Perfect Forms Guidelines

# Position Management Form

## Purpose

The intended use of these guidelines are to help guide and inform users on the position management process. It provides a brief overview of the process steps and the workflow. The process will include a dashboard for users to track the form location during the approval routing process at a later date.

## Form Roles

**Form Requestor** – The person who initiates the form is the “Requestor”. He/she submits the original request to trigger the approval workflow process. Form requestors can locate this form on the UC ANR Staff website on the Recruitment tab under the Position Management Section.

**Form Approvers** –The “Form Approvers” can be any person or group that has a role in the approval routing. Approvers include persons listed as: Supervisors/Hiring Managers, Financial Control Points (Business Officers), Statewide Program Directors/RECs, Unit Directors, RPM (Resources, Planning & Management, HR Recruiters and Positon Administrators (Staff HR Operations).

## Completing the form

**PRIOR TO INITIATION**

Prior to initiating the form users should open a Zendesk ticket first. This will serve as a tracking mechanism for the position and will also aid with the process by allowing HR to attach the position management form to the ticket once complete.

**ACCESSING THE FORM**

The requestor can access the form by clicking on the following web link:

 (<https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Recruitment/>)

**FORM INFORMATION**

**Page 1**

**Requestor:** On the first page, requestor must enter his/ her name and email. Requestor should complete as much information as possible via the drop down or type in fields.

**Request Type**: There are there three options for this section. 1) Add/New Positon 2) Change/Vacant Positon 3) Fill Vacant Position. These options are relatively self explanatory. Depending upon what type of request your are submitting please select the appropriate option.

**Zen Desk Ticket Number**: Please enter the Zendesk ticket number generated prior to submitting the form.

**Position Effective Date:** This is the date you want the positon to be effective in the system in order to begin the recruitment process. If the requestor doesn’t know this information, they may contact their HR Recruiter for help identifying this information.

**Employee Class**: Employee classifications include: Academics, Staff and Students. Staff positions are listed as: Career, Contract, etc. Select which ever is appropriate for the position being requested. The academic process is different and position management requests will be initiated by Academic HR staff.

**Proposed Job Code:** Previously called Title Code. A Job code required. If the requestor doesn’t know this information, they may contact their HR Recruiter for assistance prior to submitting the request.

**Proposed Job Title:** Requestor can enter the name of the position being requested. Example: Community Education Specialist, etc. A job title is required.

**Proposed Start Date:** Requestors should enter the date they want the identified candidate (whomever is selected) to start working. This date is just and estimation and does not need to be exact.

**Proposed End Date:** The end date should be completed for limited term or contract employees. For all others recruited for permanent or career positions, the end date should be left blank**.**

**Percentage Time:** This is the percentage of time the person will be working.

**Department:** The department and department number need to be added into this field. The Financial Control Point or Business Officer may have this information if the requester does not.

**Fixed or Variable:** Fixed indicates whether the position percentage is fixed or will vary. Most career positions are fixed unless otherwise noted. If the requestor is unsure what to enter here, they may contact their HR Recruiter. It is a required field.

**Posting Length:** Anticipated length of time the positon will be posted to accept applications for recruitment.

**Select if the Positon in a Statewide Program or Research and Extension Center (SWP/REC):** Select yes/no to indicate whether the positon is part of a Statewide Program (SWP) or Research and Extension Center (REC). This assists in determining who all of the appropriate approvers are. Missing this step may cause delays and missed approvals.

**Statewide Program/REC:** Select the appropriate statewide program in which the position is located, if applicable

**Statewide Program/REC Director:** Dropdown options list all Statewide Program and REC Directors by name. If the response is “Yes” in the first/previous question and the requestor is unsure about who to select, contact your HR Recruiter.

**Page 2**

**Identified Candidate:** Yes/No. If the requestor has already identified a candidate, then mark yes and the name should be entered in the candidate name field. In most circumstances the candidate would be unknown in this initial phase, however there are circumstances in which a candidate has been identified. In these instances, a candidates name would be entered here. Examples may include a contract or limited term employee.

**Candidate Name**: If candidate has been identified as outlined in the two scenarios listed above, type the persons name in the box. If no candidate has been identified, leave the box blank.

**Position Working w/Youth:** Relatively self explanatory, mark Yes/No.

**Fingerprinting Required:** Most often it is safe to mark “Yes”

**Background Check:** Yes/No. Most often it is safe to mark “Yes”.

**Background Check Type:** Drop down lists: Life/You Critical, Master Key, Vehicle Operations, Sensitive Data, Financial Critical, Cash Critical, Not a Critical Position. The type of background check varies based on the job requirements and the appropriate selection depends on the typical functions or tasks of the position. For example, Community Education Specialists (CES) are listed on the SPR requiring background and fingerprinting. This translates to the position management form as Life/You Critical, which is the most common selection.

**Student Status:** Relatively self explanatory. If the position request is for a student, mark whether the student is UC enrolled or Non UC enrolled.

**Units Enrolled:** Enter the number of units the student is currently enrolled in.

**Justification**: Requestor **MUST** enter information in the justification box. Enter any budget related information (if applicable) or any specific background information or notes you would like the approvers to review.

**Page 3**

**Supervisor Name**: Enter the name of the supervisor the position is reporting to.

**Supervisor Positon Number:** Enter the positon of the supervisor the position is reporting to. If the requestor is unsure what to enter here, they may contact their HR Recruiter or leave it blank.

**Supervisor Title:** Enter the Title of the supervisor the position is reporting to. If the requestor is unsure what to enter here, they may contact their HR Recruiter or leave it blank.

**Timesheet Approver Name:** Enter the timesheet approvers name.

**Backup Timesheet Approver Name/Email:** Enter the backup timesheet approvers name or email.

**Attachments /Supporting Materials Section**

This section allows the requestor the option to upload any document(s) related to the position request. By clicking the attach button, the requester can browse and upload any applicable documents (maximum of 4) that may support the position request. Examples Include: Position descriptions, justification documents, budgetary documents, etc.

**Financial Control Point Section**

The dropdown box lists all of the business officers within UC ANR. Business officers are responsible for approving the financial control portion of the form. Each location or program has a business officer assigned to them. If the requestor is unsure about who to select, he/she should contact their HR recruiter for further direction or instruction.

**Page 4**

Page 4 lists all of the financial and budgetary information as it relates to the positon. Most of this information will be entered and/or verified by the Financial Control Point/Business Officer or perhaps Resources Planning and Management (RPM) department. Considering this, it is not anticipated for the requestor will know this information. However, if the requestor knows the information, he/she is welcome to enter as much as they can.

**Centrally Funded:** Required field, Yes/No. If the requestor is unsure what to enter here, they may contact their HR Recruiter or leave it for the Financial Control Point to enter.

**CBR Rate:** CBR Rate is the Composite Benefit Rate. This is a required field. If the requestor is unsure what to enter here, they may contact their HR Recruiter or leave it for the Financial Control Point to enter.

**Permanently Funded:** Yes/No. The majority of our positons are permanently funded unless otherwise noted. An example of a position not permanently funded may include a grant funded, temporary or contract position.

**Provision Amount:** This is the amount the position is budgeted for. This is typically the first quartile, but can be different if the contract or grant has a specific budgetary threshold.

**New Provision:** Yes/No. The new provision refers to whether the positon is new or existing.

**Budgeted/Non-Budgeted Positon:** Yes/No. Relatively self explanatory, however If the requestor is unsure what to enter here, they may contact their HR Recruiter or leave it blank.

**APPROVALS**

**Approval Decision** – Approvers should check the email field and select their approval decision.

The choices are:

* Approve
* Reject

The final approver of this form is the Positon Administrator.

**Glossary of Position Management Terms**

**Background Check Type:** The type of background check varies based on the job requirements and the appropriate selection depends on the typical functions or tasks of the position. For example, Community Education Specialists (CES) are listed on the SPR requiring background and fingerprinting. This translates to the position management form as Life/You Critical, which is the most common selection.

**CBR:** Composite Benefit Rate. Information listed on staff HR website (<https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Recruitment/Calculating_costs_to_Hire/>)

**FCP:** Financial Control Point. Typically the Business Officer assigned to the location.

**Hiring Manger:** Typically the person the positon reports to.

**HR Operations:** New unit within HR created as a result of the implementation of UC Path.

**HR Recruiter**: Recruiter assigned to the specific location. The staff HR website lists assigned HR Recruiters by location under [Supervisor Resources](https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/). Please visit and select [Staff HR Assignments (by location)](https://ucanr.edu/sites/ANRSPU/files/271327.pdf) for specifics.

**RPM:** Resources Planning & Management. Responsible for reviewing and validating the entire statewide funding sources, often verifying if funds identified by the Financial Control Point are valid and/or available.

**Supervisor:** Person the position reports to.

**SWP**: Statewide Program Director.

**Unit Approver:** Often the County or REC Director.