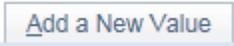


Use this task to add a new position in UCPath. Adding a position using this component does not initiate AWE.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Step	Action
1.	When you navigate to the Add/Update Position Info component, the system displays the Find an Existing Value tab, which you use to search for existing positions.
2.	To begin the steps for adding a new position, click the Add a New Value tab. <div style="text-align: center;">  </div>

Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help |

Add/Update Position Info

Find an Existing Value | Add a New Value

Position Number: 00000000

Add

Find an Existing Value | Add a New Value

Step	Action
3.	Accept the default of all zeros in the Position Number field. When you save the record, UCPath automatically assigns the next available position number.
4.	Click the Add button. 

The screenshot shows the Oracle UCPath interface for adding a new position. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page title is 'ORACLE' and the user is signed out. The form is titled 'Position Information' and includes the following sections:

- Position Information:** Position Number (00000000), Headcount Status, Current Head Count (0 out of 0), *Effective Date (07/17/2017), *Status (Active), Reason (NEW), New Position, Action Date (07/17/2017), *Position Status (Approved), Status Date (07/17/2017), and a checkbox for Key Position.
- Job Information:** *Business Unit (LACMP), Job Code, *Reg/Temp, *Regular Shift (Not Applicable), Title, *Full/Part Time (System Default - Sele), Union Code, Short Title, and Detailed Position Description.
- Work Location:** *Reg Region (USA), Department, Location, Reports To, Supervisor Lvl, *Company, and Dot-Line.
- Salary Plan Information:** Salary Admin Plan, Grade, Step, Standard Hours (0.00), and Work Period.

Step	Action
5.	Use the Description page to enter header-level information about the position, as well as job information, work location details and salary plan information. This component is effective dated to capture the history of changes to the position.
6.	You can manually enter position data for a new position or you can copy an existing position. For more information on how to copy an existing position, refer to the <i>Position Administrator: Copy Existing Position</i> topic.
7.	In the Effective Date field, enter the date on which the position becomes effective or select the appropriate date from the calendar. For this example, accept the default date.
8.	In the Status field, accept the default of Active .
9.	In the Reason field, accept the default of NEW .

Step	Action
10.	<p>In the Position Status field, accept the default of Approved or select the appropriate option.</p> <ul style="list-style-type: none"> - Approved is used for filled or vacant positions that are approved for use and that have the correct funding and/or budget established. - Frozen is used for positions that can be re-instated (Approved) when needed. Frozen status can be used for vacant positions that the Org/Dept intends to recruit for in the future. - Proposed is used when a position is created but not yet approved for use or that does not have funding and budget established. This status is a trigger for the Funding Manager to add Funding and Budget, if applicable.
11.	The Status Date field defaults to the system date (today's date), but you can update it, if necessary.
12.	Next, enter the appropriate data in the Job Information , Work Location and Salary Plan Information sections.
13.	The Business Unit field defaults based on your UCPath security profile.
14.	Click in the Job Code field. <input data-bbox="391 974 505 1010" type="text"/>
15.	<p>In the Job Code field, enter the appropriate job code or use the lookup to search for and select it.</p> <p>Enter the desired information into the Job Code field. For this example, enter 004723.</p>
16.	Note: If the Job Code selected is not extended to your Business Unit , an error message appears.
17.	In the Regular Shift and Reg/Temp fields, accept the default Not Applicable . UC does not use these fields.
18.	Click the button to the right of the Full/Part Time field. <input data-bbox="391 1423 431 1459" type="checkbox"/>

The screenshot shows the Oracle UCPath interface for adding or updating a position. The form includes the following sections and fields:

- Position Information:** Position Number (00000000), Headcount Status, Current Head Count (0 out of 0), *Effective Date (07/17/2017), *Status (Active), Reason (NEW), *Position Status (Approved), Status Date (07/17/2017), Action Date (07/17/2017), and an Initialize button.
- Job Information:** *Business Unit (LACMP - UCLA Campus), Job Code (004723 - BLANK AST 2), *Reg/Temp (Not Applicable), *Regular Shift (Not Applicable), Title (BLANK AST 2), *Full/Part Time (Fixed), Union Code (CX - Clerical & Allied Services), Short Title (BLANK AST), and Detailed Position Description.
- Work Location:** *Reg Region (USA - United States), Department, Location, Reports To, Supervisor Lvl, *Company, and Dot-Line.
- Salary Plan Information:** Salary Admin Plan, Grade, Step, Standard Hours (40.00), and Work Period (W - Weekly).

Step	Action
19.	<p>Select the appropriate value.</p> <p>For this example, select the Fixed list item.</p> <div data-bbox="391 1136 756 1167" style="border: 1px solid black; padding: 2px;">Fixed</div>

Step	Action
20.	<p>Accept the Title and Short Title default field values, or enter the appropriate values. These values default from the job code.</p> <p>For this example, accept the default values.</p>
21.	<p>The Union Code defaults from the job code. Change if needed.</p> <p>Note: The Union Code for the new position determines the Employee Relations Code field selection on the UC Position Data tab.</p> <p>For this example, accept the default.</p>
22.	<p>Accept the Reg Region field default value of USA.</p>
23.	<p>Click in the Department field.</p> <div data-bbox="391 1472 561 1514" style="border: 1px solid black; width: 100px; height: 20px; margin: 5px 0;"></div>
24.	<p>In the Department field, enter the appropriate department ID or use the lookup to search for and select it.</p> <p>The values you can enter or search for and select in the Department field are based on your security access.</p> <p>For this example, enter 352500.</p>

Step	Action
25.	<p>In most cases, when you tab out of the Department field or click in another field, the Location field value automatically populates based on the selected department.</p> <p>You can enter or update the Location field if necessary by entering the appropriate value or clicking the lookup to search for and select it.</p> <p>All positions in UCPath are established in the Company UCS; you cannot update this value.</p> <p>For this example, accept the default Location field value.</p>
26.	<p>Click in the Reports To field.</p> <input data-bbox="391 663 557 701" type="text"/>
27.	<p>In the Reports To field, enter the appropriate position number to which this position reports or use the lookup to search for and select the value.</p> <p>For this example, enter 40047026.</p>
28.	<p>If applicable, in the Dot-Line field, enter the position number to which the new position has a dotted-line reporting relationship.</p> <p>For this example, do not enter a value.</p>
29.	<p>UC does not use the Supervisor Lvl field.</p>
30.	<p>Scroll down to display additional fields and page functions.</p> <p>Click the scroll bar.</p>

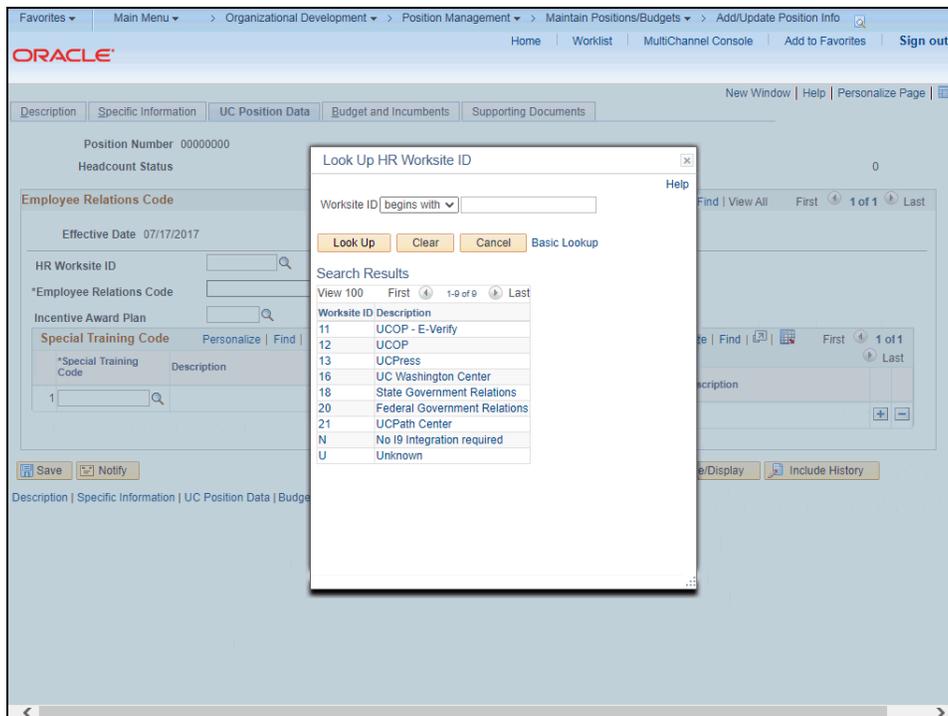
Step	Action
31.	Click in the Salary Admin Plan field. <input type="text"/>
32.	In the Salary Admin Plan field, enter the appropriate salary admin plan code or use the lookup to search for and select it. The values available for lookup and selection in the Salary Admin Plan and Salary Grade fields are dependent on the Job Code value you entered. Not all job codes have an associated salary plan. Academic job codes also include a BYA (by agreement) salary plan. For this example, enter UCCX .
33.	Click in the Grade field. <input type="text"/>
34.	Enter the desired information into the Grade field, if applicable. For this example, enter 112 .
35.	The Step field is not used at the position level. Leave this field blank.
36.	The Standard Hours and days default from the value you enter in the FTE field on the Specific Information page.
37.	The Work Period field defaults to the standard Work Period assigned to the Job Code for this position. Do not change this field.

Step	Action
38.	The daily hours indicated are inconsequential and are not used to determine an employee's time/pay.
39.	<p>The FLSA Status field defaults from the job code.</p> <p>FLSA Status options include: Exempt, Nonexempt, Nonexempt Alt Overtime and No FLSA Required.</p> <p>Note: The Nonexempt- Alt Overtime option is used to track whether someone is eligible for an alternate overtime calculation when working in states that do not use the federal overtime guidelines. This status enables the calculation of double overtime using the regular rate of pay.</p>
40.	<p>The Bargaining Unit field is not used by UC.</p> <p>Union dues and fees are based on the Union Code (above) which defaults from the Job Code. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.</p>
41.	<p>When you are finished entering data on the Description page, click the Specific Information link.</p> <p>Specific Information</p>

Step	Action
42.	The Max Head Count field defaults to 1 , but you can update it if necessary for multi-head count positions.

Step	Action
43.	If applicable, in the Health Certificate field, select the certificate required for this position.
44.	<p>UC is not using the following fields: Signature Authority, Confidential Position, Job Sharing Permitted and Available for Telework.</p> <p>When entering a new position, it is not necessary to select the Update Incumbents check box.</p>
45.	<p>If this is an approved position, ensure the Budgeted Position check box is selected. If this position's status is Proposed or Frozen, deselect the check box.</p> <p>All approved positions are considered budgeted; if you deselect this check box, you cannot report on this position.</p>
46.	<p>If you are creating a position pool position, in the Position Pool ID field, enter the appropriate value or click the lookup to search for and select it.</p> <p>Work study positions must have a position pool.</p>
47.	The Pre-Encumbrance Indicator , Encumber Salary Option and Classified Indicator field values defaults from the selected job code.
48.	UC does not currently use the Calc Group (Flex Service) or Academic Rank fields.
49.	<p>Click in the FTE field.</p> <p><input type="text" value="0.000000"/></p>
50.	Enter the desired information into the FTE field. For this example, enter 1 .
51.	<p>Click the Adds to FTE Actual Count option.</p> <p><input type="checkbox"/></p>
52.	<p>After you enter a value in the FTE field, you can confirm that the Standard Hours field and hours by day fields on the Description page are updated appropriately.</p> <p>Note: When FTE is 0.00, the Standard Hours field value defaults to .01, because it is a required field and cannot be left blank.</p>
53.	<p>When you are finished entering data on the Specific Information page, click the UC Position Data tab.</p> <p><input type="button" value="UC Position Data"/></p>

Step	Action
54.	<p>Use the UC Position Data page to enter the HR Worksite ID, Employee Relations Code, Incentive Award Plan (if applicable) and if there are any special training or security clearances required for the position.</p> <p>Note: For Lawrence Berkeley National Lab (LBNL1) an additional section appears at the bottom of the page to track Secondary Org Department and Description.</p>
55.	<p>The HR Worksite ID field drives the majority of UCPath and Tracker integration functionality.</p> <p>This field determines:</p> <ul style="list-style-type: none"> • If the new hire I-9 email is auto-generated from Tracker. • If the position requires E-Verify authorization through Tracker. • If a new I-9 will be used for employees rehired within three years. <p>Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate HR Worksite ID.</p>
56.	<p>An entry must be made in the HR Worksite field. For all new and vacant positions, the system will not allow you to save if the field is blank.</p>
57.	<p>Click the Look Up HR Worksite ID button.</p> 



Step	Action
58.	<p>If the position does not require a HR Worksite value, choose the value N - No I9 Integration required. Do not use the value U - Unknown as it is for administrator use only.</p> <p>For this example, enter a HR Worksite value directly in the field.</p>
59.	<p>Click in the HR Worksite ID field.</p> <input type="text"/>
60.	<p>Enter the desired information into the HR Worksite ID field. For this example, enter 4-3530.</p>
61.	<p>Click the button to the right of the Employee Relations Code field.</p> <input type="checkbox"/>
62.	<p>When the Job Code is changed, the Employee Relations Code is removed and required to be re-entered.</p> <p>Notes:</p> <ul style="list-style-type: none"> • If a job code is tied to the BX union code, you must select Stud Academic Title, HEERA as the Employee Relations Code. • If a job code is <u>not</u> tied to the BX union code, the Employee Relations Code <u>must not</u> be Stud Academic Title, HEERA.

The screenshot shows the Oracle UCPath interface for adding or updating a position. The breadcrumb trail is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page title is 'ORACLE'. The 'UC Position Data' tab is selected. Fields include: Position Number 00000000, Headcount Status, Current Head Count 0 out of 0. The 'Employee Relations Code' section shows an effective date of 07/17/2017 and status 'Active'. The HR Worksite ID is 4-3530, with a description '3530 REC MGMT & INFO PRACT'. A dropdown menu for '*Employee Relations Code' is open, listing options: All Others, Confidential; All Others, Not Confidential; Excluded from Coverage; Manager, Confidential; Manager, Not Confidential; Not Applicable - Contingent Wk; Not Covered HEERA (Out of Stat); Stud Academic Title, HEERA; Stud Academic Title, No HEERA; Supervisor, Confidential; Supervisor, Not Confidential. Other sections include 'Special Training Code' and 'Security Clearance'.

Step	Action
63.	<p>Select the appropriate employee relations code.</p> <p>For this example, click the All Others, Not Confidential list item.</p> <p>All Others, Not Confidential</p>

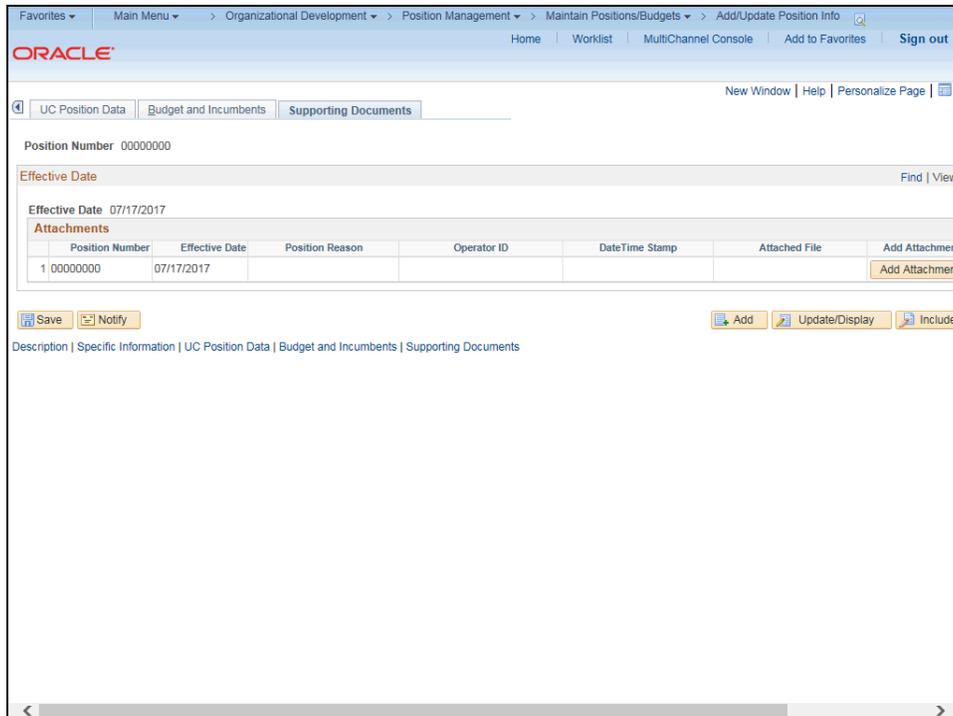
Step	Action
64.	<p>Use the Incentive Award Plan field to identify the plan level for which the position is eligible, if applicable.</p> <p>This attribute is used to help facilitate the annual incentive award plan process as well as to track and report on budgeted positions.</p>
65.	<p>If applicable, in the Special Training Code field, enter the appropriate training code value or use the lookup to search for and select it. Use the Add a new row button to add an additional code.</p> <p>For this example, do not enter a training code.</p>
66.	<p>If applicable, in the Security Clearance Type field, enter the appropriate clearance type code or use the lookup to search for and select it. Use the Add a new row button to add an additional code.</p> <p>For this example, do not enter a security clearance code.</p>
67.	<p>When you are finished entering data on the UC Position Data page, click the Budget and Incumbents tab.</p> <p></p>

Position Number 00000000
Headcount Status Current Head Count 0 out of 0

Current Budget		
Head Count	0	Current Budget FTE 0.00 Amount 0.000

Current Incumbents									
Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
0			0.00		07/17/2017				Job Data

Step	Action
68.	Review the information on the Budget and Incumbents page. For new positions, there is no data entry required for this page.
69.	Click the Supporting Documents tab. <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-top: 5px;">Supporting Documents</div>



Step	Action
70.	<p>Use the Supporting Documents page to attach one or more supporting documents to your request.</p> <p>To begin the steps for uploading a document, click the Add Attachment button.</p> <p>In this example, do not attach supporting documentation.</p>
71.	<p>When you are finished entering position details, click the Save button.</p> 

Oracle UCPath interface showing the 'Add/Update Position Info' page. The page is in the 'Supporting Documents' tab. The main content area displays a table of attachments for position 40160240, effective 07/17/2017. The table has columns for Position Number, Effective Date, Position Reason, Operator ID, DateTime Stamp, Attached File, and Add Attachment. Below the table are buttons for Save, Notify, Add, Update/Display, and Include.

Position Number	Effective Date	Position Reason	Operator ID	DateTime Stamp	Attached File	Add Attachment
1 40160240	07/17/2017					Add Attachment

Step	Action
72.	After you save the data, if there are no errors, the system automatically assigns the next available Position Number to the new position.
73.	You have added a new position in UCPath. End of Procedure.