health and Human Services (HHS) Personnel Instruction 302-1, and Part 7, Chapter 2, "Merit Promotion Plan MPP)," Indian Health Manual (IHM). Excepted Service Examining Plan for Indian Health Service
Field	Fields are used to display and/or to enter specific data on a panel. A field is a component of a record. Examples of fields are Department ID, Street, and City.
Financial Disclosure Required	Is financial disclosure required as an employment condition?
Future-dated Rows	Future-dated rows are data rows that have an effective date greater than today's date (the system date).
Grade	Proposed grade of the position being requested.
History-dated Rows	History-dated rows are data rows that have an effective date prior to the effective date on the current row.
Interdisciplinary	Indicates that the announcement has two or more occupational series.
Job Code	Job codes are similar to position descriptions (PDs), but contain more information. A job code stores information about the positions assigned to it, such as grade and job title all in Capital HR
Job Code #	Six-character (alphanumeric) field that identifies 11 attributes describing a particular job.
Job Opening ID	See Requisition Number
Job Opening Type	Defaults to Standard Requisition as per HHS customization.
Location	Position Location that the vacancies will be filled: also known as duty station.
MPP (Merit Promotion Plan)	This plan establishes policies and procedures to be followed when filling positions in the Indian Health Service (IHS). The plan implements the merit promotion policies and procedural requirements issued by the Office of Personnel Management (OPM) in 5 of Federal Regulations (CFR) 335 and in the Department of Health and Human Services (HHS) Instruction 335-6, provisions governing the filling IHS positions contained in Part 7,"Chapter 3, Indian Preference," Indian Health Manual (IHM), or related policies issued in the future. This plan must be used in conjunction with Part 7,"Chapter 1, Excepted Service Examining Plan," IHM. Merit Promotion Plan for Indian Health Service
Number of Hours	Number of hours worked per week.

Other Employment Conditions	Additional condition(s) not previously specified that are required for the position.
Position #	System-generated number from Capital HR that uniquely identifies a duty location and position. Each employee has a unique position number.
Position Title	Proposed position title of the position, with position title being the proposed official classification position title, which is used in the position description.
Position Vacated	Effective date of when position was vacated by previous incumbent.
Public Trust Position	Information forthcoming
Recruit Requestor	Used in the Capital HR recruitment module; is the person who is initiating the recruitment action.
Recruit 1st Authorizer	Used in the Capital HR recruitment module; is the second person in the management workflow
Recruit 2nd Authorizer	Used in the Capital HR recruitment module; is the third person in management workflow
Recruit Approver	Used in the Capital HR recruitment module; is the final authorizer in management workflow. Once a recruit action is approved then the action flows to EWITS (Electronic Workflow Information Tracking System).
Recruiting Office	Identifies the organizational element in which the employee is assigned. Also known as Department ID or DEPTID or SAC code or Recruiting Office
Remarks	Data field in the recruitment module where management enters data pertinent to the position that is more inclusive than what the data fields the software delivers. Requestors Guidance lists the required information.
Reports To	Name of the person the position reports to (i.e. supervisor, not necessarily the hiring manager).
Requisition #	Numeric tracking number for the recruit action, as generated by Capital HR. Sometimes referred to as Job Opening ID
Status Code	In Capital HR this is the current status of the recruit request. Statuses include: **Cancelled** (Action has been canceled by the requestor) **Closed** (Action has been completed) **Denied** (Action has been denied by an approving official) **Draft** (Action has been created but not submitted for approvals) **Hold** (Action has been put on hold) **Open** (Approvals have been obtained and action is being worked) **Pending** (Pending Approvals)
Selecting Official	Name of Selecting Official.
Series	Proposed occupational series of the position, with an occupational series being a subdivision of an occupational group consisting of positions similar as to specialized line of work and qualification requirements.
SF-50, Notification of Personnel Action	This is official notification that Human Resources has processed the requested personnel action.

SF-52, Request for Personnel Action	This is a request for Human Resources to process a personnel action.
Target Openings	Indicates the number of positions or vacancies that this recruit action will cover. If more than one position are going to be filled at the same title, series and grade(s), please indicate exact number in the Remarks section of recruit module.
Timekeeper #	Identifies the person administratively responsible for the time and leave accounting of an employee.
Work-in-Progress Status	In Capital HR, when ready to complete processing of a PAR action, the user updates the **Work-In-Progress Status** field and saves the record. Changing the WIP status routes the action through the workflow for further processing. WIP statuses include: **INI** (Initiated) **REQ** (Requested) **1st** (1st Authorized) **2nd** (2nd Authorized) **SIG** (Approved/Signed) **REV** (Reviewed by Human Resources) **PRO** (Processed by Human Resources) **RET** (Returned for More Information) **DIS** (Disapproved) **COR** (Corrected) **CAN** (Cancelled)
Work Schedule	Time basis on which an employee is scheduled to work.