Staff Position Management

Updates and Process Changes
Learning Objectives

• Have a clear understanding of the handoff and workflow of the position creation process

• Understand the new Staff Position Management Form (PMF)

• Understand creating new positions and updating existing positions
Position Management

- Position Management starts from the time your Staff Position Management Form (PMF) has gone through all the approvals and is submitted to HR. It includes the process of having HR create that position in UCPath, and later, when either an open recruitment or an identified candidate has been placed into the vacant position. Position Management is the process 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 UC Path.
Funding for Position Management

• In UCPath, funding is attached to the position, not the person

• If no funding is attached to the position, the incumbent will be paid from a default account

• Funding is entered via a separate UCPath page called Funding Entry (separate security role)

• Positions connect the position to funding chart fields which determine what fund source the employee is paid from, and allow for reporting on how labor costs are distributed.
Position Management

- A JOB cannot exist without a Position and a Person
- However, a POSITION can exist without a Job or a Person (called a Vacancy)
A job in UCPath is analogous to an Appointment in PPS. It organizes employment information, or job data, with an employee. A job is the combination of the position or “seat” and the person who has filled that seat.

- A Position in UC Path, refers to a slot or “seat” in the organizational structure. All employees will have a position.

Once a person is identified, he/she is then attached to a Position in the UC Path system to create a whole Job.

A job is the combination of the position or “seat” and the person who has filled that seat.
Staff Position Management Form (PMF)

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**UC Agriculture and Natural Resources**

**Staff Position Management Form**

Once all approval signatures obtained, submit to: humanresources@ucanr.edu and track via Zendesk Ticket

**Initiator Name:**

**Initiator Email:**

**Submission Date:**

### POSITION INFORMATION

- **Request Type:** Select from dropdown
- **Employee Class:** Select from dropdown
- **Department:** Select from dropdown
- **Work Location:**
- **Supervisor Full Name:**
- **Supervisor Timesheet Approver Name:**
- **Backup Timesheet Approver Name:**

### RECRUITMENT INFORMATION

- **Identified Candidates:** Yes / No
- **Position Working with Youth:** Yes / No
- **Student Status:** Yes / No
- **Position Desc. Submitted:** Yes / No
- **Candidate Names:**
- **Fingerprint/ Background Check Type:**
- **Funding for Fingerprint/ Background Check:**
- **Units Enrolled:**

### JUSTIFICATION

Justification should include reason for position request, source of funding, any budgetary restrictions or relevant information about the contract/grant. For instance, if there are insufficient funds in the account for term of employment, identify how the position will be paid. If applicable, also provide: Previous Incumbent name, title, pay rate, % FTE, account.
### Staff PMF (page 2)

#### BUDGET AND FINANCIAL INFORMATION

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Composite Benefit Rate</th>
<th>Provision Amount ($)</th>
<th>New Provision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select from dropdown</td>
<td>0.00%</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Funding Effective Date</th>
<th>Funding End Date</th>
<th>Earn Code</th>
<th>Chart</th>
<th>Chart-Account</th>
<th>Sub Account</th>
<th>Project</th>
<th>Object Code</th>
<th>OP Fund (optional)</th>
<th>Pay Dist % (Must add up to 100% per Earn Code)</th>
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</thead>
<tbody>
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</table>

**TOTAL:** 0.00

#### ROUTING INFORMATION

Select the applicable routing option to ensure you receive appropriate and timely approvals.

Select Routing Flow*:  
- Statewide Program
- Research and Extension Center
- UCCE
- Administration Unit

Identify Financial Control Point: 
Select from dropdown

**UCPath Departments and Business Officer List**

#### SIGNATURES

Please sign the form electronically and send, by email, to the appropriate parties. Missing signatures could mean significant delays in approval and processing.

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Vice Provost</th>
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</thead>
<tbody>
<tr>
<td>(1)</td>
<td>(4b)</td>
</tr>
</tbody>
</table>
| Director         | RPM@ucdavis.
| (2)              | edu          |
| Financial Control| HR           |
| (3)              | (6)          |
| Statewide Program| Additional   |
| Director         | Approvals    |
| (4a)             |              |

*Routing Flow:
STATEWIDE PROGRAM = Initiator -> Supervisor -> Director -> Financial Control -> SW Program Director -> RPM -> HR -> HR Ops
REC = Initiator -> Supervisor -> Director -> Financial Control -> Vice Provost -> Financial Control -> RPM -> HR -> HR Ops
ALL OTHERS = Initiator -> Supervisor -> Director -> Financial Control -> RPM -> HR -> HR Ops
Staff PMF Notes

- Complete as much info as possible. HR Operations needs all of the information to create the position. Utilize the Supervisor Resources on the HR website: https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/
- More thorough dropdowns have been added to alleviate some research
- Routing help is available in the link identifying your unit/location’s fiscal officer
- A flow of the approvals are found at the bottom of the form
- The requestor/initiator is responsible for obtaining necessary approvals and submits the completed form to humanresources@ucanr.edu to create a Zendesk ticket
Staff Position Management
Flow:

**Hiring Manager**
Initiates a request to create a position: Submits Position Management Form, PD & Zendesk Ticket.

**Position Administrator**
Enters position, sends confirmation and Position Number to appropriate chain of contacts (HR, HM/Director, BOC, BO).

**HR Recruiter**
Reviews title and PD for accuracy, approves and submits to Position Administrator.

**Director**
Reviews position request and PD, approves and sends it to the Business Officer/Financial Control point.

**Financial Control (Business Officer)**
Validates funding, signs and sends to RPM.

**RPM**
Reviews funding, validates accounts and submits final approval to HR.
Position Management: Academics

- The position management process for the Academics is different from the staff process.
- Please contact Academic HR for that process: tljordan@ucanr.edu.
Your HR Recruiter can help!