**Staff Position Management Q&A**

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 Management Form (PMF) create the position?
4. After your recruiter reviews your position description (PD) in Job Builder and your completed and approved PMF, HR Operations creates the position in UCPath. We are required to create a position whether there is a vacancy or not.
5. Are we still going to use the SPR Form?
6. No, SPR Forms have completely gone away effective July 1, 2019. All new and backfilling position requests go through the PMF now.
7. Have all current positions rolled over to the new system?
8. Yes, all current positions have rolled over into UCPath.
9. Will we be able to follow the approval status of the PMF?
10. The requester should maintain the status of approvals at all times to ensure a timely submission. Though HR is here to guide you with completing the form, we do not see the form until after the requester has obtained all necessary signatures.
11. Will this system automatically send the form to the second level supervisor, county director, and statewide director, etc?
12. At this time, the form is in an Adobe Acrobat Pro DC format. It may request you enter the email address of the next approver, but the system will not automatically send it to subsequent approvers. Please use email to forward your forms along. There is a “Routing Flow” at the end of the document to help you determine the approval steps required for your unit/location/program.
13. How long is the anticipated process time?
14. This varies and depends upon how quickly the initiator and the approvers approve the request(s).
15. 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?
16. Yes, delegation authority requires a comment in the justification section, but it's definitely allowable.
17. Is the justification required?
18. Yes, please include as much information as you are able in the Justification section. 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.
19. When will we start using the new Position Management Form?
20. The new form is effective immediately.
21. Will we use the Position Management Form for change requests?
22. No, you will not use the PMF for position change requests. The Data Change Form (DCF) is a separate form which can be found on the Forms and Resources page: <https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Forms/>.
23. Will we be able to print the form after it is all filled out to keep a hard copy draft in a working file?
24. Yes, you have the capability to print it, but we encourage the use of digital copies only.
25. What if there are 2 Financial Control Points (FCP) such as with Statewide funded positions?
26. Whoever is the primary FCP would communicate with the secondary and add the information from the other program. Alternately, both could sign off, the secondary in the Additional Approvers line.
27. How do I submit a ZenDesk ticket?
28. 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. Or send an email to [humanresources@ucanr.edu](mailto:humanresources@ucanr.edu) and it will go to our triage for ticket and recruiter assignment.
29. Where can I obtain a ZenDesk ticket number?
30. Once you submit a ZenDesk ticket, you should receive an email notification of your request(s) with the ticket number.
31. Can the supervisor be the financial manager?
32. No, supervisor cannot act as a financial manager. Someone else will need to go in and validate the funding.
33. Are we still going to use CATS?
34. We are phasing out the CATS program. You should work on transferring any PDs you have to the Job Builder (JB) program. (<https://ucjobbuilder.ucop.edu/>). There are also job standards in Job Builder to help if you need to create a position from scratch. The only positions not in JB are a handful of represented positions and the student PDs. We are working to create templates for those very soon. CATS will become read-only status before it goes away completely.
35. Who is the initiator?
36. This can be the supervisor, or someone submitting on behalf of the supervisor.
37. If we don’t know the proposed job code number, can we still submit the form?
38. Yes, the form will allow you to submit without the job code as long as the job title is listed on the form. However, we encourage you to use the Title Code System to familiarize yourself with job codes: <https://tcs.ucop.edu/tcs/jsp/nonAcademicTitlesSearch.htm>
39. What happens if I don’t know or have the information for some of the fields?
40. Most of the fields are required. Your recruiter may be able to help you find some of your information but HR Operations needs to have the form completed to create the position. In many cases, the form needs to be complete before signatures or the fields are uneditable.
41. Can we select a candidate before creating a position?
42. 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. However, if you anticipate an identified candidate, please complete that section on the PMF.
43. In what order are the approvers listed for the Position Management?
44. 1. Supervisor, 2. Unit or Location Director, 3. Financial Control Point, 4. Statewide Program Director or Vice Provost, if applicable, 5. RPM, 6. HR Recruiter, 7. Position Administration or Additional Approval, if necessary.
45. Where can I find the Composite Benefit Rate?
46. The words Composite Benefit Rate on the form will link you to the Contracts and Grants page, who maintains updates to the rate.
47. Are the initiators/users able to check the routing status?
48. The requester/initiator should maintain the routing status at all times and submit the document through the ticketing system.
49. What is the difference between position effective date and proposed start date?
50. 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.
51. Who should we contact if we don’t know who to select for the routing?
52. This is a location decision. You will need to discuss this internally or you can contact your HR recruiter. Additionally, Financial Services maintains a document which tells who the Financial Control Point is for each department. It is linked in the PMF in the Routing Information section.
53. What is the difference between Resource Planning Management (RPM) and Financial Control Point?
54. 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** obtain RPM approval. The RPM general email address is included by their signature block.

28. On the PMF, there is a Proposed End Date. Do we have to enter an end date for every positon we request?

**A.** No, the end date should only 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**.**

29. 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.

30. Who is responsible for entering information in the justification section of the form?

**A.** Anyone can 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.