



# JEMS CHRIS-HR Manual

Job and Employee Management System-Classified Human  
Resources Information System



UNIVERSITY OF WISCONSIN-MADISON

Office of Human Resources

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# **JEMS CHRIS-HR**

## **Job & Employee Management System**

### **Classified Human Resources Information System**

#### **Introduction**

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

The Job and Employee Management System (JEMS) Classified Human Resources Information System - HR (JEMS CHRIS-HR) system is a web-based application system built under the auspices of the Office of Human Resources (OHR) at the University of Wisconsin – Madison.

The purpose of the JEMS CHRIS-HR system is to automate and facilitate entry, update, hiring and other processing of position descriptions (PD) 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 OHR staff.

# Overview of the Position Description System

## 1. MENUS

A. JEMS 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 JEMSCHRIS-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 JEMS 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 OHR is now the responsible group.

### 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). Compensation and Titling Office - Reviews PD Package and modify and approve, or reject the transaction.

**C. Business Rules** The application enforces business rules and supports the general workflow for PD and position vacancy processing.

**D. Hard Copy Position Descriptions** – A hard copy of the PD Package should be printed off for signature by the employee, hiring supervisor and divisional human resources representative. The signed copy should be copied and scanned. The copy should go to the employee, the original should remain in the divisional human resources file and the scanned copy should be sent to [pdocs@ohr.wisc.edu](mailto:pdocs@ohr.wisc.edu) for inclusion in the employee's personnel file. 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**

JEMS CHRIS and JEMS 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.

## JEMS CHRIS-HR Login

**Login for CHRIS - HR**

**Welcome to the  
Classified Human Resources Information System  
CHRIS - HR**

**Please Log On -**

**2** Username:

Password:  **3**

Database:

**4**

<u>STEP</u>	<u>FIELD</u>	<u>ACTION</u>
1	URL for JEMS CHRIS-HR	Enter <a href="https://ofr01.doit.wisc.edu/chris/chris.html">https://ofr01.doit.wisc.edu/chris/chris.html</a>
2	Username	Enter Username
3	Password	Enter Password
4	Connect	Press Connect

## Menus

The menu bar at the top of JEMS CHRIS/CHRIS-HR screens is similar to the standard Windows menu. The sub-menus have some standard selections and some selections unique to JEMS 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

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' window. The 'File' menu is open, showing options: 'New Blank HR Transaction', 'Save', 'Print HR Package', 'Close Window', and 'Exit CHRIS'. The main form displays 'SVC PRG ASSOC / L&S/RSCH-HUMANITIES/CTR-HUM / 80177'. It includes tabs for 'Knowledge and Skills', 'Org Chart', 'REP', 'Comments', 'Exclusions', and 'History'. A red message states: 'Please Read: - An item with a blue label and an asterisk (\*) is required. - Only fields with white backgrounds can be key entered.' The form contains various input fields for 'UDDS\*', 'Code', 'Classification', 'Barg Unit', 'Status', 'Supervision Type\*', 'Title(s)\*', 'Rate Range\*', 'Supervisor', 'Supervisor's Email Address\*', and 'Employees With Similar Duties'. It also includes checkboxes for 'Required Exclusion Forms' (Confidential, Management, Supervisory) and fields for 'PD Discussion Date', 'Date Duties Began', 'Last PD-of-Record Date', 'Position #', 'PD/LTE Eff Date', 'Empl ID / Empl Rcd', 'HR Transaction ID', 'Cert Number', and 'HR Transaction Type'. A 'Save' button is at the bottom.

**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

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' window. The 'Edit' menu is open, showing options: 'Edit HR Transaction', 'Copy HR Transaction', 'Delete HR Transaction', 'Edit/Display CHRIS Position Vacancy Record', and 'Edit Profile'. Below the menu, the form displays various fields for an HR transaction. The 'UDDS\*' field is set to 'A484040' and 'L&S/RSCH-HUMANITIES/CTR-HUM'. The 'Status' is 'Draft'. The 'Supervisor' is 'Doe' with first name 'John' and title 'Supervisor'. The 'Rate Range\*' shows a minimum of '\$15.411' and a maximum of '\$23.579'. The 'HR Transaction ID' is '000080177'. The 'HR Transaction Type' is 'Position Vacancy'. A 'Save' button is at the bottom.

**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 JEMS 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)

UW-Madison Classified Human Resources Information System - CHRIS

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

Position De Submit HR Transaction  
 ith to Hire Approve HR Transaction  
 age 1 Pa Approve Project Position Justification  
 Reject HR Transaction

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.

UDDS\*: A484040 L&S/RSCH-HUMANITIES/CTR-HUM Status: Draft Tran Comments

Code Classification Barg Unit Supervision Type\*  
 Title(s)\*: 08500 UNIV SVC PRG ASSOC 02 General More Titles

Rate Range\*: Minimum: \$15.411 Maximum: \$23.579 Post Max Rate on Web: ☐

Supervisor: Last Name\* First Name Title\*  
 Doe John Supervisor

Supervisor's Email Address\*: jdoe@abc.123

Employees With Similar Duties  
 Last Name First Name Title More

Required Exclusion Forms: Confidential ☐ Management ☐ Supervisory ☐

PD Discussion Date: [ ] Position #: [ ] HR Transaction ID: 000080177

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

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

Save

**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/C&T staff for additional verification. Available only for PD Packages not in Draft status.

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

## 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 criteria for evaluating performance.
- B. The PD is usually to be filled out by the first-line supervisor or his/her designee with assistance by the Department or Division HR staff. Most of the requested 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 TE, 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 JEMS CHRIS/CHRIS-HR system. These are: **University Staff/Fixed-Term Finite Vacancy, TE, Reclass, Update, and Reallocation.**
  - 1. **University Staff/Fixed-Term Vacancy** is for creating position vacancies and will be used for posting and recruitment.
  - 2. **TE** is used to create Temporary Employment vacancies
  - 3. **Reclass** is used to request base pay adjustments for reclassifications and permanent and temporary changes in duties.
  - 4. **Update** is used to modify the PD of record for an employee because of changed duties and there is no base adjustment requested to accompany the change.
  - 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 (University Staff/Fixed-Term Vacancy, TE, 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.

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 TE, Press the ['TE 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 ['TE 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 TE's).

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.

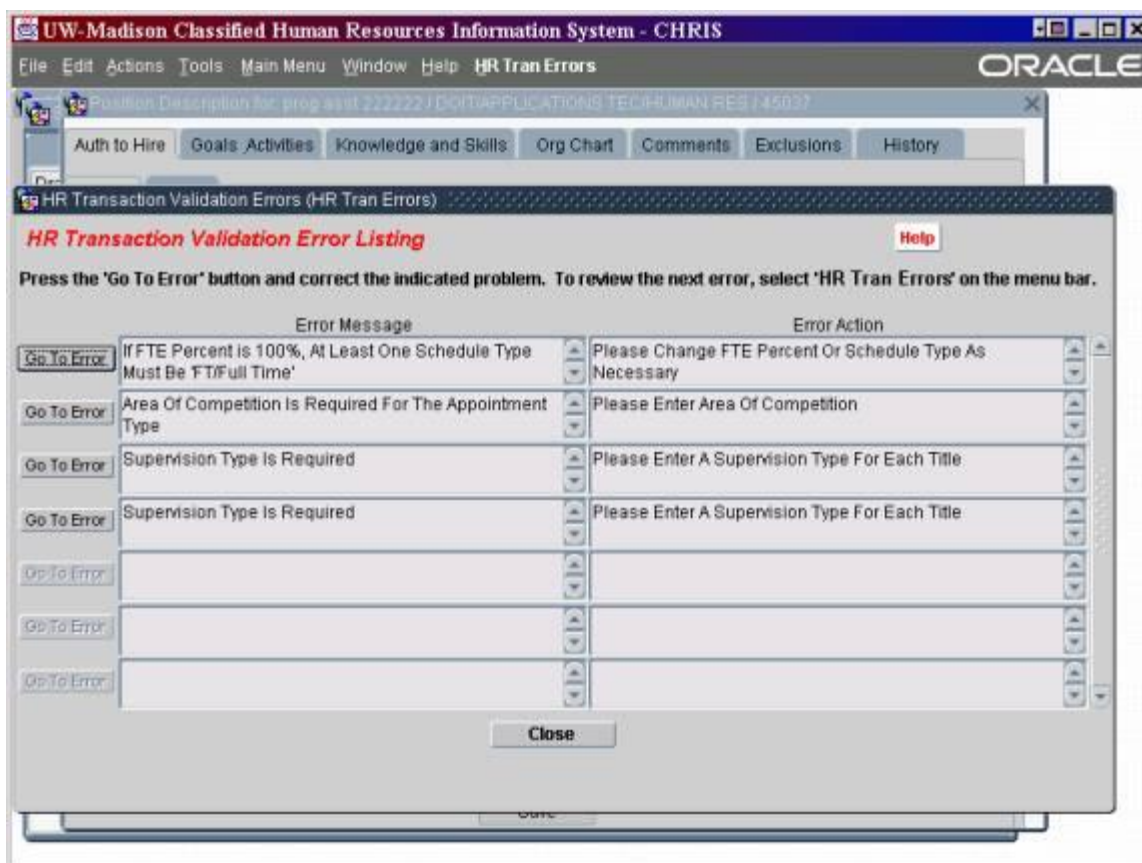
## 2. Error Checking

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 TE type Transactions. The processes for Reclass, and Update 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 C&T. People at the level at which the approval was done can only view the data, except in the case of C&T.
- 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. **TE Approval** - If the TE 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 TE Positions](#) and [TE 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 OHR 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 JEMS 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.

# University Staff/Fixed-Term Vacancy Creation

## Creating an HR Transaction

To create a new University Staff/Fixed-Term vacancy, go to the main menu. Check the box next to 'University Staff/Fixed-Term Finite Vacancy' and then press the 'New Transaction' button.

**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:**

☒ University Staff/US-Fixed Term Vacancy ☐ TE ☐ 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)**

University Staff/US-Fixed Term Processi...

\*\* 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

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

HR Transaction: UW - Madison Classified Human Resources Information System

Auth to Hire Goals Activities Knowledge and Skills Org Chart REP 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: Draft [Tran Comments](#)

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

**Title(s)\*:**    [More Titles](#)

**Rate Range\*:** Minimum:  Maximum:  Post Max Rate on Web: ☐

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

**Supervisor's Email Address\*:**

**Employees With Similar Duties**

Last Name	First Name	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>

[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 OHR 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

**Rate Range** – Auto populates minimum and maximum of the range. Fields can be adjusted

**Post Max Rate on Web** – Indicate if maximum is posted on the Employment Website posting

**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: Even though the field says "Required," these forms are no longer required as of July 1, 2015.

**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 OHR staff.

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

**PD Discussion Date** - For Reclass and Update 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 and Update PD's, the date that the employee began the duties described in the PD.

**PD/TE Effective Date** - PD Effective Date is the appointment 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 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).

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

## HR Transaction General Information: Page 2

Position Description for: UNIV SVC PRG ASSOC / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 80177

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

Page 1 Page 2 Essential Justification

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

Working Title\*: UNIV SVC PRG ASSOC Appt Type\*: FTE\*: 1.000

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

Prior Incumbent: Prior Title Code: Fixed Term Finite Justification

Converted from TE ID: 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\*:**

Phone\*: TTY Phone: 711 Info

Email: Building Code\*:

Address:

City: State: Zip Code:

---

Work Schedule\*: Multi-Shift\*: Yes No Schedule Comment: Edit

Requirements: Add'l Req: Edit

Related Web Link: Link Application Deadline Date\*: Post On Web\*: Y

Bypass Posting\*: Reason: More Waiver Justification How To Apply\*: Please click on the "Apply O Edit

Under Caregiver Law: Yes No Post On JobApply: Y Completed JobApply Init: N

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 Competition** - Press [▼] for list of values and select by highlighting and press [O.K.] or enter value if known.

**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.

**Converted from TE ID** - If this is a position that was previously an TE position identified for conversion, select the current TE 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.

**Multi-Shift** - Indicate if this position is a Blue Collar Multi-Shift

**Schedule Comment** – Mandatory field. Must include information on the work schedule. This is a free form field. If FTE range, indicate in this section (i.e., This position will be 60-100% FTE).

**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** - Not mandatory. May enter additional comments about the position's requirements.

**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 Applicant Deadline date

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

**Bypass Posting** – Indicate whether this vacancy should bypass posting.

**Reason** - Press [▼] and make selection

**Waiver Justification** - If a waiver justification is required you will receive a hard edit to enter the justification.

**How To Apply** - Mandatory. Default language states the following: "Please click on the "Apply Online" button to start the application process." Department/Divisional rep should then enter additional information such as: Who to contact and how (e.g., Jane Doe at [jdoe@wisc.edu](mailto:jdoe@wisc.edu) or 770-9999), what information candidates need to submit (e.g., resume and cover letter, and references).

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

**Post On JobApply** - Automatically defaults to "Y" for all titles except Custodian.

**Completed JobApply Init** - Once the title is approved and the vacancy is setup in JobApply OHR will change the "Completed JobApply Init" from "N" to "Y" in order to release the vacancy to the Employment Website.

## HR Transaction Essential Justification

Position Description for: UNIV SVC PRG ASSOC / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 80177

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

Page 1 Page 2 **Essential Justification**

### 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.

**Chancellor's Memo**

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

Position Description for: UNIV SVC PRG ASSOC / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 79760

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

Goals for Title: UNIV SVC PRG ASSOC View Different Title Copy Goals, etc. from other Title in this Tran Help

PD Summary\*: This is a position for someone who enjoys broad-ranging tasks and responsibilities in Edit Spell Check

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

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

Press To Switch Current Goal With Goal >>> Refresh Goals

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

Letter\* %\* Goal Statement\*

A 55 Administrative and Financial Specialist Support for the Center for the Humanities Edit Delete

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

Number\* % Activity Description\*

1	6	Manage program and general expenses, including: monitoring the operating budget as well as tracking expenditures and reconciling monthly budget expenditures using WISDOM and Center's	Edit	Delete
2	6	Prepare, process and track all internal and external financial transactions, including requisitions, check requests, bills and invoices, p-card purchases, e-reimbursements and all other financial	Edit	Delete
3	6	Expend funds from various Center accounts according to the budget guidelines. Order supplies, equipment, and materials for the office. Track use and function of program equipment and anticipate	Edit	Delete
4	6	Manage online and hard-copy records as described in UW Archives and Records Management policies.	Edit	Delete

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

Position Description for: Office Manager / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 79760

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

Goals for Title: UNIV SERVICES ASSOC 2 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. d-ranging tasks and responsibilities in Edit Spell Check

**Title Code Title Name**

16660	UNIV SERVICES ASSOC 2
08500	UNIV SVC PRG ASSOC

Close

**Goal**

Letter\* %\*

A	55
---	----

Edit

**Activities**

Number*	%	Activity Description
1	6	Manage program and general expenses, including: monitoring the operating budget as well as tracking expenditures and reconciling monthly budget expenditures using WISDOM and Center's
2	6	Prepare, process and track all internal and external financial transactions, including requisitions, check requests, bills and invoices, p-card purchases, e-reimbursements and all other financial
3	6	Expend funds from various Center accounts according to the budget guidelines. Order supplies, equipment, and materials for the office. Track use and function of program equipment and anticipate
4	6	Manage online and hard-copy records as described in UW Archives and Records Management policies.

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.

Position Description for: Office Manager / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 79760

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

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

PD Summary

Please select the title that you would like to copy from.

Title Code	Title Name
<input checked="" type="checkbox"/> 08500	UNIV SVC PRG ASSOC
<input type="checkbox"/>	
<input type="checkbox"/>	

OK Cancel

Want to Enter, Update or View

Refresh Goals

Goal

Letter\* %\*

Edit

Activities

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

Number*	%	Activity Description*
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Next Record Save Refresh Activities

### 3. Copy Goals, etc. From Another Title

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.



Position Description for: Office Manager / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 79760

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

Goals for Title: UNIV SVC PRG ASSOC View Different Title Copy Goals, etc. from other Title in this Tran Help

PD Summary\*: This is a position for someone who enjoys broad-ranging tasks and responsibilities in Edit Spell Check

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

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

Press To Switch Current Goal With Goal >>> Refresh Goals

**Goal** At least 1 goal must be entered for a Position Description. Spell Check

Letter\* %\* Goal Statement\*

A 55 Administrative and Financial Specialist Support for the Center for the Humanities Edit Delete

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

Number\* % Activity Description\*

1	6	Manage program and general expenses, including: monitoring the operating budget as well as tracking expenditures and reconciling monthly budget expenditures using WISDOM and Center's	Edit	Delete
2	6	Prepare, process and track all internal and external financial transactions, including requisitions, check requests, bills and invoices, p-card purchases, e-reimbursements and all other financial	Edit	Delete
3	6	Expend funds from various Center accounts according to the budget guidelines. Order supplies, equipment, and materials for the office. Track use and function of program equipment and anticipate	Edit	Delete
4	6	Manage online and hard-copy records as described in UW Archives and Records Management policies.	Edit	Delete

Next Record Save Refresh Activities

## 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.

## Knowledge and Skills

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.

Authorization to hire information, organization chart, Tran comments and exclusion forms apply to the entire HR Transaction, regardless of the number of titles entered.

### 1. Knowledge and Skills

Position Description for: Office Manager / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 79760

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

Knowledges & Skills for Title: UNIV SVC PRG ASSOC View Different Title Spell Check Help

*Enter the Knowledge & Skills required or preferred for the position:*

Number	Description	Delete
1	Paraprofessional skill level with extensive knowledge of the state and university administrative and financial environment.	Delete
2	Ability to make independent decisions within guidelines and directions established by the Director and Associate Director.	Delete
3	Fluency with University and State information systems, including JEMS, WISDOM, UW-Foundation Campus Access, PVS ProCard, MDS/Corporate Express Ordering System, WiscMail account administration.	Delete
4	High level of proficiency with computer systems and software, including all Microsoft Office products, especially Word and Excel. Willingness to expand the technical skill-set through training, and the ability to put training into practice.	Delete
5	Excellent written and verbal communication skills.	Delete
6	Customer-service orientation, and the proven ability to work productively, effectively, and (when necessary) diplomatically with a wide range of people from many different levels of the university and off-campus constituencies, including faculty administration, academic staff, graduate and undergraduate students.	Delete
7	Excellent problem-solving skills, including the ability to independently seek out and understand/interpret answers and solutions to administrative/policy questions and problems.	Delete

Next Record Save Refresh Knowledges

**Knowledge and Skills For Title** - Automatically filled in with the Title Code Requested to View/Edit.

**View Different Title** - Press the Button to [change](#) which title to View/Edit if more titles exist on the HR Transaction.

**Knowledge Number** - Enter the Knowledge Number to be created. [TAB]. Also see [Enter Knowledge and Skills](#).

**Knowledge Statement** - Enter the Knowledge Statement for the knowledge listed in the Knowledge Number. For a full screen, press [EDIT] button. [SEARCH] is not enabled. Press [O.K.] when done. [TAB].

**Delete (Knowledge)** - Deletes the Knowledge Number and Statement.

**Refresh Activities**- Press to save and re-display changes made when Knowledge/Skill numbers are switched.

## 2. Viewing Data for a Given Title

Position Description for: Office Manager / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 79760

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

Knowledges & Skills for Title: UNIV SVC PRG ASSOC View Different Title Spell Check Help

**E Please highlight the title that you would like to view. preferred for the position:**

Number	Title Code	Title Name
1	16660	UNIV SERVICES ASSOC 2
2	08500	UNIV SVC PRG ASSOC
3		
4		

Close

1 Parap...  
enviro...  
2 Ability...  
Assoc...  
3 Fluen...  
Acces...  
4 High I...  
Word and Excel. Willingness to expand the technical skill-set through training, and the ability to put training into practice.  
5 Excellent written and verbal communication skills.  
6 Customer-service orientation, and the proven ability to work productively, effectively, and (when necessary) diplomatically with a wide range of people from many different levels of the university and off-campus constituencies, including faculty administration, academic staff, graduate and undergraduate students.  
7 Excellent problem-solving skills, including the ability to independently seek out and understand/interpret answers and solutions to administrative/policy questions and problems.

Delete Delete Delete Delete Delete Delete

Next Record Save Refresh Knowledges

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

## 3. Enter Knowledge and Skills

- Enter the Knowledge Number using a numeric value from 1-999. Press [TAB].
- Enter the Knowledge Statement (this is a free form field). Pressing [TAB] will take you to the next Knowledge record.
- Continue until all the knowledge and skills are entered.
- To change the order of knowledge and skills, simply change the numbers as desired and press Refresh Knowledges.

## Organization Chart

The organization chart capability built in to the JEMS 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 (supervisor) 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 and coworkers in the unit

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 JEMS CHRIS/CHRIS-HR to allow organizations the ability to provide as much or as little information as needed.

## 1. Default Org Chart

Position Description for: UNIV SVC PRG ASSOC / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 80177

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

**Enter The Related Organization Chart**

HR Transaction ID: 000080177 [Help](#)

SupervisorTitleName1 (SupervisorName1)

- SupervisorTitleName2 (SupervisorName2)
  - \*\*\* SubordinateTitleName1 (SubordinateName1)
  - SubordinateTitleName2 (SubordinateName2)

**Details**

Position Identified: ☐ Position: ☒ Unit, Bldg, etc.: ☐

Name\*: SupervisorName1

Title Name\*: SupervisorTitleName1

Appt Type\*:

[Save](#)

[Add a Peer](#)

[Add a Subordinate](#)

[Move to Another Supervisor/Location](#)

[Duplicate a Position/Location](#)

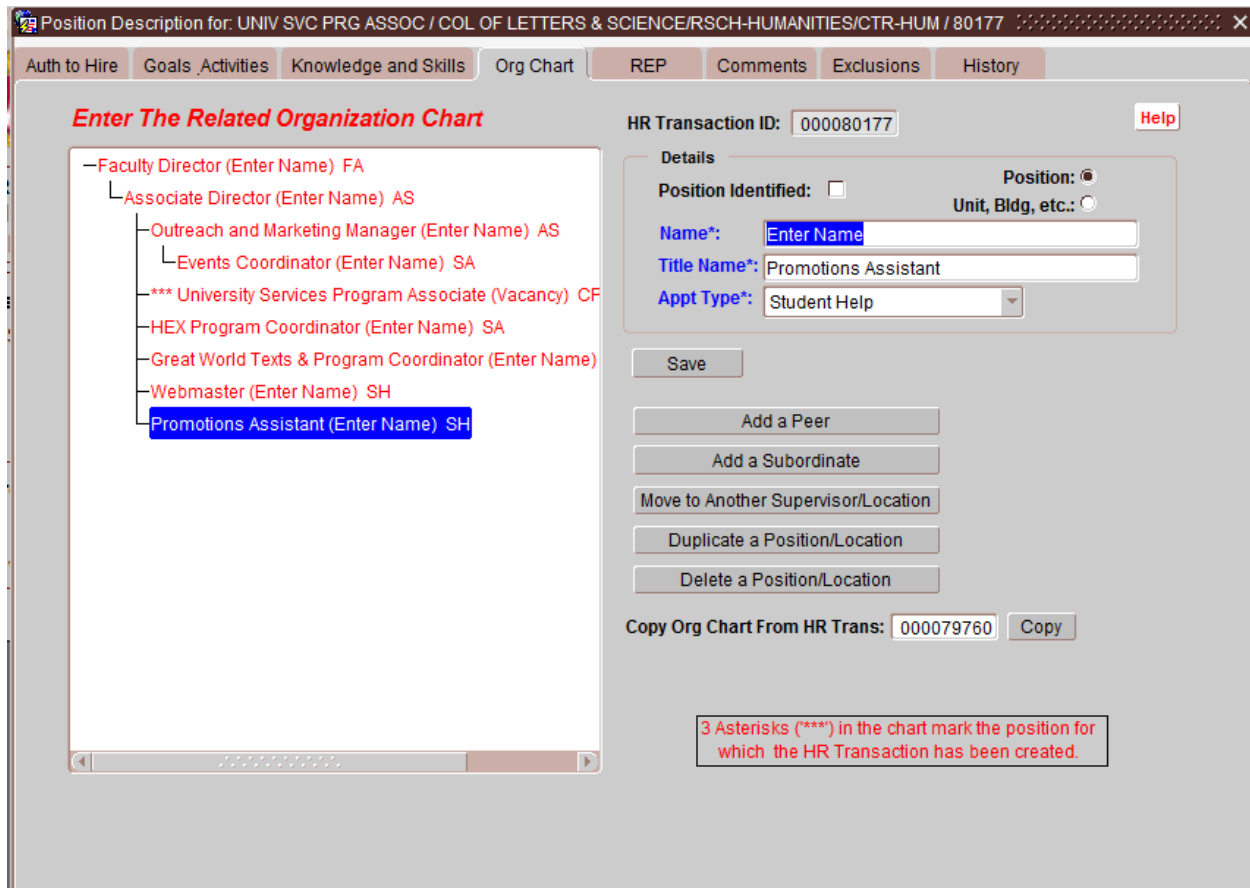
[Delete a Position/Location](#)

Copy Org Chart From HR Trans:  [Copy](#)

3 Asterisks ("\*\*\*) in the chart mark the position for which the HR Transaction has been created.

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



Position Description for: UNIV SVC PRG ASSOC / COL OF LETTERS & SCIENCE/RSCH-HUMANITIES/CTR-HUM / 80177

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

**Enter The Related Organization Chart**

HR Transaction ID: 000080177 [Help](#)

**Details**

Position Identified: ☐ Position: ☒ Unit, Bldg, etc.: ☐

Name\*:

Title Name\*:

Appt Type\*:

Copy Org Chart From HR Trans: 000079760

3 Asterisks (\*\*\*\*) in the chart mark the position for which the HR Transaction has been created.

Org Chart Hierarchy:

- Faculty Director (Enter Name) FA
  - L Associate Director (Enter Name) AS
    - Outreach and Marketing Manager (Enter Name) AS
      - L Events Coordinator (Enter Name) SA
    - \*\*\* University Services Program Associate (Vacancy) CF
    - HEX Program Coordinator (Enter Name) SA
    - Great World Texts & Program Coordinator (Enter Name)
    - Webmaster (Enter Name) SH
    - Promotions Assistant (Enter Name) SH

## 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

The screenshot displays the 'Position Description' software interface. The title bar reads 'Position Description for: VETERINARY TECH 3 / SCHOOL OF VET MEDICINE/CCU-ANESTH-ER/CCU / 80158'. The interface is divided into two main sections: an organization chart on the left and a details form on the right.

**Organization Chart:** The chart is titled 'Enter The Related Organization Chart'. It shows a hierarchical structure starting with 'Dean (Daryl Buss) LI'. Under the Dean are 'Associate Dean/VMTH Director (Ruthanne Chun) LI' and 'Associate Director-VMTH (Mark Oglesbay) AS'. Under the Associate Director are several 'Veterinary Technician Supervisor' and 'Veterinary Technician' roles, including 'Veterinary Technician 3 (Sara Kennedy) CP', 'Veterinary Technician 2 (Sara Cavanaugh) CP', and various 'Veterinary Technician 3' roles with different percentages and names like 'Shiela O'Brien', 'Lucy Jenkins-L...', 'Kristen Lynch', 'Kim Sprecher', 'Pam Gillitzer', 'Deb Straub', 'Amanda Haerterich', 'Lindsey Farquer', 'Sara Cavanaugh', 'Stephanie Simr...', 'Amanda Thompson', 'Becky Christensen', and 'Amanda Volder'.

**Details Form:** The form is titled 'Details' and includes the following fields and buttons:

- HR Transaction ID:** 000080158
- Position Identified:** ☐ (checked)
- Position:** ☐ (checked)
- Unit, Bldg, etc.:** ☐
- Name\*:** Daryl Buss
- Title Name\*:** Dean
- Appt Type\*:** Limited Appointees
- Buttons:** Save, Add a Peer, Add a Subordinate, Move to Another Supervisor/Location, Duplicate a Position/Location, Delete a Position/Location.
- Copy Org Chart From HR Trans:** [Text Field] Copy

A note at the bottom right states: '3 Asterisks (\*\*\*) in the chart mark the position for which the HR Transaction has been created.'



Position Description for: AG RES EQUIP OPR-OBJ / COL OF AG & LIFE SCIENCES/AG RES STA/ARL / 80175

Auth to Hire Goals Activities Knowledge and Skills **Org Chart** REP Comments Exclusions English Proficiency History

**Enter The Related Organization Chart**

HR Transaction ID: 000080175 [Help](#)

**Details**

Position Identified: ☐ Position: ☒  
Unit, Bldg, etc.: ☐

Name\*: Darwin Frye  
Title Name\*: ARS -Arlington Superintendent  
Appt Type\*: Academic Staff

Save

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

Copy Org Chart From HR Trans:  [Copy](#)

3 Asterisks ("\*\*\*\*") in the chart mark the position for which the HR Transaction has been created.

**Organization Chart:**

- ARS -Arlington Superintendent (Darwin Frye) AS
  - Assistant Superintendent (Jeff Breuer) AS
    - Environmental Health Spec (Kane Rockwell) CL
  - AREO-Senior (William Jennings) CP
  - Assistant Superintendent (Matt Repking) AS
    - Univ Services Associate 2 (Mindy Breunig) CP
    - Univ Services Associate 2 (Donna Sturm) CP
  - UW Ag Supervisor (Paul Bergum) CP
    - AREO Senior (Daniel Jennings) CP
    - AREO-Adv (Charles Breneman) CP
    - AREO-SR (Tom Storandt) CP
    - AREO-Obj (Vern Selk) CP
    - AREO Obj (Shawn Wheeler) CP
    - AREO-Entry (Vacant) CP
    - AREO-Entry (John Wagner) CP
  - UW Ag Supervisor (Roger Quam) CP
    - Facility Repair Worker (Craig Malnory) CP
    - Facility Repair Worker (Robert Lytle) CP
    - Equip Tech Master (Carl Breneman) CP

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

**Enter The Related Organization Chart**

HR Transaction ID: 000080177 [Help](#)

**Details**

Position Identified: ☐ Position: ☒  
Unit, Bldg, etc.: ☐

Name\*: SupervisorName1  
Title Name\*: SupervisorTitleName1  
Appt Type\*:

Save

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

Copy Org Chart From HR Trans: 79760 [Copy](#)

3 Asterisks ("\*\*\*\*") in the chart mark the position for which the HR Transaction has been created.

**Organization Chart:**

- SupervisorTitleName1 (SupervisorName1)
  - SupervisorTitleName2 (SupervisorName2)
    - \*\*\*\* SubordinateTitleName1 (SubordinateName1)
    - SubordinateTitleName2 (SubordinateName2)

**Copy Org Chart Confirmation**

Are You Sure You Want To Copy The Organization Chart?  
If Yes, The Existing Org Chart Will Be Deleted And Replaced With The Org Chart From The Entered HR Transaction ID.

Yes No

## 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.

## Recruitment Effort Plan (REP)

**RECRUITMENT EFFORTS PLAN (REP)**

REP Region: 
 Racial / Ethnic Minorities: ☐ Yes ☐ No
   
 Women: ☐ Yes ☐ No
   
 Underutilized: ☐ Yes ☐ No
   
 Sent to OED: 
  
 OED Approved: ☐ Yes ☐ No
   
 Approved:

Meetings/Conferences:  
  
 Minority Org Publications:  
  
 Newspapers:  
  
 Placement Services:  
  
 Institutions/ Labs/Programs:  
  
 Professional Publications:  
  
 Other Professional Contacts:  
  
 Other Recruitment Efforts:

The Recruitment Effort Plan Screen allows users to enter and update the proposed recruitment methods besides posting the recruitment on the web. The information on the screen is required for all underutilized titles and when the proposed salary maximum is above Range 8 Minimum.

The REP indicates if the title is underutilized.

REP Region*	Indicate the scope of the recruitment: <ul style="list-style-type: none"> <li>• Madison Area Search</li> <li>• Wisconsin Area Search</li> <li>• Regional Search</li> <li>• National Search</li> <li>• Search Within the University</li> </ul>
List of Recruitment Methods	Specify the name(s) of newspapers and publications in which the recruitment will be advertised, institutions and organizations to be contacted. REP automatically populates Diverse: issues in HigherEd, HigherEdJobs and USA Jobs

## **Exclusion Forms**

The Supervisor Exclusion, Confidential Exclusion and Management Exclusion forms are forms that were required for certain titles prior to July 1, 2015. They are no longer required but remain active in the system for historical purposes.

For information on the purpose and usage of the forms, please review the [Wisconsin Human Resources Handbook Chapter 324](#).

## 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.

Error Message	Error Action
There Must Be At Least One Goal For Each Title/Position Description	Please Enter A Goal Letter, Percent And Statement
There Must Be At Least One Goal For Each Title/Position Description	Please Enter A Goal Letter, Percent And Statement
At Least One Schedule Type Is Required	Please Enter A Valid Schedule Type
At Least One Funding Source And Funding Activity Is Required	Please Enter A Valid Funding Source And Funding Activity
The Entered Email Address Is In An Invalid Format	Please Correct The Email Address
Appointment Type Is Required	Please Enter Appointment Type
The New-Replace-Change Indicator Is Required	Please Enter A Correct Value

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 C&T. People at the level at which the approval was done can only view the data, except in the case of C&T.

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. Fixed-Term Finite Approval** - This action is available only to OHR HR staff and only for Transactions entered for Fixed-Term 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 a web-based application window titled 'UW - Madison Classified Human Resources Information System'. A modal dialog box is open, titled 'Copy Information For University Staff/US-Fixed Term Vacancies'. The dialog has a 'Help' button in the top right. Below the title bar, there are five tabs: 'Copy for US/US-Fixed Term', 'Copy for TE', 'Copy for Reclass', 'Copy for Update', and 'Copy for Reallocation'. The 'Copy for US/US-Fixed Term' tab is selected. The main content area of the dialog says 'Please Select the Items that you would like to copy.' and lists three items with checkboxes: 'Copy Authorization to Hire Information', 'Copy Goals, Activities and Knowledges', and 'Copy Organization Chart'. All three are checked. To the right of these items, there is a red text warning: 'The HR Transaction Selected to Copy Has Multiple Titles. Please Indicate If You Want to Copy All Titles or Only the Selected Title.' Below this warning, there is a 'Selected Title' section with a text input field containing '08500' and 'UNIV SVC PRG ASSOC'. Below the input field are two radio buttons: 'Copy All Titles' (selected) and 'Copy Only Selected Title'. At the bottom of the dialog are 'Copy' and 'Cancel' buttons. In the background, the main application window is visible, showing a search results list with columns for 'Employee', 'Cert Number', 'Supervisor', 'Working Title', 'Prior Employee', 'Position #', 'Effective Date', 'Creator', and 'HR Transaction ID'. The 'Copy HR Tran To New Tran' button is highlighted at the bottom of the main window.

## 1. Copy for University Staff/University Staff Fixed Term Finite

The screenshot shows a web-based application window titled "UW - Madison Classified Vacancy & Position Description Entry System". A modal dialog box is open with the title "Copy Information For University Staff/US-Fixed Term Vacancies". The dialog has a "Help" button in the top right. It contains the instruction "Please Select the Items that you would like to copy." followed by three checked checkboxes: "Copy Authorization to Hire Information", "Copy Goals, Activities and Knowledges", and "Copy Organization Chart". To the right of these checkboxes, a red text message states: "The HR Transaction Selected to Copy Has Multiple Titles. Please Indicate If You Want to Copy All Titles or Only the Selected Title." Below this message, there is a "Selected Title" section with a text input field containing "08500" and a dropdown menu showing "UNIV SVC PRG ASSOC". There are two radio buttons: "Copy All Titles" (selected) and "Copy Only Selected Title". At the bottom of the dialog are "Copy" and "Cancel" buttons. The background application window shows various fields for an HR transaction, including Employee, Cert Number (00079760), Supervisor (McDonald, Ronald), Working Title (Office Manager), Prior Employee (Sandy Nuzback), Position #, Effective Date, Creator (Nuzback, Sandra L.), and HR Transaction ID (0000079760). There are also buttons for "Edit HR Tran", "View HR Tran", "Display/Print HR Tran Documents", "Copy HR Tran To New Tran", and "Refresh Query".

**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 Authorization 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 University Staff/Fixed-Term HR Transaction using the criteria associated with the check boxes.

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

## 2. Copy for TE

The screenshot displays the 'UW-Madison Classified Human Resources Information System - CHRIS' interface. A dialog box titled 'UW - Madison Classified Vacancy & Position Description Entry System' is open, showing the 'Copy for TE' tab. The dialog box contains the following text and options:

**Copy Information For Temporary Employment Vacancies**

Please Select the Items that you would like to copy.

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

Buttons: Copy, Cancel, Help

The background window shows the following fields:

- Employee: [Empty]
- Prior Employee: Sandy Nuzback
- Cert Number: 00079760
- Go to CHRIS Vacancy Record
- Position #: [Empty]
- Effective Date: [Empty]
- Supervisor: McDonald, Ronald
- Creator: Nuzback, Sandra L.
- Working Title: Office Manager
- HR Transaction ID: 0000079760

Buttons at the bottom: Edit HR Tran, View HR Tran, Display/Print HR Tran Documents, Copy HR Tran To New Tran, 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 TE 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 US/US-Fixed Term Copy for TE **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

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:  Prior Employee: Sandy Nuzback

Cert Number: 00079760 Go to CHRIS Vacancy Record Position #:  Effective Date:

Supervisor: McDonald, Ronald Creator: Nuzback, Sandra L.

Working Title: Office Manager HR Transaction ID: 0000079760

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

UW - Madison Classified Vacancy & Position Description Entry System

Copy for US/US-Fixed Term Copy for TE 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

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:  Prior Employee: Sandy Nuzback

Cert Number: 00079760 Go to CHRIS Vacancy Record Position #:  Effective Date:

Supervisor: McDonald, Ronald Creator: Nuzback, Sandra L.

Working Title: Office Manager HR Transaction ID: 0000079760

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

UW - Madison Classified Vacancy & Position Description Entry System

Copy for US/US-Fixed Term Copy for TE Copy for Reclass Copy for Update Copy for Reallocation

**Copy Information For A Reallocation** Help

Please Select the Items that you would like to copy.

☒ Copy Authorization to Hire Information

☒ Copy Goals, Activities and Knowledges

☒ Copy Organization Chart

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

Cannot copy an HR Transaction for the same appointment 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 Appointment ID By Name

Copy Cancel

Employee: Prior Employee: Sandy Nuzback

Cert Number: 00079760 Go to CHRIS Vacancy Record Position #: Effective Date:

Supervisor: McDonald, Ronald Creator: Nuzback, Sandra L.

Working Title: Office Manager HR Transaction ID: 0000079760

Edit HR Tran View HR Tran Display/Print HR Tran Documents Copy HR Tran To New Tran 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 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.

**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:**

☐ University Staff/US-Fixed Term Vacancy ☐ TE ☒ 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)**

University Staff/US-Fixed Term Processi...

\*\* 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

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  / ☐

Find Empl ID/Empl Rcd By Name

OK Cancel

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

**E-PD Exists**

An Electronic PD Exists For The Entered Appointment ID. The Most Recent PD For This Appointment Will Be Copied As A Template For This New HR Transaction.

OK

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

HR Transaction: UW - Madison Classified Human Resources Information System

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

Page 1 | Page 2 | Reclass Detail

**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)\*:

Rate Range\*: Minimum:  Maximum:  Post Max Rate on Web: ☐

Supervisor: Last Name\*  First Name  Title\*

Supervisor's Email Address\*:

**Employees With Similar Duties**

Last Name	First Name	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>

[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:

[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

Position Description for: HR ASST / FACILITIES PLNG AND MGMT/AVC/HR-PAYROLL / 80178

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

Page 1 | Page 2 | **Reclass Detail**

**Reclassification Data** Help

Reclass or Change Duties: Permanent Reclassification Sched-Range: Current FLSA: Date Began in Current Title: Date Began Current Duties

Current or Prior Title: 16000 OFFICE ASSOCIATE 02-09 N 10/23/2011

Proposed Title: Working Title: HR ASST

Proposed Effective Date: 04/03/2016 Temp Adjustment End Date:

Date Materials Received By Div:

Date Materials Received By CHR:

FLSA Status:

Reclass Effective Date:

Approved Title Code: Sched-Range:

Current Rate: \$14.001 Rate Adjustment: New Rate:

Logical & Gradual Changes: Edit

Class Specification Language: DER Title Soecs Edit

Reclass Summary: Edit

Positions Used For Comparison: Edit

Denial Comments Convert to Reallocation Save Reclass Paper Flow

Position Description for: HR ASST / FACILITIES PLNG AND MGMT/AVC/HR-PAYROLL / 80178

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

Page 1 | Page 2 | **Reclass Detail**

**Reclassification Data** Help

Reclass or Change Duties: Permanent Change In Duties Permanent Reclassification Temporary Adjustment End Temporary Change In Duties Temporary Reclassification Sched-Range: Current FLSA: Date Began in Current Title: Date Began Current Duties

Current or Prior Title: 16000 OFFICE ASSOCIATE 02-09 N 10/23/2011

Proposed Title: Working Title: HR ASST

Proposed Effective Date: Temp Adjustment End Date:

Date Materials Received By Div:

Date Materials Received By CHR:

FLSA Status:

Reclass Effective Date:

Approved Title Code: Sched-Range:

Current Rate: \$14.001 Rate Adjustment: New Rate:

Logical & Gradual Changes: Edit

Class Specification Language: DER Title Soecs 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.]. If there is no title change requested, enter the employee's current title.

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

**Working Title** -The Working Title for the position

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

**Temp Adjustment End Date** – If the adjustment/change is temporary, enter the expected end date of the change.

**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 OHR.

**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 Division HR or C&T 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 requested.

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

**Logical & Gradual Changes** - Logical & Gradual changes in the employee's 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** – Copy University Staff Title Description for requested title.

**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

Position Description for: MEDICAL PRO ASST SEN / MEDICAL SCHOOL/OPHTHAL&VIS SCI/GEN / 79692

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

Reclass Status History

**Reclass/Reallocation Status History**

Event	Reclass Status	Status Date/Time	Status Set By (Name Or Logon ID)
CHR Approved	Reclass Approved	05/09/2011-10:54:52	SCB
Div Approved	CHR Review	05/06/2011-15:49:54	AXQ
Dept Approved	Div HR Review	05/06/2011-15:02:46	PSH
Rejected	Dept HR Review	05/03/2011-15:46:16	AXQ
Dept Approved	Div HR Review	05/03/2011-13:51:47	PSH
Submitted	Dept HR Review	05/03/2011-13:48:06	PSH
Created	Draft	04/27/2011-10:07:07	PSH

**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 'Department Review', 'Division 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

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:

Title Prior to Reclass/Realloc:

>> More than one UDDS may be entered

Department:

or

or

Working Title:

Post on JobApply(Y/N): ☐   JobApply Init Complete(Y/N): ☐

**Creator**

Last Name:

First Name:

Loqon Name:

**Appointment Type:**

**HR Transaction Type:**

**Area of Competition:**

**Employee Hired Into The Position**

Last Name:

First Name:

**Prior Employee**

Last Name:

First Name:

Max Status 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 (University University Staff Fixed Term Finite, Temporary 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

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

Search   Advanced Search   Results by Dept   Results by Type

Job Code = '16660'; Appointment Type = 'CP'; PD Package Type = 'Position Vacancy'; Department = A48; [Help](#)

Title	Div/Dept	HR Tran Status	Employee Name (or *Note)	Type	Print Results
<input type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Class Approved		CP	
<input checked="" type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Payrolled	GOOFY GUY	CP	
<input type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Draft		CP	
<input type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Draft		CP	
<input type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Div HR Review		CP	
<input type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Applicant(s) Referred		CP	
<input type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Closed		CP	

Title: 16660 UNIV SERVICES ASSOC 2      UDDS: A480200 COL OF LETTERS & SCIENCE/ADMINISTRATIVE

HR Tran Type: Position Vacancy      Status Date: 10/30/2013-14:35:39      Tran Status: Payrolled

Employee: GOOFY GUY      Prior Employee:

Cert Number: 00080114      Go to CHRIS Vacancy Record      Position #: 02069916      Effective Date: 11/08/2013

Supervisor: Mouse, Mickey      Creator: Baculik, Susan

Working Title: UNIV SERVICES ASSOC 2      HR Transaction ID: 0000080114

[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, TE). CP=University Staff vacancy, CJ=Fixed-Term vacancy, TE=TE, 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, TE).

**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

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 SERVICES ASSOC 2	A484040	Class Approved	Position Vacancy		
<input checked="" type="checkbox"/> UNIV SERVICES ASSOC 2	A480200	Payrolled	Position Vacancy	02069916	11/08/2013
<input type="checkbox"/> UNIV SERVICES ASSOC 2	A480900	Draft	Position Vacancy		
<input type="checkbox"/> UNIV SERVICES ASSOC 2	A481400	Draft	Position Vacancy		
<input type="checkbox"/> UNIV SERVICES ASSOC 2	A481800	Div HR Review	Position Vacancy		
<input type="checkbox"/> UNIV SERVICES ASSOC 2	A482900	Applicant(s) Referred	Position Vacancy		
<input type="checkbox"/> UNIV SERVICES ASSOC 2	A480200	Closed	Position Vacancy	02000346	05/09/2011

Print Results   Prev Rec   Next Rec

Title: 16660 UNIV SERVICES ASSOC 2   UDDS: A480200 COL OF LETTERS & SCIENCE/ADMINISTRATIVE

HR Tran Type: Position Vacancy   Status Date: 10/30/2013-14:35:39   Tran Status: Payrolled

Employee: GOOFY GUY   LTE Applicant Status:

Cert Number: 00080114   Go to CHRIS Vacancy Record   Position #: 02069916   Effective Date: 11/08/2013

Title Prior to Reclass/Realloc:   Creator: Baculik, Susan

Working Title: UNIV SERVICES ASSOC 2   HR Transaction ID: 0000080114

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, TE).

**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, , TE).

**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.

**TE Applicant Status** – Status of the TE 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 the 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 the 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.

## Create New Temporary Employee Employment Transactions


**Instructions for TE Positions** - Most of the TE 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 TEs 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 as well as deciding if you want to recruit using JobApply by indicating "Y" for Post on JobApply.
4. An Organizational Chart is optional.
5. A selected applicant can be entered before the original submittal of the TE 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 TE 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 TE Transaction is Class Approved by Division HR staff (if the title is delegated) or OHR.

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

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?*

Help System Changes

**HR Transaction Type:**  
☐ University Staff/US-Fixed Term Vacancy ☒ TE ☐ 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)**  
 University Staff/US-Fixed Term Processi...

**\*\* 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

## 2. TE 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 University Staff position.

The screenshot shows the 'HR Transaction: UW - Madison Classified Human Resources Information System' window. The 'General Data' tab is selected, and 'Page 1' is active. The form is titled 'HR Transaction General Information: Page 1' and includes an 'Employee:' field and a 'Help' button. A 'Please Read' message states: 'An item with a blue label and an asterisk (\*) is required. Only fields with white backgrounds can be key entered.' There are 'Debug: Turn Msg On' and 'Debug: Turn Msg Off' buttons. The form contains several input fields and checkboxes:

- UDDS\*:** A dropdown menu.
- Status:** A dropdown menu set to 'Draft'.
- Tran Comments:** A button.
- Code** and **Classification:** Labels for the UDDS dropdown.
- Title(s)\*:** A text input field.
- Applicant Status:** A text input field.
- Rate Range\*:** Includes 'Minimum:' and 'Maximum:' text input fields.
- Post Max Rate on Web:** A checkbox.
- Supervisor:** Includes 'Last Name\*', 'First Name', and 'Title\*' text input fields.
- Supervisor's Email Address\*:** A text input field.
- Employees With Similar Duties:** A section with 'Last Name', 'First Name', and 'Title' text input fields, and a 'More' button.
- Required Exclusion Forms:** Includes checkboxes for 'Confidential', 'Management', and 'Supervisory'.
- PD Discussion Date:** A text input field.
- Position #:** A text input field.
- HR Transaction ID:** A text input field.
- Date Duties Began:** A text input field.
- PD/LTE Eff Date:** A text input field.
- Cert Number:** A text input field.
- Last PD-of-Record Date:** A text input field.
- Empl ID / Empl Rcd:** A text input field.
- HR Transaction Type:** A dropdown menu set to 'Temporary Employment'.
- Buttons:** 'Cancel New HR Trans' and 'Save'.

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



### 3. TE General Information – Page 2

Position Description for: UNIV SERVICES ASSOC 2 / G SERV/HUMAN RES/TALENT MGMT / 80179

General Data | Goals Activities | Knowledge and Skills | Org Chart | REP | Comments | History

Page 1 | Page 2 | Essential Justification | TE Detail | TE Appt History

**HR Transaction General Information: Page 2** Help

Working Title\*: UNIV SERVICES ASSOC 2      Appt Type\*: Temporary Employment

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

TE 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\*:**

Phone\*:  TTY Phone:  711 Info

Email:  Building Code\*:

Address:

City:  State:  Zip Code:

---

Work Schedule:  More      Multi-Shift\*: ☐ Yes ☐ No      Schedule Comment:  Edit

Requirements:  More      Add'l Req:  Edit

Related Web Link:  Link      Application Deadline Date\*:  Post On Web\*: ☐

Bypass Posting\*: ☐ Reason:  More      How To Apply\*:  Edit

Under Caregiver Law: ☐ Yes ☐ No      Post On JobApply: N      Completed JobApply Init: N

Save

**Working Title** – Enter University Staff title for TE vacancy

**Appointment Type** – Defaults to Temporary Employment

**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.

**TE Function** – Press ▼ and select Future Conversion, Irregular or Seasonal. For information regarding TE function definitions click on “TE 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” TE positions **OR** to justify the selection of “other” for the sub-category.

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

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

## 4. HR Transaction Essential Justification

Position Description for: UNIV SERVICES ASSOC 2 / G SERV/HUMAN RES/TALENT MGMT / 80179

General Data | Goals Activities | Knowledge and Skills | Org Chart | REP | Comments | History

Page 1 | Page 2 | **Essential Justification** | TE Detail | TE Appt History

**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:**

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 University Staff/Fixed-Term Finite vacancy.

Once completed the HR Transaction should be submitted to CHR by choosing 'Submit HR Transaction' from the Actions menu.

## Hiring an Applicant into a TE Position

### 1. 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.

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:**

☐ University Staff/US-Fixed Term Vacancy ☒ **TE** ☐ 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

**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

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

University Staff/US-Fixed Term Processi...

\*\* Vacancy Transactions at least Division approved

Edit Profile Exit CHRIS

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

Search   Advanced Search   Results by Dept   Results by Type

Draft; Appointment Type = 'CL'; Department = A48; Help

Title	Div/Dept	HR Tran Status	Employee Name (or *Note)	Type
<input checked="" type="checkbox"/> UNIV SERVICES ASSOC 2	COL OF LETTERS & SCIENC	Draft		TE
<input type="checkbox"/> UNIV SERVICES ASSOC 1	COL OF LETTERS & SCIENC	Draft		TE
<input type="checkbox"/> NO TITLE	COL OF LETTERS & SCIENC	Draft		TE
<input type="checkbox"/> COMM SPEC	COL OF LETTERS & SCIENC	Draft	MARY L MULLEN	TE
<input type="checkbox"/> IS RESOURCE SUP TEC E	COL OF LETTERS & SCIENC	Draft	NOAH C HURST	TE
<input type="checkbox"/> NO TITLE	COL OF LETTERS & SCIENC	Draft		TE
<input type="checkbox"/> UNIV SVC PRG ASSOC	COL OF LETTERS & SCIENC	Draft	TARA C CLEVELAND	TE

3

Title: 16660 UNIV SERVICES ASSOC 2   UDDS: A482300 COL OF LETTERS & SCIENCE/CHAZEN MUSE

HR Tran Type: Temporary Employme   Status Date: 10/29/2015-07:41:57   Tran Status: Draft

Employee:   LTE Applicant Status:

Cert Number:   Go to CHRIS Vacancy Record   Position #:   Effective Date:

Supervisor:   Creator: Baculik, Susan

Working Title: UNIV SERVICES ASSOC 2   HR Transaction ID: 0000080176

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 TE transactions that need approval by clicking on TE 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 TE transaction already approved enter PD# and press <Edit HR Tran>

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

## 2. TE Detail - Screen is used to hire an applicant into the TE position.

Position Description for: UNIV SERVICES ASSOC 2 / L&S/CHAZEN MUSEUM/CHAZEN / 80176

General Data | Goals Activities | Knowledge and Skills | Org Chart | REP | Comments | History

Page 1 | Page 2 | Essential Justification | **TE Detail** | TE Appt History

**Details for Selected TE Applicant** Note: Only 1 Applicant Can Be Entered for a Given Vacancy Help

Title: 16660 UNIV SERVICES ASSOC 2 Sched-Range: 02 - 10 TE Max Rate: \$14,250

Soc Sec # 5 EmplID 5 Add Selected Applicant: Known SSN

Name: Last\* 6 First\* 7 Middle 8 Address\*: 14

Home Phone\*: 9 Work Phone: 10 City\*: 14 State\*: 16

Email: 11 Zip\*: 17 County: 18

Birth Date\*: 12 Adj Cont Service Date: 18 Country\*: 19 Release Home Address\*: 20

Gender\*: 22 Ethnicity 21

Hire Type 28 Empl Rec#: 26 TE Begin Date\*: 27

24 Hourly Rate\*: 28 Continuity/Duration\*: 29

Action Reason 25 CBC Status Date: 5 Position Of Trust: No 5

Rehired Annuitant\*: 82 Std. Out-of-state Plan: 88 Foreign National: 84 Eligible for Full Time State Rate: 85

Above TE Maximum: ☐ Yes ☒ No Justification: 86 Edit

Out of State: ☐ Yes ☒ No Justification: 87 Edit

Overload: 89 ☐ Yes ☒ No Employment Overload Form Living Wage Exception: 88

TE Comments (e.g., Out of State hire or Title Not Usual for the UW): 40 Edit

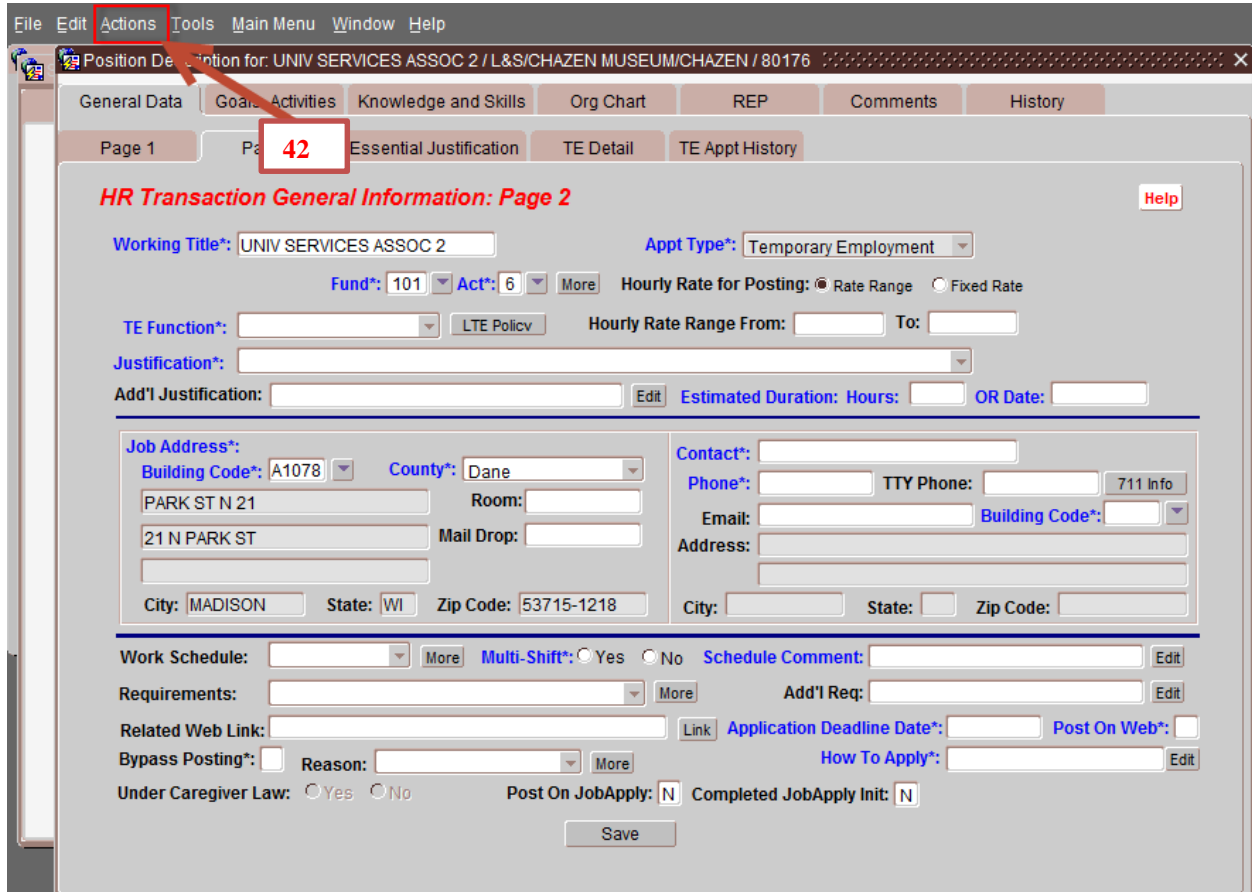
Save 41

STEP	FIELD	ACTION
5	Soc Sec # (Required)	Enter Social Security# or Empl ID 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)	
8	Middle Initial	
9	Home Phone (Required)	
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 TE appointment. Do not populate or edit if populated.
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)	
16	State (Required)	
17	Zip Code (Required)	
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. Will automatically populate if current or former employee.
22	Gender (Required)	Select from dropdown list
23	HireType (Required)	Select from Dropdown List
24	Action	Defaults no entry needed
25	Action reason (Required)	Select from dropdown list
26	Employee Record #	Select if current or former employee in HRS (Use with Hire Type “Transfer” or “Rehire”
27	TE Begin Date (Required)	Enter date
28	Hourly Rate (Required)	Enter Rate
29	Continuity/Duration (Required)	Select from dropdown list. If 02A, 02B, 02C, end date is required.
30	CBC Status Date	Enter date (If CBC is required)
31	Position of Trust	Defaults to “No” - Select from dropdown list
32	Rehired Annuitant (Required)	Select from dropdown field
33	Std. Out-of-state plan	Select if employee will be working out of state
34	Foreign National	Departments should check the foreign national box as follows: - If the employee is a foreign national; -If the employee is a permanent US resident (green card holder) and they are a new employee Do not check the box if the employee is: -A permanent US resident (green card holder) and they are a continuing employee -A naturalized US citizen (whether new or continuing employee)
35	Eligible for full time state rate	Select from dropdown list. Defaults to blank
36	Above TE maximum	Defaults to “No”
37	Out of state	Defaults to “No”
38	Living Wage Exception	Select from dropdown list. Defaults to blank
39	Overload	Defaults to “No”. Press <Employment Overload Form> if transaction generates an overload.
40	TE Comments	Free text field
41	Save	Press <Save>
<b>STEP</b>	<b>FIELD</b>	<b>ACTION</b>
5	Soc Sec # (Required)	Enter Social Security# or Empl ID if unknown add 999-99-9999 in Social Security field

### 3. TE Appointment History - Leave this screen blank even if the applicant has appointment history.

Approving TE Hire - Go to the Actions Menu and select 'TE Action'



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

Position Description for: UNIV SERVICES ASSOC 2 / L&S/CHAZEN MUSEUM/CHAZEN / 80176

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

Page 1 Page 2 **42** Essential Justification TE Detail TE Appt History

**HR Transaction General Information: Page 2** Help

Working Title\*: UNIV SERVICES ASSOC 2 Appt Type\*: Temporary Employment

Fund\*: 101 Act\*: 6 More Hourly Rate for Posting: ☒ Rate Range ☐ Fixed Rate

TE Function\*:  LTE Policyv 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\*:

Phone\*:  TTY Phone:  711 Info

Email:  Building Code\*:

Address:

City:  State:  Zip Code:

---

Work Schedule:  More Multi-Shift\*: ☐ Yes ☐ No Schedule Comment:  Edit

Requirements:  More Add'l Req:  Edit

Related Web Link:  Link Application Deadline Date\*:  Post On Web\*: ☐

Bypass Posting\*: ☐ Reason:  More How To Apply\*:  Edit

Under Caregiver Law: ☐ Yes ☐ No Post On JobApply: N Completed JobApply Init: N

Save



#### 4. TE Action Screens

**Approve/Reject LTE**

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

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

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

**Notify Transaction Creator on Final Approval:** ☐

Approve LTE Trans and Applicant      Reject LTE Trans and Applicant

Approve LTE Trans Only      Reject LTE Trans Only

**Approve LTE Applicant Only**      Reject LTE Applicant Only

Approve LTE but Reject Applicant

Cancel

5. If approved, select 'Approve TE 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**  
Applicant Selected/Selected

**Latest LTE Applicant Event/Status**  
LTE Applicant CHR Approved/LTE Applicant Approved

**Notify Transaction Creator on Final Approval:** ☐

Approve LTE Trans and Applicant      Reject LTE Trans and Applicant

Approve LTE Trans Only      Reject LTE Trans Only

Approve LTE Applicant Only      Reject LTE Applicant Only

Approve LTE but Reject Applicant

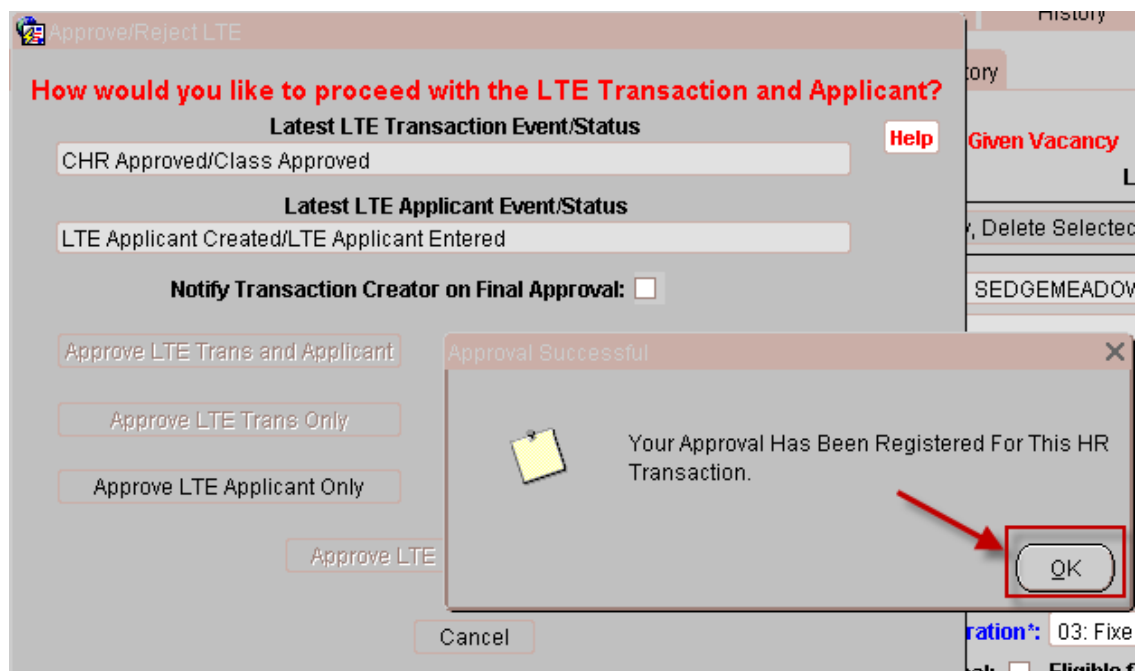
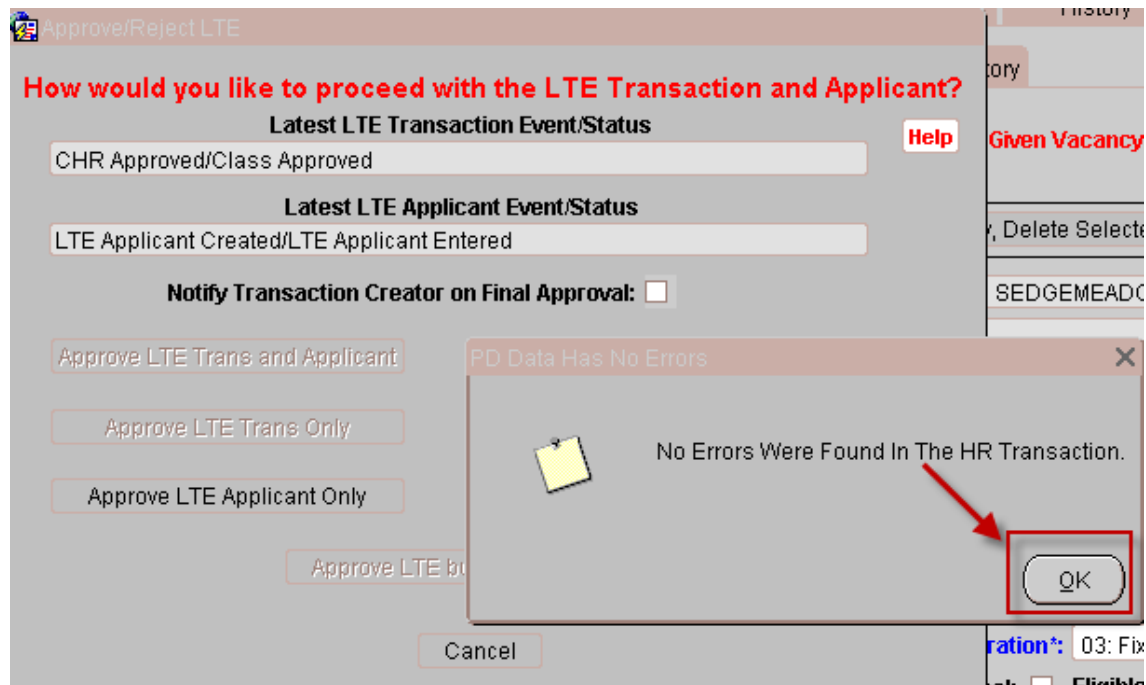
Cancel

**Approve Package**

Would you like to Save your data and Approve the HR Transaction?

Yes No

Required Exclusion Forms: Confidential ☐ N Manage  
PD Discussion Date:  Position  
Date Duties Began:  PD/LTE Eff Date: 01/09/2012  
Last PD-of-Record Date:  Empl ID / Empl Rcd:  / ☐ HR Transaction Type: Temporary Employment  
Cert Number: 00080084  
Save



## Hiring a University Staff/Fixed-Term Finite Applicant into a Position

1. Select the HR Transaction to Hire into - You can search for the appropriate HR Transaction

CHRIS Main Menu for Human Resources Staff

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

Help System Changes

*How would you like to proceed?*

**HR Transaction Type:**

☐ University Staff/US-Fixed Term Vacancy ☐ TE ☐ 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

**1**

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

University Staff/US-Fixed Term Processi...

**\*\* 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

**2. Screen is used to hire an applicant into a University Staff/Fixed-Term Finite position.**

STEP	FIELD	ACTION
1	Add Original/New Hire Processing University Staff Fixed-Term Finite	Press <University Staff/US-Fixed Term Processing> button
2	Vacancy ID (Required)	Enter PD #
3	Social Security# or Empl ID (Required)	Enter Social Security# or Empl ID if unknown add 999-99-9999 in Social Security field
4	Add Original/New Hire Applicant	Press < Add Original/New Hire Applicant > button

### 3. Screen to enter person information.

CHRIS: Original/New Hire Applicant

Position Vacancy Id 00081543 Empl Class CP Fte 1.000 Status Recruiting

Job Code 16660 UNIV SERVICES ASSOC 2 UDDS A011010 G E A/UNIVERSITY ADMIN/CHAN OFC

Announced Job Code 16660 UNIV SERVICES ASSOC 2 More Schedule/Range 02 - 10 HAM N

Soc Sec # 999-99-9999 Empl ID Applicant Id Change SS# Or Empl ID

Name: Last 5 First 6 Address 17

Middle 7 Name Suffix 8

Home Phone 9 Work Phone 10 City 18 State 19

Email 11 Zip Code 20 County 21

Birth Date 12 Adj Cont Service Date 18 Country United States 22

Gender 14 Release Home Addr. 28

Veteran N Handicapped N 15 16 Ethnicity 24

Applicant Type Original/New Hire 25 Except'l Emp Appointed

Payrolled N ROA SE 09/09/2015

Next Vacancy Appt Letter Vacancy Vacancy Log Delete Save Appointment Data

Next Applicant View Vac Apps Return Menu Push Hire to HRS

STEP	FIELD	ACTION
5	<u>Last Name (Required)</u>	<u>Enter last name-If current or former employee person information will populate fields. Cannot edit Name fields</u>
6	<u>First Name (Required)</u>	
7	<u>Middle Initial</u>	
8	<u>Suffix</u>	
9	<u>Home Phone (Required)</u>	
10	<u>Work Phone</u>	
11	<u>Email Address</u>	
12	<u>Date Of Birth (Required)</u>	<u>Enter date of birth-if populated cannot edit &lt;Date of Birth&gt; field</u>
13	<u>Adjusted Continuous Service Date</u>	<u>If new to UW-Madison or state service put in hire date, if current employee the date will populate, if former employee returning with a break in service of 5 or less years calculate new date and enter</u>
14	<u>Gender (Required)</u>	<u>Select from dropdown list</u>
15	<u>Veteran Indicator (Required)</u>	<u>Defaults to "N"</u>
16	<u>Handicapped Indicator (Required)</u>	<u>Defaults to "N"</u>
17	<u>Address (Required)</u>	<u>Enter address - If current or former employee person information will populate fields. Edit address fields with updates as necessary.</u>
18	<u>City (Required)</u>	

<u>19</u>	<u>State (Required)</u>	
<u>20</u>	<u>Zip Code (Required)</u>	
<u>21</u>	<u>County</u>	Defaults no entry needed
<u>22</u>	<u>Country (Required)</u>	Defaults to United States- Select from dropdown list if not United States
<u>23</u>	<u>Release Home Address (Required)</u>	Select “Y” or “N”-If left blank defaults to “N” in HRS
<u>24</u>	<u>Ethnicity (Required)</u>	Select from Dropdown List. Will automatically populate if current or former employee.
<u>25</u>	<u>Applicant Type (Required)</u>	Automatically populates to Original/New Hire
<u>26</u>	<u>Appointment Data</u>	Press <Appointment Data> button

#### 4. Screen used to enter selected applicant information

CHRIS: 'Selected' Applicant Data

Data for the Selected Applicant

Empl Rec# 50

Anticipated Begin Date 27 End Date 51

Hire Type 28

Action 29

Action Reason 30

Appointed Job Code 31

ESR Used ☐ Hired Above The Midpoint ☐ At Risk Emp. ☐ Yes ☐ No 34

Prior Employer 32 35 Continuity/Duration 01: Ongoing 36

CBC Status Date 37 Position Of Trust 38

Hourly Rate 39 Rate Over Max ☐ 40

Probation Type 41 Probation End Date 42

Rehired Annuitant 43 Std. Out-of-state Plan 44 Foreign National 45

Appointed 46 Position # 47 Payrolled 48

Selective Service 49 OK 50 Cancel 51

<u>STEP</u>	<u>FIELD</u>	<u>ACTION</u>
27	Anticipated begin date (Required)	Enter Date
28	Hire type (Required)	Select from dropdown list
29	Action	Defaults no entry needed
30	Action reason (Required)	Select from dropdown list
31	Appointed job code (Required)	Defaults no entry needed or if multiple job codes, select from dropdown list
32	ESR used (Required)	Select either “Y” or “N”
33	Hired Above the Midpoint (Required)	Select either “Y” or “N”
34	At Risk Emp. (Required)	Select either “Yes” or “No”
35	Prior Employer (Required)	Enter if applicant has prior employment. Defaults to “NONE”

36	Continuity/Duration	University Staff hire defaults to 01: On-going. For US Fixed Term Finite hire the Continuity/Duration will default based on end date.
37	CBC Status Date	Enter date
38	Position of Trust	Defaults to “No” – select from dropdown field
39	Hourly rate (Required)	Enter hourly rate
40	Rate Over Max	Select if over max
41	Probation type	Select from dropdown list
42	Probation end date	Defaults to 6 months Note: some titles have approved extended probationary periods that will need to be manually adjusted
43	Rehired Annuitant	Defaults to “No” – select from dropdown field
44	Std. Out-of-state plan	Select if employee will be working out of state
45	Foreign National	Departments should check the foreign national box as follows: - If the employee is a foreign national; -If the employee is a permanent US resident (green card holder) and they are a new employee Do not check the box if the employee is: -A permanent US resident (green card holder) and they are a continuing employee -A naturalized US citizen (whether new or continuing employee)
46	Appointed	Populates after the hire is successfully pulled into HRS
47	Position #	Populates after the hire is successfully pushed into HRS
48	Payrolled	Populates after the hire is successfully pushed into HRS
49	Select Service	Press <Select Service> button if applicant is a male between the ages of 18 and 25
50	Employee Record #	Select if current or former employee in HRS (Use with Hire Type “Transfer” or “Rehire”
51	End date	Enter end date if US Fixed Term Finite hire
52	OK	Press <OK>

## 5. If Selective Service Data is Required

CHRIS: Selected Applicant Data

**Selective Service Information**

Registered For Selective Service ☒ Yes ☐ No **53**

If The Applicant has not registered for Selective Service, please inform the candidate to register at:

If the applicant has not registered for a reason, an exception must be entered below. If they have registered please supply the Date of Registration.

Reason **54**

Date of Registration **55**

Cancel OK **56**

## 6. List of not Registered Reasons

CHRIS: Selected Applicant Data

**Selective Service Information**

Registered For Selective Service ☒ Yes ☐ No **53**

If The Applicant has not registered for Selective Service, please inform the candidate to register at:

If the applicant has not registered for a reason, an exception must be entered below. If they have registered please supply the Date of Registration.

Reason **54**

Date of Registration **55**

Cancel OK **56**

STEP	FIELD	ACTION
53	Registered For Selective Service	Select "Yes" or "No". Defaults to "Yes"
54	Reason	Select from dropdown list
55	Date of Registration	Enter date
56	OK	Press <OK>



## 7. Screen to Push Hire to HRS

CHRIS: Original/New Hire Applicant

Position Vacancy Id 00081543 Empl Class CP Fte 1.000 Status Recruiting

Job Code 16660 UNIV SERVICES ASSOC 2 UDDS A011010 G E A/UNIVERSITY ADMIN/CHAN OFC

Announced Job Code 16660 UNIV SERVICES ASSOC 2 More Schedule/Range 02 - 10 HAM N

Soc Sec # 999-99-9999 Empl ID Applicant Id Change SS# Or Empl ID

Name: Last First Address  
Middle Name Suffix  
Home Phone Work Phone City State  
Email Zip Code County  
Birth Date Adj Cont Service Date Country United States  
Gender Release Home Addr.  
Veteran N Handicapped N Ethnicity

Applicant Type Original/New Hire Except'l Emp Appointed  
Payrolled N  
ROA SE 09/09/2015

Next Vacancy Appt Letter Vacancy Vacancy Log Delete Save Appointment Data  
Next Applicant View Vac Appls Return Menu Push Hire to HRS 57

STEP	FIELD	ACTION
57	Push Hire to HRS	Press <Push Hire to HRS> Button. Validates data, saves changes and pushes complete "Selected Applicant" to HRS for processing (Push to Hire will not process until all the required fields are entered for a selected applicant. The process cycle to pull into HRS will run every 30 minutes. Divisions have the option to override the 30 minute process cycle and use the "On Demand" button to pull hire data into HRS immediately.

## 8. Screens to review status of hire.

Position Description for: UNIV SERVICES ASSOC 2 / SCHOOL OF EDUCATION/CTR ADVANCEMENT/WISCAP / 80127

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

Page 1 Page 2 Essential Justification

**HR Transaction General Information: Page 1** Employee: JAMES JEMS-CAGNEY Help

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

UDDS\*: A179000 SCHOOL OF EDUCATION/CTR ADVANCEMENT/WISCAP / 80127 Status: HRS Processing Tran Comments

Code Classification Barg Unit Supervision Type\*  
Title(s): 16660 UNIV SERVICES ASSOC 2 02 General More Titles 58

Rate Range\*: Minimum: \$14.250 Maximum: \$21.803 Post Max Rate on Web: ☐

Supervisor: Last Name\* First Name Title\*  
Mather Kathy UW HR Mgr-Adv

Supervisor's Email Address\*: kmather@ohr.wisc.edu

Employees With Similar Duties

Last Name	First Name	Title

More

Required Exclusion Forms: Confidential ☐ Management ☐ Supervisory ☐

PD Discussion Date: Position #: HR Transaction ID: 000080127

Date Duties Began: PD/LTE Eff Date: 11/02/2015 Cert Number: 000080127

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

Save

Position Description for: BLDGS/GROUNDS SUPV / SMPH/ADMINISTRATION/PHYS FACIL / 76618

Auth to Hire Goals Activities Knowledge and Skills Org Chart Comments Exclusions History 59


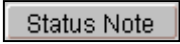
Status History

**HR Transaction Status History** Certification Number: 00076618 Help

60

Event	HR Transaction/ Vacancy Status	Status Date/Time	Status Set By (Name Or Logon ID)	Status Note
Applicant Sent To HRS	HRS Processing	12/06/2010-10:54:24	OHR01	Status Note
Applicant Selected	Selected	12/06/2010-10:54:24	OHR01	Status Note
Initial Referral	Recruiting	08/02/2010-12:00:18	UWPRD\$MAESTRO	Status Note
CHR Approved	Class Approved	08/02/2010-08:22:40	SCB	Status Note
CHR Validated	Validated	07/30/2010-10:01:35	KZL	Status Note
Div Approved	CHR Review	07/30/2010-09:28:23	PDA	Status Note
Dept Approved	Div HR Review	07/27/2010-07:57:35	FJW	Status Note
Submitted	Dept HR Review	07/27/2010-07:57:34	FJW	Status Note
Created	Draft	06/09/2010-15:33:26	FJW	Status Note
				Status Note
				Status Note

61

<b>STEP</b>	<b>FIELD</b>	<b>ACTION</b>
58	Status	<p>Page 1 of the Position Description window displays general information for the selected employee. The Status field displays <b>HRS Processing</b> which means the transaction has been sent to HRS for processing. If successful the status will be set to “payrolled”. If the push to HRS fails the field displays “HRS Errors”</p> <p><b>Note:</b> If the Status field displayed <i>HRS Errors</i>, you would need to correct the error(s) and re-do the Push Hire to HRS.</p>
59	Status History Tab	<p>To view the HR transaction history, click the <b>History</b> tab.</p> 
60	Status History Tab	<p>The History/Status History tab shows HR events in descending date order. In our example, the “Applicant Sent to HRS” event is displayed in the top row.</p>
61	Status Notes	<p>To view transaction status history notes for the event, click the Status Note button, located in the far right-hand column.</p> 
61	Status Notes	<p>The Status History Notes window displays status notes if the hire errors out after being pushed to the HRS staging table.</p>

## Updating a Position Description

### 1. Creating a New Transaction

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

#### a. Starting from the Main Menu

Check the box next to Update PD press the 'New Transaction' button. A Box will pop up requiring 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.

## b. Starting from the Search Screen

Select (check the box) next to an HR Transaction on a search results list and then select 'Copy HR Tran to New Tran' at the top of the screen.

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

Appointment Type = 'CP'; Department = A53; [Help](#)

Title	Div/Dept	HR Tran Status	Employee Name (or *Note)	Type	Print Results
<input type="checkbox"/> OPER PROGRAM ASSOC	SMPH/ADMINISTRATION/PH	Reallocation Approved	MICHAEL D WILSON	REA	
<input type="checkbox"/> PAY & BEN SPEC 4	SMPH/SURGERY/SURGERY	Reclass Approved	CHERYL L NAFFZ	RCL	
<input type="checkbox"/> IS RESOURCE SUP TEC E	SMPH/OPHTHAL&VIS SCI/FF	Class Approved	LYNN A DASSOW	UPD	
<input type="checkbox"/> IS RESOURCE SUP TEC E	SMPH/OPHTHAL&VIS SCI/FF	Class Approved	MARCIA J SCHIFFMAN	UPD	
<input checked="" type="checkbox"/> PUBLICATIONS EDITOR	SMPH/PATHOL & LAB MED/A	Closed	KAREN L DORMAN	CP	
<input type="checkbox"/> MEDICAL ASSISTANT 2	SMPH/FAMILY MEDICINE/CL	Closed	JENNY A STIEBER	CP	
<input type="checkbox"/> UNIV SERVICES ASSOC 2	SMPH/POP HEALTH SCI/POI	Closed	QUINN H FULLENKAMP	CP	

Title: 12261 PUBLICATIONS EDITOR UDDS: A536300 SMPH/PATHOL & LAB MED/ANAT PATH

HR Tran Type: Position Vacancy Status Date: 04/19/2010-18:20:15 Tran Status: Closed

Employee: KAREN L DORMAN Prior Employee:

Cert Number: 00075516 [Go to CHRIS Vacancy Record](#) Position #: 01427432 Effective Date: 04/18/2010

Supervisor: Kulow, Rachel Creator: Kulow, Rachel

Working Title: Publication Editor HR Transaction ID: 0000075516

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

2. After selecting ‘Copy HR Tran to New Tran,’ the following menu appears:

The screenshot shows the 'UW-Madison Classified Human Resources Information System - CHRIS' window. A dialog box titled 'Copy Information For Permanent/Project Vacancies' is open. It has tabs for 'Copy for Permanent/Project', 'Copy for LTE', 'Copy for Reclass', 'Copy for Update', and 'Copy for Reallocation'. The 'Copy for Permanent/Project' tab is selected. The dialog contains the following text: 'Please Select the Items that you would like to copy.' Below this are four checked checkboxes: 'Copy Authorization to Hire Information', 'Copy Goals, Activities and Knowledges', 'Copy Organization Chart', and 'Copy Exclusion Forms'. At the bottom of the dialog are 'Copy' and 'Cancel' buttons. In the background, the main window shows fields for Employee (DENISE WHITFORD), Prior Employee (Pamela Munoz), Cert Number (00079756), Position # (02024266), Effective Date (11/07/2011), Supervisor (Hoslet, Charles), Creator (Van Wey, Elizabeth j), and Working Title (PRG ASST ADV CONF). The HR Transaction ID is 0000079756. Buttons at the bottom include 'Edit HR Tran', 'View HR Tran', 'Display/Print HR Tran Documents', 'Copy HR Tran To New Tran', and 'Refresh Query'.

3. Choose the “Copy for Update” tab

The screenshot shows the same 'UW-Madison Classified Human Resources Information System - CHRIS' window, but the dialog box is now titled 'Copy Information For Update'. The 'Copy for Update' tab is selected. The dialog contains the same four checked checkboxes as before. Below these is a new section: 'Should the PD be created for the Same Empl ID/Empl Rcd or a Different One?'. It states: 'Cannot copy an HR Transaction for the same Empl ID/Empl Rcd if it is a position vacancy that is not CLOSED'. There are two radio buttons: 'Same Empl ID/Empl Rcd' (unselected) and 'Different Empl ID/Empl Rcd' (selected). To the right of the 'Different' radio button is a text field for 'Empl ID' and a text field for 'Empl Rcd'. A 'Find Empl ID By Name' button is also present. At the bottom of the dialog are 'Copy' and 'Cancel' buttons. The background main window fields are the same as in the previous screenshot.

**'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 Update HR Transaction using the criteria associated with the check boxes.

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

#### 4. Make any updates to the existing PD

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 REP Comments Exclusions History

Page 1 Page 2

**HR Transaction General Information: Page 1** Employee: CRYSTAL PETERSON 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\*: A073000 COL OF AG & LIFE SCIENCES/BIOCH Status: Tran Comments

Code Classification Barg Unit Supervision Type\*

Title(s)\*: 08500 UNIV SVC PRG ASSOC 02

Rate Range\*: Minimum: Maximum: Post Max Rate on Web:

Supervisor: Last Name\* First Name Title\*

Michael Cathy Academic Department Manager

Supervisor's Email Address\*:

Employees With Similar Duties

Last Name First Name Title More

Required Exclusion Forms: Confidential Management Supervisory

PD Discussion Date: Position #: 02109902 HR Transaction ID: 000097109

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

Last PD-of-Record Date: Empl ID / Empl Rcd: 00538999 / 0 HR Transaction Type: Update

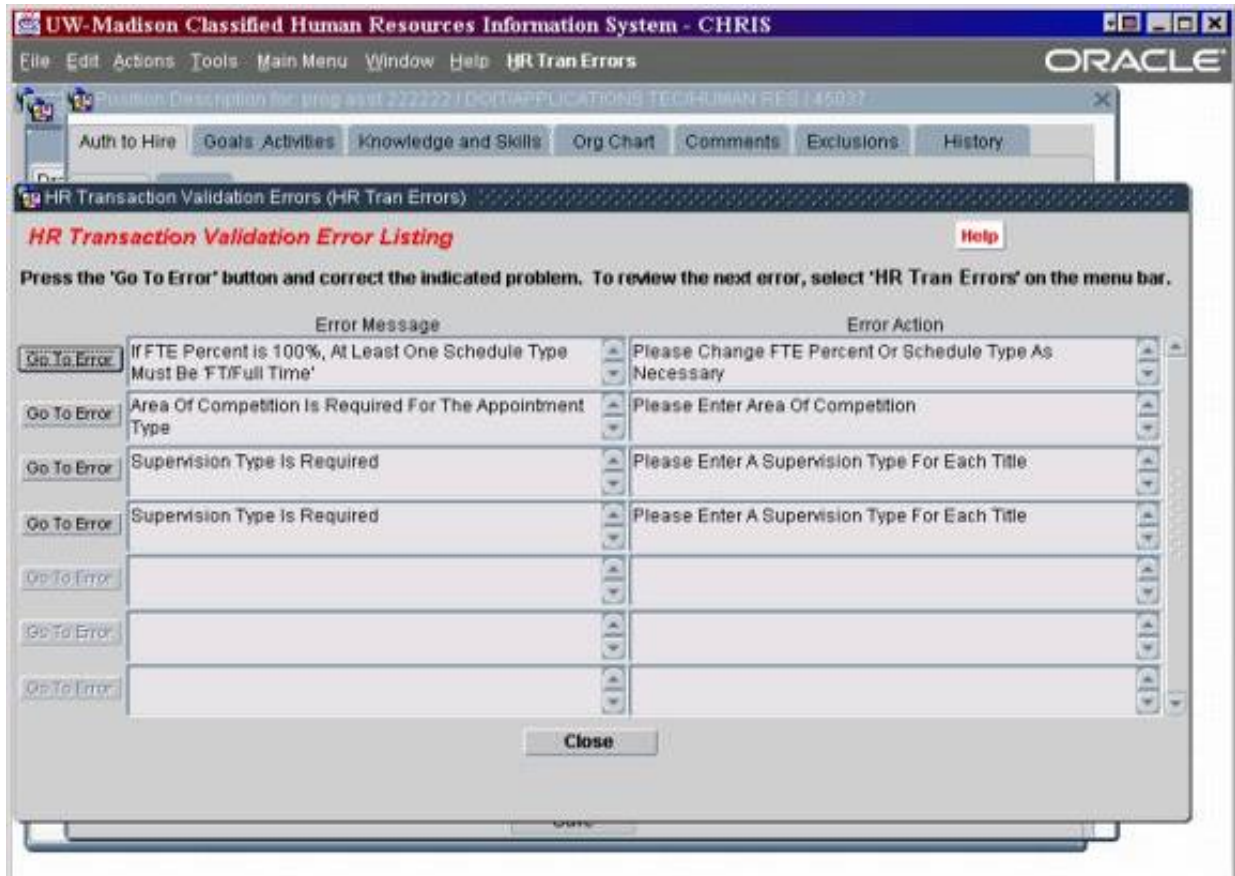
Cancel New HR Trans Save Page 1 Changed:

#### 5. 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.

1. 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.





2. 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. 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.
4. To keep track of the status of your HR Transaction, go into the Transaction and select the 'History' tab.

## 6. Submission, Rejection and Approval

1. 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.
2. Transaction Approval - If the HR person reviewing the HR Transaction accepts the PD, s/he can approve it. Approval sends it to the next level HR staff. An email is sent unless the next level is Office of Human Resources (OHR). People at the level at which the approval was done can only view the data, except in the case of OHR.