**Position Management FAQ’S**

1. What is a Position Management?
2. Position Management is the process of requesting a position and placing a selected or hired individual into a vacant position from beginning to end. This placement then creates a permanent record, which maintains the history ultimately binding the position, funding, and organizational details together in UCPath.
3. Does the Staff Position Request (SPR) create the positon?
4. The SPR creates the “job” but not the position. In UCPath, we are required to create a positon, whether there is a vacancy or not.
5. Are we still going to use the SPR Form?
6. No, SPR Form will completely go away effective July 1, 2019.
7. Will all current positions roll over to the new system?
8. Yes, all current positions will roll over.
9. Will we be able to follow the approval status through perfect forms?

**A**. Yes, we are building a dash-board to follow the approval process in Perfect Forms, It is being tested now and will be rolled out soon.

1. Will this system send to second level supervisor, county director, and statewide director for the UC CalFresh Program?
2. Yes, the system will send to director and supervisor level for approval. For statewide, there is a functionality button on the first page and you will need to select the appropriate statewide director. From there, the statewide director will receive an email notification to approve the request(s).
3. How long is the anticipated process time?
4. This varies and depends upon how quickly the initiator and the approvers approve the request(s).
5. Is there an over-ride feature? Such as, if someone is out on leave or vacation, can you over-ride the approval for that person so the form does not get 'stuck' at their desk?
6. Yes, there is an ad hoc feature that allows forms to be re-routed. There is a required justification for that, but it's definitely allowable.
7. Is the justification required?
8. Yes, please include as much information as you are able in comments/notes justification box. This is to help ensure everyone in the approval process is collecting as much information as possible. The form will be pushed back without a justification.
9. When will we start using the Position Management Form?
10. Effective July 1, 2019.
11. Will we use the Position Management Form for Position Change Request?
12. No, you will not use the Position Management Form for position change request. Position Change requests are separate and will be coming later. The process will look very similar but may not require funding.
13. Will we be able to print the perfect form after it is all filled out to keep a hard copy draft in a working file?
14. Yes, you can print the perfect form by clicking the print button on the bottom left corner.
15. What if there are 2 Financial Control Points such as with Statewide funded?
16. Whoever is the primary would act as the financial control point adding the information from the other program.
17. How do I submit a ZenDesk ticket?
18. Anyone can submit a ZenDesk ticket from the UCANR Portal Page. There is a blue box that says “HR HELP” on the top right for you to submit a request.
19. Where can I obtain a ZenDesk ticket number?
20. Once you submit a ZenDesk ticket, you should receive an email notification of your request(s) with the ticket number.
21. Can the supervisor be the financial manager?
22. No, supervisor cannot act as a financial manager. Someone else will need to go in and validate the funding.
23. Are we still going to use CATS?
24. No. CATS will go away after UC Path Go Live on October 1st.
25. Who is the initiator?
26. This can be the supervisor, or the person submitting on behalf of the supervisor.
27. If we don’t know the proposed job code number, can we still submit the form?
28. Yes, the form will allow you to submit without the job code as long as the job title is listed on the form.
29. What happens if I don’t know or have the information for some of the fields?
30. Most of the fields are required, but there are some that will allow you to submit without entering the information.
31. Can we select a candidate before creating a position?
32. No, a position needs to be created first before it can go to recruitment to hire a person and/or anything related to a person being on boarded.
33. In what order are the approvers listed for the Position Management?
34. 1. Supervisor, 2. Financial Control Point, 4. Unit Director, 3. Statewide Program Director, 5. RPM, 6. HR Recruiter, 7. Position Administration, 8. Hiring Manager.

\*Please note that this will get fix on the Perfect Form.

1. How does the routing process work?
2. The initiator will only need to put the supervisor’s name and email address on Page 5 to begin the routing process. Once the initiator submits the form, the supervisor will receive an email notification to approve/reject the request. The supervisor will then review and add the name and email address of the Financial Control Point on Page 3. The Financial Control email address automatically populates on page 5 once entered. The process will be the same for the remaining approvers.
3. If a person next in line for the approval approves/rejects the request, will the previous approver receive an email notification?
4. If the request is approved a notification will not be sent to all the approvers, only the previous approver will be notified. This is the same for a request that is rejected. Only the previous approver will be notified.
5. What does, CBR stand for on the Position Management Form?
6. Composite Benefit Rate
7. Are the initiators/users able to check the routing status?

**A.** Users are unable to check the routing at the present time. We are currently working on a dashboard which will eventually allow users to check the routing process. You will be informed as soon as the feature is available.

1. What is the difference between position effective date and proposed start date?
2. Position effective date is the date you want the position to be effective. Proposed start date is the date you want to the selected candidate to begin working.
3. Who should we contact if we don’t know who to select for the routing?
4. This is a location decision. You will need to discuss this internally or you can contact your HR recruiter.
5. What is the difference between Resource Planning Management (RPM) and Financial Control Point?
6. Financial Control Points review and manage day to day fund for specific accounts. RPM reviews and validates the entire statewide funding sources, often verifying if funds identified by the Financial Control Point are valid and/or available.

**NOTE:** While RPM was not part of the previous approval process, they are now included for budgetary oversight. Initiators/requestors **MUST** select an RPM approver as their approval is required. Following their approval, the form **MUST** be routed to the next approver with all appropriate parties providing approval in order for the process to be complete.

 30. On the positon management form the there is a box for end date. Do we have to enter an end date for every positon we request?

**A.** No, the end date box should be completed for limited term or contract employees. For all others recruited for permanent or career positions, the end date box should be left blank**.**

 31. If all approvals have been signed off and I upload the document indicating this, can the approval process be overridden?

**A.** No, all approvals/signatures are required and must run through the entire routing process, even if you have attached a document with a list of signed approvals.

32. Is there a built in process that notifies the hiring manager or approvers a positon management form has been initiated and will be coming to them for approval?

**A.** No, there is no automatic or built in process that notifies the hiring manager or approvers a positon management form is coming their way. If the initiator/requestor is concerned the approver may overlook the form he/she may wish to email to the hiring manager and/or any of the approvers to provide notification of the upcoming form.

33. Who/where is the position management form sent from?

**A.** Approvers will receive an email notification from ANR noreplyPerfectForms no-reply-perfectforms@ucanr.edu. The form usually arrives just a couple minutes after the initiator/requestor or previous approver submits the form. If the hiring manager or approver hasn’t received the form in their inbox, please check the junk mail as it may have gone there.

 34. What happens if a form is rejected during the approval process?

 **A.** If a form is rejected during the approval process it will return to the previous person in line for approval. Of course, the rejecter is charged with entering comments as to why he/she is rejecting the form. Following this, the previous person would receive a notification of the rejection via email, the same way they would receive an email to approve. This person should then review the comments, make the appropriate correction(s) and resubmit via the link thy received. This will allow the same form to continue on with the approval process.

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 35. Who is responsible for entering information in the comments section of the form?

 **A.** The comment sections on the form are reserved for the **approver** to enter notes for review or for others next in line for approval. Initiators or requestors **should not** enter dates, notes or any other information in the comment fields reserved for approvers. The requestor may use the justification section on the form for any information they wish to be documented or reviewed.