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*Any questions regarding the HRA
process, please email*

HRAQuestionsDL@stocktonusd.net

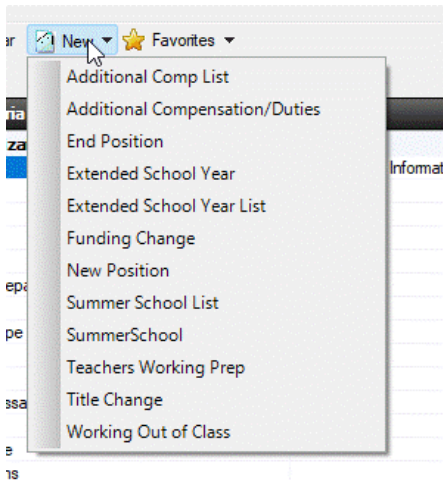
SUSD HRA POSITION GUIDE

Start a HRA

To start an HRA, go to “HR/Payroll” → “HR Authorization” → “Authorization”



On the right screen, click on “New” and select the activity that you would like to do an HRA for.



In the Authorization Tab, please make sure you add location (Site Number) before moving to the Items:1 Tab.

A screenshot of a web application's "Authorization Information" form. The form is titled "Authorization Information" and has a "New Au" button in the top right corner. The form has several tabs: "Authorization", "Items:1", "To-Do Tasks", "Approvals", "Attachments", "Notes", and "History". The "Authorization" tab is selected. The form contains the following fields: "Package Type" (Working Out of Class), "Effective Date" (5/14/2025), "Comment", "Location" (highlighted in yellow), "Division", "Academic Department", "Date Board Mtg", and "Board Description".

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Go to Items and double click on the first item on the list (Some HRA might have more than one item)

A new screen will open, please go to the instruction for each screen to review on how to complete the HRA.

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How to approve a HRA

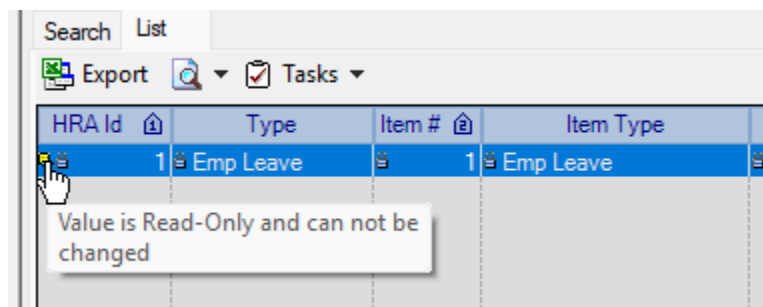
To start an HRA, go to “HR/Payroll” → “HR Authorization” → “Approve Authorization”. If you don’t have this option, please contact TI department



On the right screen, click on “Go” and the system will list all HRA waiting for your approval.

HRA Id	Type	Item #	Item Type	Description	Action	Result	Comment	Created By
1	Emp Leave	1	Emp Leave		Defer			04/14/25 3:26PM by HRATEST

To see the details of the HRA, you can click on the yellow icon on the left side of the HRA Id.



To approval the HRA, click on the Defer option in Action column and change it to Approve

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Search List

Export Tasks

HRA Id	Type	Item #	Item Type	Description	Action
1	Emp Leave	1	Emp Leave		Defer

Action

- Approve
- Defer
- Deny

Then click on the Tasks → Post Approvals/Denials

Tasks

Post Approvals/Denials

mp Leave	1	Emp Leave
----------	---	-----------

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Working Out of Class

- Working out of Class HRA's are only done for Classified Positions.
- Working out of Class HRA's should be completed on an as needed basis. They should not be done as a blanket HRA to cover the entire year for a position.
- Certificated positions can be filled as Interim. Board approval must be provided and attached to a "New Position" HRA. They can't be Working Out of Class.
- *Note: Items not listed on instructions below are NOT required to be filled.*

1-Item:

0 - Status	
Type	Additional Compensation/Duties
Status	Open
On Hold	No
1 - Item	
Begin Date	
End Date	
Employee	
Job Title	
Person Type	
Division	
Academic Dept	
Location	
Supervisor	
Salary Schedule	
Salary Placement	
Work Schedule	
Work Hours	
Work Type	
Description	
Comment	

- Begin Date – (Required) First date of acting
- End Date- (Required) Last date of acting, no later than June 30 of current fiscal year
- Employee – (Required) Name of employee working out of class (enter the ID of the employee or enter the employee's last name). Click the drop down.
- Academic Dept - (Required) Use Drop down to select SUSD.
- Location- (Required) Site name where acting.
- Work Type- (Required) Select Classified.
- Description-(Required). Include Out of class Position number, Out of class position title, justification and pay information (if timesheet will be submitted enter "timesheet" along with the pay rate)

Ex:Office Assist acting as Senior Office Assist while the employee is on extended leave will submit a timesheet 5% pay increase.

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- Comment - Will prefill with employee ID.

2-Item Accounts: *Enter the out of class account number(s)*

The screenshot shows a web form with several sections. The '2 - Item Accounts' section is highlighted. It contains the following fields:

Field	Value
Total Account %	0.00
Account 1	
Account 1 Percentage	
Account 2	
Account 2 Percentage	
Account 3	
Account 3 Percentage	

Other sections visible include:

- 0 - Action: Delay Posting Until, Action, Action Comment
- 3 - Additional Accounts
- 4 - Current Assignment Information: Primary Assignment, Non-Primary Assignment
- 99 - Add/Update Information

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event. **Use a Position 22 report to confirm the account. See below:**

The screenshot shows the 'HR / Payroll - Reports - Admin' section. It contains a table with the following data:

Report Description	Report Name
Employee Assignment Funding	Pos22

Other elements visible include:

- Activities: 070 - Stockton USD, Quick Start here
- Finance: HR / Payroll, HR Authorizations, Reports, Admin
- Online Resources: SUSD Resources

Go to HR/Payroll > Click reports > Click Admin > right side of screen will Show Pos22 > click Open.

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Once you are in the POS22 report, enter in location and Job Class >Click Go. It will have a list of all Employees associated with that search. You will then use the out of class PCN to find the account.

If you are unable to locate the account, please contact your Budget Analyst.

- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-5 - Use the lookup or enter subsequent accounts for this event.
- Account 2-5 % - Enter subsequent account percentages until the Total Account % equals 100.

Attachments

Attach approval documentation (ex. Approval email thread).

How to Submit the HRA:

0 – Action

- **Action – (Required) Change Action to “Submit”.**



0 - Action	
Delay Posting Until	
Action	Submit
Action Comment	
2 - Item Accounts	

Save and Close at Item level

Save and Close at top level

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Teacher Working Prep

- **NO blanket HRAs for the entire school year**

1-Item *Note: Items not listed on instructions below are NOT required to be filled.*

0 - Status	
Type	Additional Compensation/Duties
Status	Open
On Hold	No

1 - Item	
Begin Date	X
End Date	
Employee	X
Job Title	
Person Type	
Division	
Academic Dept	
Location	
Supervisor	
Salary Schedule	
Salary Placement	
Work Schedule	
Work Hours	
Work Type	
Description	
Comment	X

- **Begin Date – (Required)** Enter the begin date of the employee (beginning date of teacher working prep-no earlier than the 1st student contact day of the semester).
- **End Date- (Required)** Last day of the semester with student contact.
- **Employee – (Required)** Enter the ID of the employee.
- **Academic Dept- (Required)** Select SUSD-Stockton Unified School District.
- **Location- (Required)** site number.
- **Salary Schedule- (Required)** select HRA_GE General Schedule for HRA.
- **Salary Placement- (Required)** Click drop down, select 1/1.
- **Work Schedule- (Required)** Enter “Course Name” being taught during prep and add class list in attachments tab.
- **Work Type- (Required)** Certificated.
- **Description-(Required)** Amount of FTE- i.e..33%.
- **Comment – (Required)** Justification for pay.

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- Note: Prep HRA's are done on a semester basis. Remember to do 2nd semester prep HRA's with enough time to go through the approval process before the return winter break.

2- Item Accounts

Action Comment	
2 - Item Accounts	
Total Account %	0.00
Account 1	
Account 1 Percentage	
Account 2	
Account 2 Percentage	
Account 3	
Account 3 Percentage	
3 - Additional Accounts	
Account 4	
Account 4 Percentage	
Account 5	
Account 5 Percentage	
4 - Current Assignment Information	
Primary Assignment	
Non-Primary Assignment	

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-5 - Use the lookup or enter subsequent accounts for this event.
- Account 2-5 % - Enter subsequent account percentages until the Total Account % equals 100.

Attachments

Add Class List Attachment

How to Submit the HRA:

0 – Action

- Action – (Required) Change Action to “Submit”.

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0 - Action	
Delay Posting Until	
Action	Submit
Action Comment	
2 - Item Accounts	

Save and Close at Item level

Save and Close at top level

Additional Compensation/Duties

- If a physical timesheet is going to be submitted, please include the HRA number on the timesheet.
- NO blanket HRAs for the entire school year

1- Item Note: Items not listed on instructions below are NOT required to be filled.

0 - Status	
Type	Additional Compensation/Duties
Status	Open
On Hold	No
1 - Item	
Begin Date	X
End Date	
Employee	X
Job Title	
Person Type	
Division	
Academic Dept	
Location	
Supervisor	
Salary Schedule	
Salary Placement	
Work Schedule	
Work Hours	
Work Type	
Description	
Comment	X

- Begin Date – (Required) Enter first date of additional comp.
- End Date – (Required) Enter last date of additional comp.
- Employee – (Required) Enter the ID of the employee.
- Academic Dept: (Required) Stockton Unified School District (drop down).

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- Location- (Required) Site number.
- Description- (Required) include justification and maximum hours, examples below:
 - PD training not to exceed 2 hours.
 - If it is a LCAP item, list the LCAP reference here (example LCAP SA 3.2).
- Comment – (Required) Type: Additional Comp.

NOTE: If timesheet WILL BE submitted, enter “Timesheet will be completed”

2- Item Accounts

If you are unable to locate the account, please contact your Budget Analyst.

Action Comment	
2 - Item Accounts	
Total Account %	0.00
Account 1	
Account 1 Percentage	
Account 2	
Account 2 Percentage	
Account 3	
Account 3 Percentage	
3 - Additional Accounts	
Account 4	
Account 4 Percentage	
Account 5	
Account 5 Percentage	
4 - Current Assignment Information	
Primary Assignment	
Non-Primary Assignment	

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-5 - Use the lookup or enter subsequent accounts for this event.
- Account 2-5 % - Enter subsequent account percentages until the Total Account % equals

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100.

How to Submit the HRA:

0 – Action

- **Action – (Required) Change Action to “Submit”.**

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has a tree view with the following items:

- 0 - Action
 - Delay Posting Until
 - Action (highlighted in blue)
 - Action Comment
- 2 - Item Accounts

The main content area shows the 'Action' dropdown menu open, with 'Submit' selected. The 'Action Comment' field is empty. The '2 - Item Accounts' section is visible below.

Save and Close at Item level

Save and Close at top level

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Additional Comp List

- If a physical timesheet is going to be submitted, please include the HRA number on the timesheet. In the comment section of the HRA enter “Timesheets will be submitted.”
- For lists with 25 employees or more, if NO timesheets will be submitted. Fill out the excel sheet attached here. In the comment section of the HRA enter “pay employees from list”. NOTE: If information is missing on the excel sheet it will result in late payments.
- NO blanket HRAs for the entire school year.

1- Item

1 - Item	
Event Date	✖
Event Name	✖
Event Type	✖
Person Type	✖
Division	✖
Academic Department	✖
Event Location	✖
Description	✖
Salary Schedule	✖
Salary Schedule Placement	✖
!!Required!!	Attach List of Employees attending event.
Work Type	✖
Comment	✖

- Event Date – (Required) Enter the date of the event.
- Event Name – (Required) Enter the name of the event. Example: PD Day.
- Event Type – (Required) Enter the type of event. Example: Training.
- Person Type – (Required) Enter Person Type of the employees attending the event using drop down.
- Division – (Required) Enter or lookup the Division of the employees attending the event. For SCHOOL SITES, please select “Education Services” (EDUSERV)
- Academic Department – (Required) Select “Stockton Unified School District.”
- Event Location – (Required) Enter the event location.
- Description – (Required) Use this field for justification and include the **end date** of the event.
- Salary Schedule – (Required) Use the lookup to select the salary schedule to be used for this

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compensated event. **Use the salary schedule “HRA_GE”** (General Schedule for HRA).

- Salary Schedule Placement – (Required) Select 1/1 from the dropdown.
- Required – A reminder to attach a list of employees attending the event on the Attachment tab of the HRA Package.
- Work Type - (Required) Select Classified or Certificated.
- Comment - (Required) This is the comment that will appear in the Comment column on the list for HRA items. Enter Bargunit + Event (i.e STA PD Day).

NOTE: If NO timesheet will be submitted, enter “pay employees from list.”

If timesheets WILL BE submitted, enter “Timesheets will be completed”

2-Item Other/Accounts

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-7 - Use the lookup or enter subsequent accounts for this event.
- Account 2-7 % - Enter subsequent account percentages until the Total Account % equals 100.
- Budget Transfer – (Required) Select No.

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Attachments

Go to the Attachments tab to upload **EXCEL** attachments for this HRA. Please note that the HRA will be rejected if the attachment is not in Excel format. You can find the Excel template below

X Additional Compensation Duties Templates

The screenshot shows the 'New Authorization' form with the 'Attachments' tab selected. The form has a header bar with the title 'New Authorization' and a navigation bar with tabs: Authorization, Items:1, To-Do Tasks, Approvals, Attachments, Notes, and History. Below the navigation bar is a toolbar with icons for Open, New, and Export. The main area is a table with columns: Description, Attached File, Type, Item #, Received Info, Received Via, Sent Info, Sent Via, and Created. A tooltip 'Export list to Excel' is visible over the Export icon.

NOTE: When instructed to correct a HRA spreadsheet, DO NOT delete the original one. Upload the revised one with a revision date and notate the corrections made. This will help to ensure a smooth payroll process.

How to Submit the HRA:

0 – Action

- Action – (Required) Change Action to “Submit”.

The screenshot shows the '0 - Action' section of the form. It has a header bar with the title '0 - Action' and a navigation bar with tabs: Delay Posting Until, Action, and Action Comment. The 'Action' tab is selected, and the value 'Submit' is entered in the field. Below the 'Action' tab is the '2 - Item Accounts' section.

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Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

Summer School

If a physical timesheet is going to be submitted, please include the HRA number on the timesheet.

1-Item *Note: Items not listed on instructions below are NOT required to be filled.*

Authorization		Items: 1	
To-Do Tasks Approvals Attachments Notes History			
Open Export Delete Prev Next Save/Close Cancel Tasks			
0 - Status			
Type	Additional Pay		
Status	Open		
On Hold	No		
1 - Item			
Begin Date	X		
End Date	X		
Employee	X		
Job Title			
Person Type			
Division			
Academic Dept			
Location			
Supervisor			
Salary Schedule			
Salary Placement			
Work Schedule			
Work Hours			
Work Type	X		
Description			
Comment	X		

- **Begin Date** – (Required) Enter the begin date of the employee.
- **End Date** – (Required) Enter the last day of summer school.
- **Employee** – (Required) Enter the ID of the employee.
- **Work Type** – (Required) Enter either certificated or classified using the drop down.
- **Comment** – (Required) Justification for pay.

NOTE: If timesheet WILL BE submitted, enter “Timesheet will be completed”

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2-Item Accounts

The screenshot shows a web form with several sections. The '2 - Item Accounts' section is expanded, showing fields for 'Total Account %' (0.00), 'Account 1' (with a red X), 'Account 1 Percentage' (with a red X), 'Account 2', 'Account 2 Percentage', 'Account 3', and 'Account 3 Percentage'. Other sections include '0 - Action', '3 - Additional Accounts', '4 - Current Assignment Information', and '99 - Add/Update Information'.

0 - Action	
Delay Posting Until	
Action	
Action Comment	
2 - Item Accounts	
Total Account %	0.00
Account 1	✗
Account 1 Percentage	✗
Account 2	
Account 2 Percentage	
Account 3	
Account 3 Percentage	
3 - Additional Accounts	
4 - Current Assignment Information	
Primary Assignment	
Non-Primary Assignment	
99 - Add/Update Information	

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-5 - Use the lookup or enter subsequent accounts for this event.
- Account 2-5 % - Enter subsequent account percentages until the Total Account % equals 100.

How to Submit the HRA:

0 – Action

- **Action – (Required) Change Action to “Submit”.**

The screenshot shows the '0 - Action' section of the form. The 'Action' field is highlighted in blue and contains the text 'Submit'. The 'Delay Posting Until' and 'Action Comment' fields are empty. The '2 - Item Accounts' section is also visible below.

0 - Action	
Delay Posting Until	
Action	Submit
Action Comment	
2 - Item Accounts	

Save and Close at Item level

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Save and Close at top level

Summer School List

If a physical timesheet is going to be submitted, please include the HRA number on the timesheet.

1- Item

The screenshot shows a web-based form titled '1- Item' with a sidebar menu on the left and a main form area on the right. The sidebar menu includes '0 - Status' and '1 - Item'. The '1 - Item' section is expanded, showing a list of fields with red 'X' marks indicating required or error status. The main form area contains a table with the following fields and values:

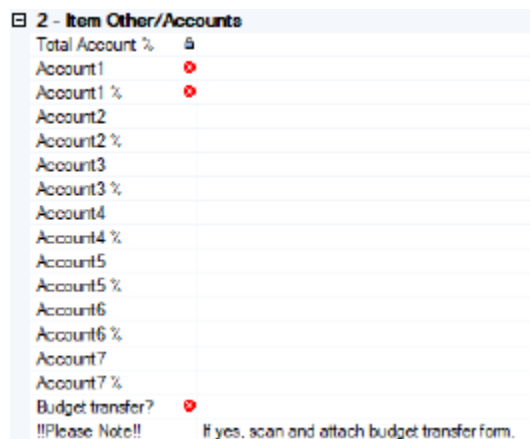
Field	Value
Type	Comp Event
Status	Open
On Hold	No
Event Date	X
Event Name	X
Event Type	X
Person Type	X
Division	X
Academic Department	X
Event Location	X
Description	X
Salary Schedule	X
Salary Schedule Placement	X
!!Required!!	Attach List of Employees attending event.
Work Type	
Comment	X

- Event Date – (Required) Enter the date of the event.
- Event Name – (Required) Enter the name of the event.
- Event Type – (Required) Enter the type of event. (ex. training)

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- Person Type – (Required) Enter or lookup the Person Type of the employees attending the event.
- Division – (Required) Enter or lookup the Division of the employees. For SCHOOL SITES, please select “Education Services” (EDUSERV)
- Academic Department – (Required) Selected “SUSD”.
- Event Location – (Required) Enter the event location.
- Description – (Required) Enter the event description.
- Salary Schedule – (Required) Use drop down and select code “HRA_GE” (General Schedule for HRA).
- Salary Schedule Placement – (Required) Use drop down and select “1/1”.
- Required – A reminder to attach a list of employees attending the event on the Attachment tab of the HRA Package.
- Work Type - (Required) Select Classified or Certificated.
- Comment - (Required) This is the comment that will appear in the Comment column on the list for HRA items. Enter “Summer School List”.

2- Item/Other Accounts



2 - Item Other/Accounts	
Total Account %	0
Account1	X
Account1 %	X
Account2	
Account2 %	
Account3	
Account3 %	
Account4	
Account4 %	
Account5	
Account5 %	
Account6	
Account6 %	
Account7	
Account7 %	
Budget transfer?	X
!!!Please Note!!! If yes, scan and attach budget transfer form.	

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.

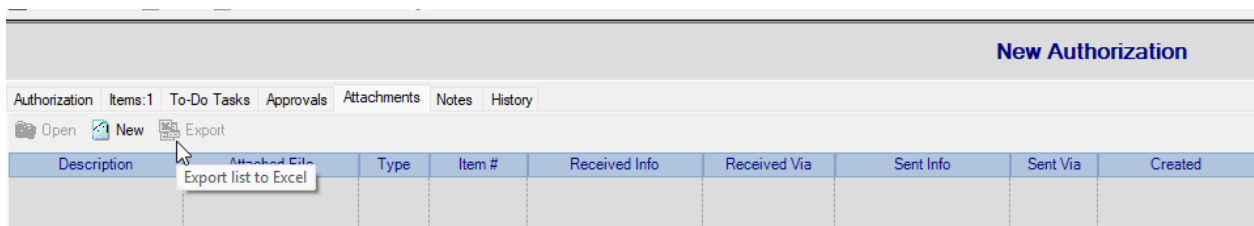
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- Account 2-7 - Use the lookup or enter subsequent accounts for this event.
- Account 2-7 % - Enter subsequent account percentages until the Total Account % equals 100.
- Budget Transfer – (Required) Enter No.

Attachments

Go to the Attachments tab to upload **EXCEL** attachments for this HRA. Please note that the HRA will be rejected if the attachment is not in Excel format. You can find the Excel template below

 [Additional Compensation Duties Templates](#)



How to Submit the HRA:

0 – Action

- Action – (Required) Change Action to “Submit”.

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0 - Action	
Delay Posting Until	
Action	Submit
Action Comment	
2 - Item Accounts	

Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

Extended School Year

If a physical timesheet is going to be submitted, please include the HRA number on the timesheet.

1-Item *Note: Items not listed on instructions below are NOT required to be filled.*

0 - Status	
Type	Additional Pay
Status	Open
On Hold	No
1 - Item	
Begin Date	
End Date	
Employee	
Job Title	
Person Type	
Division	
Academic Dept	
Location	
Supervisor	
Salary Schedule	
Salary Placement	
Work Schedule	
Work Hours	
Work Type	
Description	
Comment	

- Begin Date – (Required) First date of Extended School Year.
- End Date – (Required) Last date of Extended School Year.
- Employee – (Required) Employee name (input employee ID).
- Academic Department - Use drop down select **"SUSD"**.
- Location - (Required)
- Work Type - (Required)
- Description – (Required) Input justification (ex.ESY 4 Hours)
- Comment - (Required) Should pre populate

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2-Item Accounts

0 - Action	
Delay Posting Until	
Action	
Action Comment	
2 - Item Accounts	
Total Account %	0.00
Account 1	
Account 1 Percentage	
Account 2	
Account 2 Percentage	
Account 3	
Account 3 Percentage	
3 - Additional Accounts	
4 - Current Assignment Information	
Primary Assignment	
Non-Primary Assignment	
99 - Add/Update Information	

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-5 - Use the lookup or enter subsequent accounts for this event.
- Account 2-5 % - Enter subsequent account percentages until the Total Account % equals 100.

How to Submit the HRA:

0 – Action

- Action – (Required) Change Action to “Submit”.

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0 - Action	
Delay Posting Until	
Action	Submit
Action Comment	
2 - Item Accounts	

Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

Extended School Year List

If a physical timesheet is going to be submitted, please include the HRA number on the timesheet.

1- Item

The screenshot shows a web application interface for the SUSD HRA Position Guide. The top navigation bar includes tabs for Authorization, Items:1, To-Do Tasks, Approvals, Attachments, Notes, and History. Below the navigation bar is a toolbar with icons for Open, Export, Delete, Prev, Next, Close, Cancel, and Tasks. The main content area displays a form with two sections: '0 - Status' and '1 - Item'. The '0 - Status' section includes fields for Type (Comp Event), Status (Open), and On Hold (No). The '1 - Item' section includes fields for Event Date, Event Name, Event Type, Person Type, Division, Academic Department, Event Location, Description, Salary Schedule, Salary Schedule Placement, !!Required!! (Attach List of Employees attending event.), Work Type, and Comment. Each field in the '1 - Item' section has a red 'X' icon next to it, indicating that these fields are required.

- Event Date – (Required) Enter the date of the event.
- Event Name – (Required) Enter “**ESY**” as the name of the event.
- Event Type – (Required) Enter “**ESY**” as the type of event.
- Person Type – (Required) Either Certificated or Classified. All employees must be the same.
- Division – (Required) Enter or lookup the Division of the employees attending the event (**Division should be - Education Services**).
- Academic Department – (Required) Select SUSD (Stockton Unified School District) from drop down.
- Event Location – (Required) Enter the event location.
- Description – (Required) Enter “**ESY**” as the event description.
- Salary Schedule – (Required) Use the lookup to select code “**HRA_GE (General Schedule for HRA).**”
- Salary Schedule Placement – (Required) Use the drop down to select the salary schedule placement to be used for this compensated event. Select “**1/1**” .
- Required – A reminder to attach a list of employees attending the event on the Attachment

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tab of the HRA Package.

- Work Type - (Required) Select Classified or Certificated.
- Comment - (Required) This is the comment that will appear in the Comment column on the list for HRA items. **(Enter ESY).**

2- Item Other/Accounts

2 - Item Other/Accounts	
Total Account %	5
Account1	
Account1 %	
Account2	
Account2 %	
Account3	
Account3 %	
Account4	
Account4 %	
Account5	
Account5 %	
Account6	
Account6 %	
Account7	
Account7 %	
Budget transfer?	
!!!Please Note!! If yes, scan and attach budget transfer form.	

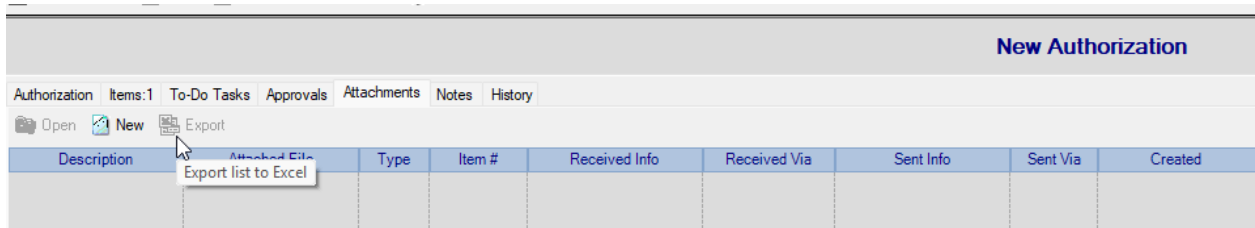
- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-7 - Use the lookup or enter subsequent accounts for this event.
- Account 2-7 % - Enter subsequent account percentages until the Total Account % equals 100.
- Budget Transfer – (Required) Enter NO.

SUSD HRA POSITION GUIDE

Attachments

Go to the Attachments tab to upload **EXCEL** attachments for this HRA. Please note that the HRA will be rejected if the attachment is not in Excel format. You can find the Excel template below

https://docs.google.com/spreadsheets/d/1wvrrvXliRGewchUGOw2a8oPgt7m1ZNgh/edit?usp=drive_link&oid=113618963605873598198&rtpof=true&sd=true



How to Submit the HRA:

0 – Action

- Action – (Required) Change Action to “Submit”.



Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

New Position

If the New Position is a brand new job title, attach the job description as well as the board agenda item with the HRA.

1 - Item *Note: Items not listed on instructions below are NOT required to be filled.*

The screenshot shows a web application interface for creating a new position. The top navigation bar includes tabs for Authorization, Items:1, To-Do Tasks, Approvals, Attachments, Notes, and History. Below the navigation bar is a toolbar with icons for Open, Export, Delete, Prev, Next, Save/Close, Cancel, and Tasks. The main content area is divided into sections: 0 - Status, 1 - Item, and 2 - Position Detail. Each section contains a list of fields with their current values or status indicators (locks, red X's, or empty fields).

0 - Status	
Type	Position New
Status	Open
On Hold	No

1 - Item	
Posted Position Id	
Begin Date	
End Date	
Position Type	
Date Approved	
Previous Position	
Work Type	
Description	
Justification	
Comment	

2 - Position Detail	
Job Category	
Job Class	
FTE Authorized	
Location	
Division	
Academic Department	
Supervisor	
Supervisor Position	
Detail Comment	

- Begin Date – (Required) Date the position should begin. Enter the first day of the month the position is supposed to begin. Ex 7/1/2025.
- End Date -leave blank unless position is temporary (If temporary: put the date the position will end)
- Position Type – (Required) Enter the position type.
- Date Approved- If the position went to board , enter the approved date, attach board items. If it is not a board approved position, leave it blank.
- Work Type - (Required) Select Classified or Certificated
- Justification- (Required) Examples below:
 - Explain the need for the new position
 - Site LCFF funded positions should include the SPSA reference number
 - If an LCAP position, include the LCAP reference number here (example: LCAP SA 3.2).
 - For Classified positions that are less than 8 hours include the schedule here (ex: 3 ½ hours =work schedule for the position is 7:30 a.m. - 11:00 a.m.).

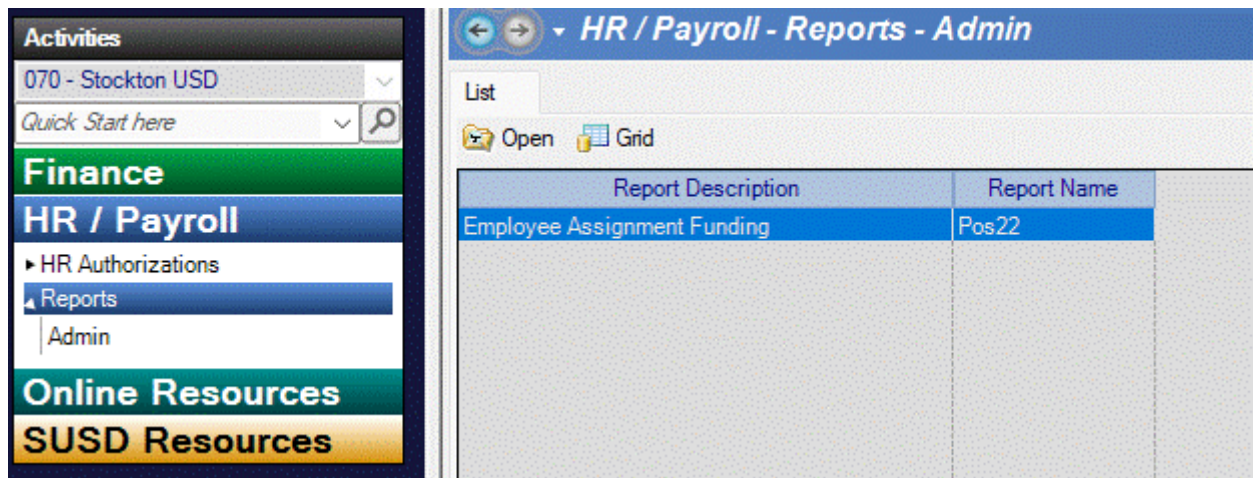
SUSD HRA POSITION GUIDE

- If this is a brand new job title, attach the job description and Board Agenda Item to the HRA
- For jobs that can have a various work year, put the number of work days in the year here (example, nurses can be 190 or 212 days).

- Comment – (Required)- type in “New Position (Position Title)”

2 – Position Detail

- Job Category – (Required) Enter Job Category. If unknown, Run a POS22 report. Shown Below:



Go to HR/Payroll > Click reports > Click Admin > right side of screen will Show Pos22 > click Open

Once you are in the POS22 report, use the drop down to Find the Job class. Once that is selected, it will auto populate the Job Category.

- Job Class – (Required) Enter Job Class.
- FTE Authorized – (Required) Enter FTE Authorized.
- Location – (Required) Enter position location.
- Academic Department- Select “**Stockton Unified School District.**”
- Supervisor- (Required) Direct manager who approves Frontline requests.
- Supervisor Position - Will prefill once Supervisor is entered.

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3 – Position Accounts & 4 – Additional Position Accounts - Enter the accounts that will fund this position, if unknown pull a Pos22 Report or contact your Budget Analyst.

0 - Action		
Delay Posting Until		
Action		
Action Comment		
3 - Position Accounts		
Total Account Percentage	0.00	
Account 01		
Account 01 Percentage		
Account 02		
Account 02 Percentage		
Account 03		
Account 03 Percentage		
4 - Additional Position Accounts		
5 - Job Class Information		
Bargaining Unit		
Hours Per Day		
Salary Schedule		
Salary Schedule Range		
Salary Extra Pay Info		
Calendar		
Paid Days + Holidays		
98 - Item Handling		
Create Additional Item(s)?	N/A {Do not create additional items}	
Complete Without Posting?	No	
99 - Add/Update Information		

- Total Account % - (Read-Only) – The total account percentage field must equal 100 before you can save and close the item if the accounts are being used.
- Account 1 – (Required) Use the lookup or enter your first account for this event.
- Account 1 % (Required) Enter the percentage of the first account that will be used for this event. If less than 100, then subsequent accounts must be entered.
- Account 2-10 - Use the lookup or enter subsequent accounts for this event.
- Account 2-10 % - Enter subsequent account percentages until the Total Account % equals 100.

5 – Job Class Information - All of this information will pre populate as you enter the item and position detail information.

SUSD HRA POSITION GUIDE

Attachments

If the New Position is a brand new job title, attach the job description as well as the board agenda item with the HRA.

How to Submit the HRA:

0 – Action

Action – (Required) Change Action to “Submit”.



0 - Action	
Delay Posting Until	
Action	Submit
Action Comment	
2 - Item Accounts	

Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

End Position

The Position End item ends an existing position record, along with its associated account(s) and detail records.

Note: You will not be allowed to end a position that has active assignment records. Do not submit an End Position unless notified by HR.

1- Item

The screenshot shows a web application interface for managing HRA positions. At the top, there are tabs: Authorization, Items:1, To-Do Tasks, Approvals, Attachments, Notes, and History. Below the tabs is a toolbar with icons for Open, Export, a search icon, Delete, Prev, Next, Save/Close, Cancel, and a Tasks dropdown. The main content area is divided into two sections: '0 - Status' and '1 - Item'. The '0 - Status' section has a table with three rows: Type (Position End), Status (Open), and On Hold (No). The '1 - Item' section has a table with five rows: Position Number, End Date, Work Type, Description, and Comment. Each row in the '1 - Item' section has a red 'X' icon in the right column, indicating required fields.

0 - Status	
Type	Position End
Status	Open
On Hold	No

1 - Item	
Position Number	X
End Date	X
Work Type	X
Description	
Comment	X

- Position Number – (Required) Enter or lookup the Position Id that you want to end.
- End Date – (Required) This will be the last day of the month that the position is supposed to end.
For Classified - Reach out to your HR Analyst for an official end date.
For Certificated - End date at the end of the Fiscal year. 6/30/202*.
- Work Type – (Required) Select Classified or Certificated.
- Description – Use this free-form field to add a justification for this HRA item.-(Example “position never filled” or “resignation” etc).
- Comment – (Required) This is the comment that will appear in the Comment column on the list for HRA items.

SUSD HRA POSITION GUIDE

2- Current Position Info - READ only, provides all current account information. No action required here.

The screenshot displays a web-based form interface for the SUSD HRA Position Guide. The interface is organized into sections, each with a collapse/expand icon (a square with a plus or minus sign) and a title. The '2 - Current Position Info' section is expanded, revealing a list of fields, each with a read-only lock icon (a padlock) to its right. The sections and fields are as follows:

- 0 - Action**
 - Delay Posting Until
 - Action
 - Action Comment
- 2 - Current Position Info**
 - Position Type
 - Job Category
 - Job Class
 - Bargaining Unit
 - FTE
 - Division
 - Location
 - Current Account Distribution
 - Current Assignments
 - Salary Schedule
 - Salary Range
 - Supervisor
 - Supervisor Phone
 - Supervisor Email
- 98 - Item Handling**
- 99 - Add/Update Information**

- Position Type – This read-only field reflects the position type of the entered position id.
- Job Category – This read-only field reflects the job category of the entered position id.
- Job Class – This read-only field reflects the job class of the entered position id.
- Bargaining Unit – This read-only field reflects the bargaining unit of the entered position id.
- FTE – This read-only field reflects the FTE Used from the entered position id.
- Division – This read-only field reflects the Division from the Position Detail of the entered position id.
- Academic Department – This read-only field reflects the Academic Department from the Position Detail of the entered position id.
- Location – This read-only field reflects the location from the entered position id.
- Current Account Distribution – This read-only field reflects the current account distribution from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)
- Current Assignments – This read-only field reflects the current assignments from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)

SUSD HRA POSITION GUIDE

- Salary Schedule – This read-only field reflects the salary schedule from the entered position id.
- Salary Schedule Range – This read-only field reflects the salary schedule range from the entered position id.
- Supervisor – This read-only field reflects the supervisor for the entered position id.
- Supervisor Phone – This read-only field reflects the supervisor’s phone number(s) for the entered position id.
- Supervisor Email – This read-only field reflects the supervisor’s email for the entered position id.

How to Submit the HRA:

0 – Action

- **Action – (Required) Change Action to “Submit”.**



0 - Action	
Delay Posting Until	
Action	Submit
Action Comment	
2 - Item Accounts	

Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

Funding Change

The Funding Change item changes a position record based on an effective date, updating position detail and account information.

NOTE: Only fill in items 3- Position Accounts, that will require a change.

The screenshot shows the SUSD HRA Position Guide software interface. The '1- Item' section is highlighted, and several fields have red error markers (X) indicating required information. The fields are: Effective Date, Position Number, Work Type, Description, and Comment. The '3- Position Accounts' section is also visible, showing fields for Total Account Percentage, Account 1, and Account 1 Percentage. The '4- Current Position Info' section is also visible, showing fields for Position Type, Job Category, Job Class, Bargaining Unit, FTE Authorized, FTE Used, Division, Academic Dept, Location, Current Account Distribution, Current Assignments, Salary Schedule, Salary Schedule Range, Supervisor, Supervisor Phone, and Supervisor Email. The '98- Item Handling' and '99- Add/Update Information' sections are also visible.

1- Item

This is a close-up screenshot of the '1- Item' section of the software interface. It shows the following fields with red error markers (X) next to them: Effective Date, Position Number, Work Type, Description, and Comment.

- Effective Date – (Required) The 1st of the next month. ie “today is 4/24/2025, your effective date will be 5/1/2025”
- Position Number – (Required) Enter or lookup the Position ID that you want to change. Once entered this will pre-populate all “Current Position Information” on the right hand side of the HRA.
- Work Type – (Required) Select Classified or Certificated.
- Description – Type: Funding Change AND an explanation for the fund change.
- Comment – (Required) This is the comment that will appear in the Comment column on the list for HRA items. (POS ID will Populate). You will type in this section Fund change effective 7/1/202*. (The beginning of the current school year). Example Below:

SUSD HRA POSITION GUIDE

1 - Item	
Effective Date	4/1/2025
Position Number	60 {CE OTHER/BEHAVSPTSPCI (841) FTE 0.000}
Work Type	CERT {Certificated}
Description	Funding change. Changing dexcode to 001
Comment	PosId: 60; Fund Change Effective 7/1/202*

2- POSITION DETAIL (For a fund change, skip this section. Leave blank.)

2 - Position Detail	
FTE Authorized	
Job Category	
Job Class	
Supervisor	
Supervisor Position	
Location	
Division	
Academic Department	

- FTE Authorized – Enter the changed authorized FTE for the position.
- Job Category – Use the lookup to select the changed job category for the position.
- Job Class – Use the lookup to select the changed job class for the position.
- Supervisor – Use the lookup to select the employee who is the supervisor for the changed position.
- Supervisor Position – Use the lookup to select the supervisor’s position for the changed position.
- Location – Use the lookup to select a location for the changed position.
- Division – Use the lookup to select the division for the changed position.
- Academic Department – Use the lookup to select the academic department for the changed position.

SUSD HRA POSITION GUIDE

3- POSITION ACCOUNTS *(Note: Only fill sections that will require a change)*

	3 - Position Accounts
Total Account Percentage 	
Account 1	
Account 1 Percentage	
Account 2	
Account 2 Percentage	
Account 3	
Account 3 Percentage	
Account 4	
Account 4 Percentage	
Account 5	
Account 5 Percentage	
Account 6	
Account 6 Percentage	
Account 7	
Account 7 Percentage	
Account 8	
Account 8 Percentage	
Account 9	
Account 9 Percentage	
Account 10	
Account 10 Percentage	

- Total Account Percentage – (Read-Only) Must equal 100 before the item can be saved.
- Account 1 – Use the lookup or enter your first account to change for the position.
- Account 1 Percentage – Enter the percentage of the first account to change for the position.

If less than 100, then subsequent accounts must be entered.

- You can change up to 10 accounts on the position.

SUSD HRA POSITION GUIDE

4-CURRENT POSITION INFO - (Read Only) Shows current information on position.

4 - Current Position Info	
Position Type	
Job Category	
Job Class	
Bargaining Unit	
FTE Authorized	
FTE Used	
Division	
Academic Dept	
Location	
Current Account Distribution	
Current Assignments	
Salary Schedule	
Salary Schedule Range	
Supervisor	
Supervisor Phone	
Supervisor Email	

- Position Type – (Read-Only) The position type of the entered position id.
- Job Category – (Read-Only) The job category of the entered position id.
- Job Class – (Read-Only) The job class of the entered position id.
- Bargaining Unit – (Read-Only) The bargaining unit of the entered position id.
- FTE Authorized – (Read-Only) The FTE Authorized from the entered position id.
- FTE Used – (Read-Only) The FTE Used from the entered position id.
- Division – (Read-Only) The Division from the Position Detail of the entered position id.
- Academic Department – (Read-Only) The Academic Department from the Position Detail of the entered position id.
- Location – (Read-Only) The location from the entered position id.
- Current Account Distribution – (Read-Only) The current account distribution from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)
- Current Assignments – (Read-Only) The current assignments from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)
- Salary Schedule – (Read-Only) The salary schedule from the entered position id.
- Salary Schedule Range – (Read-Only) The salary schedule ranges from the entered position id.
- Supervisor – (Read-Only) The supervisor for the entered position id.
- Supervisor Phone – (Read-Only) The supervisor's phone number(s) for the entered position id.
- Supervisor Email – (Read-Only) The supervisor's email for the entered position id.

SUSD HRA POSITION GUIDE

How to Submit the HRA:

0 – Action

- Action – (Required) Change Action to “Submit”.



The screenshot shows a web form with a sidebar on the left and a main content area. The sidebar has two expandable sections: '0 - Action' and '2 - Item Accounts'. The '0 - Action' section is expanded, showing three sub-items: 'Delay Posting Until', 'Action', and 'Action Comment'. The 'Action' item is selected, and its value is displayed as 'Submit' in the main content area. A dropdown arrow is visible next to the 'Submit' text.

Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

Title Change

The Title Change item changes a position record based on an effective date, updating position detail and account information.

NOTE: Only fill in items on 2- Position Detail and 3- Position Accounts, that will require a change.

0 - Status	
Type	Position Change
Status	Open
On Hold	No

1 - Item	
Effective Date	X
Position Number	X
Work Type	X
Description	
Comment	X

2 - Position Detail	
FTE Authorized	
Job Category	
Job Class	
Supervisor	
Supervisor Position	
Location	
Division	
Academic Department	

3 - Position Accounts	
Total Account Percentage	
Account 1	
Account 1 Percentage	

0 - Action	
Delay Posting Until	
Action	
Action Comment	

4 - Current Position Info	
Position Type	
Job Category	
Job Class	
Bargaining Unit	
FTE Authorized	
FTE Used	
Division	
Academic Dept	
Location	
Current Account Distribution	
Current Assignments	
Salary Schedule	
Salary Schedule Range	
Supervisor	
Supervisor Phone	
Supervisor Email	

98 - Item Handling	
99 - Add/Update Information	

1- ITEM

1 - Item	
Effective Date	X
Position Number	X
Work Type	X
Description	
Comment	X

- Effective Date – (Required) The 1st of the next month. ie “today is 4/24/2025, your effective date will be 5/1/2025”
- Position Number – (Required) Enter or lookup the Position ID that you want to change. Once entered this will pre populate all “Current Position Information” on the right hand side of the HRA.
- Work Type – (Required) Select Classified or Certificated
- Description – Use this free-form field to add a description for this HRA item. ex “title change from current title to new title”.

SUSD HRA POSITION GUIDE

- Comment – (Required) This is the comment that will appear in the Comment column on the list for HRA items. (POS ID will Populate)

2- Position Detail (Note: Only fill sections that will require a CHANGE to the current Position info)

☐ 2 - Position Detail	
FTE Authorized	
Job Category	
Job Class	
Supervisor	
Supervisor Position	
Location	
Division	
Academic Department	

- FTE Authorized – Enter the changed authorized FTE for the position.
- Job Category – Use the lookup to select the changed job category for the position.
- Job Class – Use the lookup to select the changed job class for the position.
- Supervisor – Use the lookup to select the employee who is the supervisor for the changed position.
- Supervisor Position – Use the lookup to select the supervisor's position for the changed position.
- Location – Use the lookup to select a location for the changed position.
- Division – Use the lookup to select the division for the changed position.
- Academic Department – Use the lookup to select the academic department for the changed position.

SUSD HRA POSITION GUIDE

3- Position Accounts (Note: Only fill sections that will require a CHANGE to the current Position info)

	3 - Position Accounts
Total Account Percentage 	
Account 1	
Account 1 Percentage	
Account 2	
Account 2 Percentage	
Account 3	
Account 3 Percentage	
Account 4	
Account 4 Percentage	
Account 5	
Account 5 Percentage	
Account 6	
Account 6 Percentage	
Account 7	
Account 7 Percentage	
Account 8	
Account 8 Percentage	
Account 9	
Account 9 Percentage	
Account 10	
Account 10 Percentage	

- Total Account Percentage – (Read-Only) Must equal 100 before the item can be saved.
- Account 1 – Use the lookup or enter your first account to change for the position.
- Account 1 Percentage – Enter the percentage of the first account to change for the position.

If less than 100, then subsequent accounts must be entered.

- You can change up to 10 accounts on the position.

SUSD HRA POSITION GUIDE

4-CURRENT POSITION INFO - (Read Only) Shows current information on position

4 - Current Position Info	
Position Type	🔒
Job Category	🔒
Job Class	🔒
Bargaining Unit	🔒
FTE Authorized	🔒
FTE Used	🔒
Division	🔒
Academic Dept	🔒
Location	🔒
Current Account Distribution	🔒
Current Assignments	🔒
Salary Schedule	🔒
Salary Schedule Range	🔒
Supervisor	🔒
Supervisor Phone	🔒
Supervisor Email	🔒

- Position Type – (Read-Only) The position type of the entered position id.
- Job Category – (Read-Only) The job category of the entered position id.
- Job Class – (Read-Only) The job class of the entered position id.
- Bargaining Unit – (Read-Only) The bargaining unit of the entered position id.
- FTE Authorized – (Read-Only) The FTE Authorized from the entered position id.
- FTE Used – (Read-Only) The FTE Used from the entered position id.
- Division – (Read-Only) The Division from the Position Detail of the entered position id.
- Academic Department – (Read-Only) The Academic Department from the Position Detail of the entered position id.
- Location – (Read-Only) The location from the entered position id.
- Current Account Distribution – (Read-Only) The current account distribution from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)
- Current Assignments – (Read-Only) The current assignments from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)
- Salary Schedule – (Read-Only) The salary schedule from the entered position id.
- Salary Schedule Range – (Read-Only) The salary schedule range from the entered position id.
- Supervisor – (Read-Only) The supervisor for the entered position id.

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- Supervisor Phone – (Read-Only) The supervisor’s phone number(s) for the entered position id.
- Supervisor Email – (Read-Only) The supervisor’s email for the entered position id.

How to Submit the HRA:

0 – Action

- **Action – (Required) Change Action to “Submit”.**



The screenshot shows a web form with a sidebar on the left containing a tree view with two main sections: '0 - Action' and '2 - Item Accounts'. The '0 - Action' section is expanded, showing three sub-items: 'Delay Posting Until', 'Action', and 'Action Comment'. The 'Action' sub-item is selected, and its corresponding value 'Submit' is displayed in the main form area. A dropdown arrow is visible next to the 'Submit' value. The '2 - Item Accounts' section is also expanded but empty.

Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

FTE Change

The FTE Change item changes a position record based on an effective date, updating position detail and account information.

NOTE: Only fill in items on 2- Position Detail and 3- Position Accounts, that will require a CHANGE.

The screenshot shows the SUSD HRA Position Guide software interface. The '1- Item' section is highlighted, and the following fields are marked with red error markers (X):

- Effective Date
- Position Number
- Work Type
- Description
- Comment

The interface also shows other sections like '0 - Status', '2 - Position Detail', '3 - Position Accounts', '0 - Action', '4 - Current Position Info', '98 - Item Handling', and '99 - Add/Update Information'.

1- ITEM

This is a close-up view of the '1- Item' section. The fields and their corresponding error markers are:

- Effective Date: Red X
- Position Number: Red X
- Work Type: Red X
- Description: Red X
- Comment: Red X

- Effective Date – (Required) The 1st of the next month. ie “today is 4/24/2025, your effective date will be 5/1/2025.”
- Position Number – (Required) Enter or lookup the Position ID that you want to change. Once entered this will pre-populate all “Current Position Information” on the right hand side of the HRA.
- Work Type – (Required) Select Classified or Certificated.
- Description – Use this free-form field to add a description for this HRA item. Enter explanation for FTE increase/decrease.
- Comment – (Required) This is the comment that will appear in the Comment column on the list for HRA items. (POS ID will Populate). Leave POS ID, after it Enter **“FTE (either increase or decrease)”**.

SUSD HRA POSITION GUIDE

2- Position Detail (Note: Only fill sections that will require a CHANGE)

2 - Position Detail	
FTE Authorized	
Job Category	
Job Class	
Supervisor	
Supervisor Position	
Location	
Division	
Academic Department	

- FTE Authorized – Enter the changed authorized FTE for the position.
- Job Category – Use the lookup to select the changed job category for the position.
- Job Class – Use the lookup to select the changed job class for the position.
- Supervisor – Use the lookup to select the employee who is the supervisor for the changed position.
- Supervisor Position – Use the lookup to select the supervisor’s position for the changed position.
- Location – Use the lookup to select a location for the changed position.
- Division – Use the lookup to select the division for the changed position.
- Academic Department – Use the lookup to select the academic department for the changed position.

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3- Position Accounts (FTE changes do not require an account change, leave blank)

☐ 3 - Position Accounts
Total Account Percentage 
Account 1
Account 1 Percentage
Account 2
Account 2 Percentage
Account 3
Account 3 Percentage
Account 4
Account 4 Percentage
Account 5
Account 5 Percentage
Account 6
Account 6 Percentage
Account 7
Account 7 Percentage
Account 8
Account 8 Percentage
Account 9
Account 9 Percentage
Account 10
Account 10 Percentage

- Total Account Percentage – (Read-Only) Must equal 100 before the item can be saved.
- Account 1 – Use the lookup or enter your first account to change for the position.
- Account 1 Percentage – Enter the percentage of the first account to change for the position.

If less than 100, then subsequent accounts must be entered.

- You can change up to 10 accounts on the position.

SUSD HRA POSITION GUIDE

4-Current Position Info - (Read Only) Shows current information on position

4 - Current Position Info	
Position Type	🔒
Job Category	🔒
Job Class	🔒
Bargaining Unit	🔒
FTE Authorized	🔒
FTE Used	🔒
Division	🔒
Academic Dept	🔒
Location	🔒
Current Account Distribution	🔒
Current Assignments	🔒
Salary Schedule	🔒
Salary Schedule Range	🔒
Supervisor	🔒
Supervisor Phone	🔒
Supervisor Email	🔒

- Position Type – (Read-Only) The position type of the entered position id.
- Job Category – (Read-Only) The job category of the entered position id.
- Job Class – (Read-Only) The job class of the entered position id.
- Bargaining Unit – (Read-Only) The bargaining unit of the entered position id.
- FTE Authorized – (Read-Only) The FTE Authorized from the entered position id.
- FTE Used – (Read-Only) The FTE Used from the entered position id.
- Division – (Read-Only) The Division from the Position Detail of the entered position id.
- Academic Department – (Read-Only) The Academic Department from the Position Detail of the entered position id.
- Location – (Read-Only) The location from the entered position id.
- Current Account Distribution – (Read-Only) The current account distribution from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)
- Current Assignments – (Read-Only) The current assignments from the entered position id. (Hover over the field or use the lookup to see the entirety of the field)
- Salary Schedule – (Read-Only) The salary schedule from the entered position id.
- Salary Schedule Range – (Read-Only) The salary schedule range from the entered position id.
- Supervisor – (Read-Only) The supervisor for the entered position id.
- Supervisor Phone – (Read-Only) The supervisor's phone number(s) for the entered position id.
- Supervisor Email – (Read-Only) The supervisor's email for the entered position id.

SUSD HRA POSITION GUIDE

How to Submit the HRA:

0 – Action

- **Action – (Required) Change Action to “Submit”.**



The screenshot shows a web form with a sidebar on the left containing two expandable sections: '0 - Action' and '2 - Item Accounts'. The '0 - Action' section is expanded, revealing three fields: 'Delay Posting Until', 'Action', and 'Action Comment'. The 'Action' field is highlighted with a blue background and contains the text 'Submit'. To the right of the 'Action' field is a dropdown arrow. The '2 - Item Accounts' section is collapsed.

Save and Close at Item level

Save and Close at top level

SUSD HRA POSITION GUIDE

Common Questions and Answers:

Q: I don't have the HRA option in my Escape. What should I do?



If you don't see this option below under HR / Payroll, please put in a ticket with TI team at the link below
<https://helpdesk.stocktonusd.net/>

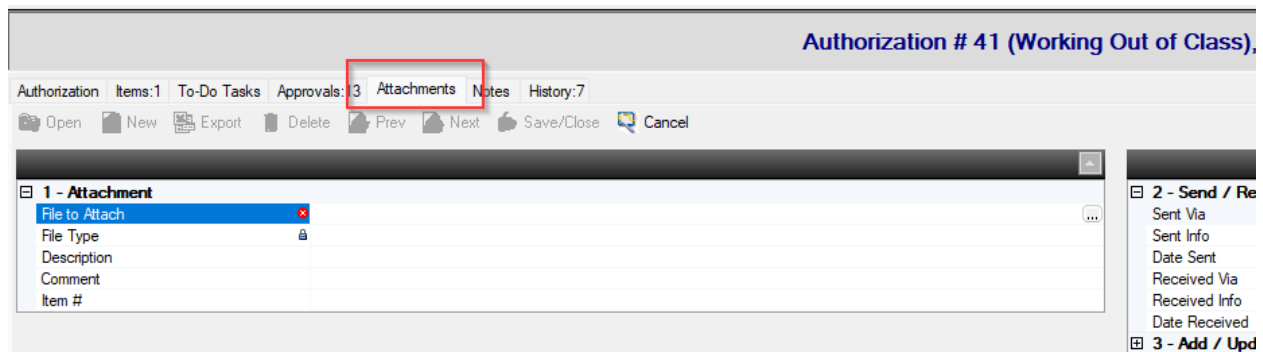
Q: Do you have the video of the training?

A: Yes, you can find the HRA training video in the link below

https://drive.google.com/file/d/1JLu_ljBg3bkN2e_3tvXS2FbK_Gb5KEP/view?usp=sharing

Q: How do I upload attachment to HRA?

A: You can upload attachment to HRA via "Attachment" tab



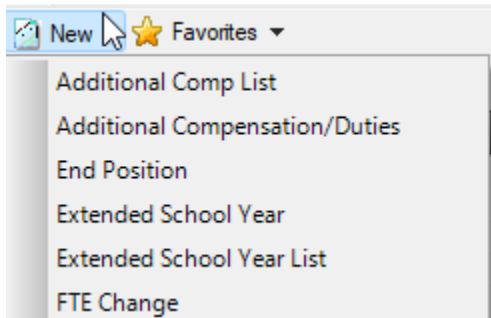
P/s: Don't forget to hit "Save/Close" after uploading the files.

SUSD HRA POSITION GUIDE

Q: How do I do HRA with a list of employees?

A: If you have a list of employees to upload to HRA, please find the corresponding activity with the word List next to it.

For example, a list of employees for “Additional Compensation/Duties” will use “Additional Comp List” as below



Please refer to the top section in this guide on how to complete “Additional Comp List” HRA.

Same process would apply to other List activities as well.

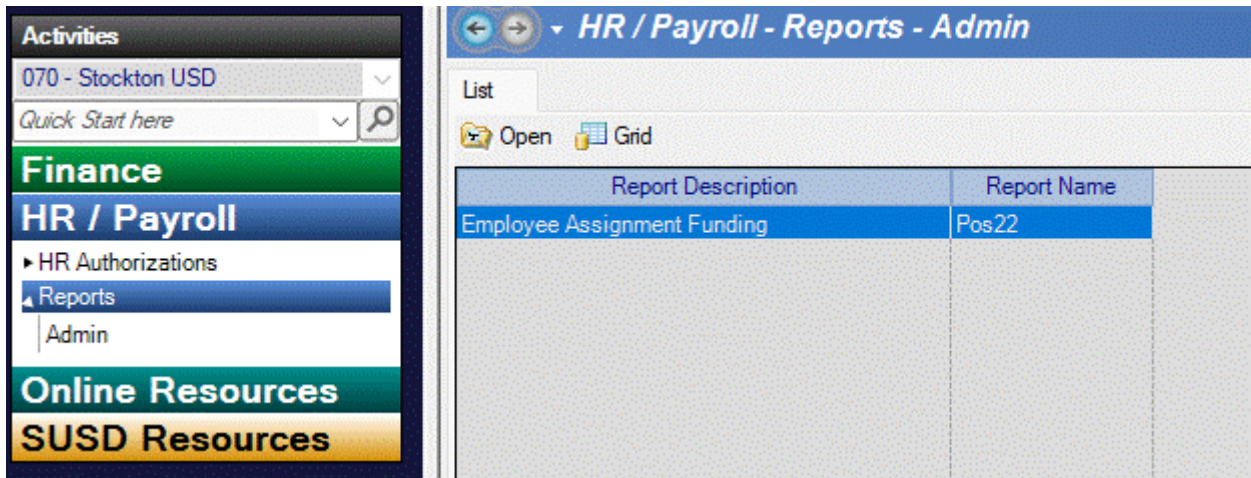
Q: How do I get my Student Support Technician access to Escape?

A: Student Support Technician does not have access to Escape per directions from Business Services. Please contact Willie Gutierrez for additional information.

Q: How do I get my PCN from Escape?

A: Please run the Pos22 report for your site to get the PCN number.

SUSD HRA POSITION GUIDE



Go to HR/Payroll > Click reports > Click Admin > right side of screen will Show Pos22 > click Open

Q: How do I bring my HRA back to OPEN status?

A: Go to the Items tab on the HRA and follow instructions below:

Step 1:
Change action to "return to open"

Step 2:
Save & Close item level

Step 3:
Save & Close top level

New Authorization

Authorization Items:1 To-Do Tasks Approvals Attachments Notes History

Open Export Delete Prev Next Save/Close Cancel Tasks

0 - Status

Type Position Change

Status Open

On Hold No

1 - Item

Effective Date

Position Number

Work Type

Description

Comment

2 - Position Detail

FTE Authorized

Job Category

Job Class

Supervisor

Supervisor Position

Location

Division

Academic Department

3 - Position Accounts

Total Account Percentage

Account 1

Account 1 Percentage

Account 2

Account 2 Percentage

Account 3

Account 3 Percentage

Account 4

Account 4 Percentage

Account 5

Account 5 Percentage

Account 6

Account 6 Percentage

Account 7

Account 7 Percentage

Account 8

Account 8 Percentage

Account 9

Account 9 Percentage

Account 10

Account 10 Percentage

0 - Action

Delay Posting Until

Action

Action Comment

4 - Current Position Info

Position Type

Job Category

Job Class

Bargaining Unit

FTE Authorized

FTE Used

Division

Academic Dept

Location

Current Account Distribution

Current Assignments

Salary Schedule

Salary Schedule Range

Supervisor

Supervisor Phone

Supervisor Email

98 - Item Handling

99 - Add/Update Information