

| Initiating a ServiceLink New Position Request |

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

ServiceLink Form – New Position

Human Resources & Academic Personnel
 Welcome to the HR and AP ServiceLink request page. These requests will route to your Shared Service provider for fulfillment in UCPath

- Onboarding - New Hire**: Hire a new UC employee/contingent worker
- Onboarding - Rehire**: Rehire an employee/contingent worker previously employed at a UC Location
- Onboarding - Transfer**: Transfer in a current employee from another UC location or within UCR
- Onboarding - Concurrent**: Add a job to an existing employee
- Onboarding - Person of Interest**: Add a non-employee who needs access to UC systems or facilities
- Offboarding**: Terminate, transfer out, or retire an employee
- New Position**: Create a new position
- Update Position**: Update an existing position

The same ServiceLink Form – New Position is used to create new Staff and AP positions (including student employees).

Position Information

Position Information

Effective Date: 03/01/18

Position Status: Approved

Job Information

The Effective Date on a Position should NEVER be the same as the Position incumbent's Job Effective Date. Having both dates be the same can have major downstream impacts. In general, the Position Effective Date should be the date on which the request is made. Once the position is in UCPath, recruitment for the Position can begin. The Position incumbent would naturally have a Job Effective Date that is chronologically later than the Position Effective Date.



Positions should only be created in the Approved or Proposed status, but never in the Frozen status. See next two slides for additional information on Effective Status and Position Status.

Effective Status Definitions

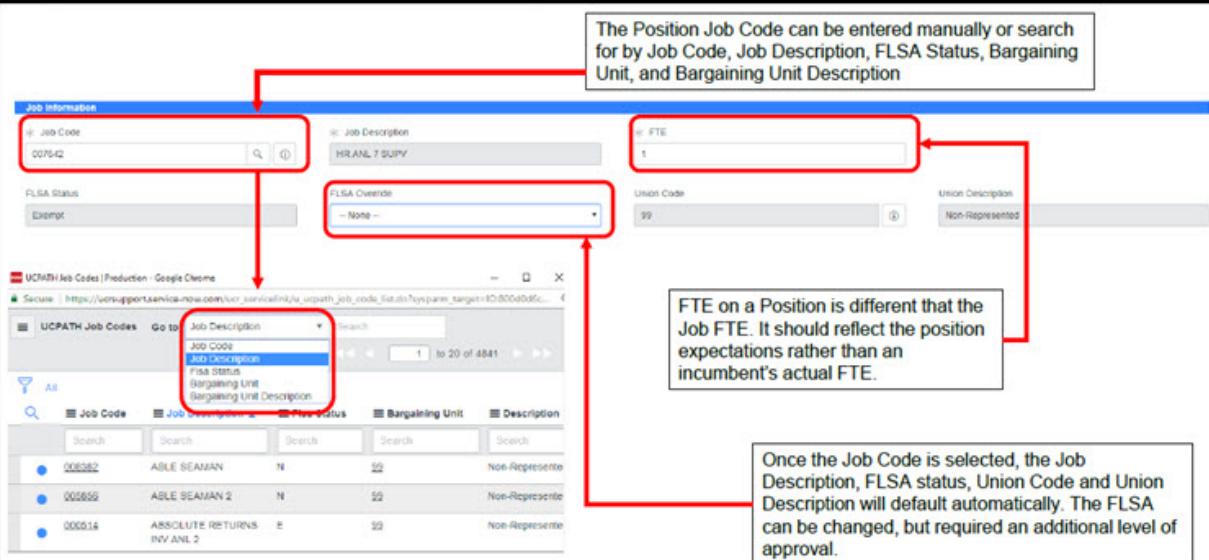
Active – Approved
 Used for vacant or filled positions that have been approved and have the correct funding and/or budget established
 Employees should only be hired into 'Active – Approved' Positions

Inactive
 Used for vacant Positions that a department does not plan to recruit for in the future.
Use Case: An employee retired and the department eliminated the position

Position Status Definitions

 Active - Proposed	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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
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Job Information

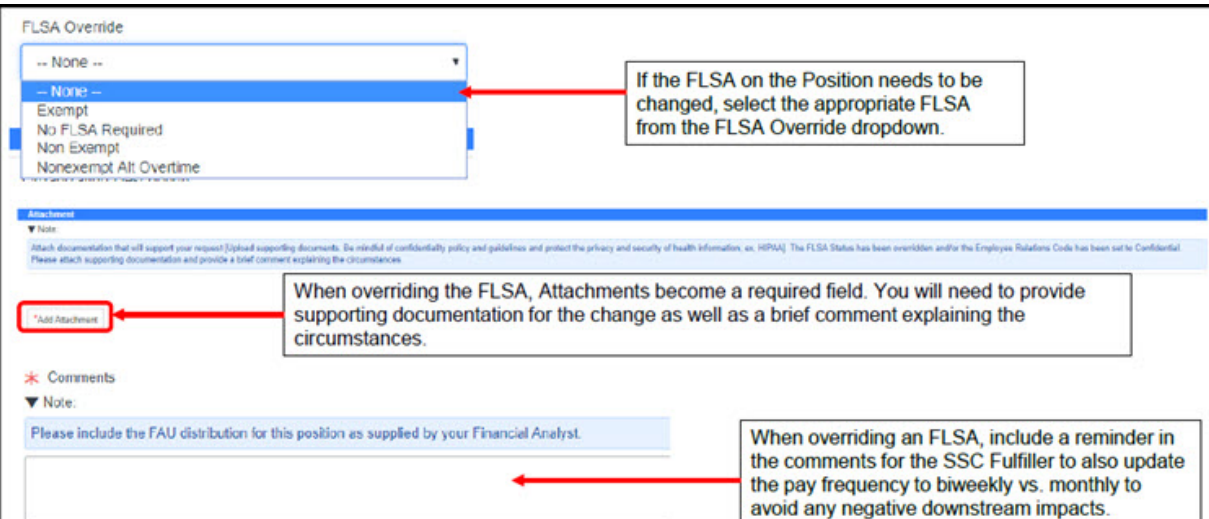


The Position Job Code can be entered manually or search for by Job Code, Job Description, FLSA Status, Bargaining Unit, and Bargaining Unit Description

FTE on a Position is different than 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 required 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.

FLSA Override (continued)

When a New Position request is submitted with an FLSA Override, additional approval is needed. The request will be routed to HR for review and approval. One of the seven approvers listed under the "Approvers" tab in the Task Catalog is required to review and approve the request.

State	Approver	Comments	Created
Requested	Sara Umali		07/09/18 13:29:20
Requested	John Henderson		07/09/18 13:29:20
Requested	Antonetta Toney		07/09/18 13:29:20
Requested	Carmela Torres		07/09/18 13:29:20
Requested	Alex Natera		07/09/18 13:29:20
Requested	Jadie Lee		07/09/18 13:29:20
Requested	Heldie Rhodes		07/09/18 13:29:20

Once one of the seven approve approve the request, the New Position request will follow a normal New Position Workflow. Upon approval, the Accountability Structure FAU Reviewer will receive a task to review the Position FAU.

Work Information

'Reports To' is part of Position Data. You can enter the Position incumbent's direct report directly in the field or by clicking on the magnifying glass icon to search for the individual. Keep in mind that in UCPath, the 'Reports To' Position number will be used. Based on the Name selected, the 'Reports to Position Job Title' and 'Reports to Position' will populate automatically.

The Department Code for the New Position can be entered directly in the field or can be searched for using the lookup tool (magnifying glass icon). Once selected, the Organization Code, Organization Description, Division Code, Division Description, Department Description, and Location Description will default automatically.

In most cases, a Location Description will default automatically from the Department Code. The Location Description can be edited, if needed. This change does NOT require an additional layer of approval in the system.

Reports to Position

- 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

Salary Plan Information

Salary Plan Information

Sal Admin Plan: Career Tracks - UCR

Salary Grade: 23

Salary Range: Minimum: 67300, Midpoint: 99900, Maximum: 132500

Salary Grade will default from the Job Code selected in the Job Information Section of the form.

Salary Admin Plan will default from the Job Code selected in the Job Information Section of the Form.

Salary Range Minimum, Midpoint, and Maximum will default automatically. This is for reference purposes. The actual compensation will be entered once an incumbent is onboarded into the Position. If the Position is stepped, steps would populate below the Salary Range. Again, this is for reference purposes.

Specific Information

Specific Information

Max Head Count: 1

Position Pool ID: [Searchable]

Employee Relations Code: All Others Not Confidential

Special Training Code: Not Applicable

Security Clearance: Not Applicable

Enter Max Head Count. If this is a Single Headcount Position, leave the Max Head at 1.

Enter or search of the Position Pool ID if this Position is for a Work Study

Select the Employee Relations Code from the dropdown. If a confidential Employee Relations Code is chosen, the request will require an additional layer of approval.

Select Special Training Code, if needed. If none is required, select 'Not Applicable'

Select Security Clearance, if needed. If none is required, select 'Not Applicable'

Max Head Count

* Max Head Count: 1

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.

* Max Head Count: 5

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 positions. 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

UCPATH Position Pool IDs Go to Position Pool Id Search

1 to 6 of 6

All

Position Pool Id Description

Position Pool Id	Description
I	WS - State Teach Int
P	WS - Presidents
E	WS - America Courts
C	WS - Community Service
F	WS - Federal
A	WS America Reads

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

Employee Relations Code

-- None --

- All Others Confidential
- All Others Not Confidential
- Excluded from Coverage
- Manager Confidential
- Manager Not Confidential
- Not Applicable - Contingent WK
- Not Covered HEERA (Out of State)
- Stud Academic Title HEERA
- Stud Academic Title No HEERA
- Supervisor Confidential
- Supervisor Not Confidential

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/erelcodechart.html> for additional policy-related information.

Attachment

Note: Attach documentation that will support your request (Upload supporting documents. Be mindful of confidentiality policy and guidelines and protect the privacy and security of health information, ex. HIPAA). The FLSA Status has been overridden and/or the Employee Relations Code has been set to Confidential. Please attach supporting documentation and provide a brief comment explaining the circumstances.

Add Attachment

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

Assignment group

Assigned to

Request REQ0019980

Stage Waiting for Approval

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, Heidie 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.

Approvers (7)

State	Approver	Comments
Requested	Sara Utzell	
Requested	John Henderson	
Requested	Antoinette Jones	
Requested	Carmela Torres	
Requested	Alex Valencia	07/09/18 13:29:20
Requested	Jedie Lee	07/09/18 13:29:20
Requested	Heidie Rhodes	07/09/18 13:29:20

Special Training Code

* Special Training Code

Note: Indicate any required certifications and/or required training or licenses. Hold down Ctrl key to select multiple items.

Not Applicable
Exclude NSF, RCR, and SHP
Exempt - Sexual Harassment not Required
Include NSF, RCR

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)

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 a supervisory title code. For example, a Blank 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.

Security Clearance

* Security Clearance

Note: Hold down Ctrl key to select multiple items.

Not Applicable
Previous Employer's Reference Check
Criminal Convictions Record
Financial Disclosure

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 Unescorted Access to Radioactive Material in Quantities of Concern](#)
- CANRA Acknowledgement
- I9 Completion
- CLERY Act
- Form 700 – Statement of Economic Interests

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

Comments & FAU

* Comments

Note:

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

FAU 40404040222299993433

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.

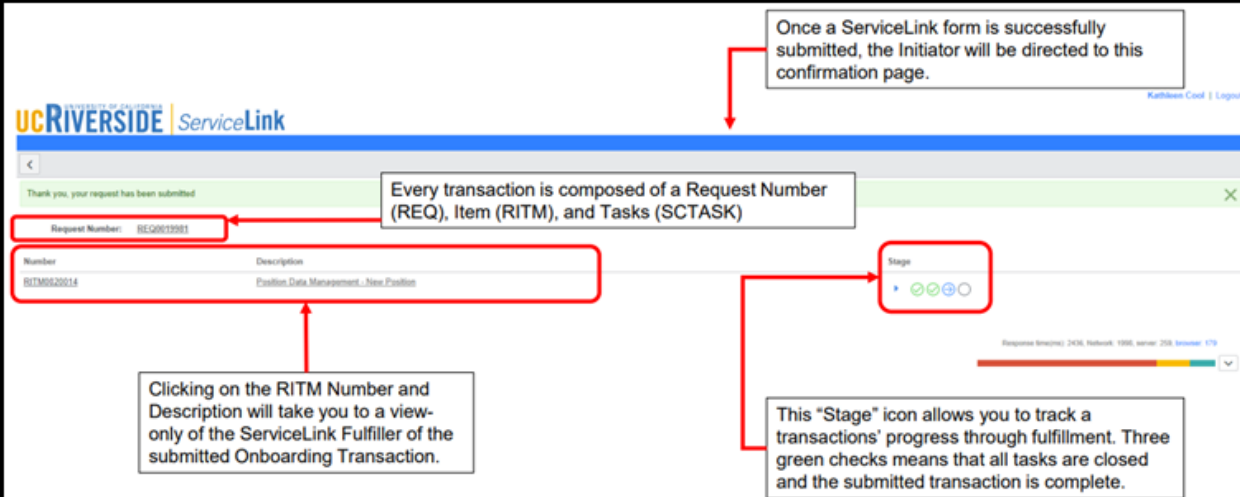
Attachment



The screenshot shows a blue header bar with the word "Attachment" in white. Below it is a light blue box containing a note: "Attach documentation that will support your request [Upload supporting documents. Be mindful of confidentiality policy and guidelines and protect the privacy and security of health information, ex, HIPAA]". Below the note is a red-bordered button labeled "Add Attachment". A red arrow points from this button to a text box.

The "Add Attachment" field on a New Position form is not required unless the FLSA on the position was overridden and/or is the Employee Relations Code is Confidential. In these instances, supporting documentation, such as a job description or rationale for the request is required.

ServiceLink Initiator



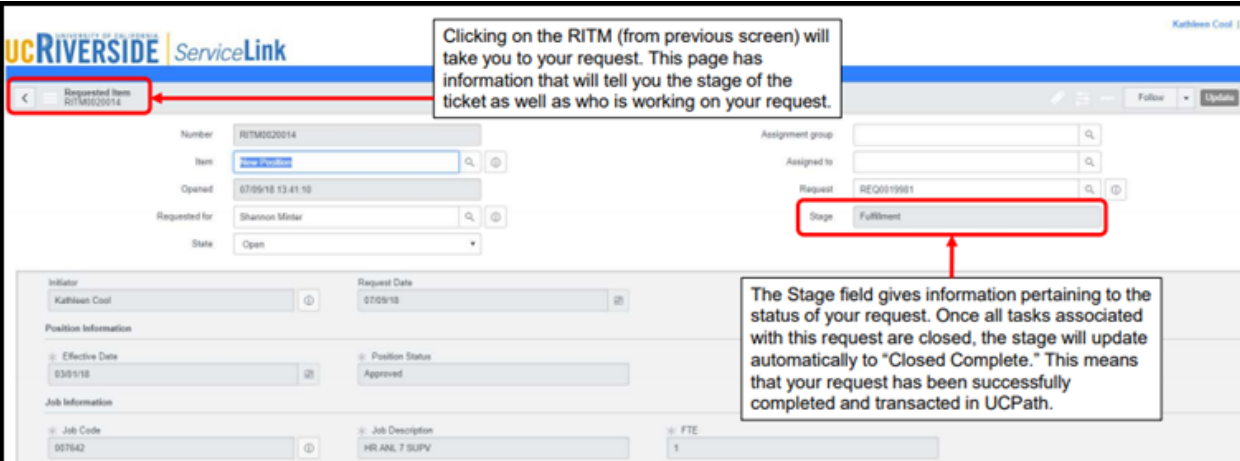
The screenshot shows the UC Riverside ServiceLink confirmation page. At the top, it says "Thank you, your request has been submitted". Below this is a table with one row: "Request Number: REQ0019981", "Number: RITM0020014", and "Description: Position Data Management - New Position". To the right of the table is a "Stage" icon consisting of three green checkmarks and one blue circle. A red arrow points from the "Request Number" to a text box. Another red arrow points from the "Stage" icon to a text box. A third red arrow points from the "Number" and "Description" to a text box.

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

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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 transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.



The screenshot shows the ServiceLink request details page. At the top, it says "Requested Item RITM0020014". Below this is a form with fields for "Number", "Item", "Opened", "Requested for", "State", "Request Date", "Request", "Stage", "Assignment group", "Assigned to", "Request Date", "Request", "Initiator", "Position Information", "Job Information", and "FTE". A red arrow points from the "Requested Item" to a text box. Another red arrow points from the "Stage" field to a text box.

Clicking on the RITM (from previous screen) will take you to your request. This page has information that 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.

FAU Reviewer

The first task generated from a New Position request is the Review FAU Information task. If you look at the RITM 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 everytime 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

Once it has been verified that the correct FAU information is included in the request, click the "Close Task" button to close the task.

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

Number: RITM0012292

Item: New Position

Opened: 12 minutes ago

Requested for: Kathleen Cool

Request: REQ0012283

Stage: Fulfillment

State: Open

All tasks relating to a RITM can be viewed at the RITM level, in the "Catalog Task," located at the very bottom of every RITM 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 Task." The task is assigned to the Assignment Group SSC_Position Management Shared Services Center. The task can also be assigned to an individual.

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0014740	Create a new position	Harvest Position Management Shared Serv...			Open
SCTASK0014739	Review FAU Information	DB (0.0) Position Management LAM Approver			Closed Complete

SSC Fulfiller – Create a New Position

Number: SCTASK0014740

Assignment group: Harvest Position Management Shared

Assigned to:

Active:

New Position Number:

Short description: Create a new position

Work notes:

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

After entering the New Position Number at the SCTASK level, the task can be closed by clicking on the "Close Task" button.

Number: SCTASK0014740

Assignment group: Harvest Position Management Shared

Assigned to:

Active:

State: Closed Complete

Request Item: RITM0012292

Requested for: Kathleen Cool

New Position Number: 400056955403

Attachment: Attach documentation that will support your request [Upload supporting documents. Be mindful of confidentiality per...]

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 RITM level, as shown here.

SSC Fulfiller – FAU Distribution

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.

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0014741	FAU Distribution for New Position	Harvest Position Management FAU Shared S...		🟢🟢🟢🟢🟢	Open
SCTASK0014740	Create a new position	Harvest Position Management Shared Serv...		🟢🟢🟢🟢🟢	Closed Complete
SCTASK0014739	Review FAU Information	001010 Position Management FAU Approver		🟢🟢🟢🟢🟢	Closed Complete

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

Stage: Completed
State: Closed Complete

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0014740	Create a new position	Harvest Position Management Shared Serv...		🟢🟢🟢🟢🟢	Closed Complete
SCTASK0014741	FAU Distribution for New Position	Harvest Position Management FAU Shared S...		🟢🟢🟢🟢🟢	Closed Complete
SCTASK0014739	Review FAU Information	001010 Position Management FAU Approver		🟢🟢🟢🟢🟢	Closed Complete

Initiator View

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

Stage: Completed

New Position Number: 400968445

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