UCDHS eHR – Department Due Dates

UC Custom Report
Department Due Dates
INTRODUCTION

The Department Due Dates report replaces the old paper-format, Department Notification of HR-Related Activity (HRET401-R01).

This new online management tool, available to eHR users designated as Department Managers or Department Originators, will help in maintaining compliance-related due dates on employee records managed in eHR. Because the new report is based on eHR data, all information is in “real-time” and refreshed nightly. Navigating is easy and information is downloadable in Excel.

HELPFUL HINTS

This guide provides helpful hints for using the Department Due Dates Report; however, there is also a website devoted to UC Custom Reports and everything else “eHR,” which will provide additional feedback. Click here to go to the eHR Intranet site, and make sure to save it to your favorites!

If you are not already familiar with our UC Custom Reports page in eHR, we encourage you to watch the online tutorial about how to run a report. The example shows how to run the Annual Safety Report, but there are also other custom reports, like Department Roster, Employee Locator, Department Assignments -- and now the Department Due Dates Report.

Below is a quick tutorial on how to access our new Department Due Dates Report and some hints on how to easily navigate around the system.

NAVIGATING TO UC CUSTOM REPORTS

First, navigate from the Main Menu to the Workforce Administration tab. Once there, click on UC Custom Reports. Click on Department Due Dates (screens differ, but this should be the first report on your display).
SEARCHING BY DEPARTMENT

The department value required for the Department search option is the department ID (not the department name). Hospital departments have the format ‘H 100nnnn’ where ‘nnnn’ is the cost center value. Values that start with S are School of Medicine departments and have the format of ‘S dddd’ where ‘ddd’ are letters. Note that the space between H and 1 for hospital departments and between S and M must be included in the search criteria or else the user sees "No matching values were found." An alternative to using the search, Department begins with ‘H 1009807’ is Department contains ‘9807’ where ‘9807’ is the cost center.

INCORRECT

Unless “begins with” is changed to “contains,” entering a four-digit cost center will produce zero results.

CORRECT

Use the pull down and select “contains” to search when a full cost-center is not entered.
Remember, if using “begins with,” be sure to enter the first descriptor accurately. For example if entering a hospital department, type H (space) 100XXXX and for a SOM department S (space) XXXX, similar to example illustrated here.

Or change any field search condition to “contains” using the dropdown arrow; then type a portion of name or number in any field.

After clicking it may take several moments for eHR to process your information.

(Maybe enough time for a well deserved break)
The report will open up to the Executive Summary, a quick glance of employees who are reaching a due date.

**Executive Summary**

HANDY VIEWING TIPS:

- You can minimize your eHR menu at the left of your screen to allow a better view of the report horizontally.

- In most browsers, the “F11” key will temporarily hide browser navigation bars to allow more vertical space. Use same function key to toggle back and forth between full view and navigation bars.

- Note options on report’s menu bar:
  - If report contains more than 12 rows, click View All to show complete list.

- Hide department instructions by clicking the paragraph heading:

- Note that all panels are downloadable to Excel.
Sort by any column to view all employees together under the same heading.

- Occasionally you’ll see one name in more than one column

- Special note regarding expired Visa info: In beta testing, we confirmed that these are data entry errors, because the information was entered in PPS – but not eHR. If you have any names on this list, please contact your HR or Academic Personnel analyst first, in the event that this was a user error.

<table>
<thead>
<tr>
<th>Visa Expired</th>
<th>Nearing Visa Expired</th>
<th>Lic/Cert Expired</th>
<th>Nearing Lic/Cert Expired</th>
<th>Final Probation Due</th>
<th>Probation Midpoint</th>
<th>Nearing Appt End</th>
<th>Nearing 1000 Hours</th>
<th>Nearing CDF Expired</th>
<th>Service Awards/Leave Change</th>
<th>Leaves of Absence</th>
</tr>
</thead>
<tbody>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>×</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
HOW WILL I KNOW WHEN INFORMATION HAS BEEN UPDATED IN eHR?

When you open your Department Due Dates report you will not see any names on the Executive Summary.

All information in the report is “real time,” so if you have forwarded appropriate documentation to Academic Personnel or HR Records and it has been updated in eHR, the information is refreshed nightly and you will notice the employee’s name has been removed from the report.

BEHIND THE EXECUTIVE SUMMARY

Each Tab Contains instructions or information for action required, as in the example below:
Other tabs are informational to mark dates that may benefit your employees.

Note that each panel has the option to return to the search screen. This is useful if you manage multiple departments and have used the search field for Dept Manager Name or UC Associate Director Name.

WHEN WILL I RECEIVE THIS REPORT?

Because this report is paperless, you will not “receive” the report as you did with the HRET 401-R01 report in the past. You have access to view this report at any time. At a minimum, you are encouraged to review the report at the beginning of each month. If you distribute follow-up assignments, you can review the report at any time to see if information has been updated in eHR.

Please contact your assigned Academic Personnel coordinator or HR Records analyst to answer any questions you have about this new report. We welcome your comments and suggestions.