Initiating a ServiceLink New Position Request

Navigation: https://ucrsupport.service-now.com/ucr_portal/

ServiceLink Form – New Position

Position Information

Effective Status Definitions

Updated 9/25/2018
Position Status Definitions

- **Active - Proposed**: Used for vacant positions where the details of the position may change before hiring or transferring an incumbent in the position (e.g., during open rank recruitment).

- **Active - Frozen**: Used for vacant positions that have had their funding and/or budget revoked (e.g., during a layoff). Position data is maintained for reporting purposes.

Job Information

- The Position Job Code can be entered manually or searched for by Job Code, Job Description, FLSA Status, Bargaining Unit, and Bargaining Unit Description.

- **FTE**: FTE on a position differs from the job FTE. It should reflect the position expectations rather than an incumbent’s actual FTE.

- Once the Job Code is selected, the Job Description, FLSA status, Union Code, and Union Description will default automatically. The FLSA can be changed, but requires an additional level of approval.

FLSA Override

- If the FLSA on the position needs to be changed, select the appropriate FLSA from the FLSA Override dropdown.

- When overriding the FLSA, attachments become a required field. You will need to provide supporting documentation for the change as well as a brief comment explaining the circumstances.

- When overriding an FLSA, include a reminder in the comments for the SSC Fulfiller to also update the pay frequency to biweekly vs. monthly to avoid any negative downstream impacts.

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FLSA Override (continued)

**Work Information**

In the new TARS system, Supervisors are maintained use the “Reports To” field in UCPath’s Position Data Management feature, NOT in Enterprise Directory.

This includes students.

The change allows TARS to identify a supervisor for each job.

If an employee’s “Reports To” information is incorrect, needs to be changed, or the supervisor is not receiving the correct timesheets in TARS, you may need request that an update to the “Reports To” field in Position Management be made.

Updates to the “Reports To” field are made using the ServiceLink Update Position form.

Updated 9/25/2018
Salary Plan Information

Specific Information

Max Head Count

A Position with a Max Head of One is a single headcount position, which means one position for one incumbent. There may be times, however, when it is more convenient to have one position for several incumbents. Instead of needing to manage several positions, as is the case with single-headcount positions, only one position needs to be managed with a Multiple-Headcount Position.

A Max Head Count of 5 means that five incumbents can be onboarded into one position. While reducing the need to manage several positions, there are rules that need to be met to create a multi-headcount position. All 5 incumbents in this position CANNOT be Career Employees and will need to have the same:

- Position Data (including reports to, job code, FAU, etc.)
- If position data (such as reports to) needs to be changed in UCPath, the delivered Position Management screen (not PayPath) must be used.
Position Pool ID

At UCR, Position Pools are used exclusively for Work Study positions. When requesting a new position for a Work Study, select the appropriate Position Pool ID. These can be searched by Description, which corresponds to their Work Study Program. If a Work Study position is multi-headcount, all incumbents MUST belong to the same Position Pool.

Employee Relations Code

Confidential [titles], per the Higher Education Employer-Employee Relations Act (HEERA) is defined as:

- "An employee required to develop or present management positions for collective bargaining, and/or an employee whose duties normally require access to information which contributes significantly to the development of such management positions."

Refer to [http://hr.ucr.edu/erscocodechart.html](http://hr.ucr.edu/erscocodechart.html) for additional policy-related information.

When selecting a Confidential Employee Relations Code, attachments become a required field. You will need to provide supporting documentation explaining the circumstances.

When a Confidential Employee Relations Code is chosen, an extra level of approval becomes required. This additional level of approval is represented by the "Waiting for Approval" Stage in the ServiceLink Initiator View.

In the "Catalog Task" at the bottom of the RITM, you will see a list of four Central HR approvers. Only one of these needs to review and approve the request. Currently, Heidi Rhodes is reviewing and approving ALL Confidential Employee Relations Code requests. Once approved, the New Position request will follow the same workflow as a request without this extra layer of approval; it will be sent to the FAU reviewer to ensure the FAU entered by the Initiator is correct.
Special Training Code

Special Training Codes are used to track certain requirements to hold a position. If none listed are required, select "Not Applicable." Entering a "Special Training Code" on a Position is NOT mandatory, nor is it appropriate for all employees. It is mainly used by a department who has an employee performing supervisory duties who is NOT is a supervisory title code. For example, a Bank Assistant who supervises student employees or an employee acting as an interim supervisor during a recruitment.

There is a "Special Training Code" that is strictly used to require or exempt someone from the supervisory version of the UC Sexual Violence and Sexual Harassment Prevention Training (Sexual Harassment Prevention and Exempt – Sexual Harassment not Required).

Other "Special Training Code" include requiring or exempting an employee from Responsible Conduct of Research (RCR) Training and National Science Foundation (NSF) Training.

You can select from (more than one can be selected):
- Not Applicable
- Exclude NSF, RCR, and SHP
- Exempt – Sexual Harassment not Required
- Include NSF, RCR
- Include NSF and RCR, Exempt SHP
- NSF and SHP Required
- Sexual Harassment Prevention (SHP)

Security Clearance

Security Clearance codes are used to track certain requirements to hold a position. If none listed are required, select "Not Applicable."

You can select from (more than one can be selected):
- Not Applicable
- Previous Employer’s Reference Check
- Criminal Convictions Record
- Financial Disclosure
- Security Clearance
- Police Officer Background Check
- Professional License or Certificate Verification
- Educational Degree Check
- DMV Driving Record Check
- E-Verify
- NRC Background Check - used to identify Individuals with Unsecured Access to Radioactive Material in Quantities of Concern
- CANRA Acknowledgement
- I9 Completion
- CLERY Act
- Form 700 – Statement of Economic Interests

Comments & FAU

Please include the FAU distribution for this position as supplied by your Financial Analyst.

FAU 00404040G22222222=33

In addition to information not included elsewhere in the form, the ServiceLink Initiator should enter the New Position FAU in the comments section. The FAU will be reviewed by the "FAU Reviewer" via the Fulfiller View of ServiceLink by a designated Financial Analyst or Manager.
Attachment

ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This “Stage” icon allows you to track a transaction’s progress through fulfillment. Three green checks mean that all tasks are closed and the submitted transaction is complete.

Clicking on the RITM (from previous screen) will tell you the stage of the ticket as well as who is working on your request.

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to “Closed Complete.” This means that your request has been successfully completed and transacted in UCPATH.
The first task generated from a New Position request is the Review FAU Information task. If you look at the RTIM of the request and scroll down to the bottom of the page, you will see a section titled "Catalog Tasks."

The Review FAU Information task is assigned to Assignment Group "Accountability Structure Position Management FAU Approver." If you want the task to automatically be assigned to a person (under the "Assigned To" field), ask your Dept. SAA. When auto-assigned, you will receive an email notification every time a new Review FAU Information task is assigned to you.

When receiving a Review FAU Information task, the FAU Reviewer should first pull up the corresponding SCTASK. The FAU entered by the ServiceLink Initiator is located in the Comments field of the form. This field is NOT editable.

If the FAU Information in the comments section is correct, you can enter "Approved" or other comments to that effect in "Work Notes." If the FAU is NOT correct, enter the correct FAU in the work notes. DO NOT forget to hit the "Post" button.

After closing the task, you will see a note in the Activity Stream notifying everyone that you closed the task. This information will also appear under the SCTASK State at the top of the form.

After entering comments in the Work Notes section, ensure that an entry was generated with the comments you entered. If you do not click on the "Post" button, the note will not be posted!
SSC Fulfiller

All tasks relating to a RTM can be viewed at the RTM level, in the "Catalog Task," located at the very bottom of every RTM form.

Once the FAU Information has been reviewed by a financial analyst and the task is closed, the New Position request is sent to the SSC as a "Create a New Position." The task is assigned to the Assignment Group SSC Position Management Shared Services Center. The task can also be assigned to an individual.

SSC Fulfiller – Create a New Position

Action can be taken on the task at the SCTASK level. Once the SSC Fulfiller enters the information for the New Position in UCPPath and the request is approved by the AWE approver, a New Position Number is automatically generated.

It is the responsibility of the SSC Position Data Management Fulfiller to enter the New Position Number at the SCTASK level once the new position number is generated by UCPPath. Comments can be added to the Work Notes as necessary to keep the Initiator and Accountability Structure Fulfiller in the loop.

Once the task is closed, the State of the tasks at the SCTASK level will show "Closed Complete." The New Position Number entered by the SSC Fulfiller at the SCTASK level will also appear in the same field at the RTM level, as shown here.
Once the "Create a New Position" task is closed, a new task is generated for the SSC Position Data Management Fulfiller, the "FAU Distribution for New Position" task.

After entering the FAU Distribution for the New Position in UCPath, the SSC Position Data Management Fulfiller will close the task by clicking on the "Close Task" button.

A New Position Request has three tasks assigned to the RTM. Once all three tasks have been closed, the RTM closes automatically and the initiator is notified via email.

Once the New Position Request is complete (all tasks are closed), the Requested Item page will show that the Stage is now "Completed."

The New Position Number displays at the bottom of the New Position Request RTM. It is pulled directly from the corresponding SCTASK.