

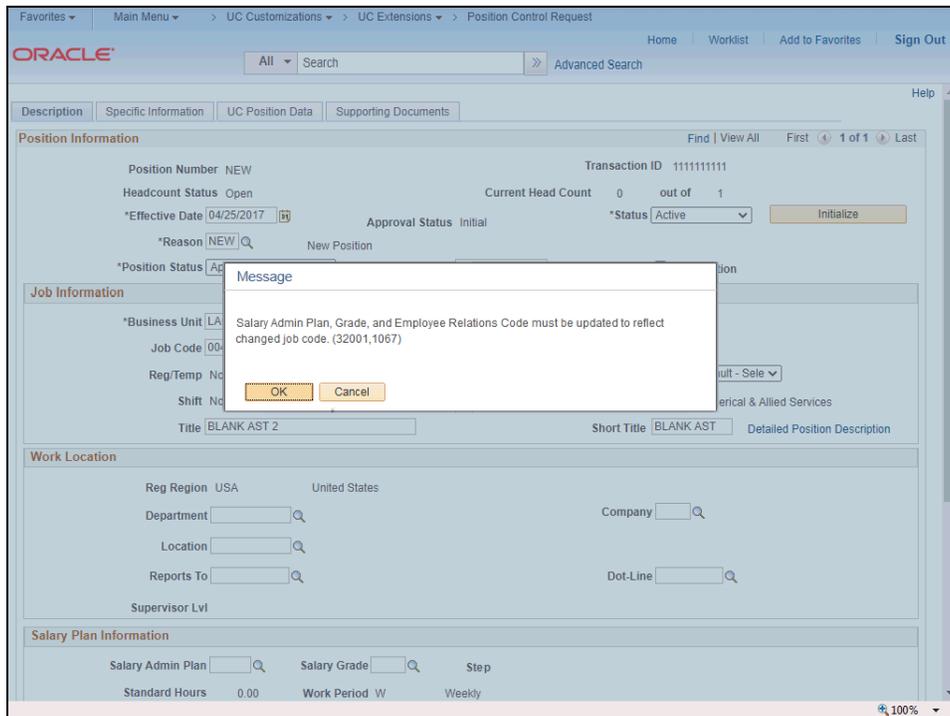
Use this task to request that a position be added in UCPath. After you save and submit a position request, it automatically routes to the appropriate Location approver(s).

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Position Control Request**

Step	Action
1.	Click the Add New Position option. <input type="radio"/>
2.	Click the Next >> button. <input type="button" value="Next >>"/>

Step	Action
3.	The Effective Date defaults to the system date (today's date), but you can update it, if necessary. Enter the date on which the position becomes effective or select the appropriate date from the calendar.
4.	In the Status field, accept the default of Active .
5.	In the Reason field, accept the default of NEW .
6.	In the Position Status field, accept the default of Approved or select the appropriate option. <ul style="list-style-type: none"> - Approved is used for filled or vacant positions that are approved for use. - Frozen is used for inactive positions that can be re-instated (Approved) when needed. - Proposed is used when a position is created but not yet approved for use.
7.	The Status Date field defaults to the system date (today's date), but you can update it, if necessary.
8.	The Key Position field is not used by UC.
9.	Click in the Job Code field. <input type="text"/>
10.	Enter the desired information into the Job Code field. For this example, enter 004723 .

Step	Action
11.	<p>When you tab out of the Job Code field or click in another field, the system populates additional fields in the Job Information section based on the job code you entered.</p> <p>Note: If the Job Code selected is not extended to your Business Unit, an error message appears.</p> <p>Press [Tab].</p>



Step	Action
12.	<p>UCPath displays a message indicating that the Sal Admin Plan, Salary Grade and Employee Relations Code fields must be updated. Review and enter these fields to reflect the Job Code change. You may also need to change Step, Pay Components or Earnings Distribution information on the Job Data tab.</p> <p>Click the OK button.</p> 
13.	<p>Click the button to the right of the Full/Part Time field.</p> 

Step	Action
14.	Select the appropriate value. For this example, click the Fixed list item. 
15.	Note the Union Code for the new position. This determines the Employee Relations Code field selection on the UC Position Data tab.

Step	Action
16.	Click in the Department field. <input type="text"/>
17.	Enter the desired information into the Department field. For this example, enter 352500 .
18.	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. 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. All positions in UCPath are established in the Company UCS ; you cannot update this value. For this example, accept the default Location field value.
19.	Click in the Reports To field. <input type="text"/>
20.	Enter the desired information into the Reports To field. For this example, enter 40081000 .
21.	The Dot-Line field is not used by UC.
22.	Scroll down to display additional fields and page options. Click the scroll bar.

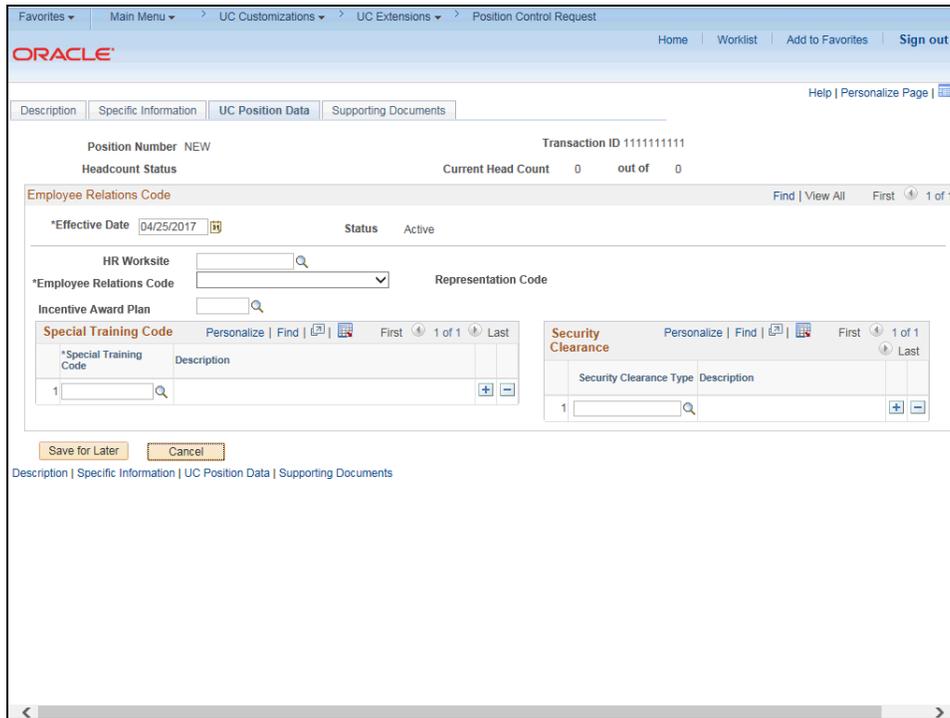
Step	Action
23.	The values available for the Salary Admin Plan and Salary Grade fields are dependent on the Job Code value you entered. Not all job codes have an associated salary plan. Academic job codes also include a BYA (by agreement) salary plan.

Step	Action
24.	Click in the Salary Admin Plan field. <input data-bbox="391 352 480 390" type="text"/>
25.	Enter the desired information into the Salary Admin Plan field. For this example, enter UCCX .
26.	Click in the Salary Grade field. <input data-bbox="391 539 464 577" type="text"/>
27.	Enter the desired information into the Salary Grade field. For this example, enter 112 .
28.	The Work Period field defaults to the standard Work Period assigned to the Job Code for this position.
29.	The daily hours indicated are inconsequential and are not used to determine an employee's time/pay.
30.	<p>The FLSA Status field defaults based on 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>
31.	<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>
32.	<p>After you begin data entry on a Position Control Request transaction, you have the option to Save for Later. This allows you to save the data you entered, access the draft transaction at a later time to continue data entry, including attaching any necessary documentation and submitting the request for review and approval.</p> <p>For this example, you will continue entering data and submit the request for review and approval.</p>
33.	Click the Specific Information link. Specific Information

The screenshot shows the 'Specific Information' tab of the Oracle UCPath Position Control Request form. At the top, it displays 'Position Number NEW' and 'Transaction ID 1111111111'. Below this, 'Headcount Status' is shown as 'Current Head Count 0 out of 0'. The 'Specific Information' section includes an 'Effective Date' of 4/25/2017 and a 'Status' of 'Active'. The 'Max Head Count' is set to 1. The 'Incumbents' section contains several checkboxes: 'Update Incumbents', 'Include Salary Plan/Grade', 'Include FTE', 'Budgeted Position' (checked), 'Confidential Position', 'Job Sharing Permitted', and 'Available for Telework'. The 'Education and Government' section includes a search for 'Position Pool ID', 'Pre-Encumbrance Indicator' (No Encumbrance), 'Encumber Salary Option' (Salary Grade Minimum), 'Classified Indicator' (Professional & Support Staff), 'Calc Group (Flex Service)', 'Academic Rank', and 'FTE' (0.000000) with an 'Adds to FTE Actual Count' checkbox.

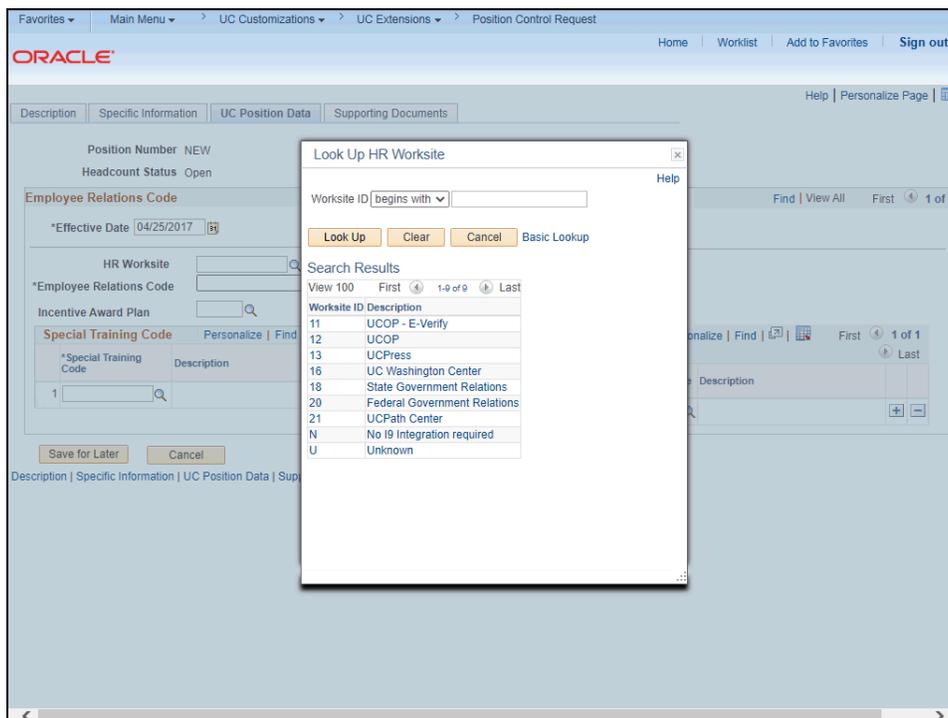
Step	Action
34.	Use the Specific Information page to identify the Max Head Count and FTE (full-time equivalency) for the position.
35.	The Max Head Count field defaults to 1 , but you can update it if necessary for multi-head count positions. For this example, accept the default value.
36.	The Update Incumbents , Include Salary Plan/Grade and Include FTE check boxes are not available when adding or updating positions using the Position Control Request page. These options (updated only by Position Administrators) allow updates to the position to automatically update the position-related fields in Job Data for the assigned incumbents.
37.	The Work Phone and Health Certificate fields are not used by UC.
38.	Click in the FTE field. <input type="text" value="0.000000"/>
39.	Enter the desired information into the FTE field. For this example, enter 1 .
40.	Click the Adds to FTE Actual Count checkbox. <input type="checkbox"/>

Step	Action
41.	<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>
42.	<p>Click the UC Position Data tab.</p> <p></p>



Step	Action
43.	<p>Use the UC Position Data page to enter the HR Worksite, 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>

Step	Action
44.	<p>The HR Worksite 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.</p>
45.	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.
46.	<p>Click the Look Up HR Worksite button.</p> 



Step	Action
47.	<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>

The screenshot shows the Oracle UCPath interface for a Position Control Request. At the top, there are navigation tabs: Description, Specific Information, UC Position Data (selected), and Supporting Documents. Below the tabs, the form displays:

- Position Number: NEW
- Transaction ID: 111111111
- Headcount Status: Current Head Count 0 out of 0
- Employee Relations Code: A search field with a dropdown arrow.
- *Effective Date: 04/25/2017
- Status: Active
- HR Worksite: A search field.
- *Employee Relations Code: A dropdown menu.
- Representation Code: A search field.
- Incentive Award Plan: A search field.
- Special Training Code: A table with columns for Special Training Code and Description.
- Security Clearance: A table with columns for Security Clearance Type and Description.

 At the bottom, there are 'Save for Later' and 'Cancel' buttons, and a breadcrumb trail: Description | Specific Information | UC Position Data | Supporting Documents.

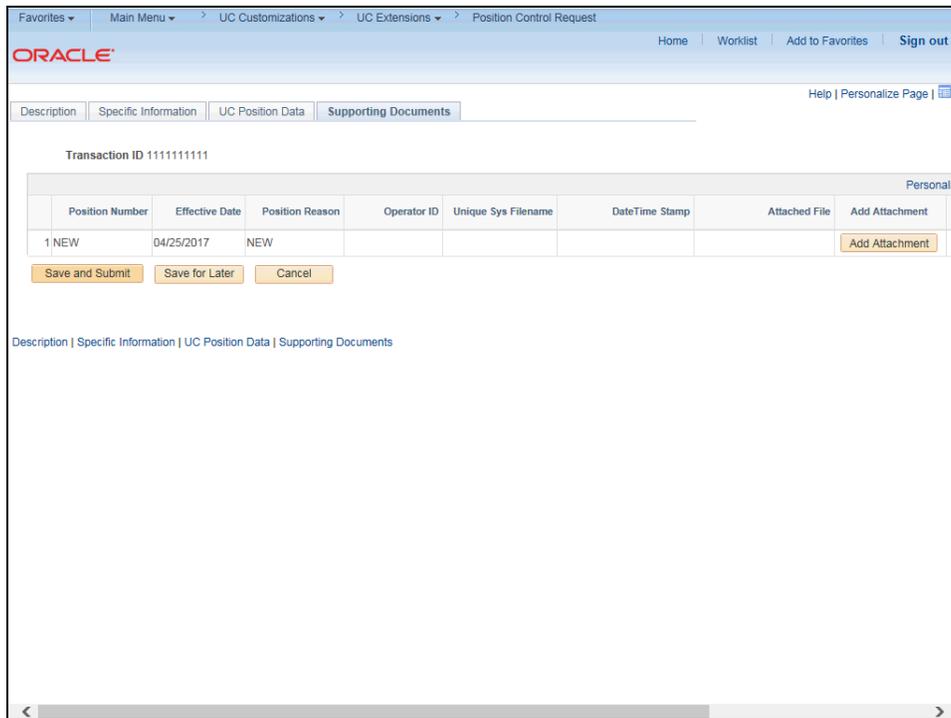
Step	Action
48.	Click in the HR Worksite field. <input type="text"/>
49.	Enter the desired information into the HR Worksite field. For this example, enter 4-3525 .
50.	Click the button to the right of the Employee Relations Code field. <input type="button" value="v"/>
51.	When the Job Code is changed, the Employee Relations Code is removed and required to be re-entered. Notes: <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 <u>is 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 a Position Control Request. The form is titled "UC Position Data" and includes fields for Position Number (NEW), Transaction ID (111111111), and Headcount Status (0 out of 0). The "Employee Relations Code" section is active, showing a dropdown menu with the following 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", and "Supervisor, Confidential Supervisor, Not Confidential". The "All Others, Not Confidential" option is highlighted. Other sections include "Special Training Code" and "Security Clearance".

Step	Action
52.	For this example, click the All Others, Not Confidential list item. All Others, Not Confidential

The screenshot shows the Oracle UCPath interface for a Position Control Request, similar to the previous one. In this view, the "Employee Relations Code" dropdown menu is closed, and the selected option is "All Others, Not Confidential". The "Representation Code" is now "Covered". The rest of the form, including "Special Training Code" and "Security Clearance" sections, remains the same.

Step	Action
53.	<p>Use the Incentive Award Plan field to identify the plan level for which the position is eligible, if applicable.</p> <p>This attribute facilitates the annual incentive award plan process as well as to track and report on budgeted positions.</p>
54.	<p>Click the Supporting Documents tab.</p> 



Step	Action
55.	<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, you will not attach supporting documentation.</p>
56.	<p>When you are finished entering position details, click the Save and Submit button.</p> 

Step	Action
57.	If there are no errors when you save and submit, the system automatically assigns the request a unique Transaction ID number.
58.	Notice that the Position Number field still displays the value NEW . Upon final approval, the system automatically assigns the next available Position Number .
59.	After you enter and submit the request, it is automatically routed to the appropriate Location approver(s).
60.	You have initiated a position control request for a new position. End of Procedure.