



# **Position Management Training for HCM**

## Training Guide

Created 12/14/2012

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# Position Management Training for HCM

## Overview

Position Management is used at UCB to track positions. By tracking positions, you can keep a history of all positions at the university, regardless of whether they are filled or vacant. In this way, organizational reporting relationships can be tracked independent of the employees in those positions.

Employees can be moved in and out of positions while the focus remains on the position and corresponding attribute information such as department, location, standard hours and funding. When an employee leaves a job, the position becomes vacant and the information associated with the position is retained. The record of position data in UCB's HCM system serves as a basis for organizational planning, budgeting, and recruitment.

## Objectives

In this manual, you will learn the following:

- What is Position Management
- Position Management Process
- Hiring using Position Management
- Job Reclassification using Position Management
- Viewing and creating positions
- Updating positions

# Understanding Position Management

## Section Overview

In this section, you will learn the concepts of Position Management and its process in HCM. You will also receive an overview of the impacts that Position Management will have on HCM, Budget and Planning.

## Section Objectives

In this section, you will learn how to perform the following tasks:


- What is Position Management?
- Implications of Position Management for HCM

## What is Position Management?

Review this topic to learn "What is Position Management?" with the HCM system.

### Procedure

In this topic, you will learn the concept of Position Management and its function within Human Capital Management (HCM).



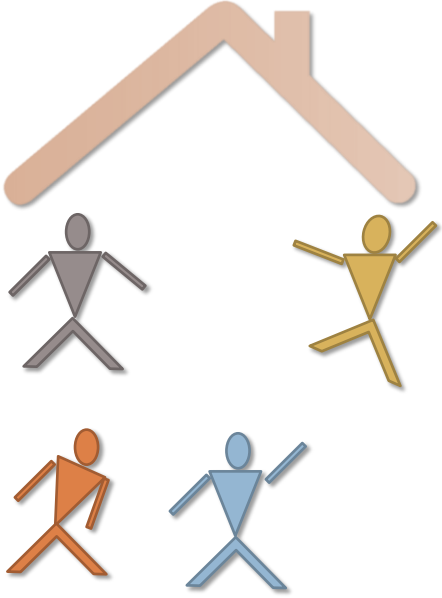
### What is Position Management?


The roof to the right represents a department. The figures represent people in the department.

Let's ask a few staffing questions about this department.

**How many people are in this department?**  
*Answer: 4*

**How many vacant positions are there?**  
*We don't know.*




 **What is Position Management?**


Let's have these people take their seats. The chairs represent all the positions in this department.

Let's ask the same questions again.

**How many people are in this department?**  
*Answer: 4*

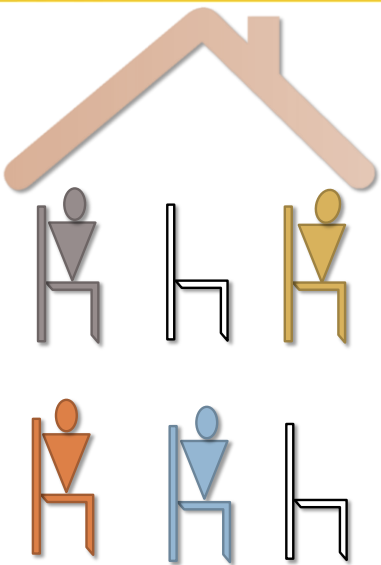
**How many vacant positions are there?**  
*Answer: 2*




 **What is Position Management?**

Position Management can tell you how many positions there are, as well as how many are filled and vacant.


Position Management can answer these questions and more.








## Using Position Management


---


  
 00050001

  
 00050002

  
 00050003


  
 00050004

  
 00050005

  
 00050006

Position Management can track positions in the HCM system by assigning them **position numbers**.

A person holding a position is an Incumbent.



## Position Numbers

---

**A Position Number is:**




- Eight digits, including possible leading zeros
- Automatically assigned to a new position
  - Numbers are assigned in order as they are created.
  - The number does not indicate the Department or Job Code.
- **Recommended** but not required for creating a TAM job posting
  - Best practice: always use a Position Number
- **Required** to hire a person into a job
- **Searchable:** You can search for an existing Position Number
  - HCM Users will be able to search for Position Numbers in HCM

Departmental Finance Managers will be responsible for maintaining Position Numbers. They will be able to pull a Department Position Roster report from BAIRS.



**What is Position Management?**

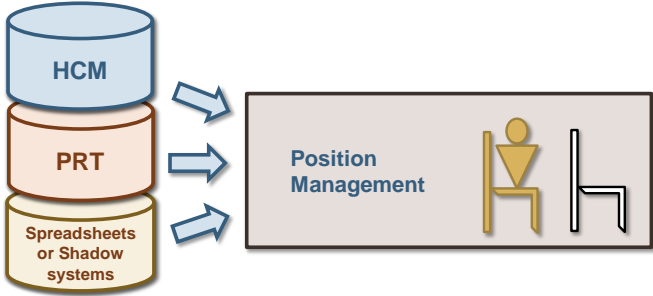
Position Management **coordinates** 3 components:

|  |   |   |
|--|---|---|
| <p><b>Position:</b><br/>A job independent of an employee</p>  <p>Example: Administrative Assistant II</p> | <p><b>Person:</b><br/>An employee</p>  <p>As in a person named "Chris Doe"</p> | <p><b>Job:</b><br/>The union of a position and person</p>  <p>Example: "Chris Doe" having the position of Administrative Assistant II</p> |
|--|---|---|

**What is Position Management?**

The **framework** to manage all positions in one central location

- Filled, vacant, active, or inactive
- Track positions, identify vacancies, and view historic position data



Hence, it is a **tool** for making more informed Human Resources and Budgeting decisions

## What is Position Management?

Position Management is a **new module** within the Human Capital Management (HCM) system.

## Position Attributes

Positions are created and viewed from the **Add/Update Position** page in the Position Management module.

Required fields:

- **Effective Date**
- **Reason (Reason Code)**
- **Job Code**
- **Department**
- **Location**
- **LVL 7 Dept (Dept ID)**
- **Standard Hours**

### Position Attributes - Funding

Use the **Position Funding** tab to enter the funding chartstrings:

- The **Effective Date** (populated from the effective date on the Description tab)
- **GL Business Unit**
- **Account** is filled in from Job Code
- **Fund**
- **DeptID**
- **Program**
- **Chartfields 1-2** (optional)
- **Distrb %**
- **ERNCD**


### Position vs. Job Funding

**Funding chartstring(s)** exist in position data and job data

- **Position chartstring:** Chartstring for budgeting (ongoing)
 

The position chartstring indicates the ongoing position funding. It is also used to report on the position when the position is vacant.
- **Job chartstring:** Chartstring for payroll
 

The job chartstring is used to indicate the funding that pays the employee. **When a position is filled**, Budget and Planning report on the position based on the **job chartstring(s)**.



### Do I want to update Position Data or Job Data?

When making changes to Position Data or Job Data, ask yourself these helpful questions:

- **Is this an on-going change or a temporary salary change?**
  - Ongoing changes, and changes that affect all incumbents in a position, should be made to Position Data.
  - Short-term changes, changes that affect only certain incumbents, and payroll funding changes to filled positions, should be made to Job Data.
- **Does the change impact the position or a specific person's job?**
  - Changes that impact how you want to budget for a position in the long run should be made to Position Data.
  - Changes that are necessary due to the person holding the position should be made to Job Data.



### Position Management – A Review


- A **position** is a job in the organization, independent of any particular employee.
- When an employee (incumbent) leaves a position, the **position remains** (vacancy) to be filled again.
- Employees with the **same position number share the following attributes:** Business Unit, Job Code, Department, Reports To, FTE, and Position Funding.
- An employee in a job has specific attributes, such as Salary, Appointment Type, and Payroll Funding.



**Position:**  
A job independent of an employee



**Person:**  
An employee



**Job:**  
The union of a position and person


## Implications of Position Management for HCM

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Review this topic to learn the "Implications of Position Management for HCM."

### Procedure

In this topic, you will learn how the implementation of Position Management will impact HCM, Planning and Budgeting at UC Berkeley.




### Summary of Changes

- HCM work procedures will change minimally so that:
  - A position number is required to hire a person in WFA
  - A position number is recommended to post a position in TAM and may be required by your department or service center business process
- **New terminology: headcount, incumbent, position funding**
- **Funding chartstring(s)** will exist in position data and job data
  - **Position chartstring:** chartstring for budgeting (ongoing)
  - **Job chartstring:** chartstring for payroll funding


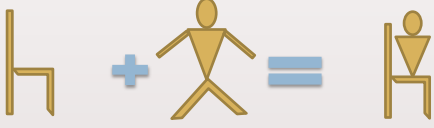
***Note:** Budget Officers will need to indicate to HCM users if chartstring(s) need to be changed in Position and/or Job. This decision has CalPlanning implications.*

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### What is changing and what is staying the same?

With Position Management, a **job** is a union of the Person and a Position.

| Current  | Future  |
|--|---|
| <br><b>Job:</b><br>"Chris"<br>Administrative Assistant II                               | <br><b>Position:</b><br>Administrative Assistant II <b>Person:</b><br>"Chris," an employee <b>Job:</b><br>The union of a position and person                            |
| <ul style="list-style-type: none"> <li>▪ A <b>Job</b> <u>cannot exist</u> without a <b>Person</b></li> <li>▪ <b>No Vacant Positions</b> can be tracked in HCM</li> </ul> | <ul style="list-style-type: none"> <li>▪ A <b>Job</b> <u>cannot exist</u> without a <b>Position</b> <u>and</u> a <b>Person</b></li> <li>▪ A <b>Position</b> can <u>exist</u> without a <b>Job</b> <u>or</u> a <b>Person</b> (a <b>Vacancy</b>)</li> </ul> |

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Persons are no longer hired using job code, but are hired into positions with the job code.

Before Position Management was implemented, the employee, "Chris" was hired using a job code and no position existed to be tracked when Chris was no longer in that job.

However, with Position Management, "Chris" occupies a position. The position can be tracked as a vacancy and filled again once Chris leaves the position.

## How is Position Data Different from Job Data?

Where we used to have only Job Data, we now use Job Data and Position Data.

| Current   | Future   |
|---|--|
| <p><b>Job Data</b></p> <ul style="list-style-type: none"> <li>▪ Job Code</li> <li>▪ Location</li> <li>▪ Standard Hours</li> </ul><br><ul style="list-style-type: none"> <li>▪ Salary</li> <li>▪ FTE</li> <li>▪ Pay schedule</li> <li>▪ Funding Chartstring</li> </ul> | <div style="margin-bottom: 10px;"> <p><b>Position Data</b></p> <ul style="list-style-type: none"> <li>▪ Job Code</li> <li>▪ Location</li> <li>▪ Standard Hours</li> <li>▪ Position Number <b>(NEW!)</b></li> <li>▪ Headcount <b>(NEW!)</b></li> <li>▪ Position FTE <b>(NEW!)</b></li> <li>▪ Position Chartstring <b>(NEW!)</b></li> </ul> </div> <div> <p><b>Job Data</b></p> <ul style="list-style-type: none"> <li>▪ Salary</li> <li>▪ Job FTE</li> <li>▪ Pay Schedule</li> <li>▪ Payroll Chartstring</li> <li>▪ Position Number <b>(NEW!)</b></li> </ul> </div> |

5

Fields that used to require entries in Job Data during the hiring process now will receive data from the Position Data pages.


Prior to Position Management, all the indicated fields would be filled out in Job Data.

With Position Management implemented, the Job Code, Location and Standard Hours fields will be maintained in Position Data.

Notice also there will be new data fields relevant to Job Data.

Salary, job FTE (percent time), Appointment Type and Funding Chartstring remain in Job Data.

There is a new Position Number field.



## Benefits of Position Management

```

graph LR
    HCM[(HCM)] --> PM[Position Management]
    PRT[(PRT)] --> PM
    AT[(Ad Hoc Tools)] --> PM
    PM --> DW[(Data Warehouse)]
    DW --> CP[(CalPlanning)]
    DW --> BAIRS[BAIRS]
        
```

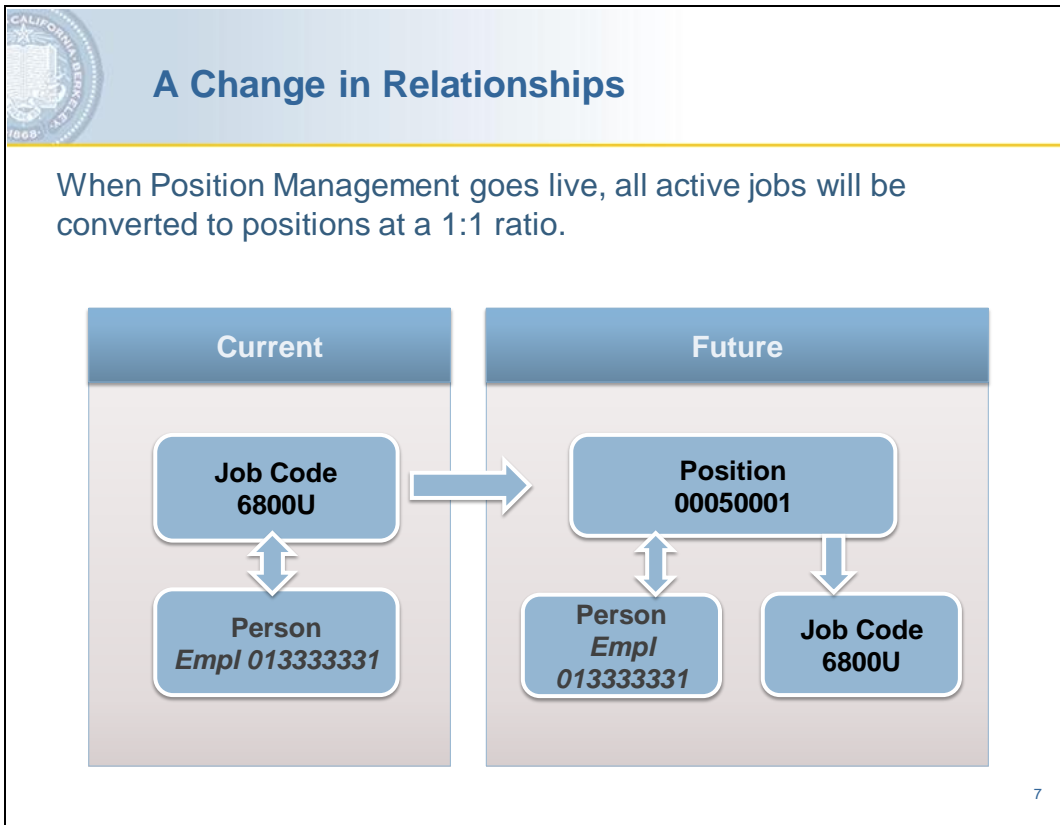
- Single, **central repository** for ALL UC Berkeley institution approved positions across all fund types/sources
  - Track all positions
  - Identify vacancies
  - View historic position data
- Provide Position and Position Funding data for **reporting**
- Reduction or **elimination of redundant data entry** in Budget, HCM, and ancillary systems
- **Builds a bridge** between Human Resources and Budgeting

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Position data becomes the basis for organizational planning, recruitment and budgeting.

Position funding data will build a stronger bridge between Human Resources and Budgeting by creating a relationship that will ensure that our positions have stronger planning and are readily provided for.





Currently, people are hired into job; however, when Position Management goes live, this relationship will be converted into one position for each person in a job (each active job). An exception will be made for student jobs. And the person will be hired into the position. As far as the job is concerned, the position will be connected to the job.




## Relationship Functionality in Position

A **position** can have **multiple incumbents**.  
When could this be useful?

A position's **Headcount** indicates the planned maximum number of incumbents for a position.

Position Incumbents




**Assistant III**  
*Position 50002*  
 Headcount = 3

Empl ID 013333331  
*Step 3*

Empl ID 013333332  
*Step 6*


Empl ID 013333333  
*Step 2*



**Job Code 4722C**  
*Step-based Salary*

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**Multiple Headcount** can be useful for employees with similar positions. For example: student workers in a department or groundskeepers. So it may make perfect sense to reduce these redundant position into one position where there are multiple people sharing the same position. We can do this because Position Management allows positions to have multiple headcount.



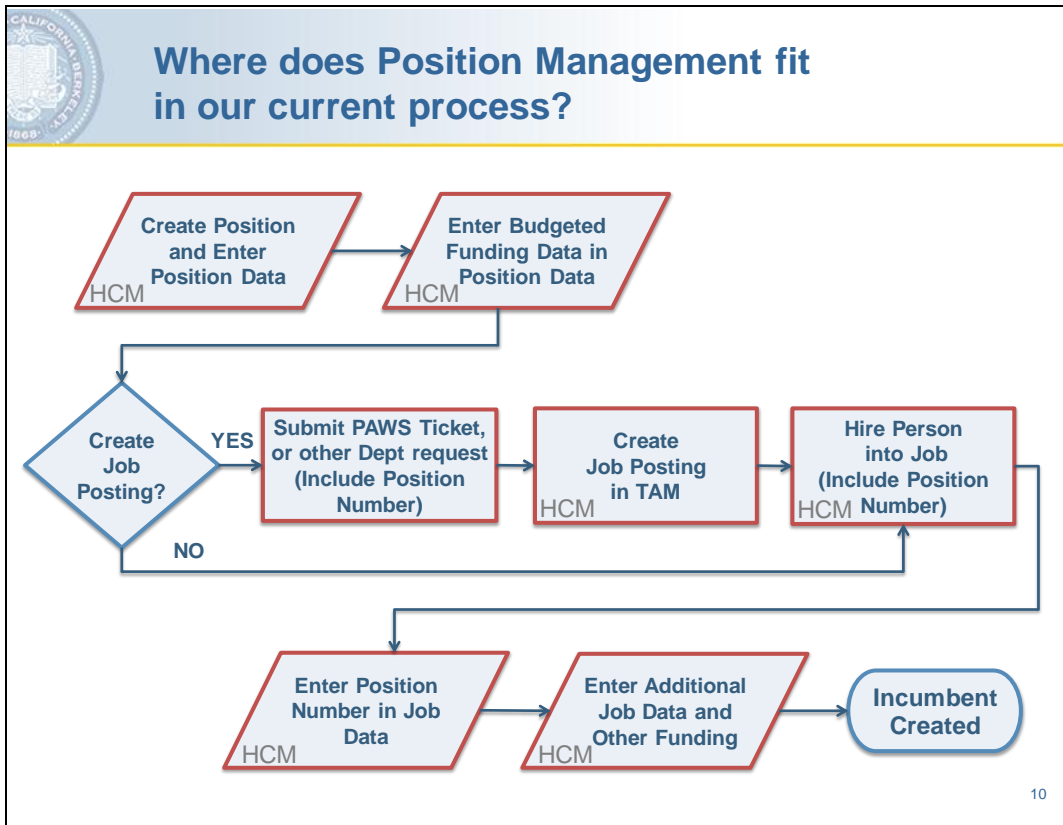
## Position Management Process

1. Enter approved positions in HCM which automatically creates a Position Number
2. Create job postings for vacant positions in TAM using the Position Number
3. Hire a person by entering a Position Number in the Job Data page
  - Automatically pulls position and funding data into the employee record
4. Some updates made to Position Data automatically flow to Workforce Administration Job Data
  - Updates to position funding data are not automatically pushed to a person's job data (Explained in detail later)

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This is general description of the Position Management process.

**Note:** When using TAM we can use the Position Number to create a posting and the position number will be available in Manage Hires.



This is a flowchart for the current process. Notice that position will be important throughout the process in the HCM system.

**Note:** How new positions are reported to you will vary across departments.



## Most Common Position Management Actions

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### Day-to-Day Operations

- Hire a person into a position
- Rehire, Transfer, Promotion, Additional Jobs, Reappointments, etc. using Position
- Enter a termination, creating a position vacancy
- Update Job Data chartstring (change from budgeted)
- Update a Job Data Supervisor ID
- Reclassify a position

### Transitional Actions Due to Conversion

- Update a position's **Reports To** Position Number
- Update a position's **Level 7 Dept** (DeptID)

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These actions are ones that you will need to perform after Position Management goes live and are due to the conversion of active jobs and PRT positions to positions in Position Management.

You will need to verify and update your positions' Reports To position numbers and the Level 7 Dept (DeptID) fields in Position Management.

# Workforce Administration

## Section Overview

At UCB, with few exceptions (such as contingent workers), persons will be hired into positions. Position numbers will be required to be entered as part of the hiring process.

For most hires that originate from TAM (New Hires, Rehires, or Transfers) position number should populate from the posting into job data. However, in those situations where no position number was entered on the TAM posting, you will be required to enter the position number in order to complete the hire.

For non-TAM hires, the position number must be entered in to the person's job data.

## Section Objectives

In this section, you will learn how to perform the following tasks:

- Hire a New Employee using Manage Hires with Position number in the Posting.
- Add an Academic Employment Instance
- Rehire a Former Employee using Manage Hires
- Transfer Into department
- Enter a Job Reclassification using same Position and a different job code

## Managing Hires: New Hire from TAM Job Posting

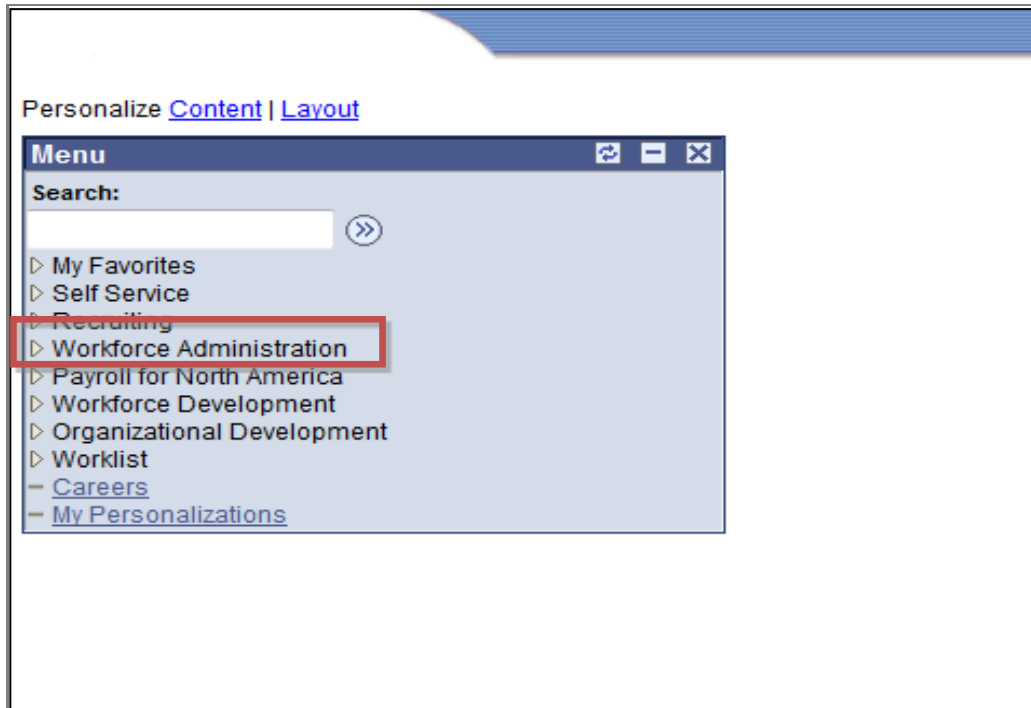
Once the "Prepare For Hire" step has been completed and has sent an applicant for hire to Workforce Administration, that person will be listed on the **Manage Hires** page. For a new hire, after selecting their name from the Manage Hires list, you will need to add them as a person in the HCM system by clicking the **Add Person** button on the **Manage Hires Detail** page. After entering their personal information, you will click the **Add the Relationship** button to enter their Job Data information. Before you can complete the hire make sure the position number has been entered into the **Position Number** field on the **Work Location** page.

**Note:** It is possible for a TAM job opening to be created without a position number. However, a position number is required before a hire can be completed. If the Position Number did not auto-populate from the TAM job opening, be sure to enter a valid position number into the **Position Number** field on the **Work Location** page.

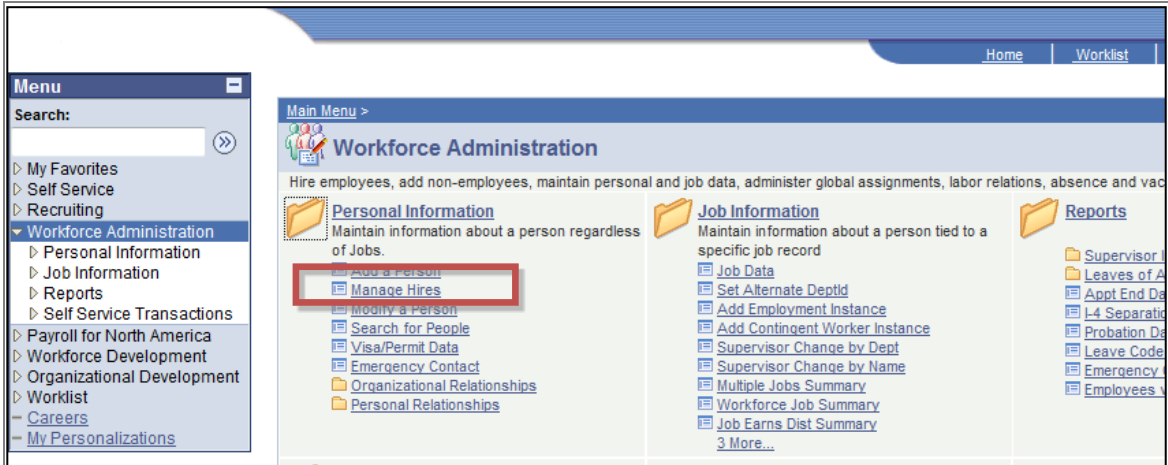
**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

### Procedure

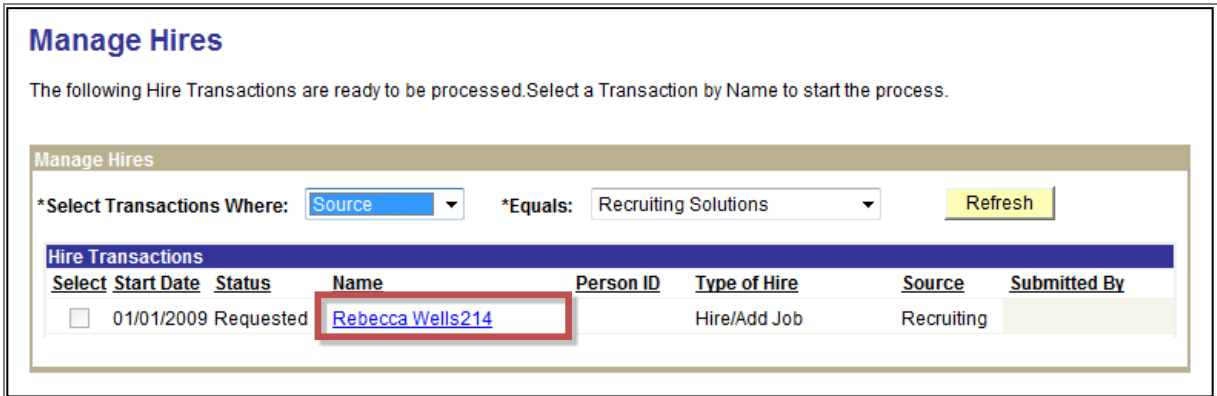
In this topic, you will learn how to hire an employee from a TAM posting created using a position number.



| Step | Action   |
|------|--|
| 1.   | Begin by clicking the <b>Workforce Administration</b> link in the main menu to start the hire.<br><a href="#">▶ Workforce Administration</a> |



| Step | Action  |
|------|---|
| 2.   | Click the <b>Manage Hires</b> link in the <b>Personal Information</b> folder.<br><a href="#">Manage Hires</a> |
| 3.   | In the <b>Manage Hires</b> worklist page, you will find applicants who are now in "ready to be hired" status. |



| Step | Action   |
|------|--|
| 4.   | Click the link displaying the person's name in the <b>Name</b> column to start the hiring process.<br>Click the <b>Rebecca Wells</b> link.<br><a href="#">Rebecca Wells214</a> |



The Start Date entered on this page will be used as the Effective Date for Job.

**Job**

Recruiter Name:

Job Opening ID: 71

Job Opening: Technician, Development, III

Position:

Job Code: Technician, Development, III

Business Unit: All Berkeley Campus

Department: Physics

Applicant Type: External - New

\*Type of Hire: Hire/Add Job

\*Desired Start Date: 10/01/2012

EmplID:

Employee ID Verified

**Org Instance**

Create new Org Instance 0

Use existing Org Instance

**Employee Assignment**

Create New Assignment 0

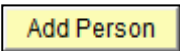
Use Existing Assignment

**Hire Comments**

**Add Person**

Select this button in order to pull the person's personal data information from Recruiting Solutions.

Add Person

| Step | Action   |
|------|--|
| 5.   | Verify the selection in the <b>Type of Hire</b> field.<br><br>Because this person is an External applicant who has never worked at UC Berkeley before, the correct type of hire for this person is "Hire/Add Job". |
| 6.   | Always enter the starting date for the job into the <b>Desired Start Date</b> field. In this example, enter " <b>10/1/12</b> ".  |
| 7.   | Click the <b>Vertical</b> scrollbar.   |
| 8.   | Press <b>[Tab]</b> .   |
| 9.   | The <b>Empl ID</b> field should be blank indicating that this is a new person in the system. The candidate will receive an employee ID once their personal information has been created in the system.             |
| 10.  | Click the <b>Vertical</b> scrollbar to begin adding the person.  |
| 11.  | Click the <b>Add Person</b> button.<br><br>   |

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#) | [Organizational Relationships](#)

Person ID: NEW

**Name** Find | View All | First 1 of 1 Last

\*Effective Date: 10/01/2012 + -

Name: Rebecca Wells214 [Edit Name](#)

Updated by: on:

---

**Biographic Information**

Date of Birth: 01/15/1977 35 Years: 10 Months: [Release Information](#)

**Biographical History** Find | View All | First 1 of 1 Last

\*Effective Date: 10/01/2012 + -

\*Gender: Female

\*Marital Status: Single

\*Highest Education Level: Bachelor's Level Degree

Student Status: 1-Not Registered Student ID#: Registered Units:

Updated by: on: 11/20/2012 8:50:07AM

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**Citizenship**

\*Country Of Citizenship/Perm Legal Residence: USA United States Citizenship Status: C

---



**Social Security Number**

Social Security Number: XXX-XX-XXXX Confirm Social Security Number: XXX-XX-XXXX

[Return to Manage Hires](#)

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#) | [Organizational Relationships](#)

| Step | Action  |
|------|---|
| 12.  | In the <b>Name</b> section, review the <b>Effective Date</b> and the <b>Name</b> of the person.   |
| 13.  | Enter the date the employment begins into the <b>Effective Date</b> field.<br>Enter "10/01/12".   |
| 14.  | Press <b>[Tab]</b> .  |
| 15.  | In this example, enter "1/15/1977" into the <b>Date of Birth</b> field.   |
| 16.  | Press <b>[Tab]</b> .  |
| 17.  | If the employee has filled out release information that differs from the default, click the <b>Release Information</b> link to edit these values.                     |
| 18.  | Indicate the gender of the person.<br><br>Click the <b>Gender</b> list.<br><div style="border: 1px solid black; padding: 2px; display: inline-block;">Unknown ▾</div> |

| Step | Action  |
|------|---|
| 19.  | Click the <b>Female</b> list item.<br>   |
| 20.  | Click in the <b>Country Of Citizenship/Perm Legal Residence</b> field.<br>                                       |
| 21.  | Enter the country code, in this example, " <b>USA</b> " into the <b>Country Of Citizenship/Perm Legal Residence</b> field.<br><br>For non-US citizens, use the <b>Look up</b> (magnifying glass). |
| 22.  | Enter " <b>C</b> " into the <b>Citizenship Status</b> field to indicate the person is a citizen.<br><br>For non-US citizens, use the <b>Look up</b> (magnifying glass).                           |
| 23.  | In this example, enter " <b>555-24-9000</b> " into the <b>Social Security Number</b> field.   |
| 24.  | Press <b>[Tab]</b> .  |
| 25.  | Re-enter the social security number " <b>555-24-9000</b> " into the <b>Confirm Social Security Number</b> field.  |
| 26.  | Click the <b>Contact Information</b> tab to continue entering information for this hire.  |

Biographical Details | **Contact Information** | Demographic Details | Eligibility

Person ID: NEW

Home Department:   PHYSICS

Paycheck Code:  [Earnings Statement Address](#)

Dept Pickup Code:

---

**Current Addresses** [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

| Address Type | As Of Date | Status | Address   |  |
|--------------|------------|--------|---|--|
| Home         | 10/01/2012 | A      | 7145 Wood Road<br>San Ramon, CA 94583<br>Contra Costa | <a href="#">Add Address Detail</a> <input type="button" value="+"/> <input type="button" value="-"/> |

---

**Phone Information** [Customize](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

| *Phone Type | Telephone    | Extension | Preferred   |
|-------------|--------------|-----------|---|
| Home        | 925/355-9211 |           | <input checked="" type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/> |

---

**Email Addresses** [Customize](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

| *Email Type | *Email Address       | Preferred   |
|-------------|----------------------|---|
| Business    | r_wells214@email.com | <input checked="" type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/> |

[Return to Manage Hires](#)

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#) | [Organizational Relationships](#)

| Step | Action   |
|------|--|
| 27.  | The <b>Contact Information</b> page displays.<br><br>In this example, enter " <b>PHYSI</b> " into the <b>Home Department</b> field.                  |
| 28.  | Press <b>[Tab]</b> .   |
| 29.  | Notice that in this example, the home address, phone, and email have populated from the applicant profile. Add or update this information as needed. |
| 30.  | Click the <b>Demographic Details</b> tab.  |

Biographical Details | Contact Information | **Demographic Details** | Eligibility | Organizational Relationships

Person ID: NEW

**Ethnicity and Race**

Hispanic, Latino or Other Spanish Origin?

In addition, please select one or more of the following categories:

American Indian or Alaska Native?    Asian?    Black/African-American?  
 Native Hawaiian/Pacific Island    White?

**Ethnic Group** View All 1 of 2

Ethnic Group: F-White (not hispanic)

**Disability** Find | View All First 1 of 1 Last

Disabled    Disabled Veteran + -

Recently Separated Veteran Dt:  B1  
(Veterans separated from the military within one year of UCB hire date)

**Military Status** Find | View All First 1 of 1 Last

Effective Date: 10/01/2012 + -

Vietnam Era Vet    War/Campaign/Expedition Vet    Armed Forces Service Medal Vet

Updated by:   on:

[Return to Manage Hires](#)

| Step | Action   |
|------|--|
| 31.  | You may already see information entered on this page from the applicant profile.<br><br>If the person has self-identified Ethnicity, Disability, and/or military status, indicate this information on this page. |
| 32.  | Click the <b>White</b> option.<br><input type="checkbox"/>   |
| 33.  | Click the <b>Ethnic Group</b> list.<br><input type="text" value="U-Denied to State"/>  |
| 34.  | Click the <b>F-White (not Hispanic)</b> list item.<br><input type="text" value="F-White (not hispanic)"/>  |
| 35.  | Click the <b>Eligibility</b> tab.<br><input type="button" value="Eligibility"/>  |

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | **Eligibility** | [Organizational Relationships](#)

Person ID: NEW

**\*\* Information on this page is needed for Employees only.**

Empl Rel Code: E-All Others-Not Confidential

**Eligibility Details**


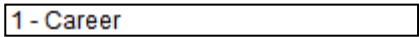
BELI Code: 1 - Career  Effective Date: 11/1/2012   
 Primary SQC:  Effective Date:   
 Secondary SQC:  Effective Date:   
 I9 Verification Date: 10/3/2012   
 Patent Date: 10/3/2012   
 State Oath Date: 10/3/2012

**E-Verify**

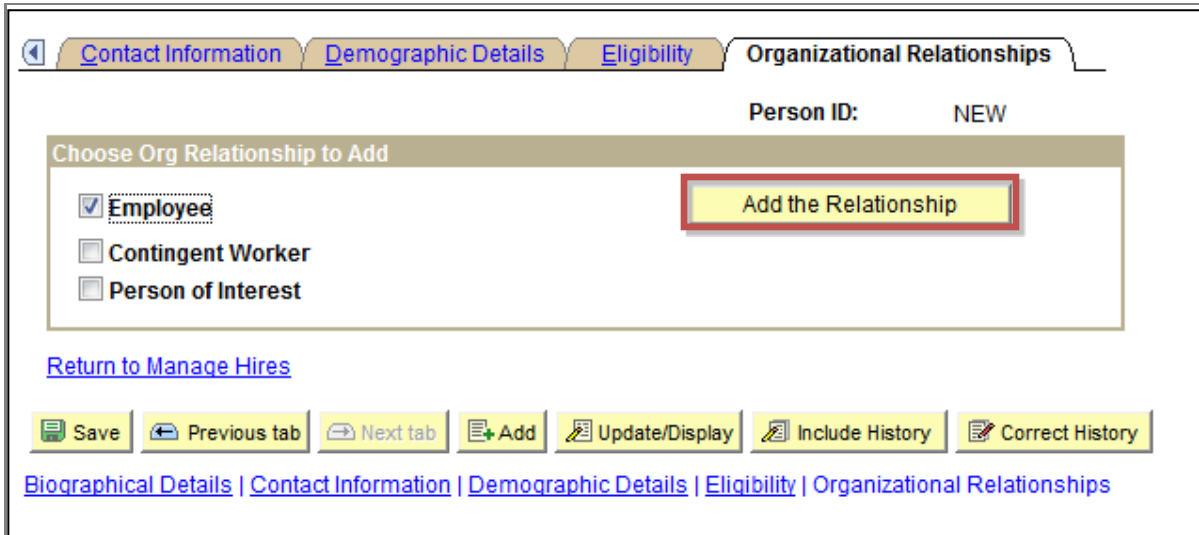
E-Verify Date:   
E-Verify Status:

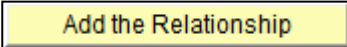
[Return to Manage Hires](#)

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#) | [Organizational Relationships](#)

| Step | Action   |
|------|--|
| 36.  | Select the Benefits Eligibility Level Indicator code (BELI) information.<br>Click the <b>BELI Code</b> list.<br>  |
| 37.  | Click the <b>1 - Career</b> list item.<br>  |
| 38.  | The BELI Effective Date is the date that elected benefits may begin.<br>Enter the date, " <b>11/1/2012</b> ", into the <b>Effective Date</b> field for the BELI code.  |
| 39.  | Enter the date that the person signed the I9 Verification form into the <b>I9 Verification Date</b> field. Enter " <b>10/3/2012</b> ".<br><b>Note:</b> The form must be signed before or on the first day of work.                                       |
| 40.  | Press <b>[Tab]</b> .   |
| 41.  | Enter the signature date for the Patent form into the <b>Patent Date</b> field. In this example, enter " <b>10/03/2012</b> ".<br><b>Note:</b> The form must be signed before or on the first day of work.  |
| 42.  | Press <b>[Tab]</b> .   |
| 43.  | Enter the signature date of the State Oath form into the <b>State Oath Date</b> field. In this example, enter " <b>10/03/2012</b> ".<br><b>Note:</b> The form must be signed before or on the first day of work. Only U.S. citizens must sign this form. |

| Step | Action   |
|------|--|
| 44.  | Click the <b>Organizational Relationships</b> tab. |



| Step | Action   |
|------|--|
| 45.  | Since this is an employee coming from a TAM posting, the system has already selected the employee relationship. Select the <b>Employee</b> checkbox if not defaulted.  |
| 46.  | Use the <b>Add Relationship</b> button to enter the job data for this person.<br><br><b>Note:</b> Clicking the <b>Add Relationship</b> button also saves all entries you have made and assigns an employee number. |
| 47.  | Click the <b>Add the Relationship</b> button.<br><br>   |

Work Location | Job Information | Payroll | Salary Plan | Compensation

Rebecca Wells214 EMP ID: 010006248 Empl Rcd #: 0

Work Location Find First 1 of 1 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 11/01/2012 Sequence: 0

\*Action: Hire \*Reason: Hire

Last Start Date: 11/20/2012 Termination Date:

Position Number: 00000698 Technician, Development, III Position Entry Date: 11/01/2012

Prior/Next Employer

Override Position Data  Position Management Record

Regulatory Region: USA United States

Company: UCB UC Berkeley

Control Unit: COLLS Department Entry Date: 11/01/2012

Department: PHYSI Physics

Location: CAMPUS Main Campus-Berkeley


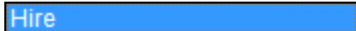
Date Created: 11/20/2012

Updated by on 11/20/2012 8:57:16AM

Job Data [Employment Data](#) [Earnings Distribution](#)

OK Cancel Apply Previous tab Next tab Refresh

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action  |
|------|---|
| 48.  | Verify or update the effective date.<br><br>Enter the date the employment begins into the <b>Effective Date</b> field.<br>Enter " <b>11/1/2012</b> ".   |
| 49.  | Press <b>[Tab]</b> .  |
| 50.  | For the <b>Action</b> field, the "Hire" action has defaulted since this information is coming from <b>Manage Hires</b> page.<br><br>However, we must select a corresponding reason.<br><br>Click the <b>Reason</b> list.<br> |
| 51.  | Click the <b>Hire</b> list item.<br>   |
| 52.  | Press <b>[Tab]</b> .  |
| 53.  | The position number defaults from the TAM posting; however, it can be changed here if needed.   |



| Step | Action   |
|------|--|
| 54.  | <p>Notice that information has defaulted from the position, such as the <b>Department</b> and <b>Location</b> fields.</p> <p>If any defaulted information needs to be changed on this page or subsequent job data pages, then click the <b>Override Position Data</b> button to enable these fields.</p> <p>Note that when Override Position Data is activated, updates to the position will not flow to the incumbent's job data. You will typically only override position data defaults when making a temporary change or exception to an incumbent's data that does not apply to the position.</p> |
| 55.  | Click the <b>Job Information</b> tab.  |

[Work Location](#)
**Job Information**
[Payroll](#)
[Salary Plan](#)
[Compensation](#)

Rebecca Wells214      EMP      ID: 010006248      Empl Rcd #: 0

Job Information
Find    First ◀ 1 of 1 ▶ Last

|                 |   |                       |            |   |            |
|-----------------|---|-----------------------|------------|---|------------|
| Effective Date: | 11/01/2012                              | Effective Sequence:   | 0          | Job Category:   |            |
| Action:         | Hire                                    | Reason:               | Hire       |   |            |
| Current         |   |                       |            |   |            |
| Job Code:       | 7172C      Technician, Development, III | Begin Date:           | 11/01/2012 | Empl Duration:  | I-Indefini |
| Supervisor ID:  | 010003853      Eric Thomas 100          | Appointment End Date: |            | <input checked="" type="radio"/> Fixed <input type="radio"/> Variable |            |
| Reports To:     | 00000609                                | Regular/Temporary:    | Reg        |   |            |
| Appt Type:      | 2 - Regular                             | Full/Part:            | Full-Time  |   |            |
| Work Period:    | W      Weekly                           | *Empl Rel Code:       | E-Other-NC |   |            |
| Union Code      | TX      Technical Unit                  | FTE:                  | 1.000000   |   |            |
| Pay Schedule    | MO                                      | Time Code             | E          |   |            |
| FLSA Status     | N                                       | EEO Class             | N          | Leave Code  | A          |

Job Data      [Employment Data](#)      [Earnings Distribution](#)

OK    Cancel    Apply    Previous tab    Next tab    Refresh

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action  |
|------|---|
| 56.  | <p>If <b>Reports To</b> was completed in the position, the Reports To position number displays. If the Reports To position is not vacant, and has only one incumbent, the employee ID of the Reports To position incumbent auto-populates the Supervisor ID field. If the Supervisor ID field does not populate from the position, or if the suggested ID is incorrect, then you will need to enter or update it.</p> |
| 57.  | <p>In this example, this is a career appointment. The Employee Duration is "Indefinite" and no appointment end date is needed.</p> <p>Click the <b>Empl Duration</b> list.</p> <div data-bbox="402 615 581 657" style="border: 1px solid black; padding: 2px;">             W-End Date ▾           </div>   |
| 58.  | <p>Click the <b>I-Indefini</b> list item.</p> <div data-bbox="402 711 581 743" style="border: 1px solid black; padding: 2px;">             I-Indefini           </div>  |
| 59.  | <p>In the <b>Appt Type</b> field, select the Regular/Career list item.</p> <p>Click the <b>Appt Type</b> list.</p> <div data-bbox="402 863 581 905" style="border: 1px solid black; padding: 2px;"> <span style="display: inline-block; width: 100%; height: 15px; background-color: #f0f0f0;"></span> ▾           </div>   |
| 60.  | <p>Click the <b>2 - Regular/Career</b> list item.</p> <div data-bbox="402 961 773 993" style="border: 1px solid black; padding: 2px;">             2 - Regular/Career           </div>  |
| 61.  | <p>In this example, the employee is paid on the <b>MO</b> cycle.</p> <p><b>Note:</b> In 2013, SM and MA pay schedules will be phased out and replaced with the new code "BW" for biweekly.</p> <p>Enter "<b>MO</b>" into the <b>Pay Schedule</b> field.</p>   |
| 62.  | <p>Press <b>[Tab]</b>.</p>  |
| 63.  | <p>In this example, enter "<b>E</b>" for exception time into the <b>Time Code</b> field.</p>  |
| 64.  | <p>The <b>Employee Relation Code</b> defaults from the Job Code while the <b>FTE</b> field defaults from the position.</p>  |
| 65.  | <p>Verify the <b>FTE</b> field.</p> <p><b>Note:</b> The data in the <b>FTE</b> field comes from the position FTE. The <b>FTE</b> field can be edited here, but cannot be greater that the position FTE.</p>   |
| 66.  | <p>Click in the <b>Leave Code</b> field.</p> <div data-bbox="402 1583 456 1625" style="border: 1px solid black; width: 30px; height: 20px; display: inline-block;"></div>   |
| 67.  | <p>In this example, the employee will earn leave at a rate of 10 hours a month.</p> <p>Enter "<b>A</b>" into the <b>Leave Code</b> field.</p>   |

| Step | Action  |
|------|---|
| 68.  | <p>Because this job is step-based, click the <b>Salary Plan</b> tab to enter the salary step that the employee will have.</p> <p>Note: If this is an open-range job, you can skip the <b>Salary Plan</b> page and go to the <b>Compensation</b> page.</p> |

| Step | Action  |
|------|---|
| 69.  | <p>Click in the <b>Step</b> field.</p> <div style="border: 1px solid black; width: 40px; height: 20px; margin-left: 20px;"></div> |
| 70.  | Enter "3" into the <b>Step</b> field.   |
| 71.  | Press <b>[Tab]</b> .  |
| 72.  | Click the <b>Compensation</b> tab to verify the employee's monthly salary.  |

Work Location | Job Information | Payroll | Salary Plan | **Compensation**

Rebecca Wells214 EMP ID: 010006248 Empl Rcd #: 0

**Compensation** Find First 1 of 1 Last

Effective Date: 11/01/2012 Effective Sequence: 0 Job Category:  
 Action: Hire Reason: Hire

Current

Employee Job Grade Job Step 3.0

Compensation Rate: 3,766.000000 Frequency: M Monthly

Comparative Information

Change Amount: 0.000000 Monthly

Change Percent: 0.000

Pay Rates

|         |            |        |           |
|---------|------------|--------|-----------|
| Annual  | 45,192.000 | Daily  | 173.820   |
| Monthly | 3,766.000  | Hourly | 21.640000 |

Pay Components Customize | Find | First 1 of 1 Last

Amounts | Controls | Changes | Conversion

| *Rate Code | Off/Above Scale | Comp Rate    | Frequency |
|------------|-----------------|--------------|-----------|
| 1 MONTH    |                 | 3,766.000000 | M         |

Job Data **Employment Data** Earnings Distribution

OK Cancel Apply Previous tab Next tab Refresh

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action  |
|------|---|
| 73.  | Verify the monthly <b>Comp Rate</b> .<br><br><b>Note:</b> If this were an open-range based salary, this field would be enabled and you would enter the salary into the <b>Comp Rate</b> column. |
| 74.  | Click the <b>Employment Data</b> link to enter the probation date for the employee.<br><a href="#">Employment Data</a>  |

**Employment Information**

Rebecca Wells214      EMP      ID: 010006248      Empl Rcd #: 0

---

**Organizational Instance**

Organizational Instance Rcd: 0      Original Hire Date:  Override

Hire Date:

Termination Date:

Org Instance Service Date:

---

**Organizational Assignment Data**

**Instance Record**

Business Title: Technician, Development, III

Work Phone:

---

Assignment Start Date: 11/20/2012      Probation Date: 4/20/2012

Assignment End Date:

Last Assignment Start Date: 11/20/2012

---

Date Last Increase:

Last Date in Pay Status:       Mandatory Reporting Signature Date:

---

[Job Data](#)      Employment Data      [Earnings Distribution](#)

---

OK    Cancel    Apply    Refresh

| Step | Action   |
|------|--|
| 75.  | <p>In this example, enter the appropriate probation date into the <b>Probation Date</b> field for this employee. Enter "<b>4/2/2012</b>".</p> <p><b>Note:</b> If you are uncertain whether a job requires a probation period, check the appropriate policy or union contract.</p>  |
| 76.  | <p>When an employee has signed and completed Mandated Reporter forms, the HR Administrator should record this date. Departments should enter the date the employee signed both of the following forms:</p> <ul style="list-style-type: none"> <li>- Statement Acknowledging Requirement To Report Child Abuse</li> <li>- Statement Acknowledging Requirement To Report Suspected Abuse Of Dependent Adults And Elders</li> </ul> |
| 77.  | <p>Click the <b>Earnings Distribution</b> link.</p> <p><a href="#">Earnings Distribution</a></p>   |

**Job Earnings Distribution**

Rebecca Wells214      EMP      ID: 010006248      Empl Rcd #: 0

**Earnings Distribution Type**      Find      First 1 of 1 Last

Effective Date: 11/01/2012      Effective Sequence: 0      Job Category:

Action: Hire      Reason: Hire      Current

Standard Hours: 40.00      Work Period: W

Pay Rate/Amount: 3,766.000000      Comp Freq: M Monthly

FTE: 1.000000

**Job Earnings Distribution**      Find      First 1 of 1 Last

Begin Date: 11/01/2012      End Date:      \*Earn Code: REG Regular      Distrb %: 100.0000      Pay Rate/Amount: 3766.000000

Budgeted FTE: 1.0      Work Study Program:      Speed Type: 00000008      GL BU: 1

**Earnings Chartfields**

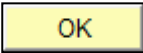
| Account | Fund          | Dept          | Program                     | Chartfield 1 | Chartfield 2 |
|---------|---------------|---------------|-----------------------------|--------------|--------------|
| 51210   | 19900         | 13050         | 40                          |              |              |
|         | GENERAL FUNDS | PHYSI Gen Ops | Instruction & Dept Research |              |              |

updated by      on

Job Data      Employment Data      Earnings Distribution

OK      Cancel      Apply      Refresh

| Step | Action   |
|------|--|
| 78.  | In the <b>Job Earnings Distribution</b> section, verify that the <b>Begin Date</b> of the Job matches the effective date of the hire.<br><br>If this job has an <b>End Date</b> , then enter the appropriate end date.   |
| 79.  | The funding chartstring has populated from the position information. However, if necessary, you can add additional funding chartstrings or edit the one displayed.<br><br>Be sure to adjust the Distrb % fields on all distributions to the correct percentage for each distribution while ensuring that together, all distribution percentages equal the amount of FTE. |
| 80.  | If this is a budgeted position in PRT, enter the FTE budgeted for the position into the <b>Budgeted FTE</b> field.<br><br><b>Note:</b> This field will only be used through the end of the fiscal year 2011/2012.<br><br>In this example, enter "1.0".   |
| 81.  | <b>Tab</b> out of the field.   |

| Step | Action  |
|------|---|
| 82.  | <p>Once all required data have been entered for this person's job data, click the <b>Save</b> button to complete the hiring process for this new employee.</p> <p>Click the <b>OK</b> button.</p>  |
| 83.  | <p><b>Congratulations!</b><br/>You have completed this topic.<br/><b>End of Procedure.</b></p>  |

## Add an Academic Employment Instance

Prospective faculty being considered in the Academic Case Tracking system will have a Case-Tracking POI (person of interest) relationship in HCM. When an academic POI is hired, you will need to create an employee relationship with UCB by adding an Employment Instance (Job Record) to them. Begin the process by searching for the person using the **Person Organizational Summary** link and then using the **Add Employment Instance** link.

**Note:** You can contact the Academic Personnel Office if you have any specific questions on how to set up academic appointments. Once you have the information you need you can proceed with the entry into HCM.

**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

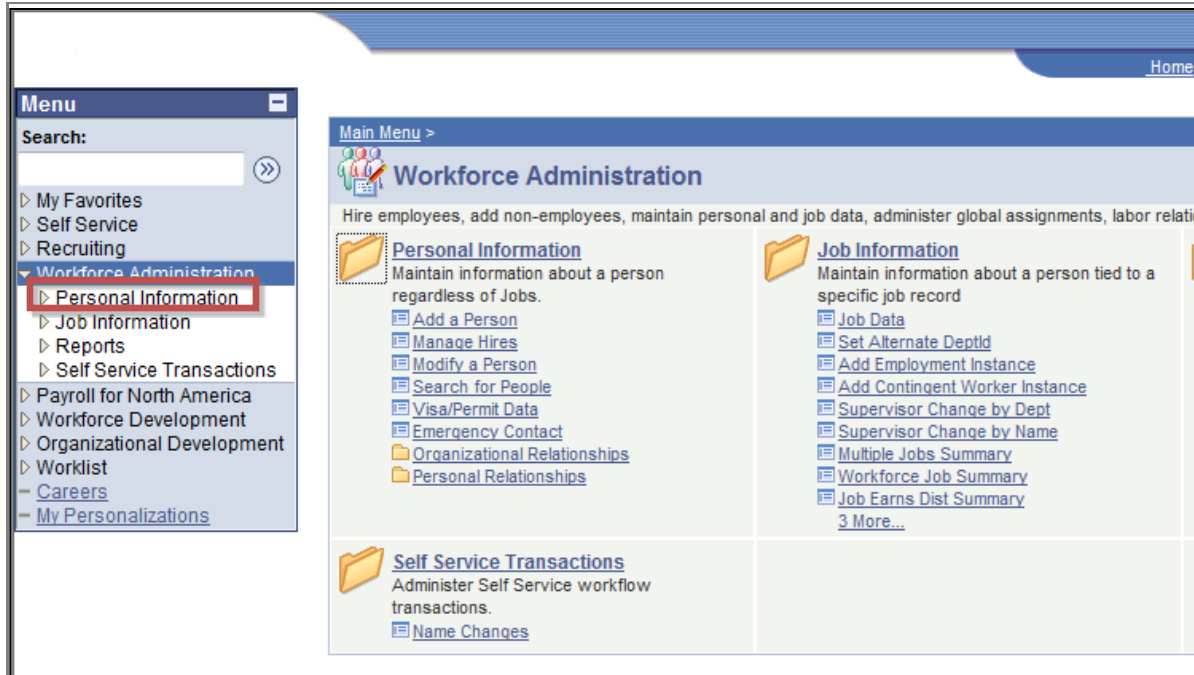
### Procedure

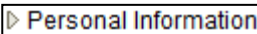
In this topic, you will learn how to add an employment instance to an academic person of interest (POI) using a position.

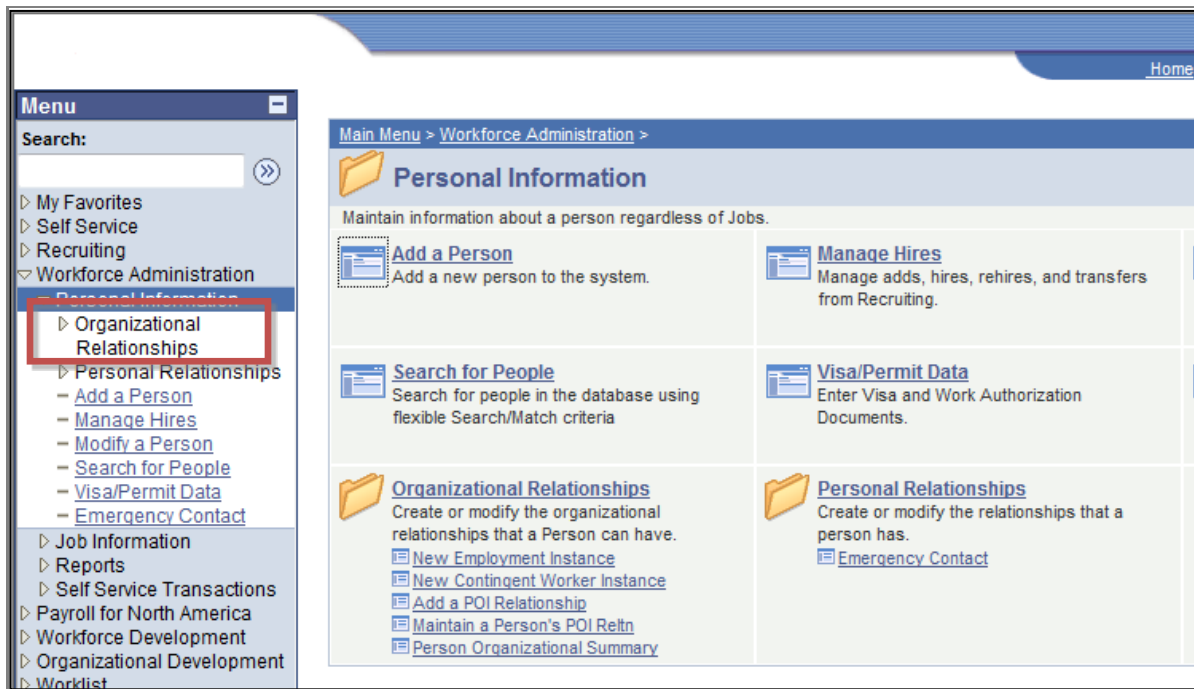


| Step | Action   |
|------|--|
| 1.   | <p>Begin by navigating to the <b>Personal Organizational Summary</b> search page.</p> <p>Click the <b>Workforce Administration</b> link.</p> <p><a href="#">▶ Workforce Administration</a></p> |

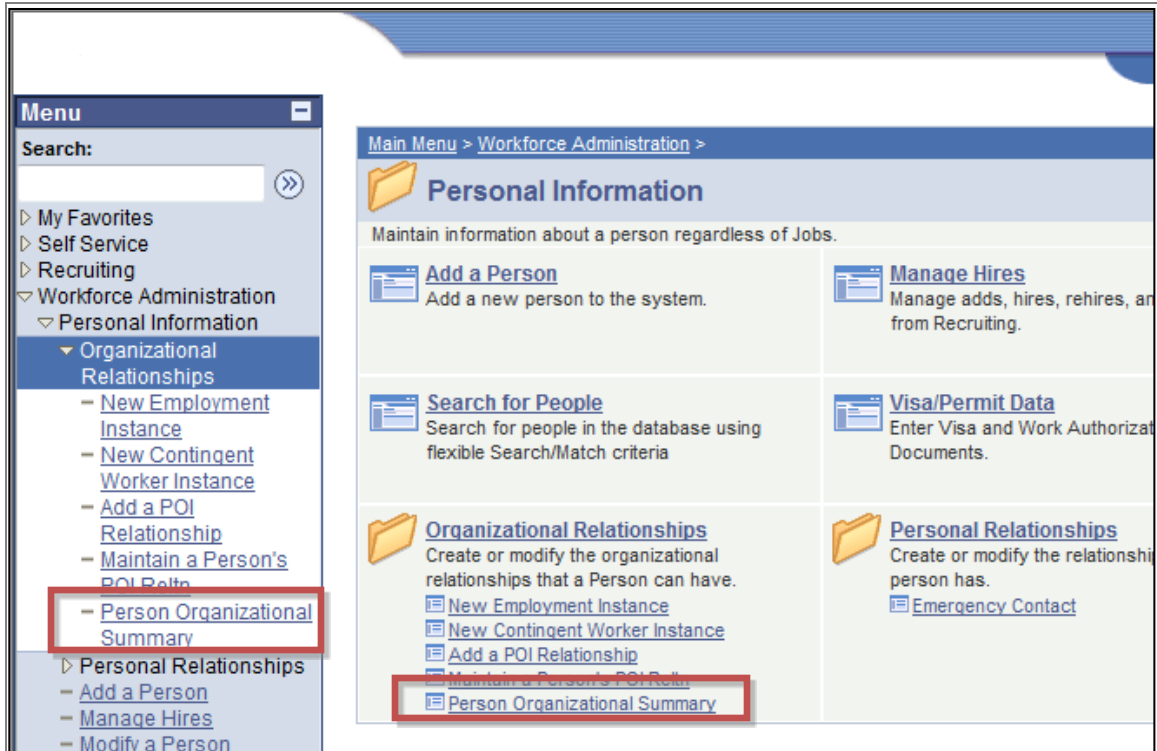




| Step | Action   |
|------|--|
| 2.   | Click the <b>Personal Information</b> link in the menu.<br> |



| Step | Action   |
|------|--|
| 3.   | Click the <b>Organizational Relationships</b> link.<br> |



| Step | Action  |
|------|---|
| 4.   | Click the <b>Personnel Organizational Summary</b> link. |

**Personnel Organizational Summary**  
Enter any information you have and click Search. Leave fields blank for a

Find an Existing Value

EmpID: begins with

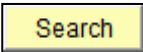
Name: begins with

Last Name: begins with

First Name: begins with

Case Sensitive

[Basic Search](#)

| Step | Action  |
|------|---|
| 5.   | <p>In this example, Elizabeth Burgess is an Academic Person of Interest who will be hired as a professor in the Physics Department.</p> <p><b>Note:</b> The recommended business practice is to search by ID number.</p> <p>On the <b>Person Organizational Summary</b> page, enter "<b>Burgess</b>" into the <b>Last Name</b> field.</p> |
| 6.   | On your keyboard, press <b>[Tab]</b> to move to the <b>First Name</b> field.  |
| 7.   | Enter " <b>Elizabeth</b> " into the <b>First Name</b> field.  |
| 8.   | <p>Click the <b>Search</b> button.</p>   |

Person Summary


Elizabeth Burgess      Person ID: 010006255      [Edit Personal Data](#)

[Add Employment Instance](#)    [Add Contingent Worker Instance](#)    [Add a POI Relationship](#)

Person of Interest Instances

| Person of Interest Type        | Status | Begin Date/ | End Date   | Edit POI                 |
|--------------------------------|--------|-------------|------------|--------------------------|
| Academic Case Tracking Prehire | A      | 07/01/2012  | 07/01/2013 | <a href="#">Edit POI</a> |

[Return to Search](#)    [Notify](#)

| Step | Action   |
|------|--|
| 9.   | <p>From the <b>Person Summary</b> page, you can see that Elizabeth Burgess is already has a POI relationship with the university. From this page, you can add her employment instance (job). If she didn't have a POI relationship with the university, you would need to add that relationship.</p> <p>Click the <b>Add Employment Instance</b> link.</p>  |

Work Location | Job Information | Payroll | Salary Plan | Compensation

Elizabeth Burgess EMP ID: 010006255 Empl Rcd #: 0

Work Location Find First 1 of 1 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 10/03/2012 Sequence: 0

\*Action: Hire \*Reason: Hire

Last Start Date: 11/21/2012 Termination Date:

Position Number: 00000699 Position Entry Date: 10/03/2012

Prior/Next Employer: BUW Professor-Acad Yr

Override Position Data  Position Management Record

Regulatory Region: USA United States

Company: UCB UC Berkeley

Control Unit: COLLS Department Entry Date: 10/03/2012

Department: PHYSI Physics

Location: CAMPUS Main Campus-Berkeley

Updated by on 11/21/2012 2:17:41PM Date Created: 11/21/2012

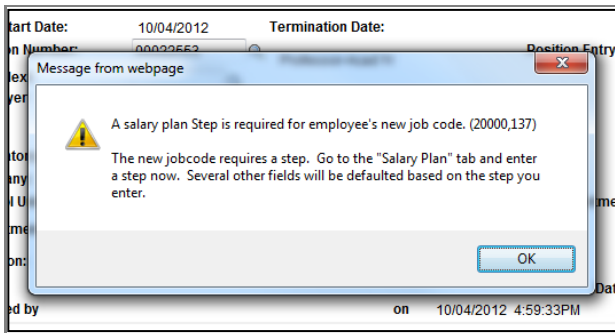
Job Data [Employment Data](#) [Earnings Distribution](#)

Save Return to Search Notify Previous tab Next tab Refresh

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action  |
|------|---|
| 10.  | Verify or update the effective date.<br>Click in the <b>Effective Date</b> field.<br>07/01/2012                             |
| 11.  | Enter the date the person will start work into the <b>Effective Date</b> field.<br>Enter "10/03/2012".                      |
| 12.  | The <b>Action</b> field contains the default action of "Hire". You will need to select a corresponding reason for the hire. |
| 13.  | Click the <b>Reason</b> list.<br>[Dropdown menu]  |
| 14.  | For Elizabeth Burgess, the best reason is "Hire".<br>Click the <b>Hire</b> list item.<br>Hire                               |

| Step | Action  |
|------|---|
| 15.  | <p>Indicate the position into which the new academic employee is being hired by entering the position number in the <b>Position Number</b> field.</p> <p>Enter the position number for the hire into the <b>Position Number</b> field.<br/>Enter "<b>00000699</b>".</p> |
| 16.  | <p>Press the <b>[Tab]</b> key to populate data from the position.</p> <div style="border: 1px solid black; width: 100px; height: 20px; margin-top: 5px;"></div>   |



| Step | Action  |
|------|---|
| 17.  | <p>Step data is not maintained in the position information. You will need to enter the <b>Step</b> value on the <b>Salary Plan</b> page for this employee prior to saving.</p> <p>Click the <b>OK</b> button to close the message.</p> <div style="border: 1px solid black; width: 100px; height: 20px; margin-top: 5px; text-align: center; background-color: #e0e0e0;">OK</div> |
| 18.  | <p>Because this is an academic job, the <b>Prior/Next Employer</b> field should be completed. Type in the appropriate code or use the magnifying glass to look up the code.</p> <div style="border: 1px solid black; width: 100px; height: 20px; margin-top: 5px;"></div>   |
| 19.  | <p>If there is a code for the previous employer, then enter it into the <b>Prior/Next Employer</b> field. Enter "<b>BUW</b>".</p>   |
| 20.  | <p>Press <b>[Tab]</b>.</p>  |

| Step | Action   |
|------|--|
| 21.  | <p>Notice that information has defaulted from the position, such as the <b>Department</b> and <b>Location</b> fields.</p> <p>If any defaulted information needs to be changed on this page or subsequent job data pages, then click the <b>Override Position Data</b> button to enable these fields.</p> <p>Note that when Override Position Data is activated, updates to the position will not flow to the incumbent's job data. You will typically only override position data defaults when making a temporary change or exception to an incumbent's data that does not apply to the position.</p> |

| Step | Action  |
|------|---|
| 22.  | <p>Click the <b>Job Information</b> tab.</p> <p><a href="#">Job Information</a></p> |

Elizabeth Burgess EMP ID: 010006255 Empl Rcd #: 0

**Job Information** Find First 1 of 1 Last

Effective Date: 10/03/2012 Effective Sequence: 0 Job Category:   
 Action: Hire Reason: Hire Current

Job Code: 1100 Professor-Acad Yr Begin Date: 10/03/2012   
 Supervisor ID: 010006151 Jonathan Friedman Empl Duration: T-Tenure   
 Reports To: 00000566 Appointment End Date:   
 Regular/Temporary: Reg Fixed Variable   
 Appt Type: X - Faculty Full/Part: Full-Time   
 Work Period: W Weekly \*Empl Rel Code: E-Other-NC   
 Union Code A1 Academic Senate FTE: 1.000000   
 Pay Schedule MO Time Code E   
 FLSA Status E EEO Class N Leave Code N

Job Data [Employment Data](#) [Earnings Distribution](#)

Save Return to Search Notify Previous tab Next tab Refresh

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action   |
|------|--|
| 23.  | If <b>Reports To</b> was completed in the position, the Reports To position number displays. If the Reports To position is not vacant, and has only one incumbent, the employee ID of the Reports To position incumbent auto-populates the Supervisor ID field. If the Supervisor ID field does not populate from the position, or if the suggested ID is incorrect, then you will need to enter or update it. |
| 24.  | Elizabeth Burgess is being hired as a tenured faculty member. Update the <b>Empl Duration</b> and <b>Appt Type</b> fields to reflect this information.<br><br>No Appointment End Date should be entered.<br><br>Click the <b>Empl Duration</b> list.<br><input type="text"/>   |

| Step | Action  |
|------|---|
| 25.  | Click the <b>T-Tenure</b> list item.<br><input type="text" value="T-Tenure"/>   |
| 26.  | Click the <b>Appt Type</b> list.<br><input type="text"/>  |
| 27.  | Click the <b>X - Faculty</b> list item.<br><input type="text" value="X - Faculty"/>   |
| 28.  | Indicate the Pay schedule. In this example, she will be paid on the <b>MO</b> cycle.<br><br><b>Note:</b> In 2013, SM and MA pay schedules will be phased out and replaced with the new code "BW" for biweekly.<br><br>Enter " <b>MO</b> " into the <b>Pay Schedule</b> field. |
| 29.  | This employee will be paid exception time.<br><br>Indicate this exception time by entering " <b>E</b> " into the <b>Time Code</b> field.  |
| 30.  | Due to academic policy, this job does not accrue leave.<br><br>Enter " <b>N</b> " for "None" into the <b>Leave Code</b> field.  |
| 31.  | Press <b>[Tab]</b> .  |
| 32.  | As was indicated by the message you saw earlier, you need to enter the Step value for this employee's salary plan.<br><br>Click the <b>Salary Plan</b> tab.<br><input type="text" value="Salary Plan"/>   |

[Work Location](#) | [Job Information](#) | [Payroll](#) | **Salary Plan** | [Compensation](#)

Elizabeth Burgess      EMP      ID: 010006255      Empl Rcd #: 0

**Salary Plan** Find    First 1 of 1 Last

**Effective Date:** 10/03/2012      **Effective Sequence:** 0      **Job Category:**  
**Action:** Hire      **Reason:** Hire      Current

**Salary Administration** A02      **Grade:** NA      **Grade Entry Date** 10/03/2012  
**Plan:**      **Step:** 4      **Step Entry Date**  
**Review Type**

[Job Data](#)      [Employment Data](#)      [Earnings Distribution](#)

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action  |
|------|---|
| 33.  | Click in the <b>Step</b> field.<br><input type="text"/>   |
| 34.  | Enter this persons salary enter the step number into the <b>Step</b> field. Enter "4".  |
| 35.  | Verify that based on position, job code, and the step entered; this employee will receive the correct monthly salary.<br><br>Click the <b>Compensation</b> tab.<br><a href="#">Compensation</a> |



Work Location | Job Information | Payroll | Salary Plan | **Compensation**

Elizabeth Burgess EMP ID: 010006255 Empl Rcd #: 0

**Compensation** Find First 1 of 1 Last

Effective Date: 10/03/2012 Effective Sequence: 0 Job Category:   
 Action: Hire Reason: Hire

Employee Job Grade Job Step 4.0 Frequency: M Monthly

Compensation Rate: 8,275.000000

Comparative Information

Change Amount: 0.000000 Monthly

Change Percent: 0.000

Pay Rates

|         |            |        |           |
|---------|------------|--------|-----------|
| Annual  | 99,300.000 | Daily  | 381.920   |
| Monthly | 8,275.000  | Hourly | 47.560000 |

Pay Components Customize | Find | First 1 of 1 Last

Amounts Controls Changes Conversion

| *Rate Code | Off/Above Scale | Comp Rate    | Frequency |
|------------|-----------------|--------------|-----------|
| 1 9/12     |                 | 8,275.000000 | M         |

Job Data Employment Data Earnings Distribution

Save Return to Search Notify Previous tab Next tab Refresh

Work Location | Job Information | Payroll | Salary Plan | Compensation

| Step | Action  |
|------|---|
| 36.  | Verify the monthly <b>Comp Rate</b> .<br><br><b>Note:</b> If this were an open-range based salary, this field would be enabled and you would enter the salary into the <b>Comp Rate</b> column. |
| 37.  | At the bottom of the <b>Compensation</b> page, click the <b>Earnings Distribution</b> link.<br><a href="#">Earnings Distribution</a>  |

**Job Earnings Distribution**

Elizabeth Burgess      EMP      ID: 010006255      Empl Rcd #: 0

---

**Earnings Distribution Type** Find First 1 of 1 Last

Effective Date: 10/03/2012      Effective Sequence: 0      Job Category:

Action: Hire      Reason: Hire      Current

---

Standard Hours: 40.00      Work Period: W

Pay Rate/Amount: 8,275.000000      Comp Freq: M Monthly

FTE: 1.000000

---

**Job Earnings Distribution** Find First 1 of 1 Last

|              |                    |             |          |                 |  |
|--------------|--------------------|-------------|----------|-----------------|--|
| Begin Date   | End Date           | *Earn Code  | Distrb % | Pay Rate/Amount |  |
| 10/03/2012   |                    | REG Regular | 100.0000 | 8275.000000     |  |
| Budgeted FTE | Work Study Program | Speed Type: | GL BU    |                 |  |
| 1.0          |                    | 00000004    | 1        |                 |  |

**Earnings Chartfields**

|         |               |               |                             |              |              |
|---------|---------------|---------------|-----------------------------|--------------|--------------|
| Account | Fund          | Dept          | Program                     | Chartfield 1 | Chartfield 2 |
| 50210   | 19900         | 13050         | 40                          |              |              |
|         | GENERAL FUNDS | PHYSI Gen Ops | Instruction & Dept Research |              |              |

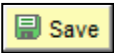
updated by \_\_\_\_\_ on \_\_\_\_\_

---

[Job Data](#)      [Employment Data](#)      Earnings Distribution

---

| Step | Action   |
|------|--|
| 38.  | <p>In the <b>Job Earnings Distribution</b> section, verify that the <b>Begin Date</b> of the job matches the effective date of the hire.</p> <p>If this job has an <b>End Date</b>, then enter the appropriate end date.</p>   |
| 39.  | <p>Since the employee will be paid from one funding source and the FTE for this job is 1.0 (a full-time employee), this distribution percentage must be 100. In this example, the Distrb % has populated from the position funding.</p> <p><b>Note:</b> Be mindful that 100% FTE is represented in Payroll as a whole number (e.g. 1.0); however, the earnings distributions are represented as a percentage of FTE (e.g. 100.0000).</p> |

| Step | Action  |
|------|---|
| 40.  | <p>Verify the earnings chartstrings that are in the <b>Job Earnings Distribution</b> section. Verify the fields: <b>Fund, Dept, Program,</b> and <b>Chartfields</b>.</p> <p><b>Note:</b> If this employee's job requires additional funding distributions, you would add a new row and enter the chartstring.</p> <p>Be sure to adjust the Distrb % fields on all distributions to the correct percentage for each distribution while ensuring that together, all distribution percentages equal the amount of FTE.</p> |
| 41.  | <p>If this is a budgeted position in PRT, enter the FTE budgeted for the position into the Budgeted FTE field.</p> <p><b>Note:</b> This field will only be used through end of fiscal year 2011/2012.</p> <p>For this job and distribution the Budgeted FTE is 1.00. Enter "<b>1.0</b>" into the <b>Budgeted FTE</b> field.</p>   |
| 42.  | <p>Upon save, the job will be added into the system and the person will have gained an employee relationship.</p> <p>Click the <b>Save</b> button.</p>   |
| 43.  | <p><b>Congratulations!</b><br/>You have completed the topic.<br/><b>End of Procedure.</b></p>   |

## Managing Hires: Rehire from TAM Posting

Once the Prepare for Hire step in TAM is complete and the Alternate Dept ID is set, if needed, the candidate will be in "Ready to Hire" status and you will be able to hire the person from the **Manage Hires** page. For a rehire, after selecting their name from the Manage Hires list, you will need to review and edit their personal information in the HCM system by clicking the **Add Person** button on the **Manage Hires Detail** page. After reviewing and making any changes to their personal information, you will return to the **Manage Hires Detail** page and click the **Add Job** button to enter their Job Data information. Before you can complete the hire make sure the position number has been entered into the **Position Number** field on the **Work Location** page.

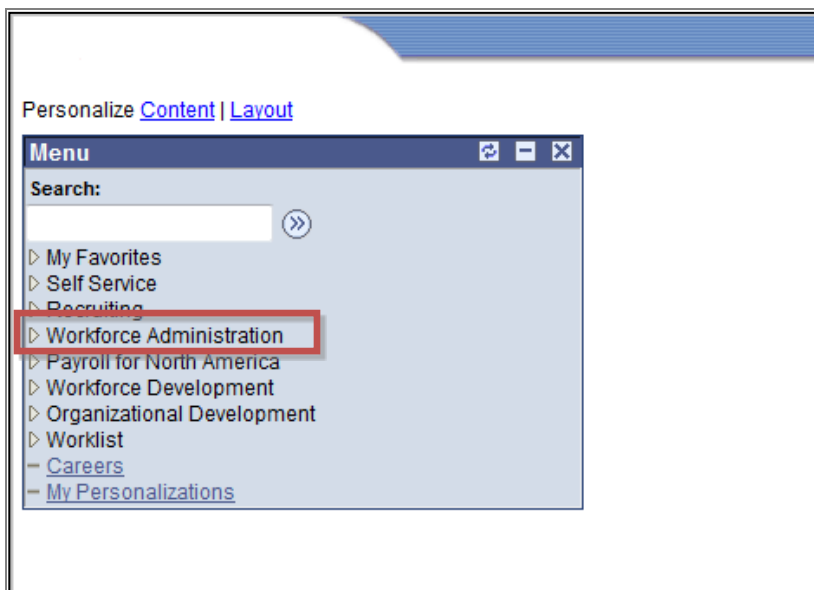
**Note:** It is possible for TAM to prepare a candidate for rehire for a job without a position number. However, a position number is required before a hire can be completed. Be sure to enter a valid position code into the **Position Number** field on the **Work Location** page.

**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

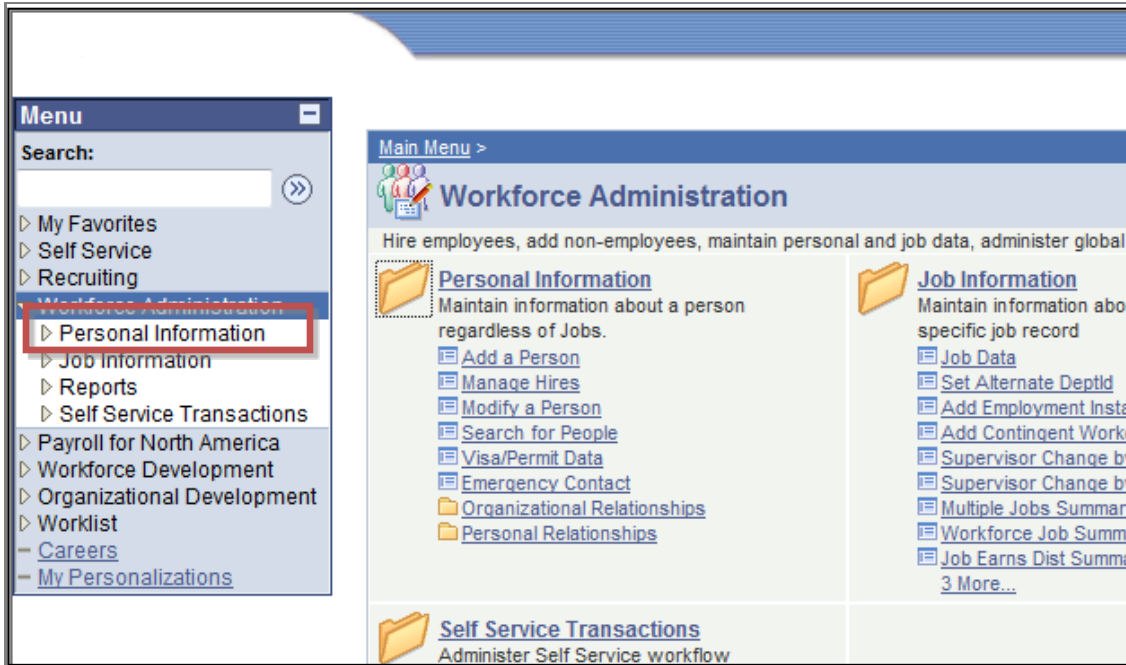
### Procedure

In this topic, you will learn how to rehire a former employee who is returning to the university through a TAM job posting.

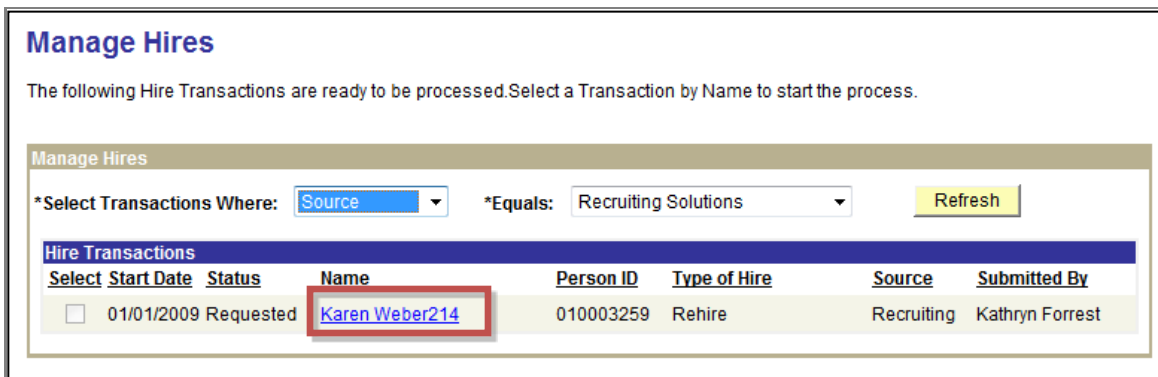
Karen Weber is a former employee of UCB. She applied to a TAM job posting and has been selected to be rehired by the university. It is assumed that the Alternate Dept ID has already been set so you are ready to begin the hiring process.



| Step | Action  |
|------|---|
| 1.   | <p>Begin by navigating to the <b>Manage Hires</b> page.</p> <p>Click the <b>Workforce Administration</b> link in the main menu.</p> <p><a href="#">▶ Workforce Administration</a></p> |



| Step | Action   |
|------|--|
| 2.   | <p>Click the <b>Manage Hires</b> link in the <b>Personal Information</b> folder.</p> <p><a href="#">Manage Hires</a></p> |



| Step | Action   |
|------|--|
| 3.   | <p>On the <b>Manage Hires</b> page <b>Hire Transactions</b> section, click the link for the person's name in the <b>Name</b> column for the individual you are hiring.</p> <p>In this example, click <b>Karen Weber</b>.</p> <p><a href="#">Karen Weber214</a></p> |

**Manage Hires**

---

**Manage Hires Detail**

Karen Weber214

The Start Date entered on this page will be used as the Effective Date for Job.

**Job**

**Recruiter Name:** Kathryn Forrest

**Job Opening ID:** 135

**Job Opening:** \_\_\_\_\_ Assistant III

**Position:**

**Job Code:** \_\_\_\_\_ Assistant III

**Business Unit:** All Berkeley Campus

**Department:** Physics

**Applicant Type:** External - Previous Employee

**\*Type of Hire:** Rehire ▼

**\*Desired Start Date:** 10/02/2012 31

**EmpID:** 010003259 [View Person Org Summary](#)

Employee ID Verified

**Org Instance**

Create new Org Instance

Use existing Org Instance 0 ▼

**Employee Assignment**

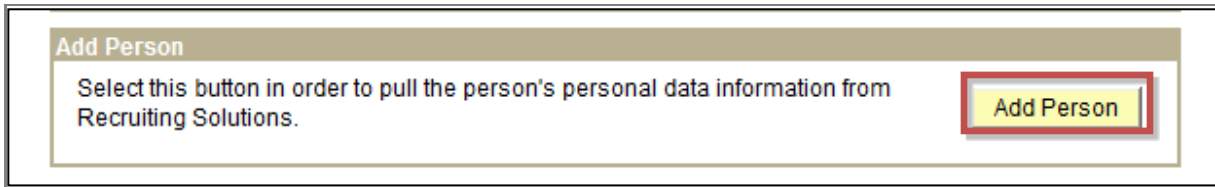
Create New Assignment

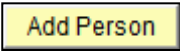
Use Existing Assignment 0

**Hire Comments**

| Step | Action  |
|------|---|
| 4.   | <p>The <b>Manage Hires Details</b> page displays.</p> <p>Verify or change the <b>Desired Start Date</b> on this page to the date the person will begin working.</p> |

| Step | Action  |
|------|---|
| 5.   | Enter the date into the <b>Desired Start Date</b> field. Enter " <b>10/02/2012</b> ".   |
| 6.   | Scroll down to the <b>Add Person</b> button.<br><br>Click the <b>Vertical</b> scrollbar.  |
| 7.   | Manage Hires will require you to update the personal information first, before adding the job.<br><br>Click the <b>Add Person</b> button at the bottom of the Manage Hires Detail page to continue to the <b>Modify A Person</b> pages. |



| Step | Action   |
|------|--|
| 8.   | Click the <b>Add Person</b> button.<br> |

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#)

Karen Weber214 Person ID: 010003259

**Name** Find | View All First 1 of 2 Last

\*Effective Date: 10/02/2012

Name: Karen Weber214 [Edit Name](#)

Updated by: on:

---

**Biographic Information**

Date of Birth: 08/01/1971  41 Years: 3 Months: Date of Death:  [Release Information](#)

**Biographical History** Find | View All First 1 of 2 Last

\*Effective Date: 01/01/2009

\*Gender: Female

\*Marital Status: Single

\*Highest Education Level: Bachelor's Level Degree

Student Status: 1-Not Registered Student ID#:  Registered Units:

Updated by: on: 11/26/2012 12:42:08PM

---

**Citizenship**

\*Country Of Citizenship/Perm Legal Residence: USA  United States Citizenship Status: C

---

**Social Security Number**

Social Security Number  [Confirm Social Security Number](#)

XXX-XX-XXXX  XXX-XX-XXXX

[Return to Manage Hires](#)

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#)

| Step | Action  |
|------|---|
| 9.   | Enter the desired information into the <b>Effective Date</b> field. Enter " <b>10/02/2012</b> ".  |
| 10.  | <p>The <b>Modify A Person - Biographical Details</b> page displays.</p> <p>On this page, some of the information remains from when the person was previously employed, the rest comes from the applicant's profile.</p> <p>Review all appropriate information and update what has changed. The following information defaults from the TAM applicant profile:</p> <ul style="list-style-type: none"> <li>- Current Addresses</li> <li>- Phone Information;</li> <li>- Email Addresses.</li> </ul> <p>All information should be reviewed for accuracy.</p> |
| 11.  | Click the <b>Contact Information</b> tab.   |



[Biographical Details](#) | **Contact Information** | [Demographic Details](#) | [Eligibility](#)

Karen Weber214 Person ID: 010003259

---

Home Department:   PHYSICS

Paycheck Code:  [Earnings Statement Address](#)

Dept Pickup Code:

---

**Current Addresses** Customize | Find | View All | First 1 of 1 Last

| Address Type | As Of Date | Status | Address                                |   |
|--------------|------------|--------|--|---|
| Home         | 01/14/1998 | A      | 3350 Center Street<br>Albany, CA 94706 | <a href="#">View Address Detail</a> + - |

---

**Phone Information** Customize | Find | First 1-2 of 2 Last

| *Phone Type | Telephone    | Extension | Preferred                           |     |
|-------------|--------------|-----------|-------------------------------------|-----|
| Home        | 510/528-6354 |           | <input checked="" type="checkbox"/> | + - |
| Business    | 510/642-2788 |           | <input checked="" type="checkbox"/> | + - |

---

**Email Addresses** Customize | Find | First 1 of 1 Last

| *Email Type | *Email Address       | Preferred                           |     |
|-------------|----------------------|-------------------------------------|-----|
| Business    | k_weber214@email.com | <input checked="" type="checkbox"/> | + - |

[Return to Manage Hires](#)

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#)

| Step | Action   |
|------|--|
| 12.  | The <b>Contact Information</b> page displays.<br><br>In this example, the candidate formerly worked in Space Sciences, so her Home Department needs to be updated to her new department.<br><br>In this example, enter " <b>PHYSI</b> " into the <b>Home Department</b> field. |
| 13.  | Press <b>[Tab]</b> .   |
| 14.  | Verify or update the person's contact information.   |
| 15.  | In this example, no demographic details have changed; therefore, click the <b>Eligibility</b> tab.   |

Biographical Details
Contact Information
Demographic Details

Karen Weber214
Person ID: 010003259

**\*\* Information on this page is needed for Employees only.**

Empl Rel Code: E-All Others-Not Confidential

**Eligibility Details**

|                                  |                            |
|----------------------------------|----------------------------|
| BELI Code: 1 - Career            | Effective Date: 10/02/2012 |
| Primary SQC:                     | Effective Date:            |
| Secondary SQC:                   | Effective Date:            |
| I9 Verification Date: 10/02/2012 | E-Verify                   |
| Patent Date: 10/02/2012          | E-Verify Date:             |
| State Oath Date: 10/02/2012      | E-Verify Status:           |

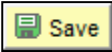
[Return to Manage Hires](#)

Save
Return to Search
Previous tab
Next tab

Add
Update/Display
Include History
Correct History


[Biographical Details](#) | 
 [Contact Information](#) | 
 [Demographic Details](#) | 
 [Eligibility](#)

| Step | Action   |
|------|--|
| 16.  | <p>The Eligibility screen displays.</p> <p>On the Eligibility page, enter the information and data for the following (if relevant) from the rehire paperwork:</p> <ul style="list-style-type: none"> <li>- <b>BELI CODE:</b> Benefits Eligibility Level Indicator (BELI)</li> <li>- <b>I-9 Verification:</b> Employment Eligibility Verification (Form I-9 - Federal I-9)</li> <li>- <b>Patent Date:</b> (Patent Policy Acknowledgement)</li> <li>- <b>State Oath Date:</b> State Oath of Allegiance State.</li> </ul> <p>For information on HR forms, enter the following URL in your browser's address bar for HR Forms: <a href="http://hrweb.berkeley.edu/hrms/formsdetail.htm">http://hrweb.berkeley.edu/hrms/formsdetail.htm</a></p> |
| 17.  | <p>In this example, the <b>BELI Code Effective Date, I9 Verification, Patent</b> and <b>State Oath</b> signature dates have all been updated in compliance with policy.</p> <p>If you have questions, please review the policies for these forms.</p>  |
| 18.  | <p>The <b>BELI code</b> date is the date that you want the benefits to begin. It may not be the same date that the paperwork was signed since rehire paperwork may be signed before work starts.</p>   |
| 19.  | <p>Enter the date the <b>I9 Verification Date</b> form was signed.</p> <p><b>Note:</b> This form only needs to be signed if it has been more than 3 years since the last time this information was verified.</p>   |
| 20.  | <p>Enter the date the <b>State Oath Date</b> form was signed.</p> <p><b>Note:</b> Non-citizens do not sign this form. A new form does not need to be signed, if the last one was signed within one year of the current date.</p>   |

| Step | Action  |
|------|---|
| 21.  | Enter the desired information into the <b>Effective Date</b> field. Enter " <b>10/02/2012</b> ".  |
| 22.  | Enter the desired information into the <b>I9 Verification Date</b> field. Enter " <b>10/02/2012</b> ".  |
| 23.  | Enter the desired information into the <b>Patent Date</b> field. Enter " <b>10/02/2012</b> ".   |
| 24.  | Enter the desired information into the <b>State Oath Date</b> field. Enter " <b>10/02/2012</b> ".   |
| 25.  | Once you have made all necessary updates, save the changes to the employee's personal data.<br><br>Click the <b>Save</b> button.<br> |
| 26.  | Return to the <b>Manage Hires Details</b> page for this individual and add the job.<br><br>Click the <b>Return to Manage Hires</b> link above the <b>Save</b> button.<br><a href="#">Return to Manage Hires</a>       |

**Applicant Type:** External - Previous Employee

**\*Type of Hire:** Rehire ▼

**\*Desired Start Date:** 10/02/2012 

**EmplID:** 010003259 [View Person Org Summary](#)

Employee ID Verified

---

**Org Instance**

Create new Org Instance

Use existing Org Instance 0 ▼

---

**Employee Assignment**

Create New Assignment

Use Existing Assignment 0

---

**Hire Comments**

---

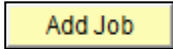
**View / Edit Person**

Select the View/Edit Person hyperlink to view or manually updated Personal Information. [View / Edit Person](#)

---

**Add Job**

Select this button in order to pull the person's job information from Recruiting Solutions. You will also have the option to access Job from Personal Data. **Add Job**

| Step | Action  |
|------|---|
| 27.  | <p>Now that the individual's personal information has been updated, add the job to the person.</p> <p>Scroll down to the <b>Add Job</b> button.</p> <p>Click the scrollbar.</p> |
| 28.  | <p>Click the <b>Add Job</b> button.</p>    |

Work Location | Job Information | Payroll | Salary Plan | Compensation

Karen Weber214 EMP ID: 010003259 Empl Rcd #: 0

Work Location Find First 1 of 2 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 10/02/2012 Sequence: 0

\*Action: Rehire \*Reason: Rehire

Last Start Date: 01/01/2009 Termination Date: Position Entry Date: 10/02/2012

Position Number: 00000700 Assistant III

Prior/Next Employer

Override Position Data Position Management Record

Regulatory Region: USA United States

Company: UCB UC Berkeley

Control Unit: COLLS Department Entry Date: 10/02/2012

Department: PHYSI Physics

Location: CAMPUS Main Campus-Berkeley


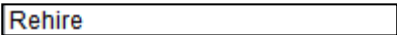
Updated by 656 on 08/01/2002 5:58:52PM

Job Data Employment Data Earnings Distribution

Save Return to Search Previous tab Next tab Update/Display

Work Location | Job Information | Payroll | Salary Plan | Compensation

| Step | Action   |
|------|--|
| 29.  | Enter the desired information into the <b>Effective Date</b> field. Enter " <b>10/02/2012</b> ". |

| Step | Action   |
|------|--|
| 30.  | <p>The Job Data pages display.</p> <p>On the <b>Work Location</b> page, the <b>Effective Date</b> field will be populated from TAM and for the <b>Action</b> field "Rehire" will be already be selected.</p> <p>Click the <b>Reason</b> list to select "Rehire" as the reason for the action.</p>   |
| 31.  | <p>Click the <b>Rehire</b> list item.</p>   |
| 32.  | <p>Notice that since the TAM posting included the position number that number is already entered.</p> <p>However, if the position number was not entered, be sure to enter it now or you will not be able to complete this hire.</p>   |
| 33.  | <p>The <b>Prior/Next Employer</b> field should be completed only for academic jobs.</p> <p>In this example, this job is not an academic job, so the field should be left empty.</p>  |
| 34.  | <p>Notice that some job data have populated from the position information in the TAM posting.</p> <p>If needed, you can change position information such as the <b>Department</b> and <b>Location</b> fields by clicking the <b>Override Position Data</b> button.</p> <p>Note that when Override Position Data is activated, updates to the position will not flow to the incumbent's job data. You will typically only override position data defaults when making a temporary change or exception to an incumbent's data that does not apply to the position.</p> |
| 35.  | <p>Click the <b>Job Information</b> tab.</p>   |

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Karen Weber214 EMP ID: 010003259 Empl Rcd #: 0.

**Job Information** Find First 1 of 2 Last

Effective Date: 10/02/2012 Effective Sequence: 0 Job Category: Principal

Action: Rehire Reason: Current

Job Code: 4722C Assistant III Begin Date: 10/02/2012

Supervisor ID: 010001939 Diane Stiles 100 Empl Duration: I-Indefini

Reports To: 00000376 Appointment End Date: Fixed Variable

Regular/Temporary: Reg Appt Type: 2 - Regular

Work Period: W Weekly Full/Part: Full-Time

Union Code: CX Clerical Unit

Pay Schedule: MO Time Code: E FTE: 1.000000

FLSA Status: N EEO Class: N Leave Code: A

[Job Data](#) | [Employment Data](#) | [Earnings Distribution](#)

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action  |
|------|---|
| 36.  | Some of this data have already been entered on the <b>Job Information</b> page. Verify the fields and add or update any information.              |
| 37.  | This position does not have an end date.<br>Click the <b>Empl Duration</b> list.<br><input type="text" value="W-End Date"/>                       |
| 38.  | Click the <b>I-Indefini</b> list item.<br><input type="text" value="I-Indefini"/>   |
| 39.  | Select the "Regular/Career" appointment type.<br>Click the <b>Appt Type</b> list.<br><input type="text" value=""/>                                |
| 40.  | Click the <b>2 - Regular/Career</b> list item.<br><input type="text" value="2 - Regular/Career"/>   |
| 41.  | <b>Note:</b> In 2013, SM and MA pay schedules will be phased out and replaced with the new code "BW" for biweekly.                                |
| 42.  | The <b>FTE</b> populates from the position information. It can be changed in the <b>FTE</b> field, but must not be greater than the position FTE. |

| Step | Action   |
|------|--|
| 43.  | In this example, we have entered data for you. Normally, you will select the <b>Fixed</b> or <b>Variable</b> option and fill in the <b>Pay Schedule</b> , <b>Time Code</b> , and <b>Leave Code</b> fields. |
| 44.  | Since this job code is step-based, you will need to fill out information on the <b>Salary Plan</b> page.<br><br>Click the <b>Salary Plan</b> tab to enter the Salary Step for the person.                  |

| Step | Action   |
|------|--|
| 45.  | The <b>Step</b> field will be enabled for input.<br><br><b>Note:</b> The valid values for each step of the job code can also be selected by clicking on the magnifying glass.<br><br>Click in the <b>Step</b> field.<br><input type="text"/> |
| 46.  | This person is at step 7.<br><br>Enter " <b>7</b> " into the <b>Step</b> field.  |
| 47.  | Tab out to update the record.<br><br>Press <b>[Tab]</b> .  |
| 48.  | Next verify the person's pay information.<br><br>Click the <b>Compensation</b> tab.  |

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | **Compensation**

Karen Weber214      EMP      ID: 010003259      Empl Rcd #: 0

**Compensation**      Find      First 1 of 2 Last

**Effective Date:** 10/02/2012      **Effective Sequence:** 0      **Job Category:** Principal

**Action:** Rehire      **Reason:**

---

**Compensation Rate:** 3,959.000000      **Frequency:** M      Monthly

**Comparative Information**

**Change Amount:** 3,959.000000      Monthly

**Change Percent:** 125.444

**Pay Rates**

|                |            |               |           |
|----------------|------------|---------------|-----------|
| <b>Annual</b>  | 47,508.000 | <b>Daily</b>  | 182.720   |
| <b>Monthly</b> | 3,959.000  | <b>Hourly</b> | 22.750000 |

**Pay Components**      Customize | Find | First 1 of 1 Last

Amounts      Controls      Changes      Conversion

**\*Rate Code**      **Off/Above Scale**      **Comp Rate Frequency**

1 MONTH            3,959.000000 M      +      -

[Job Data](#)      [Employment Data](#)      [Earnings Distribution](#)

Save      Return to Search      Previous tab      Next tab      Update/Display      Inc

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

| Step | Action   |
|------|--|
| 49.  | Verify that the person's pay is correct.<br><br><b>Note:</b> If this job code was an open range (instead of step-based), you would enter the monthly salary in the <b>Comp Rate</b> field that would be enabled for input. |
| 50.  | After verifying the information on the <b>Compensation</b> page, enter the probation end date if appropriate for this person.<br><br>Click the <b>Employment Data</b> link.<br><a href="#">Employment Data</a>             |



**Employment Information**

Karen Weber214                      EMP                      ID: 010003259                      Empl Rcd #: 0

---

**Organizational Instance**

Organizational Instance Rcd: 0                      Original Hire Date: 01/14/1998                       Override

Hire Date: 01/14/1998

Termination Date: 06/30/2000

Org Instance Service Date: 01/14/1998

---

**Organizational Assignment Data**

**Instance Record**

---

Business Title: \_\_\_\_\_ Assistant III

Work Phone: \_\_\_\_\_

---

Assignment Start Date: 01/14/1998                      Probation Date: 4/2/2012

Assignment End Date: \_\_\_\_\_

---

Last Assignment Start Date: 01/01/2009

---

Date Last Increase: 10/02/2012

Last Date in Pay Status:                       Mandatory Reporting Signature Date:

---

[Job Data](#)                      Employment Data                      [Earnings Distribution](#)

---

| Step | Action   |
|------|--|
| 51.  | Enter the appropriate date into the <b>Probation Date</b> field. Enter " <b>4/2/2012</b> ".  |
| 52.  | Press <b>[Tab]</b> .   |
| 53.  | When an employee has signed and completed Mandated Reporter forms, the HR Administrator should record this date. Departments should enter the date the employee signed both:<br>- STATEMENT ACKNOWLEDGING REQUIREMENT TO REPORT CHILD ABUSE<br>- STATEMENT ACKNOWLEDGING REQUIREMENT TO REPORT SUSPECTED ABUSE OF DEPENDENT ADULTS AND ELDERS. |
| 54.  | Click the <b>Earnings Distribution</b> link.<br><a href="#">Earnings Distribution</a>  |

**Job Earnings Distribution**

Karen Weber214                      EMP                      ID: 010003259                      Empl Rcd #: 0

Find   First 1 of 2 Last

**Earnings Distribution Type**

Effective Date: 10/02/2012      Effective Sequence: 0      Job Category: Principal

Action: Rehire      Reason: \_\_\_\_\_      Current

Standard Hours: 40.00      Work Period: W

Pay Rate/Amount: 3,959.000000      Comp Freq: M Monthly

FTE: 1.000000

Find   First 1 of 1 Last

**Job Earnings Distribution**

|   |                    |                                   |          |                 |
|---|--------------------|-----------------------------------|----------|-----------------|
| Begin Date                                | End Date           | *Earn Code                        | Distrb % | Pay Rate/Amount |
| 10/02/2012                                |                    | REG Regular                       | 100.0000 | 3959.000000     |
| Budgeted FTE                              | Work Study Program | Speed Type:                       | GL BU    |                 |
| <input style="width: 50px;" type="text"/> |                    | <input type="checkbox"/> 00000008 | 1        |                 |

**Earnings Chartfields**

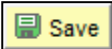
|         |               |               |                             |              |              |
|---------|---------------|---------------|-----------------------------|--------------|--------------|
| Account | Fund          | Dept          | Program                     | Chartfield 1 | Chartfield 2 |
| 51210   | 19900         | 13050         | 40                          |              |              |
|         | GENERAL FUNDS | PHYSI Gen Ops | Instruction & Dept Research |              |              |

updated by \_\_\_\_\_ on \_\_\_\_\_

[Job Data](#)      [Employment Data](#)      Earnings Distribution

Save    [Return to Search](#)      [Update/Display](#)    [Inclu](#)

| Step | Action  |
|------|---|
| 55.  | <p>In the <b>Job Earnings Distribution</b> section, verify that the <b>Begin Date</b> of the Job matches the effective date of the hire.</p> <p>If this job has an <b>End Date</b>, then enter the appropriate end date.</p>  |
| 56.  | <p>Since the employee will be paid from one funding source and the FTE for this job is 1.0 (a full-time employee), this distribution percentage (<b>Distrb %</b> field) must be 100.</p> <p><b>Note:</b> Be mindful that 100% FTE is represented in Payroll as a whole number (e.g. 1.0); however, the earnings distributions are represented as a percentage of FTE (e.g. 100.0000).</p> |

| Step | Action  |
|------|---|
| 57.  | <p>The funding chartstring has populated from the position information. However, if necessary, you can add additional funding chartstrings or edit the one displayed.</p> <p>Be sure to adjust the Distrib % fields on all distributions to the correct percentage for each distribution while ensuring that together, all distribution percentages equal the amount of FTE.</p> <p>In this example, no edits to the chartstring are necessary.</p> |
| 58.  | <p>If this is a budgeted position in PRT, enter the FTE budgeted for the position into the <b>Budgeted FTE</b> field. (Note: This field will only be used through end of fiscal year 2011/2012.)</p> <p>In this example, the position is not budgeted in PRT so leave the field blank.</p>  |
| 59.  | <p>Once you have reviewed and updated all job information for this person. Complete the rehire by saving your changes.</p> <p>Click the <b>Save</b> button.</p>    |
| 60.  | <p><b>Congratulations!</b><br/>           You have rehired a former employee into a position.<br/> <b>End of Procedure.</b></p>   |

## Transfer: Into department

---

You will often hire employees who currently work in another department and are receiving a transfer, promotion, or demotion into your department. (A Transfer is a *lateral* move. A Promotion is a new job with a *higher* salary maximum while a Demotion is one with a *lower* salary maximum.) As the receiving department, you will enter the transfer (or promotion, demotion) action for the appointment in your department. If this transfer is filling a TAM posting, normally the position number will have been entered on the TAM posting. Be sure to verify the position number on the **Work Location** page.

After the releasing department has entered the Internal Transfer action, your department has access to the job record. Enter the transfer, promotion, or demotion in Job Data. After you complete the job action, you will have access to the individual's Personal Data as well.

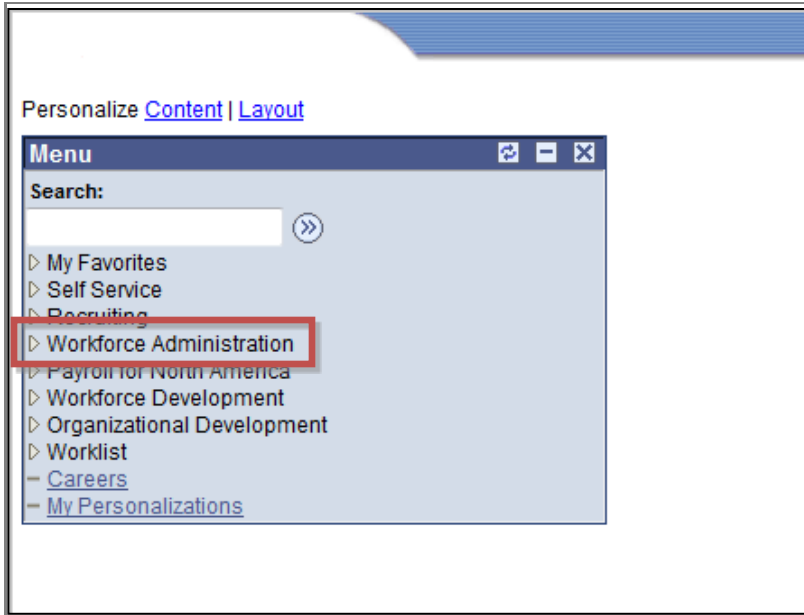
Update any information as appropriate, including Home Department (Earnings Statement Address) so the employee's campus mail will come to your department. You are now the administrator of the employee's personal information, so you will input any changes they make in the future to Name, Address, BELI, Visa, etc.

**Note:** This example assumes that you have already asked the previous department to add a Transfer Out row to the record (dated the day before your job begins) in order to turn over the record and for you to be able to access the record and add your Transfer.

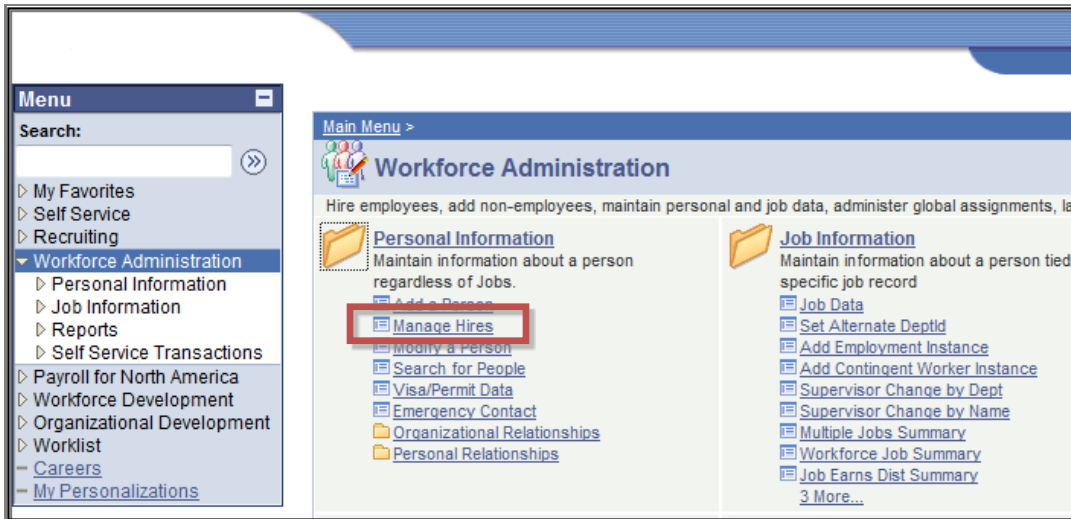
**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

### Procedure

In this example, Joann Pierce is transferring into the Physics Department at UCB. You will start from the Manage Hires page to verify and complete her job information and to update her personal information as well.



| Step | Action   |
|------|--|
| 1.   | <p>Begin by navigating to the <b>Manage Hires</b> page.</p> <p>Click the <b>Workforce Administration</b> link.</p> <p><a href="#">▷ Workforce Administration</a></p> |



| Step | Action                              |
|------|-------------------------------------|
| 2.   | Click the <b>Manage Hires</b> link. |

### Manage Hires

The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

**Manage Hires**

\*Select Transactions Where: Source \*Equals: Recruiting Solutions Refresh

| Hire Transactions        |            |           |                                 |           |                     |            |              |
|--------------------------|------------|-----------|---------------------------------|-----------|---------------------|------------|--------------|
| Select                   | Start Date | Status    | Name                            | Person ID | Type of Hire        | Source     | Submitted By |
| <input type="checkbox"/> | 01/01/2009 | Requested | <a href="#">Joann Pierce200</a> | 010001137 | Transfer/Update Job | Recruiting |              |

| Step | Action   |
|------|--|
| 3.   | <p>On the <b>Manage Hires</b> page <b>Hire Transactions</b> section, click the link for the person's name in the <b>Name</b> column for the individual you are hiring.</p> <p>In this example, click <b>Joann Pierce</b>.</p> <p><a href="#">Joann Pierce200</a></p> |

### Manage Hires

#### Manage Hires Detail

Joann Pierce200

The Start Date entered on this page will be used as the Effective Date for Job.

**Job**

Recruiter Name:

Job Opening ID: 89

Job Opening: \_\_\_\_\_Assistant II

Position:

Job Code: \_\_\_\_\_Assistant II

Business Unit: All Berkeley Campus

Department: Physics

Applicant Type: Internal - Employee

\*Type of Hire: Transfer/Update Job

\*Desired Start Date: 11/1/2012

EmplID: 010001137 [View Person Org Summary](#)

Employee ID Verified

---

**Org Instance**

Create new Org Instance

Use existing Org Instance 0

---

**Employee Assignment**

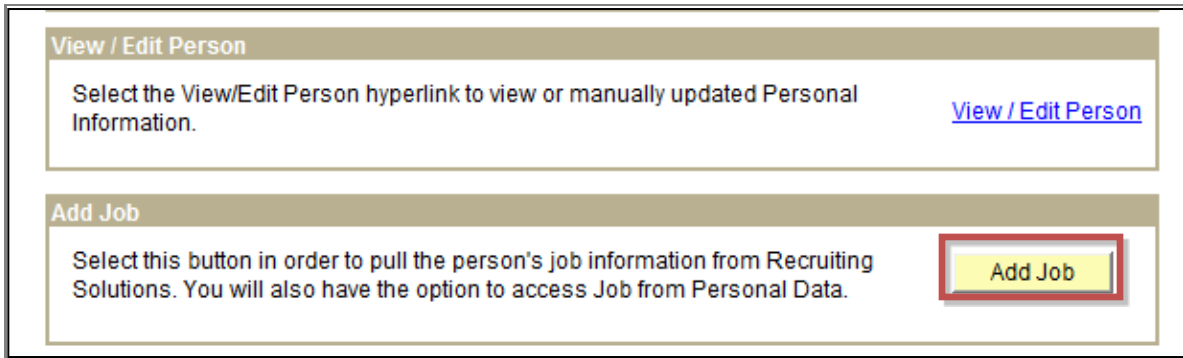
Create New Assignment

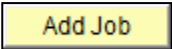
Use Existing Assignment 0

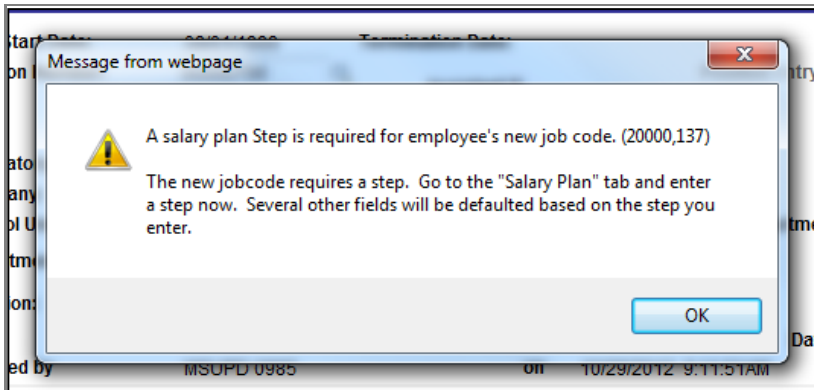
---

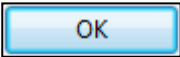
**Hire Comments**

| Step | Action   |
|------|--|
| 4.   | The <b>Manage Hires Details</b> page displays.<br><br>Verify or change the <b>Desired Start Date</b> on this page to the date the person will begin working. |
| 5.   | Enter the desired information into the <b>Desired Start Date</b> field. Enter <b>"11/1/2012"</b> .   |
| 6.   | Click the <b>Vertical</b> scrollbar to scroll down to the <b>Add Job</b> button.   |



| Step | Action  |
|------|---|
| 7.   | Click the <b>Add Job</b> button.<br><br> |



| Step | Action   |
|------|--|
| 8.   | The position that this employ is transferring into is a step-based salary. You will need to enter the step before you complete the transfer.<br><br>Click the <b>OK</b> button.<br><br> |

Work Location | Job Information | Payroll | Salary Plan | Compensation

Joann Pierce200 EMP ID: 010001137 Empl Rcd #: 0

Work Location Find First 1 of 2 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 11/01/2012 Sequence: 0

\*Action: Transfer In \*Reason: Transfer to New Department

Last Start Date: 09/01/1999 Termination Date: Position Entry Date: 11/01/2012

Position Number: 00000700 Assistant III

Override Position Data Position Management Record

Regulatory Region: USA United States

Company: UCB UC Berkeley

Control Unit: COLLS Department Entry Date: 11/01/2012

Department: PHYSI Physics

Location: CAMPUS Main Campus-Berkeley

Updated by: MSUPD 0985 on 10/29/2012 9:11:51AM Date Created: 11/21/2012

Job Data Employment Data Earnings Distribution

Save Return to Search Previous tab Next tab Update/Display


Work Location | Job Information | Payroll | Salary Plan | Compensation

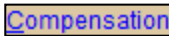
| Step | Action  |
|------|---|
| 9.   | <p>The Job Data pages display.</p> <p>On the <b>Work Location</b> page, the <b>Effective Date</b> field will be populated from TAM and for the <b>Action</b> field "Transfer In" will be selected already.</p> <p>If needed, you can change the <b>Action</b> field to "Promotion" or "Demotion". In this example, because the person is staying in the same salary range, we will accept the default value.</p> <p>Click the <b>Reason</b> list to select "Transfer to New Department" as the reason for the action.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px; display: flex; justify-content: flex-end; align-items: center;">▼</div> |
| 10.  | <p>Click the <b>Transfer to New Department</b> list item.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px; display: flex; justify-content: flex-end; align-items: center;">Transfer to New Department</div>  |
| 11.  | <p>Notice that since the TAM posting included the position number that number is already entered.</p> <p>However, if the position number was not entered into the TAM job posting, be sure to enter it now or you will not be able to complete this transaction.</p>  |



| Step | Action   |
|------|--|
| 12.  | <p>Notice that information has defaulted from the position, such as the <b>Department</b> and <b>Location</b> fields.</p> <p>If any defaulted information needs to be changed on this page or subsequent job data pages, then click the <b>Override Position Data</b> button to enable these fields.</p> <p>Note that when Override Position Data is activated, updates to the position will not flow to the incumbent's job data. You will typically only override position data defaults when making a temporary change or exception to an incumbent's data that does not apply to the position.</p> |
| 13.  | <p>Click the <b>Job Information</b> tab.</p> <p><a href="#">Job Information</a></p>  |

| Step | Action  |
|------|---|
| 14.  | Some of the position data have populated on the <b>Job Information</b> page. Verify the fields and add or update any information.           |
| 15.  | Notice that <b>Empl Duration</b> of "I - Indefinite" and <b>Appt Type</b> of "2 - Regular/Career" have been populated from the TAM posting. |
| 16.  | The <b>FTE</b> populates from the position information. It can be changed here, but the value must not be greater than the position FTE.    |

| Step | Action   |
|------|--|
| 17.  | In this example, we have entered data for you. Normally, you will select the <b>Fixed</b> or <b>Variable</b> option and fill in the <b>Pay Schedule</b> , <b>Time Code</b> , and <b>Leave Code</b> fields.   |
| 18.  | <b>Note:</b> In 2013, SM and MA pay schedules will be phased out and replaced with the new code "BW" for biweekly.   |
| 19.  | Since this job code is steps-based, you will need to fill out information on the <b>Salary Plan</b> page.<br><br>Click the <b>Salary Plan</b> tab to enter the Salary Step for the job.<br> |

| Step | Action  |
|------|---|
| 20.  | The <b>Step</b> field will be enabled for input.<br><br><b>Note:</b> The valid values for each step of the job code can also be selected by clicking on the magnifying glass. |
| 21.  | Joanne is at step 6 for this position.<br><br>In the <b>Step</b> field, enter "6".  |
| 22.  | Press <b>[Tab]</b> .  |
| 23.  | Next verify the person's pay information.<br><br>Click the <b>Compensation</b> tab.<br>    |

Work Location | Job Information | Payroll | Salary Plan | **Compensation**

Joann Pierce200 EMP ID: 010001137 Empl Rcd #: 0

**Compensation** Find First 1 of 2 Last

Effective Date: 11/01/2012 Effective Sequence: 0 Job Category: Principal  
 Action: Transfer In Reason: Transfer to New Department

Employee Job Grade Job Step 6.0

Compensation Rate: 3,875.000000 Frequency: M Monthly

Comparative Information

Change Amount: 1,119.000000 Monthly

Change Percent: 40.602

Pay Rates

|         |            |        |           |
|---------|------------|--------|-----------|
| Annual  | 46,500.000 | Daily  | 178.850   |
| Monthly | 3,875.000  | Hourly | 22.270000 |

Pay Components Customize | Find | First 1 of 1 Last

Amounts Controls Changes Conversion

| *Rate Code | Off/Above Scale | Comp Rate    | Frequency |
|------------|-----------------|--------------|-----------|
| 1 MONTH    |                 | 3,875.000000 | M         |

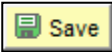
Job Data Employment Data Earnings Distribution

Save Return to Search Previous tab Next tab Update/Display Inc

Work Location | Job Information | Payroll | Salary Plan | Compensation

| Step | Action  |
|------|---|
| 24.  | Verify that the person's pay is correct.<br><br><b>Note:</b> If this job code was an open range (instead of step-based) you would enter the monthly salary in the <b>Comp Rate</b> field that would be enabled for input. |
| 25.  | Click the <b>Earnings Distribution</b> link.<br><a href="#">Earnings Distribution</a>   |



| Step | Action  |
|------|---|
| 28.  | <p>Notice that the chartstring information has populated based on the position information.</p> <p>If needed, you can edit the chartstring information or add additional distributions.</p> <p>Be sure to adjust the Distrb % fields on all distributions to the correct percentage for each distribution while ensuring that together, all distribution percentages equal the amount of FTE.</p> |
| 29.  | <p>If this is a budgeted position in PRT, enter the FTE budgeted for the position into the Budgeted FTE field. (Note: This field will only be used through end of fiscal year 2011/2012.)</p>   |
| 30.  | <p>After you have verified and updated job data as needed, save your changes and respond to any warning and/or error messages.</p> <p>Click the <b>Save</b> button.</p>    |
| 31.  | <p>Next, you will need to update the employee's information that has changed as a result of this job change.</p> <p>Click the <b>Modify a Person</b> link.</p> <p><a href="#">Modify a Person</a></p>   |

**Personal Information**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**EmpID:** begins with

**Name:** begins with

**Last Name:** begins with

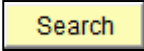
**First Name:** begins with

**Department:** begins with

Include History
  Correct History
  Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

| Step | Action  |
|------|---|
| 32.  | <p>The employee's personal information displays.</p> <p>Click the <b>Search</b> button.</p>  |

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#)

Joann Pierce200 Person ID: 010001137

**Name** Find | View All First 1 of 1 Last

**Effective Date:** 09/01/1999 + -

**Name:** Joann Pierce200 [View Name](#)

**Updated by:** on:

---

**Biographic Information**

**Date of Birth:** 11/02/1964 48 Years: 0 Months: Date of Death: Release Information

**Biographical History** Find | View All First 1 of 1 Last

**\*Effective Date:** 09/01/1999 + -

**\*Gender:** Female

**\*Marital Status:** Unknown

**\*Highest Education Level:** Bachelor's Level Degree

**Student Status:** 1-Not Registered Student ID#: Registered Units:

**Updated by:** 010798824 on: 10/28/2011 3:14:47PM

---

**Citizenship**

**\*Country Of Citizenship/Perm Legal Residence:** USA United States Citizenship Status: C

---

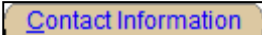
**Social Security Number**

**Social Security Number** **Confirm Social Security Number**

XXX-XX-XXXX XXX-XX-XXXX

Save Return to Search Previous tab Next tab Add Update/Display Include History Correct History

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#)

| Step | Action   |
|------|--|
| 33.  | <p>Click the <b>Contact Information</b> tab.</p>  |

Biographical Details | **Contact Information** | Demographic Details | Eligibility

Joann Pierce200 Person ID: 010001137

---

Home Department:   PHYSICS

Paycheck Code:  [Earnings Statement Address](#)

Dept Pickup Code:

---

**Current Addresses** Customize | Find | View All |  1 of 1

| Address Type | As Of Date | Status | Address                                |   |
|--------------|------------|--------|--|---|
| Home         | 09/01/1999 | A      | 2110 Park Blvd<br>El Cerrito, CA 94530 | <a href="#">View Address Detail</a> <input type="button" value="+"/> <input type="button" value="-"/> |

---

**Phone Information** Customize | Find |  1 of 1

| *Phone Type | Telephone                                 | Extension            | Preferred                           |   |
|-------------|---|----------------------|-------------------------------------|---|
| Business    | <input type="text" value="510/642-1414"/> | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="button" value="+"/> <input type="button" value="-"/> |


---

**Email Addresses** Customize | Find |  1 of 1

| *Email Type | *Email Address                                     | Preferred                           |   |
|-------------|--|-------------------------------------|---|
| Business    | <input type="text" value="j_pierce@berkeley.edu"/> | <input checked="" type="checkbox"/> | <input type="button" value="+"/> <input type="button" value="-"/> |

[Biographical Details](#) | [Contact Information](#) | [Demographic Details](#) | [Eligibility](#)

| Step | Action  |
|------|---|
| 34.  | In this example, the home department has changed.<br><br>On the Contact Information page, update the department in the <b>Home Department</b> field.<br><br>Enter " <b>PHYSI</b> ".   |
| 35.  | Enter the desired information into the <b>Home Department</b> field. Enter " <b>PHYSI</b> ".  |
| 36.  | In this example, the employee has a business phone number that has changed.<br><br>In the Phone Information section, update (overwrite) the employee's Business number to reflect their phone at their new location.<br><br>Click in the <b>Telephone</b> field.<br><input type="text" value="510/643-1144"/> |
| 37.  | Press <b>[Backspace]</b> .  |
| 38.  | Enter the new business telephone number the <b>Telephone</b> field. Enter " <b>642-1414</b> ".  |

| Step | Action  |
|------|---|
| 39.  | <p>Review and verify the rest of the data in the <b>Personal Information</b> pages to see if anything needs to be changed.</p> <p><b>For example:</b> Citizenship status may have changed. Benefits eligibility may have changed.</p> |
| 40.  | <p>Once you save your changes, the person's transfer (or promotion/demotion) will be complete.</p> <p>Click the <b>Save</b> button.</p>              |
| 41.  | <p><b>Congratulations!</b><br/>You have completed transferring an employee.<br/><b>End of Procedure.</b></p>  |



## Job Reclassification (using same Position)

Job reclassifications can be performed in HCM in two separate procedures depending upon the requirements of the situation. The first procedure, which will be the one demonstrated in this topic requires that the job code be changed in the position that the current employee holds. This procedure makes sense if the position is held by only one incumbent's and it is only that incumbent job that has changed. Once the job code is changed in the Position, you will need to go to the **Add/Update Position - Incumbents and Funding** page to click the **Job Data** link for the incumbent. This action will display the incumbent Job Data pages. Insert a row in the incumbent's **Job Data**, perform the "jiggle" (delete, tab out, and re-enter) procedure detailed in this topic, and complete the remaining fields to save the record.

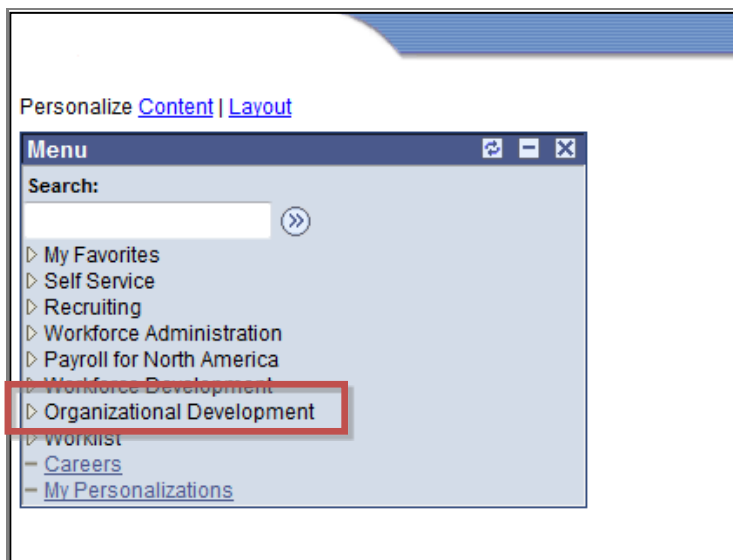
The second reclassification procedure, which will not be demonstrated in this topic, is to place the incumbent into a different position by inserting a row in Job Data, entering another position number in job data, and completing the remaining fields to save the record.

**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

### Procedure

In this topic, you will learn how to perform a job reclassification by changing a job code in an existing position.

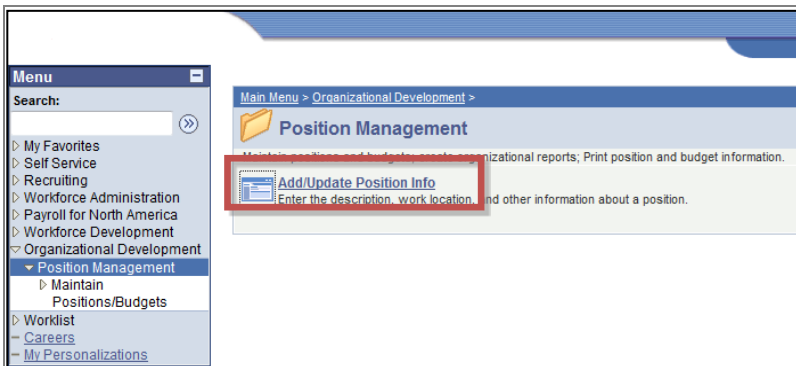
Karen Weber's job duties have substantially changed. The department has submitted and received approval to reclassify his position. To proceed with the reclassification, you will change the job code on the position to reflect his new assignment.



| Step | Action   |
|------|--|
| 1.   | Begin by navigating to the <b>Add/Update Position Info</b> page.<br>Click the <b>Organizational Development</b> link in the main menu.<br><a href="#">▶ Organizational Development</a> |



| Step | Action  |
|------|---|
| 2.   | Click the <b>Position Management</b> link in the Menu.<br><a href="#">▶ Position Management</a> |



| Step | Action  |
|------|---|
| 3.   | Click the <b>Add/Update Position Info</b> link in the Maintain Positions/Budgets folder to the right of the menu.<br><a href="#">Add/Update Position Info</a> |

### Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

---

**Position Number:** begins with ▾ 00000700

**Description:** begins with ▾

**Position Status:** = ▾  ▾

**Business Unit:** begins with ▾  🔍

**Department:** begins with ▾  🔍

**Job Code:** begins with ▾  🔍

**Reports To Position Number:** begins with ▾

Include History  
  Correct History  
  Case Sensitive


Search  
 Clear  
 [Basic Search](#)  
 [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

| Step | Action  |
|------|---|
| 4.   | <p>The <b>Add/Update Position Info</b> search page displays.</p> <p>If you know the position number for job you are reclassifying, enter it into the <b>Position Number</b> field.</p> <p>If you do not know the position number, use the various search fields.</p> <p>In this example, enter "<b>00000700</b>".</p> |
| 5.   | <p>Click the <b>Search</b> button.</p> <div style="border: 1px solid black; background-color: #ffff00; padding: 5px; display: inline-block; margin: 5px 0;">Search</div>  |

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

**Position Information** Find | View All | First 1 of 2 Last

Position Number: 00000700   
 Headcount Status: Partially Filled Current Head Count: 1 out of 50  
 \*Effective Date: 11/26/2012 \*Status: Active  
 \*Reason: JRC Job Reclassification Action Date: 11/26/2012  
 \*Position Status: Approved Status Date: 07/01/2012  Key Position

**Job Information**



\*Business Unit: UCBAL All Berkeley Campus Manager Level: All Other Positions  
 Job Code: 4723C Assistant II Full/Part Time: Full-Time  
 Reg/Temp: Reg Union Code: CX Clerical Unit  
 \*Regular Shift: N/A Short Title: Assis [Detailed Position Description](#)  
 Title: Assistant II

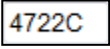
**Work Location**

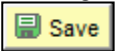
\*Reg Region: USA United States Company: UCB UC Berkeley  
 Department: PHYSI Physics \*LVL 7 Dept: 13050 PHYSI Gen Ops  
 Location: CAMPUS Main Campus-Berkeley Dot-Line:  
 Reports To: 00000376 Events Specialist 2 Security Clearance:  
 Supervisor Lvl:

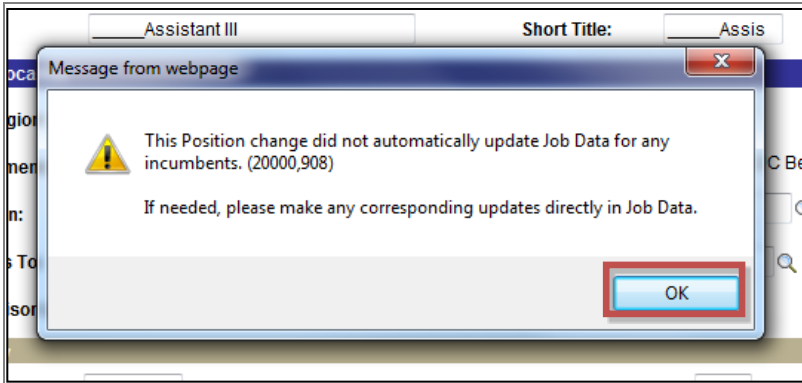
**Salary Plan Information**

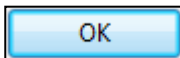
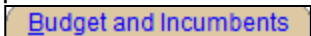
Salary Admin Plan: CX Grade: STP Step:  
 Standard Hours: 40.00 Work Period: W Weekly FTE: 1.000000  
 Mon Tue Wed Thu Fri Sat Sun

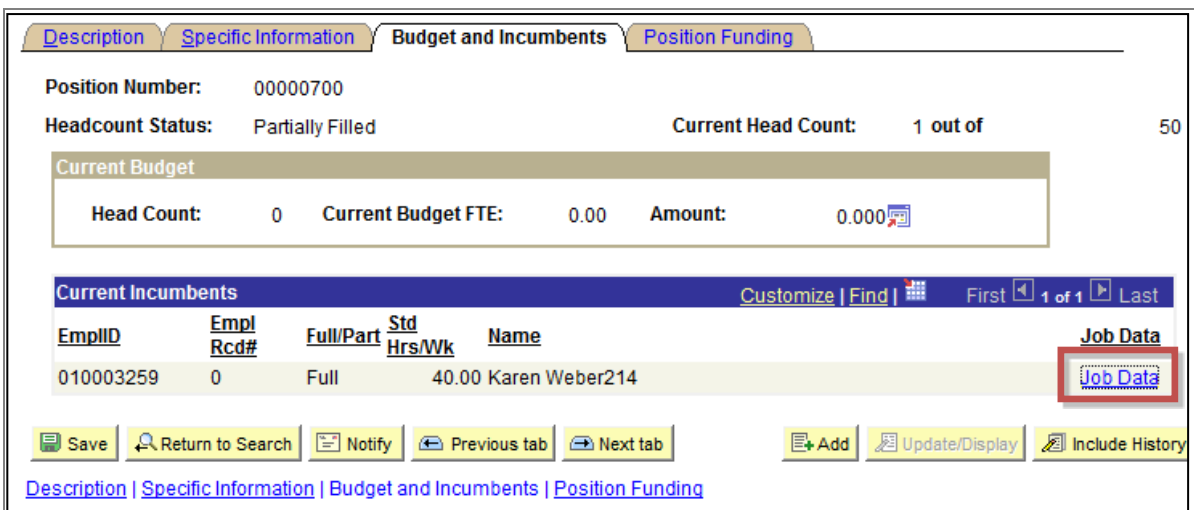
| Step | Action   |
|------|--|
| 6.   | <p>The <b>Position Description</b> page displays. Remember, that when making updates to position, you will need to begin by clicking the plus button to <b>add a new row</b>.</p> <p>Click the <b>Add a new row at row 1 (Alt+7)</b> button.</p>  |
| 7.   | <p>In the new row that appears, all field data have defaulted from the previous description.</p> <p>You will need to update/verify the <b>Effective Date</b> field. Enter a reason for the change and then replace the old job code with the new one.</p>  |
| 8.   | <p>You must enter a reason for the change.</p> <p>Click in the <b>Reason</b> field.</p>   |

| Step | Action   |
|------|--|
| 9.   | Since this is a "Job Reclassification", enter the code for Job Classification into the <b>Reason</b> field.<br><br>Enter the Reason Code into the <b>Reason</b> field. Enter " <b>JRC</b> ". |
| 10.  | Press <b>[Tab]</b> .   |
| 11.  | Click in the <b>Job Code</b> field to replace the old code with the new one.<br>                            |
| 12.  | Enter the new code into the <b>Job Code</b> field. In this example, enter job code, " <b>4723C</b> ".  |
| 13.  | Press <b>[Tab]</b> .   |
| 14.  | Notice that the job description to the right of the <b>Job Code</b> field has updated.   |
| 15.  | Click the <b>Vertical</b> scrollbar.   |

| Step | Action   |
|------|--|
| 16.  | If you know the position number of the position this one reports to, enter it into the <b>Reports To</b> field.<br><br>This field is recommended but not required in the system. However, your department might require the <b>Reports To</b> field.   |
| 17.  | In this example, we are only changing the job code for the position (reclassifying the position) and making no other changes, complete your changes by clicking the <b>Save</b> button.<br><br>However, a job reclassification may involve a Level 7 Department and/or funding change. Make any additional changes as needed.<br> |



| Step | Action   |
|------|--|
| 18.  | <p>A message box will appear whenever the position you are updating is a filled position. The message indicates that in order for the changes to apply to the position incumbents, you must update the position information for each incumbent's job data in Workforce Administration.</p> <p>Click the <b>OK</b> button to close the message.</p>  |
| 19.  | <p>You need to update the job data in Workforce Administration for the person(s) in this position. You can navigate by going to the <b>Workforce Administration &gt; Job Data</b>. Or, use the Job Data link(s) on the <b>Budgets and Incumbents</b> page. Scroll up to view the <b>Budgets and Incumbents</b> tab.</p>  |
| 20.  | <p>Click the <b>Budget and Incumbents</b> tab to access the <b>Job Data</b> link for the position incumbent.</p>    |



| Step | Action  |
|------|---|
| 21.  | On the <b>Budget and Incumbents</b> page, click the <b>Job Data</b> link for the incumbent.<br><a href="#">Job Data</a> |

Work Location | Job Information | Payroll | Salary Plan | Compensation

Karen Weber214 EMP ID: 010003259 Empl Rcd #: 0

Work Location Find First 1 of 2 Last

HR Status: Active Payroll Status: Active

\*Effective Date: 11/26/2012

\*Action: Job Reclassification \*Reason: Upward

Last Start Date: 10/02/2012 Termination Date:

Position Number: 00000700 Assistant II Position Entry Date: 10/02/2012

Regulatory Region: USA United States

Company: UCB UC Berkeley

Control Unit: COLLS Department Entry Date: 10/02/2012

Department: PHYSI Physics

Location: CAMPUS Main Campus-Berkeley

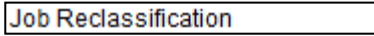


Updated by: 019999998 on 11/26/2012 12:55:53PM Date Created: 11/26/2012

Job Data [Employment Data](#) [Earnings Distribution](#)

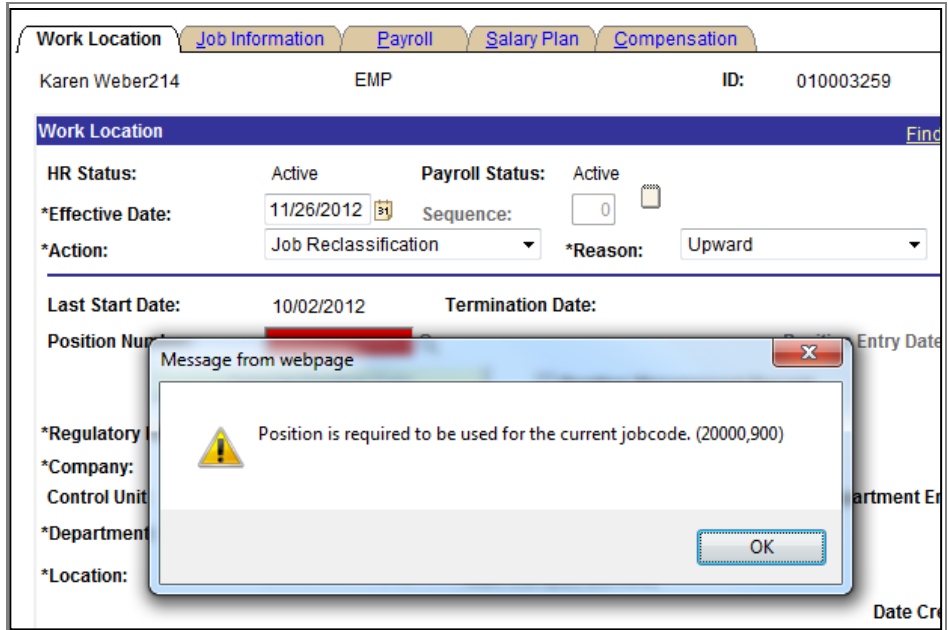
OK Cancel Apply Previous tab Next tab


Work Location | Job Information | Payroll | Salary Plan | Compensation

| Step | Action  |
|------|---|
| 22.  | The Job Data pages for the position incumbent display. Notice that the Position Title to the right of the <b>Position Number</b> field has not updated.<br><br>Job reclassifications require a new row to be added to the incumbent's job data. |
| 23.  | In the upper right of the <b>Work Location</b> section, click the <b>Add a new row at row 1 (Alt+7)</b> button.<br>   |
| 24.  | Every new row to job data requires you to verify/update the <b>Effective Date</b> and provide an action and a reason for the change.<br><br>Click the <b>Action</b> list.<br>   |

| Step | Action  |
|------|---|
| 25.  | <p>There is a selection in the <b>Action</b> field for Job Reclassification.</p> <p>Click the <b>Job Reclassification</b> list item.</p>   |
| 26.  | <p>You must also enter a reason.</p> <p>Click in the <b>Reason</b> field.</p>    |
| 27.  | <p>Since the position change represents a movement to a job code with a higher salary range maximum, click the <b>Upward</b> list item.</p>    |
| 28.  | <p>Press the <b>[Tab]</b> key on your keyboard to move to the <b>Position Number</b> field.</p>   |
| 29.  | <p>Refreshing the job data with the updated position will require a "jiggle". "Jiggle" is a term we will use to indicate a procedure that forces data to repopulate.</p> <p><b>The "Jiggle" steps are:</b></p> <ol style="list-style-type: none"> <li>1. Delete the position number.</li> <li>2. Tab out of the Position Number field to clear the position data from the row.</li> <li>3. Re-enter the position number.</li> <li>4. Tab out of the Position Number field to refresh the position data into the row.</li> </ol> |
| 30.  | <p>Begin the "jiggle" procedure.</p> <p>Press the <b>[Delete]</b> key to clear the position number from the <b>Position Number</b> field.</p>   |
| 31.  | <p>Press the <b>[Tab]</b> key to clear the position data from the job data record.</p>  |





| Step | Action   |
|------|--|
| 32.  | <p>Since positions are required by the system, you will receive a message indicating this requirement.</p> <p>Click the <b>OK</b> button to close the message box.</p>  |



| Step | Action  |
|------|---|
| 33.  | Re-enter the position number, " <b>00000700</b> ", into the <b>Position Number</b> field. |
| 34.  | Press the <b>[Tab]</b> key to refresh the job data from the updated position.             |

Work Location | Job Information | Payroll | Salary Plan | Compensation

Karen Weber214 EMP ID: 010003259

Work Location

HR Status: Active Payroll Status: Active

\*Effective Date: 11/26/2012 Sequence: 0

\*Action: Job Reclassification \*Reason: Upward

Last Start Date: 10/02/2012 Termination Date:

Position: [redacted]

Regulator: [redacted]

Company: [redacted]

Control U: [redacted]

Department: [redacted]

Location: [redacted]



Updated by: 01999996 On: 11/26/2012

Message from webpage

A salary plan Step is required for employee's new job code. (20000,137)

The new jobcode requires a step. Go to the "Salary Plan" tab and enter a step now. Several other fields will be defaulted based on the step you enter.

OK

| Step | Action   |
|------|--|
| 35.  | <p>Because the job code for this position is step-based, a message box displays. As indicated by the message, you will need to go to the <b>Salary Plan</b> page and enter the step.</p> <p>Click the <b>OK</b> button on the message box.</p>  |
| 36.  | <p>Click the <b>Salary Plan</b> tab.</p>    |

Work Location | Job Information | Payroll | Salary Plan | Compensation

Karen Weber214 EMP ID: 010003259 Empl Rcd #: 0

Salary Plan Find First 1 of 2 Last

Effective Date: 11/26/2012 Effective Sequence: 0 Job Category: Principal

Action: Job Reclas Reason: Upward

Salary Administration CX Grade: [redacted] Grade Entry Date 10/02/2012

Plan: [redacted] Step: 6.0 Step Entry Date 11/26/2012

Review Type [redacted]

Job Data Employment Data Earnings Distribution

OK Cancel Apply Previous tab Next tab

Work Location | Job Information | Payroll | Salary Plan | Compensation

| Step | Action   |
|------|--|
| 37.  | Click in the <b>Step</b> field.<br><input type="text"/>            |
| 38.  | Enter "6" into the <b>Step</b> field.                              |
| 39.  | Press the <b>[Tab]</b> key to update the record.                   |
| 40.  | Click the <b>Compensation</b> tab.<br><a href="#">Compensation</a> |

| Step | Action   |
|------|--|
| 41.  | Verify that the person's pay is correct.<br><br><b>Note:</b> If this job code was an open range (instead of step-based), you would enter the monthly salary in the <b>Comp Rate</b> field that would be enabled for input. |
| 42.  | Click the <b>Earnings Distribution</b> link.<br>Verify the information on the Job Earning Distribution page.<br><a href="#">Earnings Distribution</a>  |

Job Earnings Distribution

Karen Weber214                      EMP                      ID: 010003259                      Empl Rcd #: 0

---

Find    First 1 of 2 Last

**Earnings Distribution Type**

Effective Date: 11/26/2012      Effective Sequence: 0      Job Category: Principal

Action: Job Reclas                      Reason: Upward                      Current

---

Standard Hours: 40.00                      Work Period: W Weekly

Pay Rate/Amount: 3,404.000000                      Comp Freq: M Monthly

FTE: 1.000000

---

Find    First 1 of 1 Last

**Job Earnings Distribution**

Begin Date: 11/16/2012      End Date:      \*Earn Code: REG Regular      Distrb %: 100.0000      Pay Rate/Amount: 3,404.000000

Budgeted FTE:        Work Study Program:      Speed Type:      GL BU: 1

**Earnings Chartfields**

Account: 51210      Fund: 19900      Dept: 13050      Program: 40      Chartfield 1:      Chartfield 2:      GENERAL FUNDS      PHYSI Gen Ops      Instruction & Dept Research

---

Job Data
Employment Data
Earnings Distribution

---

OK
Cancel
Apply

| Step | Action  |
|------|---|
| 43.  | <p>For this example, all the necessary changes for a job reclassification have been performed, click the <b>OK</b> button to save and apply your changes.</p> <p>A job reclassification could also require a funding change or other changes. Be sure to verify that all needed changes have been made prior to saving.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 10px 0;">OK</div> |
| 44.  | <p><b>Congratulations!</b></p> <p>You have learned how to perform a job reclassification by changing a position's job code.</p> <p><b>End of Procedure.</b></p>   |

# TAM Posting

## Section Overview

The Originator of the Job Opening begins the process by creating the job opening and submitting it to the Authorizer for online approval. If this is a new or a substantially changed position, make sure that the job description and PEM (Physical, Environmental & Mental) form has been reviewed by the Compensation Unit in central HR before you begin the process of creating a Job Opening.

In order to create a Job Opening, you will need the following information:

For the **Job Opening- Job Details** page:

- Position Number
- Number of openings to be filled
- Department (will fill in based on Position number)
- Location (will fill in based on Position number)
- Schedule Type
- Appointment Type

**Job Opening- Posting Information** page:

### Posting Descriptions:

- Departmental Overview
- Responsibilities
- Required Qualifications
- Preferred Qualifications
- Salary & Benefits
- Equal Employment Opportunity
- Criminal Background Check (as needed)
- Additional descriptions (as needed)

### Posting Destinations:

- Berkeley Job Site
- External Advertisement Venues (as needed)

### Hiring Team page:

- Recruiter Hiring Manager or Supervisor
- Interview Committee Members
- Department Authorizer

Because of the complexity of this process, make sure that you have the necessary information before you begin.

## Section Objective

- Creating a TAM Posting Using Position Number

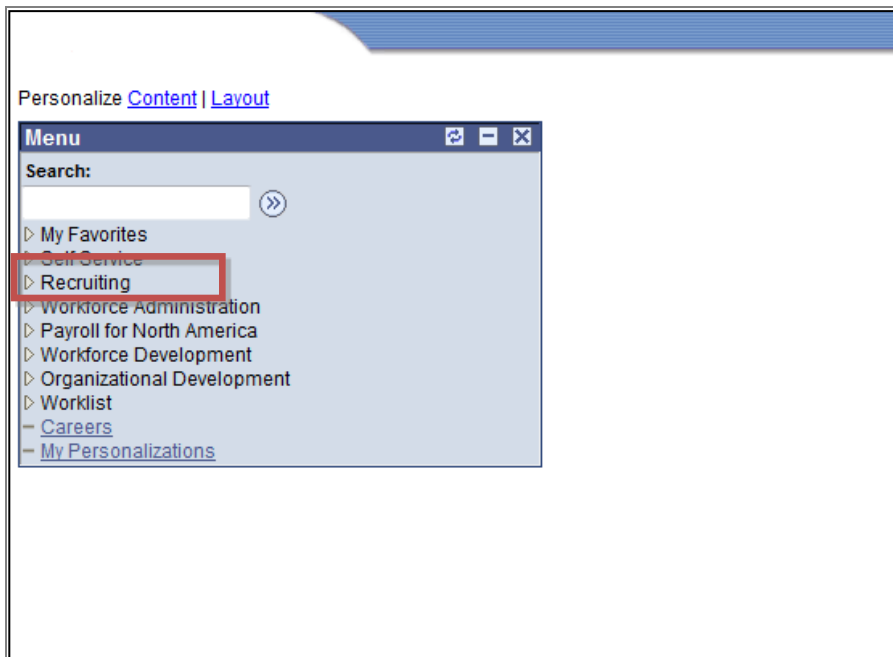
Use the **Job Opening** component which can be accessed through the **Create New Job Opening** link in the **Recruiting** module of HCM. Job openings should be created using position numbers. Remember that only staff jobs are posted through TAM.

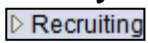
**Note:** During the initial implementation, the system will allow a job posting to be created without a position number (using the job code instead). However, your department or Shared Service Center may require you to use a position number when creating a job posting,

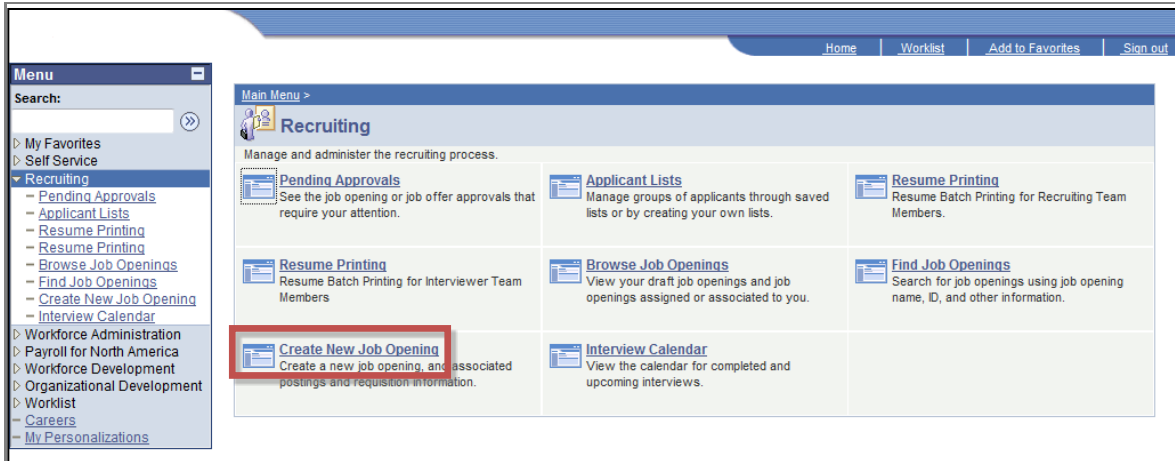
**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

## Procedure

In this topic, you will create a TAM posting using a position number.



| Step | Action   |
|------|--|
| 1.   | Begin by clicking the <b>Recruiting</b> link in the main menu to go to the <b>Enter Primary Job Opening Information</b> page.<br> |



| Step | Action  |
|------|---|
| 2.   | Click the <b>Create New Job Opening</b> link from either the Menu item or the <b>Recruiting</b> folder. |

### Enter Primary Job Opening Information

**Opening Information**

**Job Opening Type:** Standard Requisition

**Business Unit:** All Berkeley Campus

**Position Number:** 00000464

**Job Code:** 4722C

**Posting Title:**

| Step | Action  |
|------|---|
| 3.   | Notice that <b>Job Opening Type</b> and <b>Business Unit</b> fields have default values. <b>DO NOT</b> change these values.<br><br>If you do not know the position number, use the lookup feature by clicking the magnifying glass. |
| 4.   | Enter the position number for the job posting into the <b>Position Number</b> field. Enter " <b>00000464</b> ".   |

| Step | Action   |
|------|--|
| 5.   | Review the <b>Posting Title</b> which has filled in for you. The Posting Title is an open field so you can change it if you have a different title to use for the posting. Remember that a posting title is what an applicant sees when reviewing jobs, so make sure to choose a title that is a good descriptor of the job and is understandable to applicants. In this example, you do not need to change the posting title. |

### Enter Primary Job Opening Information

**Opening Information**

**Job Opening Type:** Standard Requisition

**Business Unit:** All Berkeley Campus


**Position Number:**

**Job Code:** 4722C Assistant III

**Posting Title:** Assistant III

**Continue**

Message from webpage

 Warning (20000,907)

This Job Code requires a Position Number at the time of Hire. Please enter the Position Number for the Job Posting, if available.

**OK**

| Step | Action   |
|------|--|
| 6.   | <p>If there is no position number, you can enter a job code instead of a position number, but you will receive a warning message reminding you that a position number is required at the time of hire.</p> <p>When you exit the field, a warning message displays with the text: "This Job Code requires a Position Humber at the time of Hire. Please enter the Position Number for the Job Posting, if available." You can close this message and continue creating the posting.</p> |
| 7.   | <p>Click the <b>Continue</b> button to go to the <b>Job Opening</b> page.</p> <p style="text-align: center;"><b>Continue</b></p>   |



### Job Opening

**Posting Title:** \_\_\_\_\_ Assistant III  
**Job Opening Status:** 005 Draft  
**Job Title:** \_\_\_\_\_ Assistant III      **Job Code:** 4722C  
**Position Number:** 00000464 \_\_\_\_\_ Assistant III  
**Business Unit:** UCBAL All Berkeley Campus

---

[Job Details](#)    [Job Postings](#)    [Hiring Team](#)


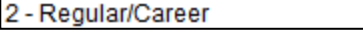

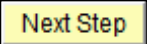
**Opening Information**

**Job Opening Type:** Standard Requisition  
**Created By:** 01000001 Joyce Ming100  
**Created:** 11/26/2012   
**\*Openings to Fill:** Limited ▾  
**Target Openings:** 1  
**Available Openings:** 1  
**Business Unit:** UCBAL All Berkeley Campus  
**Position Number:** 00000464 \_\_\_\_\_ Assistant III  
**Job Code:** 4722C \_\_\_\_\_ Assistant III  
**Department:** PHYSI Physics  
**Location:** CAMPUS Main Campus-Berkeley  
**Recruiting Location:** 1 Main Campus-Berkeley  
[Add Additional Locations](#)  
**AA Goals:** --  
**Status Code:** 005 Draft  
**Status Reason:**

| Step | Action  |
|------|---|
| 8.   | <p>After the <b>Continue</b> button is clicked on the <b>Primary Job Opening Information</b> page, the <b>Job Opening</b> page appears.</p> <p><u>Above</u> the <b>Job Details</b> link, the page header displays summary information that you have established for this Job Opening; it cannot be modified.</p> <p><u>Below</u> the <b>Job Details</b> link, in the <b>Opening Information</b> area, <b>Created by</b>, <b>Created Date</b>, and <b>Openings to Fill</b> fields have default settings and should not be changed.</p> |
| 9.   | <p>The <b>Limited</b> selection indicates that your department is posting a limited number of Job Openings.</p> <p><b>This field must remain "Limited".</b></p>   |

| Step | Action   |
|------|--|
| 10.  | <p><b>Target Openings</b> defaults to "1". If we are posting this job for more than one opening, we would enter the appropriate number of positions we are filling and tab out of the field.</p> <p>At the time of the initial posting, <b>Available Openings</b> will match <b>Target Openings</b>.</p> <p>When multiple openings are posted, as the recruitment progresses, the number of Available Openings will update with each new hire. For example, if 5 positions were posted and 3 applicants have been hired, the Available Openings would display 2, the remaining number of open positions.</p> <p>In this lesson, we are only posting 1 position and we will leave the default "1".</p> <p>The total Available Openings should be less than or equal to the Target Openings.</p> |
| 11.  | <p>The <b>Business Unit, Position Number, Job Code, Department, Location</b> and <b>Recruiting Location</b> fields default based on the position number you entered earlier. The AA goals for this job should display based on the combination of Job Code and Department code.</p>  |
| 12.  | <p>Scroll down on the page.</p> <p>Click the <b>Vertical</b> scrollbar.</p>  |
| 13.  | <p><b>Status Date</b> defaults to the day you create the Job Opening and cannot be changed.</p> <p>The <b>Desired Start Date, Projected Fill Date, Date Authorized, Referral Program ID,</b> and <b>Recruitment Contact</b> fields <b>are not used</b> at UC Berkeley.</p>   |
| 14.  | <p>If this Job Opening is intended to fill a position being vacated, you can enter the departing employee's name in the <b>Employees Being Replaced</b> section. If more than one employee is being replaced, you would use the <b>Add</b> button.</p> <p>In this example, we are posting a NEW position, no one is being replaced.</p>  |

| Step | Action  |
|------|---|
| 15.  | Scroll down to the <b>Additional Job Specifications</b> section.<br>Click the scrollbar.  |
| 16.  | In this example, the posting is for a Regular career job without an end date. It does not have a special shift and requires no travel. It will have a 40 hour work week.  |
| 17.  | In the <b>Staffing Information</b> section, you can skip entering begin and end dates for Career positions, however estimated begin and end dates should be entered for Contract or Limited jobs. The 900 Hours box should be checked for any Limited jobs to indicate your department will not violate the 1000 hour rules for Limited employment. |

| Step | Action  |
|------|---|
| 18.  | Click the <b>Appt Type</b> list.<br>   |
| 19.  | Click the <b>2 - Regular/Career</b> list item.<br>   |
| 20.  | Verify or update the remaining fields in the <b>Staffing Information</b> section as needed.   |
| 21.  | <p>Compensation Unit review is a requirement for posting a job opening. In this example, we have followed the 'best practice' and have already had Compensation review this position before creating the Job Opening. Therefore, we will answer the compensation question with a 'yes'.</p> <p>If you have not had Compensation review this position, you cannot submit the job. You may "Save as Draft" and return to continue after Compensation review has been completed.</p> <p>In the <b>Compensation Approvals</b> section, click the <b>Yes</b> option for the question: "Has this position been classified by the Compensation Unit?".</p>  |
| 22.  | <p>The <b>Additional Comments</b> box can be used to communicate any other necessary information to the <b>Department Authorizer</b> and <b>Employment Services</b>.</p> <p>Examples of information to include here:</p> <ul style="list-style-type: none"> <li>- Provide the name and contact information/URL for the "other" option for a non-UCB job posting destination.</li> <li>- Provide the chartstring to be charged for any non-UCB posting costs</li> <li>- Information about a waiver to the hiring freeze.</li> </ul> <p>In this example, we do not have any comments to make.</p>   |
| 23.  | At the bottom right side of the page, click the <b>Next Step</b> button.<br>   |
| 24.  | The <b>Job Opening</b> page displays.<br><br>Below the <b>Job Postings</b> section, click the <b>Add Job Postings</b> link to go to a subpage where you will add information that will describe the job and where it will be published.   |

**Job Opening**  
**Posting Information**

Job Postings

Posting Title:

Job Descriptions Find First 1 of 1 Last

\*Visible:

\*Description Type:

Description ID:

Description:

[+ Add Posting Descriptions](#) AA Goals Asian/Pacific Islander, Black, Hispanic, Minority

Job Posting Destinations Customize Find First 1 of 1 Last

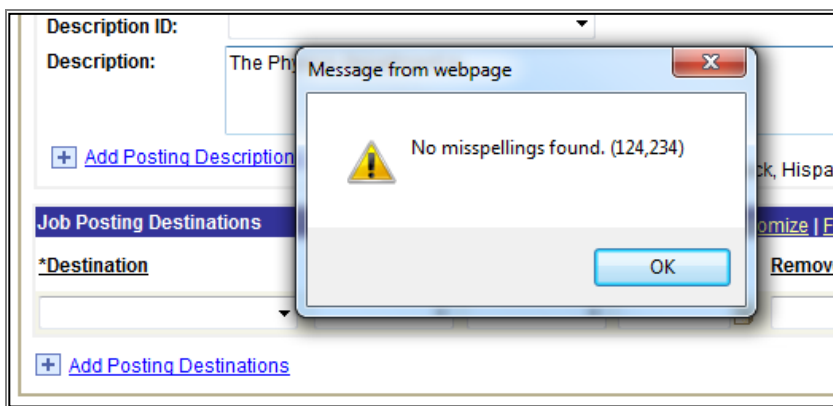
| *Destination         | *Posting Type        | Relative Open Date   | Post Date            | Remove Date          | Posting Duration (Days) |
|----------------------|----------------------|----------------------|----------------------|----------------------|-------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>    |

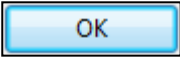
[+ Add Posting Destinations](#)

OK Cancel Preview

| Step | Action   |
|------|--|
| 25.  | <p>The <b>Job Postings - Posting Information</b> page contains important information concerning the job responsibilities and minimum qualifications for the posting.</p> <p>Information entered on this page will be viewed by the applicants as they read the job posting. Take care to provide complete and accurate information; this is the key to getting the quality candidates you want.</p> <p>The description types may be added to any order but will always display to applicants in a pre-determined order. In this example, we will add the <b>Description</b> types in the actual posting order.</p> <p>The required Job Posting Descriptions are: <b>Departmental Overview, Responsibilities, Required Qualifications, Preferred Qualifications, Salary &amp; Benefits, and Equal Employment Opportunity.</b></p> <p><b>Note:</b> If the Job Opening has been designated as "sensitive", you must also include the Criminal Background Required description by selecting the Description ID which populates the description field with pre-written language (that should not be changed).</p> |

| Step | Action  |
|------|---|
| 26.  | <p>The <b>Visible</b> field determines which applicants (Internal and/or External) will be able to view the information for each description. The system defaults to Internal and External view. <b>DO NOT</b> change this except in the very rare instance that the job opening is for internal recruitment only and has been approved by OHR &amp; Staff Affirmative Action &amp; Compliance Office.</p> <p><b>Note:</b> Berkeley job postings are intended to be viewed by all applicants for all descriptions; it is not recommended to have selected descriptions limited to only one of the views. As an example of why this is so important, if you select External Only, no internal applicants will be able to see the posting on the jobs page.</p> |
| 27.  | <p>The <b>Job Opening - Posting Information</b> page displays.</p> <p>In the <b>Job Descriptions</b> section, click the <b>Description Type</b> list.</p> <div style="border: 1px solid black; width: 200px; height: 20px; margin-left: 20px; display: flex; align-items: center; justify-content: flex-end; padding-right: 5px;"> <span style="font-size: 10px;">▼</span> </div>   |
| 28.  | <p>Click the <b>Departmental Overview</b> list item.</p> <div style="border: 1px solid black; width: 200px; height: 20px; margin-left: 20px; display: flex; align-items: center; padding: 2px;"> <span style="font-size: 10px;">Departmental Overview</span> </div>   |
| 29.  | <p>The Departmental Overview Description should contain a short introduction to the department. Type directly into this field or cut and paste from another source. In this example, we will type an abbreviated sample of text directly into this field.</p> <p>Enter a description of the department into the <b>Description</b> field. Enter "<b>The Physics department is...</b>"</p>   |
| 30.  | <p>If there were any spelling errors, we would have the opportunity to fix them.</p> <p><b>Note:</b> The spell check does not check grammar.</p> <p>Click the <b>Spell Check Description (Alt+5)</b> button.</p> <div style="display: flex; align-items: center; margin-left: 20px;"> </div>  |



| Step | Action  |
|------|---|
| 31.  | If no misspellings are found, click the <b>OK</b> button in the message box that displays.<br> |

**Job Opening**  
**Posting Information**

**Job Postings**

Posting Title:

**Job Descriptions** Find First 1-2 of 2 Last

\*Visible: Internal and External

\*Description Type: Departmental Overview

Description ID:

Description: The Physics department is...

[+ Add Posting Descriptions](#) AA Goals Asian/Pacific Islander, Black, Hispanic, Minority

---

\*Visible: Internal and External

\*Description Type: Responsibilities

Description ID:

Description: Provide administrative support to...]

[+ Add Posting Descriptions](#) AA Goals Asian/Pacific Islander, Black, Hispanic, Minority

**Job Posting Destinations** Customize | Find | First 1 of 1 Last

| *Destination         | *Posting Type        | Relative Open Date   | Post Date            | Remove Date          | Posting Duration (Days) |
|----------------------|----------------------|----------------------|----------------------|----------------------|-------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>    |

[+ Add Posting Destinations](#)

OK Cancel Preview

| Step | Action   |
|------|--|
| 32.  | At the bottom of the <b>Job Descriptions</b> section, click the <b>Add Posting Descriptions</b> link to add description of job responsibilities to this posting. |
| 33.  | Click the <b>Description Type</b> list.<br><input type="text" value="Responsibilities"/>   |
| 34.  | Click the <b>Responsibilities</b> list item.<br><input type="text" value="Responsibilities"/>  |
| 35.  | Enter a description of job responsibilities into the <b>Description</b> field.<br>Enter " <b>Provide administrative support to...</b> "                          |

| Step | Action  |
|------|---|
| 36.  | At the bottom of the <b>Job Descriptions</b> section, click the <b>Add Posting Descriptions</b> link to add description of the preferred qualification for the job to this posting. |

The screenshot shows the 'Job Opening Posting Information' page. At the top, there's a 'Job Postings' section with a 'Posting Title' field containing 'Assistant III'. Below this is a 'Job Descriptions' section with a search bar and navigation controls. Three description entries are listed:

- Entry 1:** \*Visible: Internal and External; \*Description Type: Departmental Overview; Description: The Physics department is...
- Entry 2:** \*Visible: Internal and External; \*Description Type: Responsibilities; Description: Provide administrative support to...
- Entry 3 (highlighted):** \*Visible: Internal and External; \*Description Type: Required Qualifications; Description: Administrative experience...

Each entry has an 'Add Posting Descriptions' link below it. At the bottom of the list, there are 'AA Goals' listed as 'Asian/Pacific Islander, Black, Hispanic, Minority'.

| Step | Action  |
|------|---|
| 37.  | Click the <b>Description Type</b> list.<br><input type="text" value="Required Qualifications"/>   |
| 38.  | Click the <b>Required Qualifications</b> list item.<br><input type="text" value="Required Qualifications"/>   |
| 39.  | Enter the preferred qualifications into the <b>Description</b> field. Enter " <b>Administrative experience...</b> "   |
| 40.  | At the bottom of the <b>Job Descriptions</b> section, click the <b>Add Posting Descriptions</b> link to add salary and benefits information to this posting.<br><br>Click the <b>Add Posting Descriptions</b> link. |
| 41.  | Click the <b>Vertical</b> scrollbar.  |



\*Description Type: Responsibilities  
 Description ID:  
 Description: Provide administrative support to...  
[+ Add Posting Descriptions](#) AA Goals Asian/Pacific Islander, Black, Hispanic, Minority

---

\*Visible: Internal and External  
 \*Description Type: Required Qualifications  
 Description ID:  
 Description: Administrative experience...  
[+ Add Posting Descriptions](#) AA Goals Asian/Pacific Islander, Black, Hispanic, Minority

\*Visible: Internal and External  
 \*Description Type: Preferred Qualifications  
 Description ID:  
 Description: UC Berkeley experience...  
[+ Add Posting Descriptions](#) AA Goals Asian/Pacific Islander, Black, Hispanic, Minority

**Job Posting Destinations** Customize | Find | First 1 of 1 Last


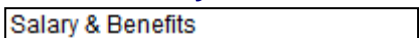
| *Destination | *Posting Type | Relative Open Date | Post Date | Remove Date | Posting Duration (Days) |
|--------------|---------------|--------------------|-----------|-------------|-------------------------|
|              |               |                    |           |             |                         |

[+ Add Posting Destinations](#)

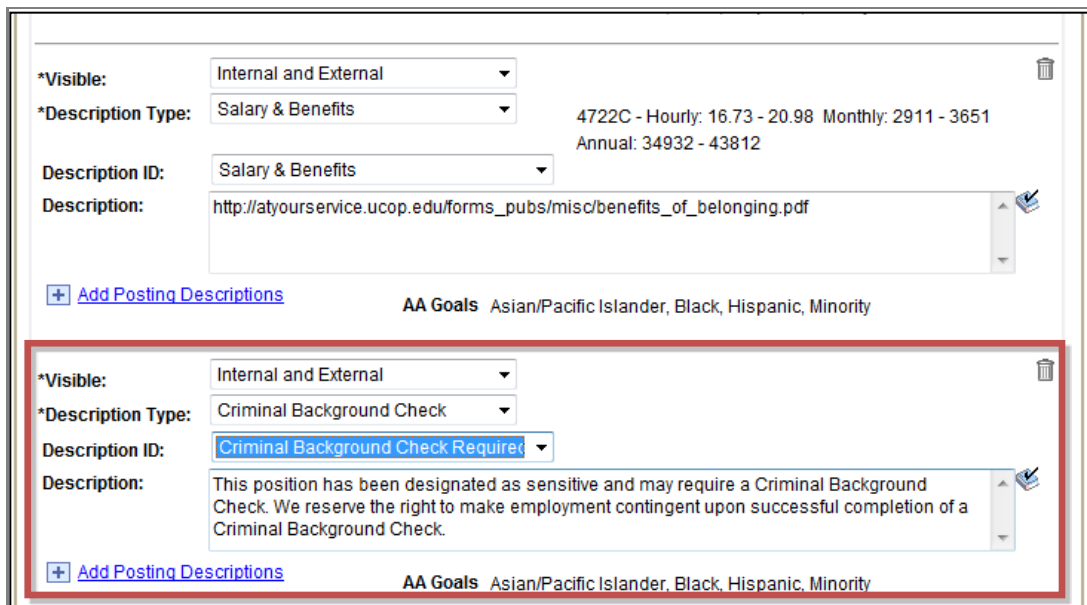
OK Cancel Preview

| Step | Action  |
|------|---|
| 42.  | Click the <b>Description Type</b> list.<br>   |
| 43.  | Click the <b>Preferred Qualifications</b> list item.<br>  |
| 44.  | Enter the preferred qualifications into the <b>Description</b> field. Enter " <b>UC Berkeley experience...</b> "  |
| 45.  | At the bottom of the <b>Job Descriptions</b> section, click the <b>Add Posting Descriptions</b> link to add salary and benefits information to this posting.<br><br>Click the <b>Add Posting Descriptions</b> link. |

The screenshot shows a web-based interface for configuring job postings. It features three vertically stacked sections, each representing a different description type. Each section includes a dropdown for 'Description ID', a text area for 'Description', a '+ Add Posting Descriptions' link, and 'AA Goals' (Asian/Pacific Islander, Black, Hispanic, Minority). The first two sections have 'Internal and External' visibility and 'Preferred Qualifications' type. The third section has 'Internal and External' visibility and 'Salary & Benefits' type, with salary information displayed: '4722C - Hourly: 16.73 - 20.98 Monthly: 2911 - 3651 Annual: 34932 - 43812'. Below these sections is a 'Job Posting Destinations' table with columns for Destination, Posting Type, Relative Open Date, Post Date, Remove Date, and Posting Duration (Days). The table currently has one empty row. At the bottom are 'OK', 'Cancel', and 'Preview' buttons.

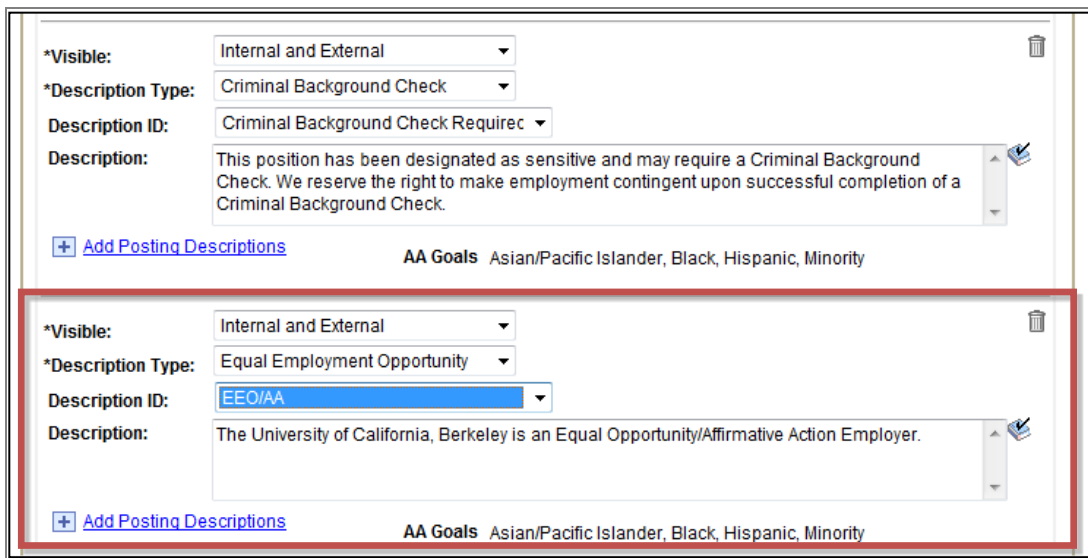
| Step | Action   |
|------|--|
| 46.  | Click the <b>Description Type</b> list.<br>   |
| 47.  | Click the <b>Salary &amp; Benefits</b> list item.<br>   |
| 48.  | Notice that the full salary range for this Job Code displays on the right and above the Description Field.<br><br>This salary range information will not automatically display in the job posting. We will need to enter the salary information we wish applicants to see. |

| Step | Action   |
|------|--|
| 49.  | <p>If this job provides benefits, click the <b>Description ID</b> drop-down list to add pre-written text to this Description. In this case, the action adds a link to the UCOP website about employee benefits. (Remember to only add this information if the job will be providing benefits.)</p> <p>Click the <b>Description Type</b> list.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px;"></div>        |
| 50.  | <p>Click the <b>Salary &amp; Benefits</b> list item.</p> <div style="border: 1px solid black; background-color: #0070C0; color: white; padding: 2px; margin-left: 20px;">Salary &amp; Benefits</div>   |
| 51.  | <p>Click the <b>Vertical</b> scrollbar.</p>  |
| 52.  | <p>In this example, the position being posted has been designated as “sensitive” (dealing with money, sensitive information, etc.), so we will add one of the conditional Description Types the Criminal Background Check description.</p> <p>Indicate on the posting that a criminal background check will be required for the job.</p> <p>Click the <b>Add Posting Descriptions</b> link at the bottom of the <b>Job Descriptions</b> section.</p> |



| Step | Action   |
|------|--|
| 53.  | <p>Click the <b>Description Type</b> list.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px;"></div> |

| Step | Action   |
|------|--|
| 54.  | Click the <b>Criminal Background Check</b> list item.<br><input type="text" value="Criminal Background Check"/>  |
| 55.  | <p>Certain positions are designated as needing fingerprinting and Federal &amp; State background checks. In this example, we have added the Criminal Background Check because this particular job requires it.</p> <p>If you are uncertain if the job you are posting requires a background check or if you have questions regarding background checks, contact central HR.</p> <p>If you add the Criminal Background Check job posting type, you must add the pre-written language in the Description ID field to the posting.</p> <p>Click the <b>Description Type</b> list.<br/> <input type="text"/></p> |
| 56.  | Click the <b>Criminal Background Check Required</b> list item.<br><input type="text" value="Criminal Background Check Required"/>  |
| 57.  | The Criminal Background Check pre-written language displays in the <b>Description</b> field.   |
| 58.  | Click the <b>Vertical</b> scrollbar.   |
| 59.  | Finally add an EEO statement on the posting by clicking the <b>Add Posting Descriptions</b> link.  |



| Step | Action  |
|------|---|
| 60.  | Click the <b>Description Type</b> list.<br><input type="text"/> |

| Step | Action   |
|------|--|
| 61.  | Click the <b>Equal Employment Opportunity</b> list item.<br><input type="text" value="Equal Employment Opportunity"/>  |
| 62.  | The <b>Equal Employment Opportunity</b> Description Type also has pre-written text for its description.<br><br>Click the <b>Description Type</b> list.<br><input type="text"/>   |
| 63.  | Click the <b>EEO/AA</b> list item.<br><input type="text" value="EEO/AA"/>  |
| 64.  | The Equal Employment Opportunity pre-written language appears.<br><br>In this example, we have added all the Job Posting Descriptions needed for applicants for this particular job. You may need to use other Descriptions as needed for your jobs. |
| 65.  | Click the <b>Vertical</b> scrollbar.   |

\*Visible:

\*Description Type:

Description ID:

Description:

[+ Add Posting Descriptions](#) AA Goals Asian/Pacific Islander, Black, Hispanic, Minority

| Job Posting Destinations |               |                    |            |             |                         | Customize   Find   # | First | 1-2 of 2 | Last |
|--------------------------|---------------|--------------------|------------|-------------|-------------------------|----------------------|-------|----------|------|
| *Destination             | *Posting Type | Relative Open Date | Post Date  | Remove Date | Posting Duration (Days) |                      |       |          |      |
| *Berkeley Job Site       | External      | Approve Dt         | 11/26/2012 | 12/10/2012  | 14                      |                      |       |          |      |
| *Berkeley Job Site       | Internal      | Approve Dt         | 11/26/2012 | 12/10/2012  | 14                      |                      |       |          |      |

[+ Add Posting Destinations](#)

| Step | Action   |
|------|--|
| 66.  | Jobs must be posted for both External and Internal viewing (Internal only posting exceptions are rare).<br><br>The system requires you to post to External and Internal destinations separately. |
| 67.  | As a best practice, click the <b>Add Posting Destination</b> link in the <b>Posting Destinations</b> section to have two rows to create both External and Internal posting destinations.         |

| Step | Action   |
|------|--|
| 68.  | Two <b>Job Posting Destination</b> lines are displayed. We will use one for External posting and the other for Internal posting.   |
| 69.  | In the first line of the <b>Posting Destinations</b> section, click the <b>Destination</b> list.<br><input data-bbox="407 453 732 499" type="text"/>   |
| 70.  | Click the <b>*Berkeley Job Site</b> list item.<br><input data-bbox="407 552 781 583" type="text"/>   |
| 71.  | Continue entering posting destination information in the first line by clicking the <b>Posting Type</b> list.<br><input data-bbox="407 667 583 716" type="text"/>  |
| 72.  | Click the <b>External</b> list item.<br><input data-bbox="407 768 578 800" type="text"/>   |
| 73.  | Continue entering posting destination information in the first line by clicking the <b>Relative Open Date</b> list.<br><input data-bbox="407 884 583 932" type="text"/>  |
| 74.  | Once the Relative Open Date field is populated, the system will assign today's date as the posting date.<br><br>Due to the authorization and approval process, the job will not necessarily be posted today but will be posted as soon as the Department Authorizer and Employment Services approve the job.<br><br>Click the <b>Approve Dt</b> list item.<br><input data-bbox="407 1220 578 1251" type="text"/>   |
| 75.  | You can choose to enter either a <b>Remove Date</b> or a <b>Posting Duration</b> .<br><br>Posting Duration is the length of time a Job Opening will be open. There is a 14 day mandatory posting period; you can post up to 90 days. You can also pick a specific date (as long as it is more than 14 days and less than 90 days from the date the job will be posted.)<br><br>The Posting Duration cannot be shortened to less than 14 days.<br><br>If the posting has not been filled within the initial 90 days, you can request Employment Services to extend the posting period.<br><br>In this example, we have entered a Posting Duration of 14 days. |

| Step | Action  |
|------|---|
| 76.  | Enter the desired information into the <b>Posting Duration (Days)</b> field. Enter "14".  |
| 77.  | Move to the next line and continue entering posting destination information in the second line by clicking the <b>Destination</b> list.<br><input data-bbox="310 411 638 457" type="text"/> |
| 78.  | Click the <b>*Berkeley Job Site</b> list item.<br><input data-bbox="310 512 686 543" type="text"/>  |
| 79.  | Continue entering posting destination information in the second line by clicking the <b>Posting Type</b> list.<br><input data-bbox="310 630 488 676" type="text"/>                          |
| 80.  | Click the <b>Internal</b> list item.<br><input data-bbox="310 728 485 760" type="text"/>  |
| 81.  | Continue entering posting destination information in the second line by clicking the <b>Relative Open Date</b> list.<br><input data-bbox="310 846 488 892" type="text"/>                    |
| 82.  | Click the <b>Approve Dt</b> list item.<br><input data-bbox="310 945 485 976" type="text"/>  |
| 83.  | Enter the desired information into the <b>Posting Duration (Days)</b> field. Enter "14".  |
| 84.  | With all job posting details entered, click the <b>Preview</b> button to view the job opening as applicants will see it.<br><input data-bbox="310 1142 456 1188" type="button"/>            |

### Job Description

**Job Title:** \_\_\_\_\_ Assistant III

**Job ID:** 9999999999999999

**Department:**

**Location:** Main Campus-Berkeley

**Full/Part Time:** Full-Time

**Regular/Temporary:** Regular

---

[Return to Previous Page](#)    [Switch to Internal View](#)

---

**Departmental Overview**  
The Physics department is...

**Responsibilities**  
Provide administrative support to...

**Required Qualifications**  
Administrative experience...

**Preferred Qualifications**  
UC Berkeley experience...

**Salary & Benefits**  
[http://atyourservice.ucop.edu/forms\\_pubs/misc/benefits\\_of\\_belonging.pdf](http://atyourservice.ucop.edu/forms_pubs/misc/benefits_of_belonging.pdf)

**Criminal Background Check**  
This position has been designated as sensitive and may require a Criminal Background Check. We reserve the right to make employment contingent upon successful completion of a Criminal Background Check.

| Step | Action   |
|------|--|
| 85.  | <p>Review the information on the Job Description preview page.</p> <p>When you are finished, click the <b>Return to Previous Page</b> link.</p> <p><a href="#">Return to Previous Page</a></p>   |
| 86.  | <p>If you need to make changes to the information you have entered on the <b>Job Opening - Posting Information</b> page, make them now.</p> <p>Otherwise, click the <b>OK</b> button to return to the <b>Job Opening</b> page and to continue creating the posting.</p> <p style="text-align: center;"><span style="border: 1px solid black; padding: 2px 10px;">OK</span></p> |



| Step | Action   |
|------|--|
| 87.  | <p>Notice that the Job Postings sections have been collapsed into a single posting link Administrative Assistant 3. This link would be used to open the Job Posting page for this job.</p> <p><b>Note:</b> If you want to re-open the job posting, click on the specific named link and NOT <b>Add Job Postings</b>. If we clicked the <b>Add</b> link, we would be creating a second Job Opening posting and both would appear on the posted Job Site under the same Job ID which would be very confusing.</p> <p>The <b>Trash can</b> icon on the right would only be used if we wanted to delete the posting page and start over.</p> |

The screenshot shows a 'Job Opening' form with the following details:

- Posting Title: \_\_\_\_\_ Assistant III
- Job Opening Status: 005 Draft
- Job Title: \_\_\_\_\_ Assistant III
- Job Code: 4722C
- Position Number: 00000464 \_\_\_\_\_ Assistant III
- Business Unit: UCBAL All Berkeley Campus

Navigation tabs: Job Details | Job Postings | Hiring Team

Buttons: Save & Submit | Save as Draft | Cancel | Previous Step | **Next Step** (highlighted in red)

Job Postings section:

| Postings                      | Primary Posting Title               |  |
|-------------------------------|-------------------------------------|--|
| <a href="#">Assistant III</a> | <input checked="" type="checkbox"/> |  |

[+ Add Job Postings](#)

Navigation tabs: Job Details | Job Postings | Hiring Team

Buttons: Save & Submit | Save as Draft | Cancel | Previous Step | **Next Step** (highlighted in red)

| Step | Action  |
|------|---|
| 88.  | Click the <b>Next Step</b> button to proceed to the Hiring Team page. |

### Job Opening

**Posting Title:** \_\_\_\_\_Assistant III  
**Job Opening Status:** 005 Draft  
**Job Title:** \_\_\_\_\_Assistant III                      **Job Code:** 4722C  
**Position Number:** 00000464 \_\_\_\_\_Assistant III  
**Business Unit:** UCBAL All Berkeley Campus

---

[Job Details](#)    [Job Postings](#)    Hiring Team

---

**Assignments**

**Recruiters**

No Recruiters have been added to this Job Opening

**Dept Authorizer**

No Hiring Managers have been added to this Job Opening

**Interviewers**

No Interviewers have been added to this Job Opening


  

**Manager/Supervisor**

No Interested Parties have been added to this Job Opening

---

[Job Details](#)    [Job Postings](#)    Hiring Team

| Step | Action  |
|------|---|
| 89.  | <p>Designate <b>Employment Recruiter, Dept. Authorizer, Interviewer(s)</b> and the <b>Manager/Supervisor</b> for this job opening.</p> <p>This is the only page that can be edited and changed after the job has been submitted and approved. The information on this page can be edited throughout the recruitment process since the individuals involved may change over time.</p> <p>In the Assignments section, click the <b>Add Recruiters</b> link.</p> |
| 90.  | <p>Click the <b>Look up Recruiter ID (Alt+5)</b> button to display the <b>Look up Recruiter ID</b> page.</p> <p></p>   |

### Look Up Recruiter ID

EmpID:

Name:



[Basic Lookup](#)

#### Search Results


View All First  1-4 of 4  Last


| EmpID                     | Name                          |
|---------------------------|-------------------------------|
| <a href="#">010000017</a> | <a href="#">Joyce Ming100</a> |
| <a href="#">010005444</a> | <a href="#">George Leelee</a> |
| <a href="#">010006199</a> | <a href="#">Kyra Forum</a>    |
| <a href="#">010006200</a> | <a href="#">Jenn Train</a>    |


| Step | Action  |
|------|---|
| 91.  | <p>The results will be filtered by recruiter role. You can narrow the list by adding the recruiter name or click the link for the appropriate recruiter in the <b>Search Results</b> section below.</p> <p>In this example, click the <b>Joyce Ming100</b> link.</p> <p><a href="#">Joyce Ming100</a></p>     |
| 92.  | <p>Notice that the Recruiter name and ID now appear on the Hiring Team page.</p> <p>The Dept. Authorizer is the person with the designated authority to approve hires in their department.</p> <p>Click the <b>Add Dept Authorizer</b> link.</p>  |
| 93.  | <p>Click the <b>Look up ID (Alt+5)</b> button to display the <b>Look up ID</b> page.</p> <p></p>  |
| 94.  | <p>In this example, click the the <b>Ron Forum</b> link.</p> <p><a href="#">Ron Forum</a></p>   |
| 95.  | <p>We will now add the Interviewers. Interviewers can be anyone on campus with an ID. Best practice is to always add the Supervisor of the position posted as the first member of the Interview Team so that they too are able to access the applications.</p> <p>Click the <b>Add Interviewers</b> link.</p> |


| Step | Action   |
|------|--|
| 96.  | In most cases you will need to use the Lookup Interviewer ID to search your interviewers by their names.<br><br>Click the <b>Look up Interviewer ID (Alt+5)</b> button to display the <b>Look up Interviewer ID</b> page.<br> |
| 97.  | Click the <b>Marcus Leelee</b> link.<br><a href="#">Marcus Leelee</a>  |
| 98.  | Next, we will designate the Manager/Supervisor. This is the person who will be the Supervisor of the employee(s) hired for this job.<br><br>Click the <b>Manager/Supervisor</b> link.  |
| 99.  | Click the <b>Look up EmplID (Alt+5)</b> button to display the <b>Look up EmplID</b> page.<br><br>You can use these fields to search by name.<br>  |
| 100. | Click the <b>Kyra Forum</b> link.<br><a href="#">Kyra Forum</a>  |

**Assignments**

| Recruiters  |              |   |
|---|--------------|---|
| Name  | Recruiter ID | Primary   |
| Joyce Ming100   | 010000017    | <input checked="" type="checkbox"/>  |
| <a href="#">+ Add Recruiters</a> <a href="#">+ Add Team</a> |              |   |

| Dept Authorizer  |            |   |
|--|------------|---|
| Name   | Manager ID | Primary   |
| Ron Forum  | 010006182  | <input checked="" type="checkbox"/>  |
| <a href="#">+ Add Dept Authorizer</a> <a href="#">+ Add Team</a> |            |   |

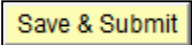
| Interviewers  |   |
|---|---|
| Name  | Interviewer ID  |
| Marc Leelee   | 010005437  |
| <a href="#">+ Add Interviewers</a> <a href="#">+ Add Team</a> |   |

| Manager/Supervisor  |   |
|---|---|
| Name  | EmplID  |
| Kyra Forum  | 010002011  |
| <a href="#">+ Manager/Supervisor</a> <a href="#">+ Add Team</a> |   |

---

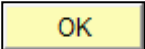
[Job Details](#)   [Job Postings](#)   Hiring Team

Save & Submit   Save as Draft   Cancel   Previous Step   Next Step

| Step | Action  |
|------|---|
| 101. | <p>The Job Posting page is displayed. After entering all assignments, click the <b>Save &amp; Submit</b> button at the bottom left of the page.</p>  |

I confirm that this job has been classified by the Compensation Unit. (21000,236)

If this job hasn't been classified by the Compensation Unit, click on Cancel and Save as a Draft and then you can Submit later.

| Step | Action  |
|------|---|
| 102. | <p>A confirmation page displays that requires you to confirm that the job has been classified by the Compensation Unit.</p> <p>If you have confirmed that the job has been classified by the Compensation Unit, then click the <b>OK</b> button to complete the submission. Otherwise, click the <b>Cancel</b> button, save the data you have enter as draft until you have obtained the required confirmation.</p> <p>In this example, click the <b>OK</b> button.</p>  |

| Name      | Manager ID | Primary                             |
|-----------|------------|-------------------------------------|
| Ron Forum | 010006182  | <input checked="" type="checkbox"/> |

[+ Add Dept Authorizer](#)   [+ Add Team](#)

| Interviewers |                |
|--------------|----------------|
| Name         | Interviewer ID |
| Marc Leelee  | 010005437      |

[+ Add Interviewers](#)   [+ Add Team](#)

| Manager/Supervisor |           |
|--------------------|-----------|
| Name               | EmpID     |
| Kyra Forum         | 010002011 |

[+ Manager/Supervisor](#)   [+ Add Team](#)

---

**Job Approvals**

**Department/Recruiter Grp Aprv**

**JobOpening: Pending**

Route to Department/Recruiter

Pending

010006182

Department Authorizer

→

Not Routed

Multiple Approvers

Recruiter Authorizer

→

Comments Text:

---

[Job Details](#)   [Job Postings](#)   Hiring Team   [Approvals](#)

| Step | Action  |
|------|---|
| 103. | <p>Notice the Approvals information appears displaying the next steps in the approval process.</p> <p>You can return at any time to the Approvals link to check the status of the job.</p> <p>An e-mail is automatically generated to the Department Authorizer informing them that there is a Job Opening needing their approval.</p> <p>Once approved, the first box header will change from blue to green and will display a check mark. The status will change from Pending to Approved.</p> <p>Notice the Job Opening ID has been assigned once the Job Opening was saved.</p> |
| 104. | <p><b>Congratulations!</b></p> <p>You have completed the topic.</p> <p><b>End of Procedure.</b></p>   |

# Position Management

## Section Overview

Position Management is used at UCB to track positions. By tracking positions in HCM, you can keep a history of all positions. This means that organizational reporting relationships can be tracked independent of the employees in positions.

Use **Position Management** (within the Organizational Development module) to view, create, and update positions.

## Section Objectives

- Viewing Position Data
- Adding a New Position
- Updating a Filled Position
- Updating Position Funding

## Viewing Position Data

To view a position, you use the same HCM component as you would to create or update a position. Navigate to the **Add/Update Position** link in Position Management.

**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

### Procedure

In this example, you will learn how to look up a position.

You will review the position for its job code, department, standard hours, head count, incumbents, and funding.



| Step | Action  |
|------|---|
| 1.   | <p>Begin by navigating to the <b>Add/Update Position Information</b> page.</p> <p>Click the <b>Organizational Development</b> link in the main menu.</p> <p></p> |

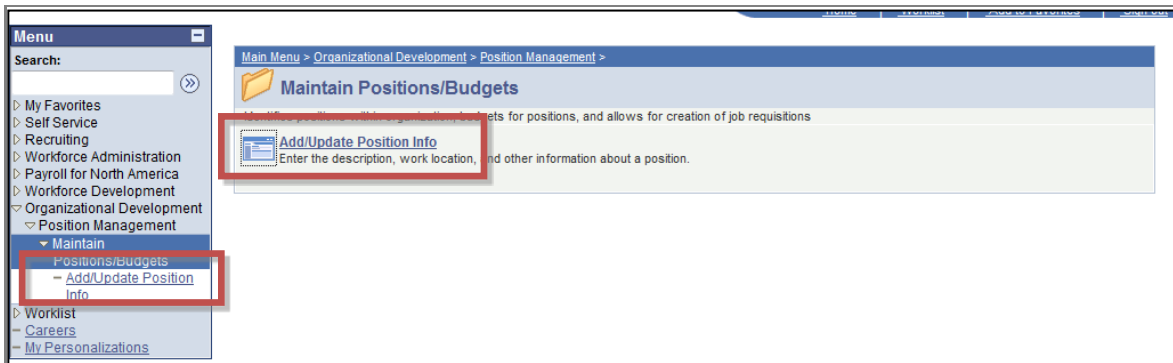




| Step | Action  |
|------|---|
| 2.   | Click the <b>Position Management</b> link in the menu.<br> |



| Step | Action   |
|------|--|
| 3.   | Click the <b>Maintain Positions/Budgets</b> link in the menu.<br> |



| Step | Action   |
|------|--|
| 4.   | Click the <b>Add/Update Position Info</b> link in either the main menu or the in the <b>Maintain Positions/ Budgets</b> folder on the right of the menu. |

### Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

---

**Position Number:** begins with ▾

**Description:** begins with ▾

**Position Status:** = ▾  ▾

**Business Unit:** begins with ▾  🔍

**Department:** begins with ▾  🔍

**Job Code:** begins with ▾  🔍

**Reports To Position Number:** begins with ▾

Include History  
  Correct History  
  Case Sensitive

 
   
[Basic Search](#)  

[Find an Existing Value](#) | [Add a New Value](#)

| Step | Action   |
|------|--|
| 5.   | <p>The <b>Add/Update Position Info</b> page displays. If you know the position number, enter it here and click the <b>Search</b> button.</p> <p>If you do not know the position number, use the search fields to find the appropriate position number.</p> <p>Click in the <b>Position Number</b> field.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px;"></div> |
| 6.   | In this example, enter "00000690" into the <b>Position Number</b> field.   |
| 7.   | <p>Click the <b>Search</b> button.</p> <div style="border: 1px solid black; display: inline-block; padding: 2px 10px; margin-left: 20px;">Search</div>   |

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

---

**Position Information** Find | View All | First 1 of 1 Last

Position Number: 00000690 + -  
 Headcount Status: Filled Current Head Count: 1 out of 1  
 \*Effective Date: 10/01/2012 \*Status: Active  
 \*Reason: NEW New Position Action Date: 10/01/2012  
 \*Position Status: Approved Status Date: 10/01/2012  Key Position

---

**Job Information**

\*Business Unit: UCBAL All Berkeley Campus Manager Level: All Other Positions  
 Job Code: 1200 Asso Professor-Acad Yr Full/Part Time: Full-Time  
 Reg/Temp: Reg Union Code: A1 Academic Senate  
 \*Regular Shift: N/A Short Title: Asso Profe [Detailed Position Description](#)  
 Title: Asso Professor-Acad Yr

---

**Work Location**

\*Reg Region: USA United States Company: UCB UC Berkeley  
 Department: PHYSI Physics \*LVL 7 Dept: 13050 PHYSI Gen Ops  
 Location: CAMPUS Main Campus-Berkeley Dot-Line:  
 Reports To: 00000566 Professor-Acad Yr Security Clearance:  
 Supervisor Lvl:

---

**Salary Plan Information**

Salary Admin Plan: A02 Grade: 22 Step:  
 Standard Hours: 40.00 Work Period: W Weekly FTE: 1.000000  
Mon Tue Wed Thu Fri Sat Sun

| Step | Action   |
|------|--|
| 8.   | The <b>Description</b> page for the position displays.<br><br>Notice the <b>Effective Date</b> for the position in the <b>Position Information</b> section. The effective date for a position must be on or before the effective date an incumbent is hired into the position. |
| 9.   | When updating a position, you enter a new line by click the <b>Add new row</b> button (plus sign) in the upper right of the <b>Position Information</b> section.<br><br>A <b>Reason Code</b> is required for a position update.  |
| 10.  | Some of the fields in the <b>Job Information</b> section populate from the job code entered in position.   |
| 11.  | The fields in the <b>Work Location</b> section were filled out when the position was created.  |
| 12.  | In the <b>Work Location</b> section, the <b>LVL 7 Dept</b> field is a required field. The LVL 7 Dept ID is often the same as the Dept ID field in the chartstring.   |

| Step | Action  |
|------|---|
| 13.  | <p>When this position was created the <b>Reports To</b> position number was entered. This is a recommended field, but not a required field.</p> <p><b>Reports To</b> will populate in an employee's <b>Job Data - Job Information</b> (WFA) page. <b>Supervisor ID</b> will also populate from the Reports To position data, only if the position is not vacant and there is one incumbent.</p> |
| 14.  | <p>Scroll down to view the <b>Salary Plan Information</b> section.</p> <p>Click the <b>Vertical</b> scrollbar.</p>  |

\*Effective Date: 10/01/2012   \*Status: Active

\*Reason: NEW  New Position Action Date: 10/01/2012

\*Position Status: Approved  Status Date: 10/01/2012    Key Position

**Job Information**

\*Business Unit: UCBAL  All Berkeley Campus  
 Job Code: 1200  Asso Professor-Acad Yr  
 Reg/Temp: Reg  
 \*Regular Shift: N/A   
 Title: Asso Professor-Acad Yr  
 Manager Level: All Other Positions  
 Full/Part Time: Full-Time  
 Union Code: A1  Academic Senate  
 Short Title: Asso Profe [Detailed Position Description](#)

**Work Location**

\*Reg Region: USA  United States  
 Department: PHYSI  Physics Company: UCB UC Berkeley  
 Location: CAMPUS  Main Campus-Berkeley \*LVL 7 Dept: 13050  PHYSI Gen Ops  
 Reports To: 00000566  Professor-Acad Yr Dot-Line:    
 Supervisor Lvl:   Security Clearance:

**Salary Plan Information**

Salary Admin Plan: A02 Grade: 22 Step:  
 Standard Hours: 40.00 Work Period: W  Weekly FTE: 1.000000  
 Mon Tue Wed Thu Fri Sat Sun  
 8.00 8.00 8.00 8.00 8.00

Updated on: 10/27/2012 8:54:37AM Updated By: CNV

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

| Step | Action   |
|------|--|
| 15.  | <p>In this example, the <b>Standard Hours</b> for the position are 40. When this position was created entering 40 hours automatically set the FTE to 1.00000 and the work days to 8 hours per day.</p> <p>FTE can also be changed on an incumbent's <b>Job Data - Job Information</b> (WFA) page, but cannot be greater than the Position FTE.</p> <p><b>Note:</b> The workday boxes are to assist in calculating Standard Hours/FTE only and do not pass to or affect Job Data, PPS, CalTime or any other system.</p> |
| 16.  | <p>Scroll up to view the tabs.</p> <p>Click the <b>Vertical</b> scrollbar.</p>   |
| 17.  | <p>Click the <b>Specific Information</b> tab to view head count.</p> <p><a href="#">Specific Information</a></p>   |

The screenshot shows a web interface with several tabs: Description, Specific Information (selected), Budget and Incumbents, and Position Funding. The 'Specific Information' tab is active, displaying the following details:

- Position Number: 00000690
- Headcount Status: Filled
- Current Head Count: 1 out of 1
- Effective Date: 10/01/2012
- Status: Active
- Max Head Count: 1 (highlighted with a red box)
- Incumbents section with checkboxes:
  - Update Incumbents
  - Include Salary Plan/Grade
  - Budgeted Position
  - Confidential Position
  - Job Sharing Permitted

At the bottom, there is a navigation bar with buttons: Save, Return to Search, Notify, Previous tab, Next tab, Add, Update/Display, Include History, and Correct History. Below the buttons are links: Description | Specific Information | Budget and Incumbents | Position Funding.

| Step | Action  |
|------|---|
| 18.  | <p>The <b>Max Head Count</b> field for the position is on the <b>Specific Information</b> page. This field indicates the maximum expected number of incumbents for this position.</p> |

| Step | Action  |
|------|---|
| 19.  | <p>Notice the <b>Headcount Status</b> field. If the number of incumbents exceeds the Max Headcount number, then the Headcount status will be "Overallocated".</p> <p>If the number of incumbents is less than the Max Headcount number, then the Headcount status will be "Partial Filled".</p> <p>If the number of incumbents is same as the Max Headcount number, then the Headcount status will be "Filled".</p> |
| 20.  | <p>The <b>Budget and Incumbents</b> page lists the employees who currently hold this position.</p> <p>Click the <b>Budget and Incumbents</b> <a href="#">Budget and Incumbents</a></p>  |

| Step | Action  |
|------|---|
| 21.  | All active incumbents for the position are listed in the <b>Current Incumbents</b> section.                                       |
| 22.  | From each incumbents listing, you can view and/or update their Job Data pages by clicking the corresponding <b>Job Data</b> link. |
| 23.  | Click the <b>Position Funding</b> tab.<br><a href="#">Position Funding</a>  |

Description
Specific Information
Budget and Incumbents
Position Funding

Position Number: 00000690  
 Headcount Status: Filled      Current Head Count: 1 out of 1

Budget Data
Find | View All    First 1 of 1 Last

Position: 00000690 Asso Professor-Acad Yr       Position

\*Effective Date: 10/01/2012    Eff Seq: 0    Status: Active    Date Entered: 10/01/2012

Funding Distribution
Customize | Find | View All    First 1 of 1 Last

| GL BU | Account | Fund  | DeptID | Program | Chartfield 1 | Chartfield 2 | Distrb % | ERNCD |
|-------|---------|-------|--------|---------|--------------|--------------|----------|-------|
| 1 1   | 50210   | 19900 | 13050  | 40      |              |              | 100.0000 | REG   |

Save Return to Search Notify Previous tab Next tab Add Update/Display Include History Correct Histo

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

| Step | Action   |
|------|--|
| 24.  | <p>On the <b>Position Funding</b> page, funding chartstrings have been entered in the <b>Funding Distribution</b> section.</p> <p>In this example, there is one chartstring with an Earnings Code of REG and a distribution of 100%. Additional chartstrings can be entered with the funding distributed among them. However, the total distribution percent on all chartstrings with REG Earnings Codes must equal 100%.</p> <p>Chartstrings with other Earnings Codes are also allowable, in accordance with business and system rules similar to those in WFA Job Data and Job Earnings Distribution.</p> |
| 25.  | <p><b>Congratulations!</b><br/>                     You have reviewed position information.<br/> <b>End of Procedure.</b></p>  |

## Adding a New Position

Use the **Add/Update Position** component in HCM to add a new position to a department. Required data include: Effective Date, Reason, Job Code, Department, Location, Level 7 Department ID, Standard hours (FTE) and the funding chartstring.

It is recommended that you also enter the **Reports To** position number. If you do not enter a value, upon saving the new position you will be advised to enter the **Reports To** position number, but you can save without doing so.

**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

### Procedure

In this topic, approval has been given to create an Applications Programmer 3 position. You will use the Add/Update Positions page to create the new position.

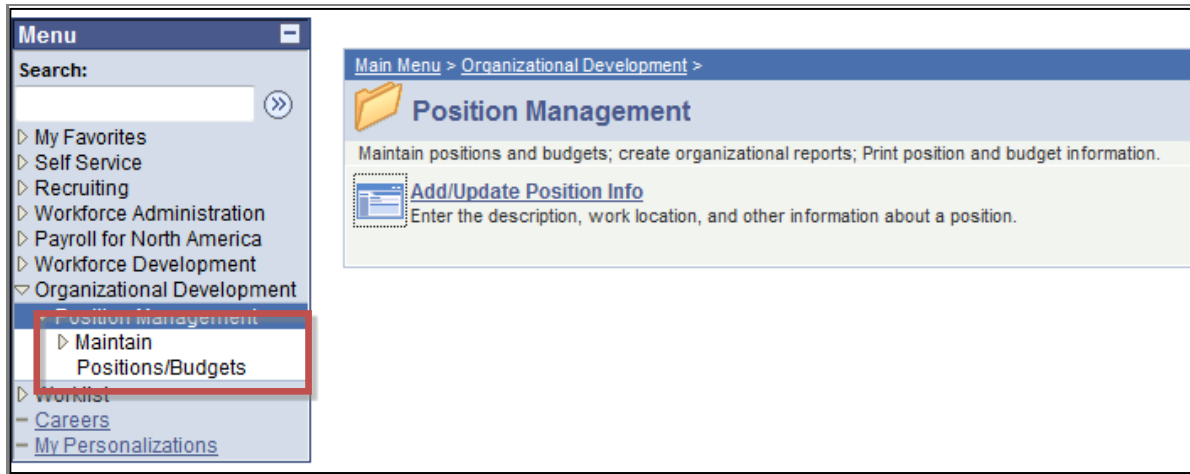


| Step | Action  |
|------|---|
| 1.   | <p>Begin navigating to the <b>Add/Update Position Info</b> page.</p> <p>Click the <b>Organizational Development</b> link in the main menu.</p> <p><b>Organizational Development</b></p> |





| Step | Action  |
|------|---|
| 2.   | Click the <b>Position Management</b> link in the menu.<br> |



| Step | Action   |
|------|--|
| 3.   | Click the <b>Maintain Positions/Budgets</b> link in the menu.<br> |



| Step | Action   |
|------|--|
| 4.   | Click the <b>Add/Update Position Info</b> link in the menu or in the <b>Maintain Position/Budgets</b> folder on the right of the menu. |

The screenshot shows the 'Add/Update Position Info' search form. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red box. The form contains several search criteria fields, each with a 'begins with' dropdown and an input field: Position Number, Description, Position Status, Business Unit, Department, Job Code, and Reports To Position Number. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

| Step | Action   |
|------|--|
| 5.   | Since you are creating a new position, click the <b>Add a New Value</b> tab. |

### Add/Update Position Info

Find an Existing Value
Add a New Value

Position Number:

Add

[Find an Existing Value](#) | [Add a New Value](#)

| Step | Action   |
|------|--|
| 6.   | <p>The default position number when adding a new position is '00000000'. The system will assign the position a new number once it is successfully saved.</p> <p>Click the <b>Add</b> button.</p> <div style="border: 2px solid red; display: inline-block; padding: 5px 15px; margin: 10px 0;">Add</div> |

Description
Specific Information
Budget and Incumbents
Position Funding

**Position Information**
Find | View All
First  Last

Position Number: 00000000 + -

Headcount Status: Current Head Count: 0 out of 0

\*Effective Date: 11/26/2012 BT \*Status: Active

\*Reason: NEW New Position Action Date: 11/26/2012

\*Position Status: Approved Status Date: 11/26/2012 BT  Key Position

**Job Information**

\*Business Unit: UCBAL All Berkeley Campus

Job Code: 4722C Assistant III Manager Level: All Other Positions

Reg/Temp: Reg Full/Part Time: Full-Time

\*Regular Shift: N/A Union Code: CX Clerical Unit

Title:  Short Title:  [Detailed Position Description](#)

**Work Location**

\*Reg Region: USA United States

Department: PHYSI Physics Company: UCB UC Berkeley

Location: CAMPUS Main Campus-Berkeley \*LVL 7 Dep: 13050 PHYSI Gen Ops

Reports To: 00000232 Information Systems Manager 2 Dot-Line:

Supervisor Lvl:  Security Clearance:

**Salary Plan Information**

Salary Admin Plan: CX Grade: STP Step:

Standard Hours:  Work Period: W Weekly FTE: 1.000000

Mon Tue Wed Thu Fri Sat Sun

| Step | Action   |
|------|--|
| 7.   | The <b>Description</b> page for Add/Update Position displays.<br><br>Note the <b>Effective Date</b> for the position in the <b>Position Information</b> section. The effective date for a position <b>must</b> be on or before the effective date of a person hired into the position.   |
| 8.   | Since a new position is being created in this example the default for the <b>Reason</b> field is "New". Leave as defaulted.  |
| 9.   | You must associate this position with an approved job code.<br><br>Click in the <b>Job Code</b> field.<br><input type="text"/>   |
| 10.  | In this example, enter " <b>4722C</b> " into the <b>Job Code</b> field.  |
| 11.  | Tab out to load the page with Job information associated with the code you entered.<br><br><b>Note:</b> As a best practice, tab out of each of your entries on this page. This action will help you verify the data you have entered.<br><br>Press <b>[Tab]</b> .  |
| 12.  | The fields in the <b>Job Information</b> section populate when the job code is entered in position.  |
| 13.  | The value in the <b>Full/Part Time</b> field defaults based on the FTE status in the <b>Salary Plan Information</b> section at the bottom of this page.<br><br>When first creating a position, Standard Hours defaults to 40.00 and FTE to 1.000000; therefore, the <b>Full/Part Time</b> value defaults to "Full-Time". The Full/Part Time value will change to Part Time when the Standard Hours entered decreases the FTE to less than 1.0. |
| 14.  | Next add the department for the position.<br><br>Click in the <b>Department</b> field.<br><input type="text"/>   |
| 15.  | In this example, enter the code for University Relations. Enter " <b>PHYSI</b> " into the <b>Department</b> field.   |
| 16.  | Press <b>[Tab]</b> .   |
| 17.  | Enter " <b>CAMPUS</b> " into the <b>Location</b> field.  |
| 18.  | Press <b>[Tab]</b> .   |

| Step | Action  |
|------|---|
| 19.  | Level 7 department is a required field. Enter the Level 7 department that has budgetary ownership of the position. To see a list of Level 7 entries, click the Lookup button.<br><br>For this department and position, enter "13050" into the <b>LVL 7 Dept</b> field.  |
| 20.  | Press <b>[Tab]</b> .  |
| 21.  | The <b>Reports To</b> field indicates the position number that this position will report to. This is a recommended field in the system, but not a required field. Your department may require this field for reporting purposes.<br><br>Upon hire, Reports To will populate in an employee's Job Data - Job Information (WFA) page. Supervisor ID will also populate from the Reports To position, if the position is not vacant and there is only one incumbent. |
| 22.  | Enter the position number, "00000232", into the <b>Reports To</b> field.  |
| 23.  | Press <b>[Tab]</b> .  |
| 24.  | Scroll down to enter the Standard Hours for the Position, which will calculate the Position FTE (full time equivalent).<br><br>Click the scrollbar.   |

**Work Location**

\*Reg Region: USA United States  
 Department: PHYSI Physics Company: UCB UC Berkeley  
 Location: CAMPUS Main Campus-Berkeley \*LVL 7 Dept: 13050 PHYSI Gen Ops  
 Reports To: 00000232 Information Systems Manager 2 Dot-Line:  
 Supervisor Lvl: Security Clearance:

**Salary Plan Information**

Salary Admin Plan: CX Grade: STP Step: Weekly  
 Standard Hours: 40.00 Work Period: W FTE: 1.000000

| Mon  | Tue  | Wed  | Thu  | Fri  | Sat | Sun |
|------|------|------|------|------|-----|-----|
| 8.00 | 8.00 | 8.00 | 8.00 | 8.00 |     |     |

| Step | Action   |
|------|--|
| 25.  | In this example, we are creating a part-time position at 30 hours a week.<br><br>Click in the <b>Standard Hours</b> field.<br> |
| 26.  | Enter "30" into the <b>Standard Hours</b> field.   |
| 27.  | Press <b>[Tab]</b> .   |

| Step | Action  |
|------|---|
| 28.  | <p>Notice that upon tabbing out of the <b>Standard Hours</b> field the hours updated and are distributed evenly throughout the work week. You can also manually distribute the hours across the work week to calculate total Standard Hours.</p> <p><b>Note:</b> The division of the hours across the work week is a calculation tool only and is not meant to reflect the actual schedule of the incumbent, nor does this information pass to Job Data, PPS, or CalTime.</p> |
| 29.  | Note that the <b>FTE</b> field has recalculated based upon standard hours divided by a 40 hour work week.   |
| 30.  | <p>Click the <b>Specific Information</b> link at the bottom of the page.</p> <p><a href="#">Specific Information</a></p>  |

| Step | Action   |
|------|--|
| 31.  | <p>The <b>Specific Information</b> page displays. In the Specific Information section, the <b>Max Head Count</b> field indicates the maximum expected number of incumbents for this position.</p> <p>The default is one. If this is correct, accept this value, otherwise change to the number of people expected to this position.</p> <p>In this example, we will only have one incumbent in this position, so we will leave the default value of one.</p> |
| 32.  | For all checkboxes on the right, accept all the defaulted values and make no changes for new positions.  |

| Step | Action                                      |
|------|---|
| 33.  | Click the <b>Budget and Incumbents</b> tab. |

| Step | Action  |
|------|---|
| 34.  | The <b>Budget and Incumbents</b> page displays. When creating a new position, this page will remain blank. Once employees are hired into this position, they will be listed in the <b>Current Incumbents</b> section. |
| 35.  | Click the <b>Position Funding</b> tab to enter the funding chartstring(s) for this position.  |

| Step | Action  |
|------|---|
| 36.  | <p>On the Position Funding page that displays, GL Business Unit and Account default. Begin entering the funding in the Funding Distribution section.</p> <p>In this example, enter "19900" into the Fund field.</p>   |
| 37.  | <p>Tabbing out of each field validates your entry.</p> <p>Press [Tab].</p>  |
| 38.  | <p>Enter the appropriate information into the DeptID field. Enter "13050".</p>  |
| 39.  | <p>Press [Tab].</p>   |
| 40.  | <p>Enter the appropriate information into the Program field. Enter "40".</p>  |
| 41.  | <p>Click in the Distrb % field.</p> <div data-bbox="402 699 526 747" style="border: 1px solid black; width: 76px; height: 23px; margin-left: 20px;"></div>  |
| 42.  | <p>Note that the total distribution percent on all REG distribution lines must equal 100%, even if the Position FTE is less than 1.0. In this example, the Position FTE is .75 but the total distribution percent equals 100%. If the funding is distributed between multiple chartstrings, the system will make the appropriate adjustment to the distribution percent when the funding is brought into Job Earnings Distribution, so that the total distribution percent matches the Job FTE (percent time) according to WFA business rules.</p> <p>In this case, the funding will be distributed 60/40 between two funding chartstrings.</p> <p>Enter "60" into the Distrb% field. .</p> |
| 43.  | <p>Press [Tab].</p>   |
| 44.  | <p>This funding is "Regular" pay.</p> <p>Enter "REG" into the ERNCD field</p>   |
| 45.  | <p>Add a line for the next chartstring.</p> <p>Click the Add a new row at row 1 (Alt+7) button.</p> <div data-bbox="402 1444 451 1486" style="border: 1px solid blue; padding: 2px; display: inline-block;">+</div>   |



[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

**Position Number:** 00000706  
**Headcount Status:** Current Head Count: 0 out of 1

**Budget Data** Find | View All First 1 of 1 Last

**Position:** 00000706  Position

**\*Effective Date:** 11/26/2012  **Eff Seq:** 0 **Status:** Active **Date Entered:** 11/26/2012

**Funding Distribution** Customize | Find | View All First 1-2 of 2 Last

| GL BU | Account | Fund  | DeptID | Program | Chartfield 1 | Chartfield 2 | Distrb % | ERNCD |
|-------|---------|-------|--------|---------|--------------|--------------|----------|-------|
| 1 1   | 51210   | 19900 | 13050  | 40      |              |              | 60.0000  | REG   |
| 2 1   | 51210   | 19900 | 13000  | 40      |              |              | 40.0000  | REG   |

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

| Step | Action  |
|------|---|
| 46.  | Click in the <b>Fund</b> field.<br><input type="text"/>   |
| 47.  | Enter the appropriate information into the <b>Fund</b> field. Enter " <b>19900</b> ".   |
| 48.  | Press <b>[Tab]</b> .  |
| 49.  | Enter the appropriate information into the <b>DeptID</b> field. Enter " <b>13000</b> ".   |
| 50.  | Press <b>[Tab]</b> .  |
| 51.  | Enter the appropriate information into the <b>Program</b> field. Enter " <b>40</b> ".   |
| 52.  | Enter the appropriate information into the <b>Distrb %</b> field. Enter " <b>40</b> ".  |
| 53.  | Press <b>[Tab]</b> .  |
| 54.  | Enter the appropriate information into the <b>ERNCD</b> field. Enter " <b>REG</b> ".  |
| 55.  | Once you have entered all required data, create the position by saving it.<br>Click the <b>Save</b> button.<br><input type="button" value="Save"/>  |
| 56.  | A successful save is indicated when the system assigns the position a position number. Make sure to note the position number for use when creating a TAM job posting or in the Job Data page (in Workforce Administration). |
| 57.  | <b>Congratulations!</b><br>You have learned how to create a position.<br><b>End of Procedure.</b>   |

## Updating a Filled Position

Position data updates including Department, Location, Standard Hours, and Reports To fields will automatically update job data in Workforce Administration by inserting a new, effective-dated row.

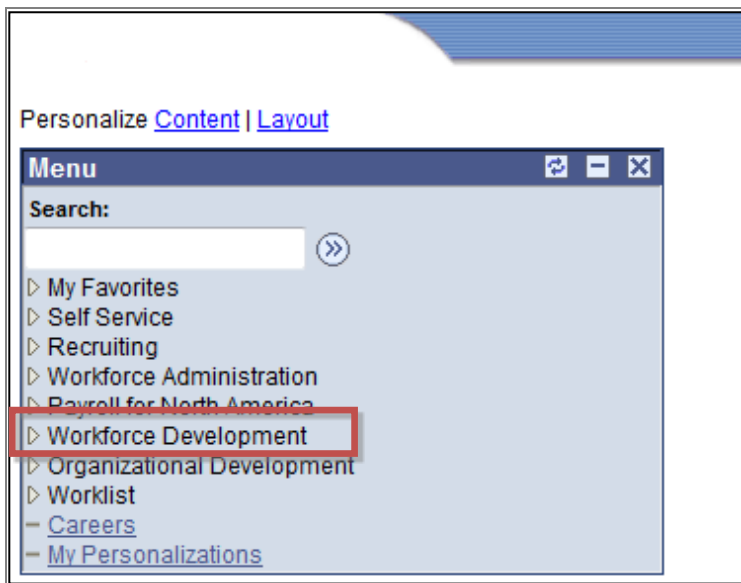
Changes to Job Code, FTE or Position Funding (chartstring changes) will NOT automatically update Job Data in Workforce Administration. You will need to add anew effective dated row in Workforce Administration for these changes.

Row deletions and corrections to position data also do not update Job Data automatically.

**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

### Procedure

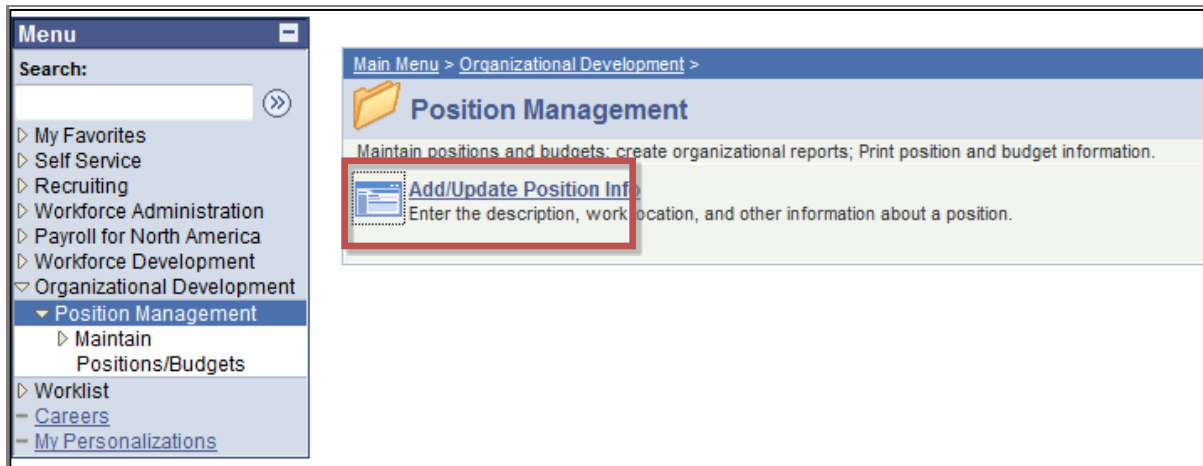
In this topic, you will make several updates to a position which has an incumbent. All changes made will automatically populate to each incumbent job data.



| Step | Action   |
|------|--|
| 1.   | <p>Begin by navigating to the <b>Add/Update Position Info</b> page.</p> <p>Click the <b>Organizational Development</b> link in the main menu.</p> <p><b>▷ Organizational Development</b></p> |



| Step | Action   |
|------|--|
| 2.   | Click the <b>Position Management</b> link in the main menu.<br> |



| Step | Action  |
|------|---|
| 3.   | Click the <b>Add/Update Position Info</b> link in the <b>Maintain Positions/Budgets</b> folder to the right of the main menu. |

### Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

**Position Number:** begins with ▾

**Description:** begins with ▾

**Position Status:** = ▾

**Business Unit:** begins with ▾  🔍

**Department:** begins with ▾  🔍

**Job Code:** begins with ▾  🔍

**Reports To Position Number:** begins with ▾

Include History    Correct History    Case Sensitive



Search
Clear
[Basic Search](#)
[Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)




| Step | Action   |
|------|--|
| 4.   | <p>It is recommended that if you know the position number, enter it on the <b>Add/Update Position Info</b> search page.</p> <p>In this example, enter "<b>00000630</b>" into the <b>Position Number</b> field.</p> |
| 5.   | <p>Click the <b>Search</b> button.</p> <div style="border: 1px solid black; background-color: #ffff00; padding: 5px; display: inline-block; margin-top: 5px;">Search</div>   |

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)









**Position Information** Find | View All | First 1 of 2 Last

Position Number: 00000630   
 Headcount Status: Filled Current Head Count: 1 out of 1  
 \*Effective Date: 11/26/2012 \*Status: Active  
 \*Reason: LOC  Location Action Date: 11/26/2012  
 \*Position Status: Approved Status Date: 10/01/2012  Key Position


**Job Information**



\*Business Unit: UCBAL  All Berkeley Campus  
 Job Code: 0442U  R&D Engineer 4 Manager Level: All Other Positions  
 Reg/Temp: Reg Full/Part Time: Full-Time  
 \*Regular Shift: N/A Union Code: 99  Non Represented  
 Title: R&D Engineer 4 Short Title: ENG\_R&D\_4 [Detailed Position Description](#)

**Work Location**

\*Reg Region: USA  United States  
 Department: PHYSI  Physics Company: UCB UC Berkeley  
 Location: CAMPUS  Main Campus-Berkeley \*LVL 7 Dept: 13050  PHYSI Gen Ops  
 Reports To: 00000528  Administrative Manager 1 Dot-Line:   
 Supervisor Lvl:  Security Clearance: 

**Salary Plan Information**

Salary Admin Plan: MSP Grade: 22 Step:  
 Standard Hours: 40.00 Work Period: W  Weekly FTE: 1.000000  
Mon Tue Wed Thu Fri Sat Sun

| Step | Action  |
|------|---|
| 6.   | In this example, we are updating the <b>Location</b> and <b>Reports To</b> fields for the position. Add a new line to begin making these changes.<br><br>Click the <b>Add a new row at row 1 (Alt+7)</b> button.<br> |
| 7.   | A reason code is required when creating or updating a position.<br><br>Click the <b>Look up Reason (Alt+5)</b> button.<br>   |

**Look Up Reason**

Action: POS

Reason Code: begins with

Description: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

**Search Results**

View All First 1-18 of 18 Last

| Reason Code         | Status | as of Effective Date | Description                            |
|---------------------|--------|----------------------|--|
| <a href="#">CNY</a> | Active |                      | <a href="#">Pos Mgmt Conversion</a>    |
| <a href="#">DEP</a> | Active |                      | <a href="#">Department</a>             |
| <a href="#">FTE</a> | Active |                      | <a href="#">Change in Budgeted FTE</a> |
| <a href="#">HCD</a> | Active |                      | <a href="#">Headcount Decrease</a>     |
| <a href="#">HCI</a> | Active |                      | <a href="#">Headcount Increase</a>     |
| <a href="#">HRS</a> | Active |                      | <a href="#">Standard Hours</a>         |
| <a href="#">INA</a> | Active |                      | <a href="#">Position Inactivated</a>   |
| <a href="#">IRC</a> | Active |                      | <a href="#">Job Reclassification</a>   |
| <a href="#">LOC</a> | Active |                      | <a href="#">Location</a>               |
| <a href="#">LVL</a> | Active |                      | <a href="#">Level 7 Dept ID</a>        |
| <a href="#">NEW</a> | Active |                      | <a href="#">New Position</a>           |
| <a href="#">OVR</a> | Active |                      | <a href="#">Override Position</a>      |
| <a href="#">PRO</a> | Active |                      | <a href="#">Academic Promotion</a>     |
| <a href="#">PRT</a> | Active |                      | <a href="#">Position Hold</a>          |
| <a href="#">REP</a> | Active |                      | <a href="#">Reports To</a>             |
| <a href="#">RMV</a> | Active |                      | <a href="#">Remove Position Hold</a>   |
| <a href="#">UPD</a> | Active |                      | <a href="#">Position Data Update</a>   |
| <a href="#">USE</a> | Active |                      | <a href="#">Use Position Data</a>      |

| Step | Action   |
|------|--|
| 8.   | In this example, select "LOC".<br><br>Click the <b>LOC</b> link.<br><a href="#">LOC</a>                                      |
| 9.   | This position is moving onto the main campus.<br><br>Enter " <b>CAMPUS</b> " into the <b>Location</b> field.                 |
| 10.  | Press <b>[Tab]</b> .   |
| 11.  | Enter the new position number to which this position will report into the <b>Reports To</b> field. Enter " <b>0000528</b> ". |
| 12.  | Press <b>[Tab]</b> .   |
| 13.  | Scroll down to update the Salary Plan Information.<br><br>Click the <b>Vertical</b> scrollbar.                               |

Supervisor Lvl:  Security Clearance:

**Salary Plan Information**

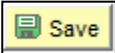
Salary Admin Plan: MSP Grade: 22 Step:

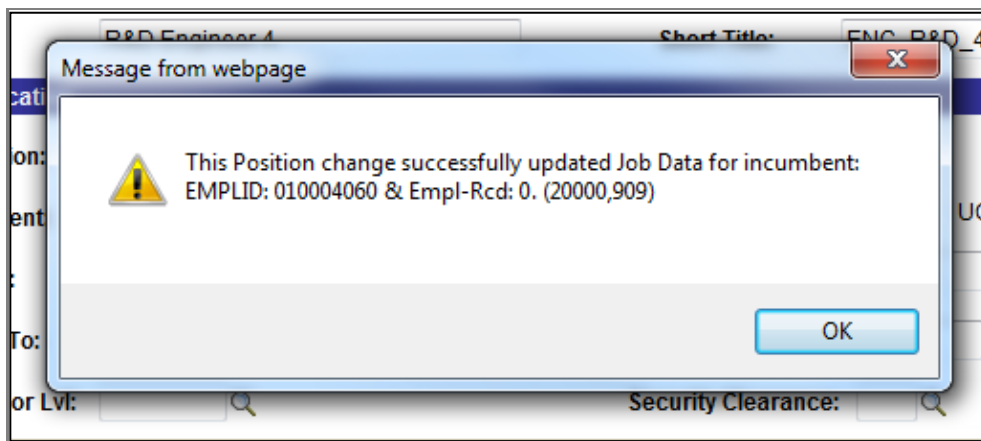
Standard Hours:  Work Period: W Weekly FTE:

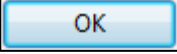
| Mon  | Tue  | Wed  | Thu  | Fri  | Sat | Sun |
|------|------|------|------|------|-----|-----|
| 6.00 | 6.00 | 6.00 | 6.00 | 6.00 |     |     |

Updated on: 11/26/2012 4:57:14PM Updated By: 019999998 Joyce Ming100

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

| Step | Action  |
|------|---|
| 14.  | Enter the desired information into the <b>Standard Hours</b> field. Enter "30".   |
| 15.  | Press <b>[Tab]</b> .  |
| 16.  | The new standard hours are distributed evenly throughout the week.<br><br>The work week hours can be changed to help calculate the FTE.<br><br><b>Note:</b> The hours entered are for calculation purposes only and do not pass to or affect Job Data, PPS, CalTime or any other system.. |
| 17.  | The position is automatically adjusted to <b>Part-Time</b> when less than 40 hours are entered.<br><br>Also, note that the <b>FTE</b> for the position has also updated.  |
| 18.  | Complete the changes to position by saving.<br><br>Click the <b>Save</b> button.<br>   |



| Step | Action  |
|------|---|
| 19.  | <p>A message box displays indicating that these changes will automatically update the Job Data for all incumbents in this position. No manual update is required in Workforce Administration.</p> <p>Click the <b>OK</b> button.</p>   |
| 20.  | <p>To verify that the changes took place in the job data pages of the incumbent(s), you can click on the <b>Budget and Incumbents</b> tab and click on the incumbent's <b>Job Data</b> link.</p> <p>You can also navigate to the Job Data pages by clicking <b>Workforce Administration</b> in the main menu and then the <b>Job Data</b> link. Search for the incumbents by position number.</p> |
| 21.  | <p><b>Congratulations!</b></p> <p>You have made the following changes to a position, all of which will automatically update to the incumbent's job data: Department, Location, Reports To, and Standard Hours.</p> <p><b>End of Procedure.</b></p>  |



## Updating Position Funding

Updates to Position Funding do not automatically flow to Workforce Administration job data of the incumbent. After updating the position funding data with a new line and saving the funding update, if you want to update the incumbent's earnings distribution(s) as well you will need to manually enter the update in the incumbent's job data in Workforce Administration. To do this, in the Add/Update Position - Incumbents and Funding page, click the Job Data link for the incumbent. Insert a row in the incumbent's Job Data page and either enter an earnings distribution change, or reset (aka "jiggle") the Position Number to pull over all current Position and funding data. (Note that with the reset method you will need to re-enter the incumbent's compensation data before saving.)

In general, for short-term funding changes to filled positions that may not affect the Position budgeting, it is not usually necessary to update Position funding. Earnings distribution updates can be made directly in Workforce Administration-Job Data. HCM users may be asked to update Position funding when the position becomes vacant or when the department is preparing for a periodic upload of data from HCM to CalPlanning.

**Depending on your security access, you may have fewer menu choices than are displayed in this topic.**

### Procedure

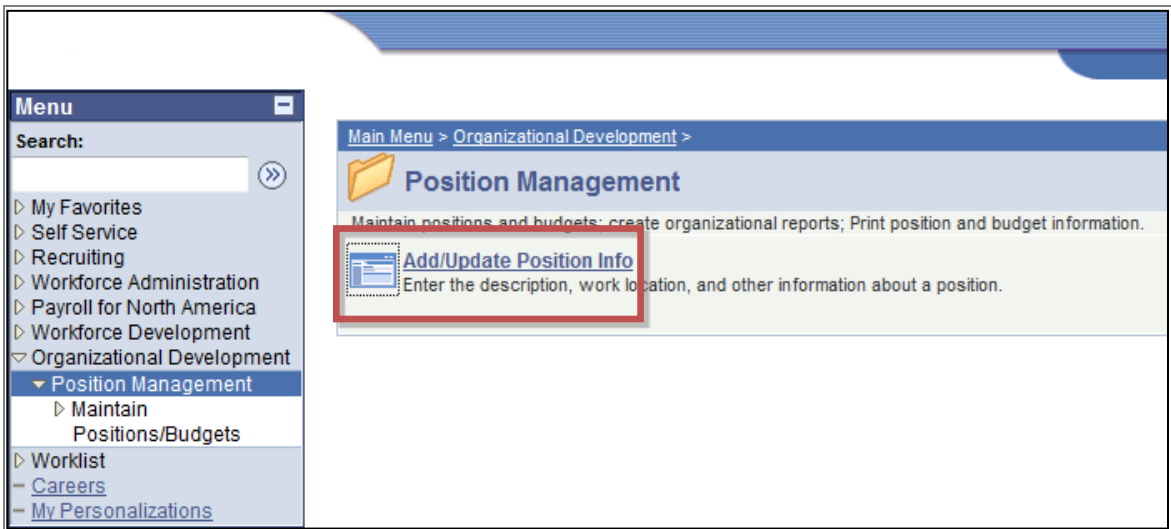
In this topic, you will learn how to update a position's funding.



| Step | Action   |
|------|--|
| 1.   | Begin by navigating to the <b>Add/Update Position Info</b> page.<br><br>Click the <b>Organizational Development</b> link in the main menu.<br><a href="#">▶ Organizational Development</a> |



| Step | Action  |
|------|---|
| 2.   | Click the <b>Position Management</b> link in the menu.<br><a href="#">▶ Position Management</a> |



| Step | Action  |
|------|---|
| 3.   | Click the <b>Add/Update Position Info</b> link in the <b>Maintain Positions/Budgets</b> section to the right of the menu.<br><a href="#">Add/Update Position Info</a> |

**Add/Update Position Info**  
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

Position Number: begins with

Description: begins with

Position Status: =

Business Unit: begins with

Department: begins with

Job Code: begins with

Reports To Position Number: begins with

Include History  Correct History  Case Sensitive

**Search** Clear [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

| Step | Action  |
|------|---|
| 4.   | If you know the position number, enter it on the <b>Add/Update Position Info</b> search page.<br><br>In this example, enter "00000631" into the <b>Position Number</b> field. |
| 5.   | Click the <b>Search</b> button.<br><br>   |

[New Window](#) | [Help](#) | [Customize Page](#)

Description | **Specific Information** | Budget and Incumbents | **Position Funding**

**Position Information** Find | View All First 1 of 1 Last

Position Number: 00000631

Headcount Status: Filled Current Head Count: 1 out of 1

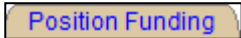
\*Effective Date: 10/01/2012 \*Status: Active


\*Reason: NEW New Position Action Date: 10/01/2012



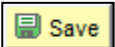
\*Position Status: Approved Status Date: 10/01/2012  Key Position

**Job Information**

\*Business Unit: LICBAL All Berkeley Campus

| Step | Action  |
|------|---|
| 6.   | <p>Since we are updating the funding for this position, go directly to the <b>Position Funding</b> page to enter the funding chartstring(s) for this position.</p> <p>Do NOT add a row to Position Data if you are only updating position funding.</p> <p>Click the <b>Position Funding</b> tab.</p> <p></p> |

| Step | Action   |
|------|--|
| 7.   | <p>Click the <b>Add a new row at row 1 (Alt+7)</b> button in the <b>Budget Data</b> section.</p> <p><b>Note:</b> There are two <b>Add a new row</b> buttons on this page. To update funding, be sure to add a row in the <b>Budget Data</b> section, not the <b>Funding Distribution</b> section.</p> <p></p> |
| 8.   | This action adds a new <b>Budget Data</b> line. Notice that the Funding Distribution line data has defaulted.  |
| 9.   | Be sure to change or verify the Effective Date.  |

| Step | Action   |
|------|--|
| 10.  | <p>In this example, you will add another distribution chartstring. The funding will be split between the two lines, each at 50 percent.</p> <p>Indicate that 50% of funding will come from this chartstring. Enter "50" into the <b>Distrb %</b> field.</p>  |
| 11.  | <p>On your keyboard, press <b>[Tab]</b>.</p>   |
| 12.  | <p>Now add the new line for the new chartstring.</p> <p>Click the <b>Add a new row at row 1 (Alt+7)</b> button.</p>   |
| 13.  | <p>Enter the appropriate information into the <b>Fund</b> field. Enter "1990".</p>   |
| 14.  | <p>Press <b>[Tab]</b>.</p>   |
| 15.  | <p>Enter the appropriate information into the <b>DeptID</b> field. Enter "13051".</p>  |
| 16.  | <p>Press <b>[Tab]</b>.</p>   |
| 17.  | <p>Enter the appropriate information into the <b>Program</b> field. Enter "40".</p>  |
| 18.  | <p>Press <b>[Tab]</b>.</p>   |
| 19.  | <p>The remaining percentage will be distributed to this chartstring.</p> <p>Click in the <b>Distrb %</b> field.</p>   |
| 20.  | <p>Enter the appropriate information into the <b>Distrb %</b> field. Enter "50".</p>   |
| 21.  | <p>Press <b>[Tab]</b>.</p>   |
| 22.  | <p>Enter the appropriate information into the <b>ERNCD</b> field. Enter "REG".</p>   |
| 23.  | <p>Press <b>[Tab]</b>.</p>   |
| 24.  | <p>Click the <b>Save</b> button.</p>    |
| 25.  | <p>Now that you have updated and saved your changes to this position, you will update the incumbent's funding on the Job Data pages in Workforce Administration.</p> <p><b>Note:</b> You will only take this action for those incumbents who require their funding information to be updated to match the position.</p> <p>Click the <b>Budget and Incumbents</b> tab.</p> |

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

**Position Number:** 00000631  
**Headcount Status:** Filled **Current Head Count:** 1 out of 1

**Current Budget**  
**Head Count:** 0 **Current Budget FTE:** 0.00 **Amount:** 0.000

**Current Incumbents** Customize | Find | First 1 of 1 Last

| EmplID    | Empl Rcd# | Full/Part | Std Hrs/Wk | Name           | Job Data                 |
|-----------|-----------|-----------|------------|----------------|--------------------------|
| 010004077 | 0         | Full      | 40.00      | Eric Thomas206 | <a href="#">Job Data</a> |

[Save](#) | [Return to Search](#) | [Notify](#) | [Previous tab](#) | [Next tab](#) | [Add](#) | [Update/Display](#) | [Include History](#)

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Funding](#)

| Step | Action   |
|------|--|
| 26.  | Click the <b>Job Data</b> link to access this employee's <b>Job Data</b> page.<br><br>Note: You can also navigate by following the <b>Workforce Administration &gt; Job Data</b> path.<br><a href="#">Job Data</a> |

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Eric Thomas206 EMP ID: 010004077 Empl Rcd #: 0

**Work Location** Find First 1 of 2 Last

**HR Status:** Active **Payroll Status:** Active

**\*Effective Date:** 10/03/2012 **Sequence:** 0

**\*Action:** Earnings Distribution Change **\*Reason:** Earnings Code Change

**Last Start Date:** 02/01/1995 **Termination Date:** Current

**Position Number:** 00000631 R&D Engineer 4 **Position Entry Date:** 05/01/2009


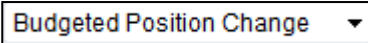

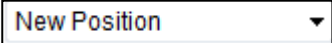

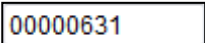
[Override Position Data](#)  [Position Management Record](#)

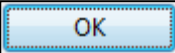
**Regulatory Region:** USA United States  
**Company:** UCB UC Berkeley  
**Control Unit:** COLLS **Department Entry Date:** 02/01/1995  
**Department:** PHYSI Physics  
**Location:** CAMPUS Main Campus-Berkeley  
**Date Created:** 11/26/2012  
**Updated by:** MSUPD 0985 on 10/29/2012 9:12:00AM

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| Step | Action   |
|------|--|
| 27.  | Click the <b>Add a new row at row 1 (Alt+7)</b> button.<br>   |
| 28.  | Enter the desired information into the <b>Effective Date</b> field. Enter " <b>10/03/2012</b> ".   |
| 29.  | Click in the <b>Action</b> field.<br>   |
| 30.  | Click the <b>Earnings Distribution Change</b> list item.<br>  |
| 31.  | Click in the <b>Reason</b> field.<br>   |
| 32.  | Click the <b>Reason</b> list item.<br>  |
| 33.  | <p>You now have two choices to update the data, either reset (a.k.a. "jiggle") the Position number to refresh the data and then review/update fields to ensure they are correct (jiggling will cause salary or other fields to be refreshed/blanked out) -- or go to the Earnings Distribution page and manually enter the new chartstring.</p> <p>In this example, we will try "jiggling" the position number.</p> <p>Refreshing the job data with the updated funding information will require a "jiggle". "Jiggle" is a term used to indicate a 4 step procedure required to update the Job code.</p> <p>The "Jiggle" steps are:</p> <ol style="list-style-type: none"> <li>1. Delete the position number.</li> <li>2. Tab out of the Position Number field to clear the position data from the line.</li> <li>3. Re-enter the position number.</li> <li>4. Tab out of the Position Number field to refresh the position data into the line.</li> </ol> |
| 34.  | <p>Begin the "jiggle" procedure.</p> <p>Click in the <b>Position Number</b> field.</p>    |
| 35.  | Press <b>[Delete]</b> to remove the position number data from the Position Number field.   |
| 36.  | Press the <b>[Tab]</b> key to clear the position data from the job data record.  |

| Step | Action   |
|------|--|
| 37.  | <p>Since positions are required by the system, you will receive a message indicating this requirement.</p> <p>Click the <b>OK</b> button to close the message box.</p>  |

| Step | Action  |
|------|---|
| 38.  | Reenter the <b>Position Number</b> , "0000631" into the <b>Position Number</b> field. |
| 39.  | Press the <b>[Tab]</b> key to refresh the job data from the updated position.         |



| Step | Action   |
|------|--|
| 40.  | Click the <b>Compensation</b> tab.   |
| 41.  | Enter the desired information into the <b>Comp Rate</b> field. Enter " <b>6893.50</b> ". |
| 42.  | Press <b>[Tab]</b> .   |

Eric Thomas206 EMP ID: 010004077 Empl Rcd #: 0

**Compensation** Find First 1 of 2 Last

Effective Date: 11/26/2012 Effective Sequence: 0 Job Category: Principal  
 Action: Earnings Distribution Change Reason: Earnings Code Change Current

|   |              |                 |         |                     |   |           |
|---|--------------|-----------------|---------|---------------------|---|-----------|
| Employee Job Grade                                | 25           | Job Step        |         | Frequency:          | M | Monthly   |
| Compensation Rate:                                | 6,893.500000 |                 |         |                     |   |           |
| Comparative Information                           |              |                 |         |                     |   |           |
| Change Amount:                                    | 0.000000     |                 | Monthly |                     |   |           |
| Change Percent:                                   | 0.000        |                 |         |                     |   |           |
| Pay Rates   |              |                 |         |                     |   |           |
| Annual  | 82,722.000   | Daily           |         |                     |   | 318.160   |
| Monthly   | 6,893.500    | Hourly          |         |                     |   | 39.620000 |
| Pay Components Customize   Find First 1 of 1 Last |              |                 |         |                     |   |           |
| *Rate Code  |              | Off/Above Scale |         | Comp Rate Frequency |   |           |
| 1 MONTH   |              |                 |         | 6,893.500000        | M |           |

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| Step | Action   |
|------|--|
| 43.  | <p>You may need to review information on the <b>Salary Plan</b> or <b>Compensation</b> pages to ensure salary is correctly displaying since the position jiggle has reset the job code as well.</p> <p>Make sure to go to the <b>Earnings Distribution</b> page to verify that the Begin Date matches the Effective Date of the row that you added and to ensure the funding for this employee has refreshed with the new funding data from the position.</p> <p>Click the <b>Earnings Distribution</b> link.<br/> <a href="#">Earnings Distribution</a></p> |

FTE 1.000000

**Job Earnings Distribution** Find First 1-2 of 2 Last

Begin Date: 11/26/2012  
 End Date:   
 \*Earn Code: REG Regular  
 Distrb %: 50.0000  
 Pay Rate/Amount: 6893.500000  
 Budgeted FTE:   
 Work Study Program:   
 Speed Type: 00000008  
 GL BU: 1

**Earnings Chartfields**

Account: 51210  
 Fund: 19900 GENERAL FUNDS  
 Dept: 13050 PHYSI Gen Ops  
 Program: 40 Instruction & Dept Research  
 Chartfield 1:   
 Chartfield 2:   
 updated by: on

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Begin Date: 11/26/2012  
 End Date:   
 \*Earn Code: REG Regular  
 Distrb %: 50.0000  
 Pay Rate/Amount: 6893.500000  
 Budgeted FTE:   
 Work Study Program:   
 Speed Type: 00000022  
 GL BU: 1

**Earnings Chartfields**

Account: 51210  
 Fund: 19900 GENERAL FUNDS  
 Dept: 13051 PGECE Ctr for IsotopeGeochem  
 Program: 40 Instruction & Dept Research  
 Chartfield 1:   
 Chartfield 2:   
 updated by: on

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| Step | Action   |
|------|--|
| 44.  | Click the <b>Vertical</b> scrollbar to view all the funding information.   |
| 45.  | In this example, the update has created a new <b>Job Earnings Distribution</b> line and updated this line with the two chartstrings you created in the position. Note that the system adjusts the distribution percent to equal the percent time, as required by Job Data and Job Earnings Distribution save-edit rules. |
| 46.  | Verify or update Budgeted FTE, if needed.<br><br>In this example, the position is not budgeted in PRT, so leave blank.   |
| 47.  | Click the <b>Save</b> button to save the update to the employee's job data.<br><br><input type="button" value="OK"/>   |
| 48.  | <b>Congratulations!</b><br>You have learned how to update position and incumbent funding.<br><b>End of Procedure.</b>  |