Staff Position Management Form Guideline

# 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 Initiator/Requestor** – The person who initiates the form is also 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. Additionally, the PD should already be completed and ready to submit when you submit the form to HR.

**ACCESSING THE FORM**

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

(<https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Recruitment/>) or on the Forms and Resources page: <https://ucanr.edu/sites/ANRSPU/Supervisor_Resources/Forms/>

**FORM INFORMATION**

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**Initiator:** 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. Date the form as well.

**POSITION INFORMATION**

**Request Type**: There are there three options for this section. New Position, Vacant Position, or Change to Vacancy. These options are relatively self-explanatory. Depending upon what type of request you are submitting, please select the appropriate option.

**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.

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

**Employee Class**: Because this form is for use with Staff and Student positions, those are the various options available. Staff positions are listed as: Career, Contract, Limited, Per Diem, Rehired Retiree, Contingent Worker or Student: Casual/Restricted. 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 Title:** Requestor can enter the name of the position being requested. Example: Community Education Specialist, etc. A job title is required.

**Proposed Job Code:** Previously called Title Code. A Job code is required. If the requestor doesn’t know this information, they may contact their HR Recruiter for assistance prior to submitting the request or use the Title Code System to look it up: <https://tcs.ucop.edu/tcs/jsp/nonAcademicTitlesSearch.htm>

**Department:** The department and department number need to be selected from the dropdown menu. They are listed in order of department number. Your Financial Control Point or Business Officer may have this information if the requester does not.

**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.

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

**Work Location:** Type in the address if you do not know the work location code used in UCPath.

**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**.**

**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.

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

**Supervisor Position Number:** Enter the position 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 and Email**: Enter the name and email address of the primary approver.

**Backup Timesheet Approver Name and Email**: Enter the secondary approver name and email.

**Position Number and Status**: HR Operations will complete this IF it is a NEW position; initiator completes if it is a backfill (in which case would be the position number of the person who vacated the position).

**RECRUITMENT INFORMATION**

**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. Examples may include a student or a 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.

**Rehire:** Indicate whether you know if the person has worked for UC before.

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

**Fingerprinting Background Check Type:** More often than not, it is a requirement. Students are not required. If you know the person will be dealing with cash, (i.e. collects money at events), they need a credit check. There is an option to have HR review the PD and determine the level of background check but if it is a backfill, you may already know this information.

**Background Check Funding:** Please enter the account number to charge the fingerprinting/background check.

**Student Status:** If the position request is for a student, also complete the campus field. This helps us determine whether the student should be classified as Limited Term (non UC student) or Casual/Restricted (UC student).

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

**Position Description Submitted:** Reminder to submit the PD with every PMF. Can provide Job Builder number in the Zendesk ticket.

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

**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 and/or HR to review. Examples are included in the form.

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**BUDGET AND FINANCIAL INFORMATION**

Most likely this section will be completed by the Financial Control Point, who has access to financial data.

**Fund Type:** Select from dropdown menu

**Composite Benefit Rate:** Linked to Contracts and Grants website. Scroll down and click on Chart L to look up applicable rate using position data and both tabs on the document.

**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 position is new or existing.

**Funding Table:** Complete all of the accounting information from which this position is to be paid. Please add the percentage amounts in the Total field.

**ROUTING INFORMATION**

Select the radio button whether this position request is for a Statewide Program, REC, UCCE, or Administrative Unit.

Identify your Financial Control Point using the dropdown menu.

Use the hyperlink “UCPath Departments and Business Officer List” for help to find your FCP. Financial Services (Jing Yu/Connie Tadesse) maintains this list; please contact them if you need revisions)

**SIGNATURES**

**Approvals:** Using the Routing Flow at the bottom of the form, please determine who should approver your document before submitting to HR. Please monitor the form along the signature cycle as HR receives the form last. THE form should be as complete as possible before routing through signatures as it may affect the editability of the form once signatures have been initiated.

Once all the signatures have been obtained, submit the form and PD, and any other necessary documentation (i.e. Waiver of Recruitment form for identified candidates, etc.) to a Zendesk ticket or by email to humanresources@ucanr.edu.

**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.