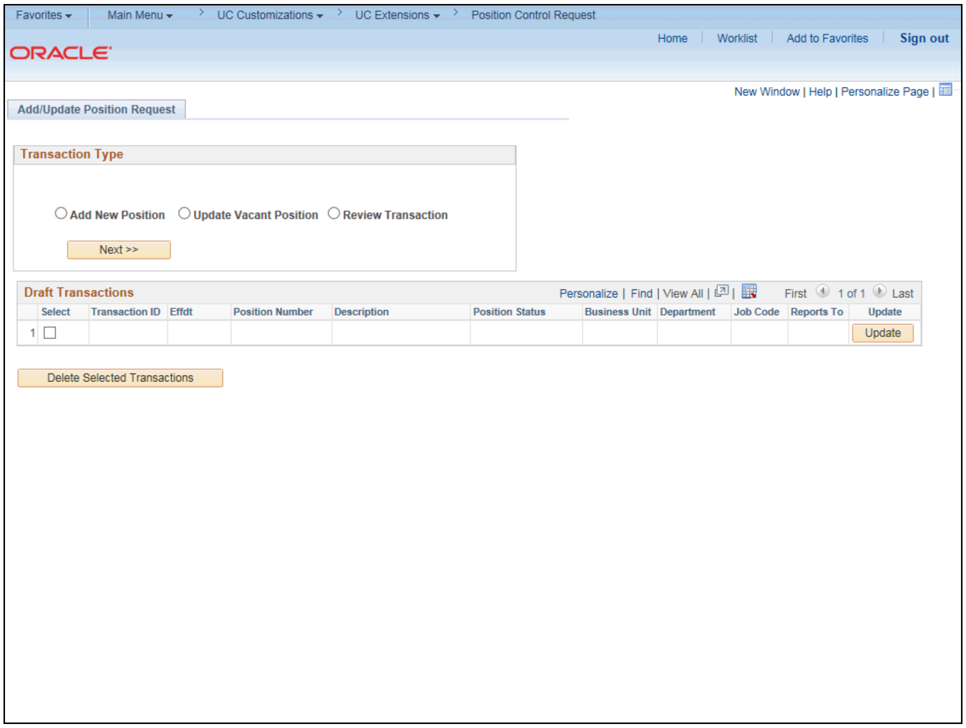
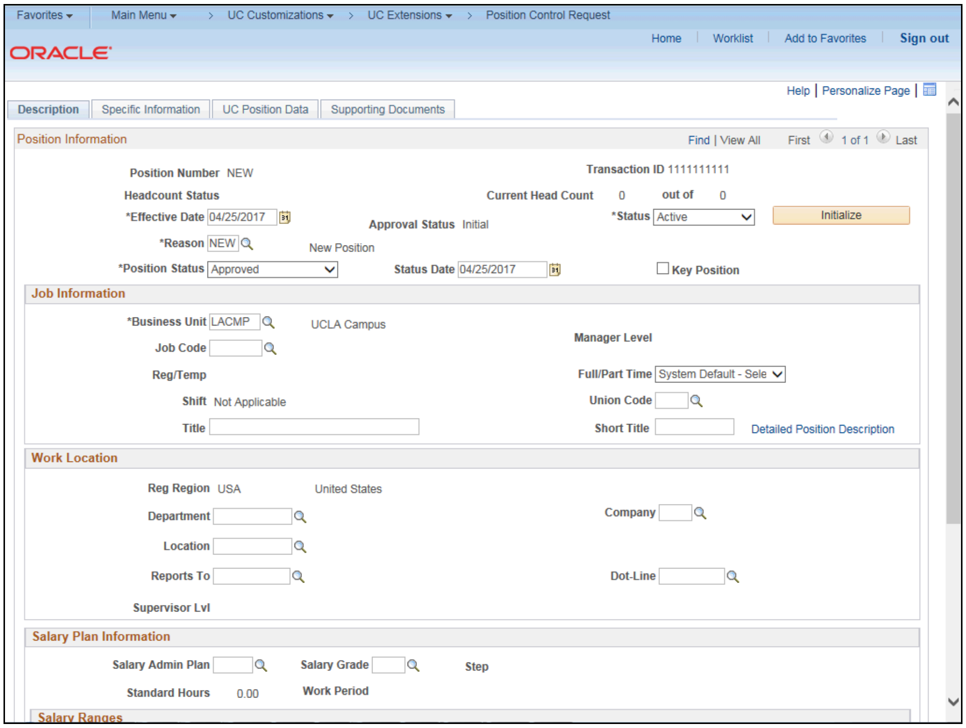
Use this task to request that a position be added in UCPath. After you save and submit a position request, it automatically routes to the appropriate Location approver(s).

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

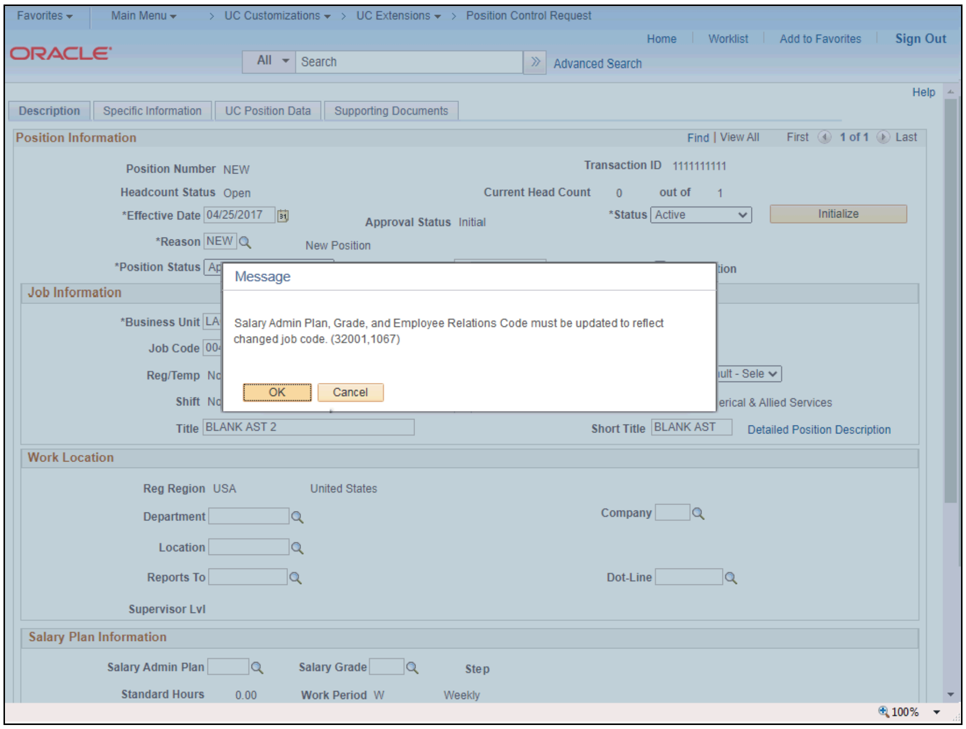


Step	Action
1.	Click the **Add New Position** option.
2.	Click the **Next** >> button. 

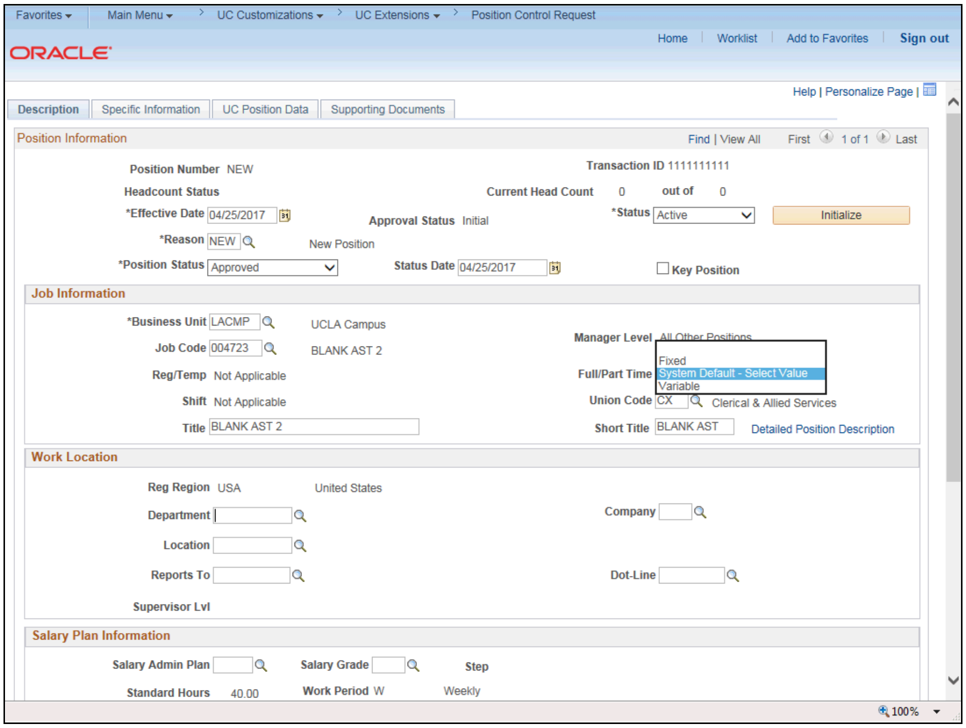


Step	Action
3.	The **Effective Date** defaults to the system date (today's date), but you can update it, if necessary. Enter the date on which the position becomes effective or select the appropriate date from the calendar.
4.	In the **Status** field, accept the default of **Active**.
5.	In the **Reason** field, accept the default of **NEW**.
6.	In the **Position Status** field, accept the default of **Approved** or select the appropriate option. **- 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. 
10.	Enter the desired information into the **Job Code** field. For this example, enter **004723**.

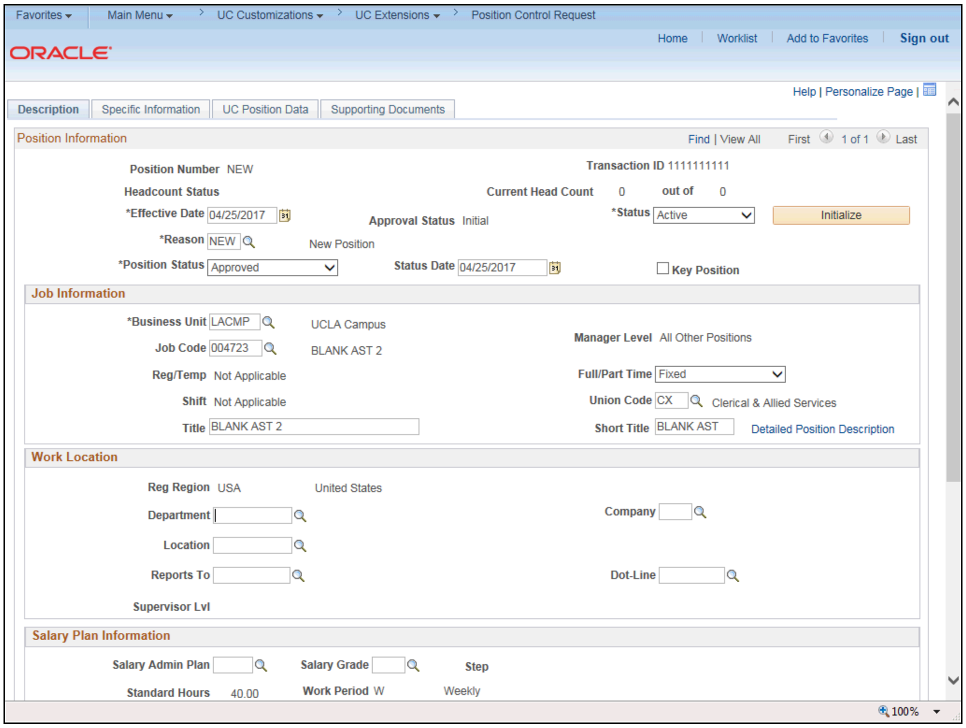
Step	Action
11.	When you tab out of the **Job Code** field or click in another field, the system populates additional fields in the **Job Information** section based on the job code you entered. **Note:** If the **Job Code** selected is not extended to your **Business Unit**, an error message appears.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



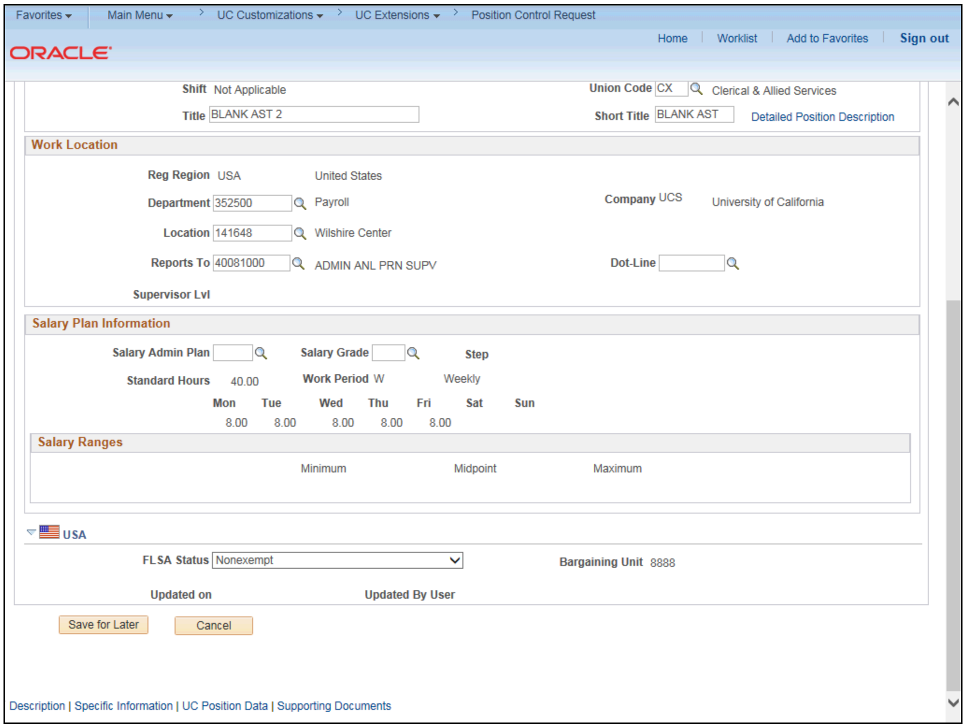
Step	Action
12.	UCPath displays a message indicating that the **Sal Admin Plan**, **Salary Grade** and **Employee Relations Code** fields must be updated. Review and enter these fields to reflect the **Job Code** change. You may also need to change **Step**, **Pay Components** or **Earnings Distribution**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



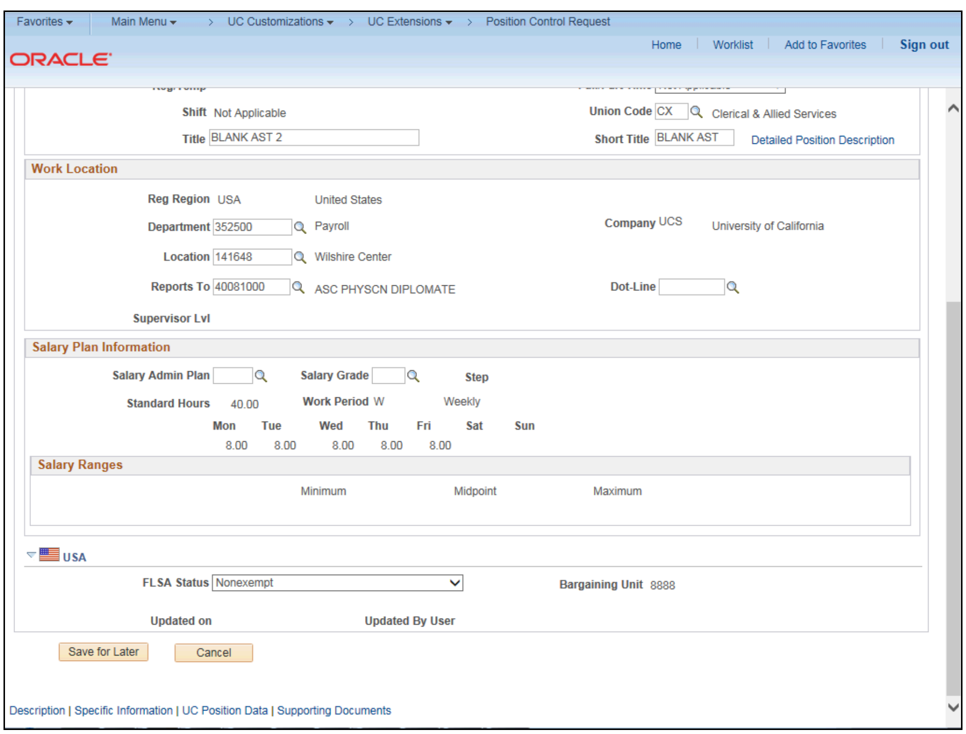
Step	Action
14.	Select the appropriate value. For this example, click the **Fixed** list item. 
15.	Note the **Union Code** for the new position. This determines the **Employee Relations Code** field selection on the **UC Position Data** tab.



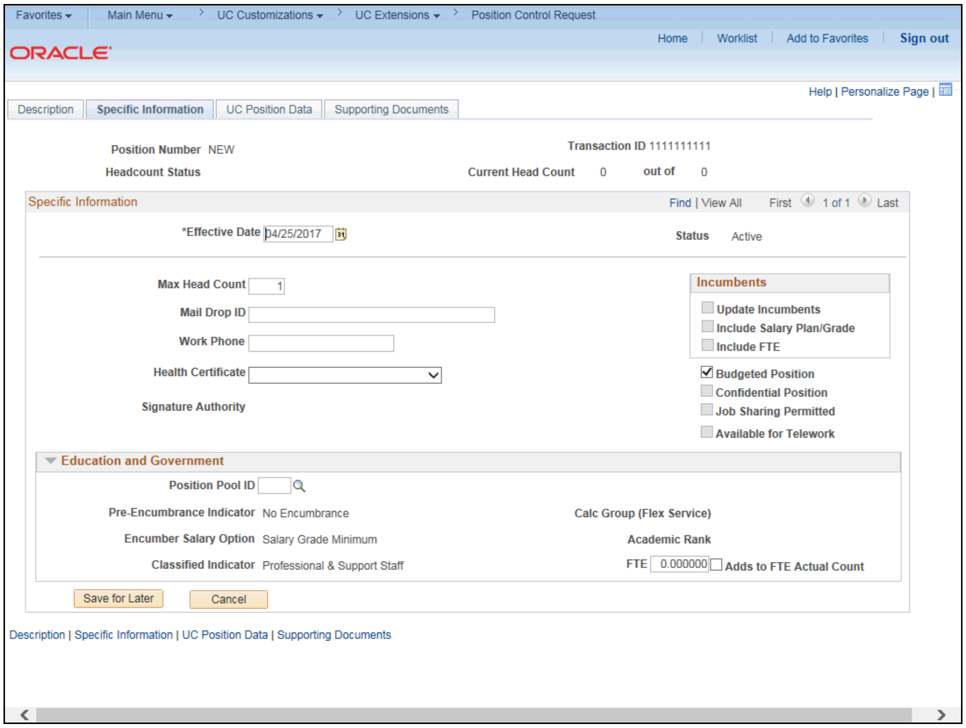
Step	Action
16.	Click in the **Department** field.
17.	Enter the desired information into the **Department** field. For this example, enter **352500**.
18.	In most cases, when you tab out of the **Department** field or click in another field, the **Location** field value automatically populates based 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.
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.



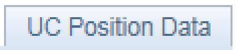
Step	Action
23.	The values available for the **Salary Admin Plan** and **Salary Grade** fields are dependent on the **Job Code** value you entered. Not all job codes have an associated salary plan. Academic job codes also include a BYA (by agreement) salary plan.

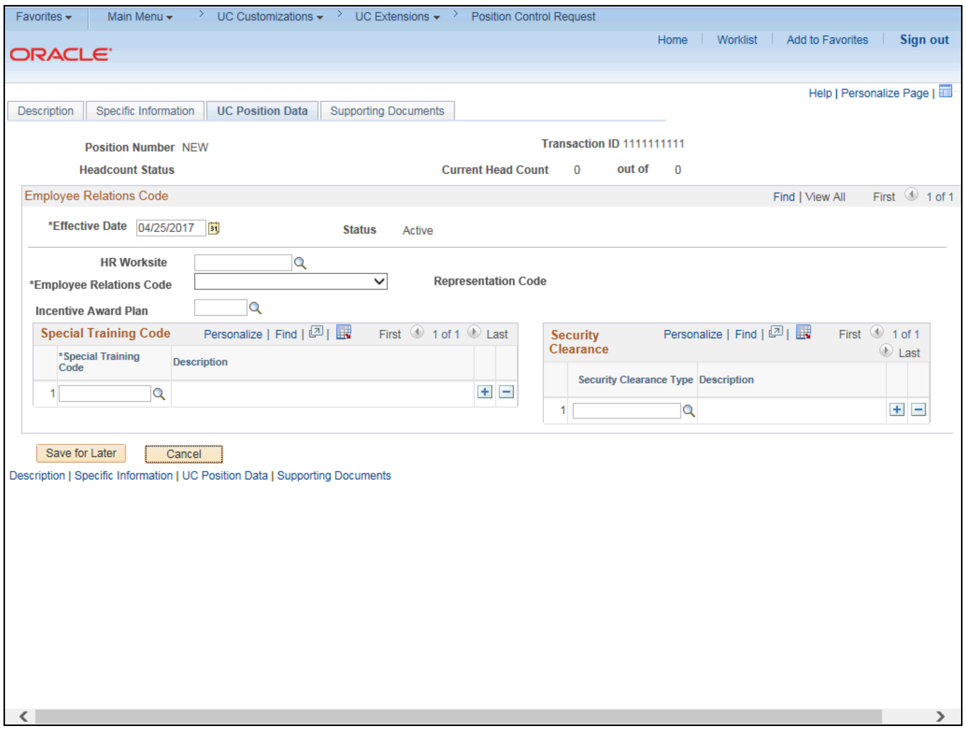


Step	Action
24.	Click in the **Salary Admin Plan** field.
25.	Enter the desired information into the **Salary Admin Plan** field. For this example, enter **UCCX**.
26.	Click in the **Salary Grade** field.
27.	Enter the desired information into the **Salary Grade** field. For this example, enter **112**.
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.	The **FLSA Status** field defaults based on the job code. **FLSA Status** options include: **Exempt**, **Nonexempt, Nonexempt Alt Overtime** and **No FLSA Required**. **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.
31.	The **Bargaining Unit** field is not used by UC. 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.
32.	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. For this example, you will continue entering data and submit the request for review and approval.
33.	Click the **Specific Information** link. Specific Information



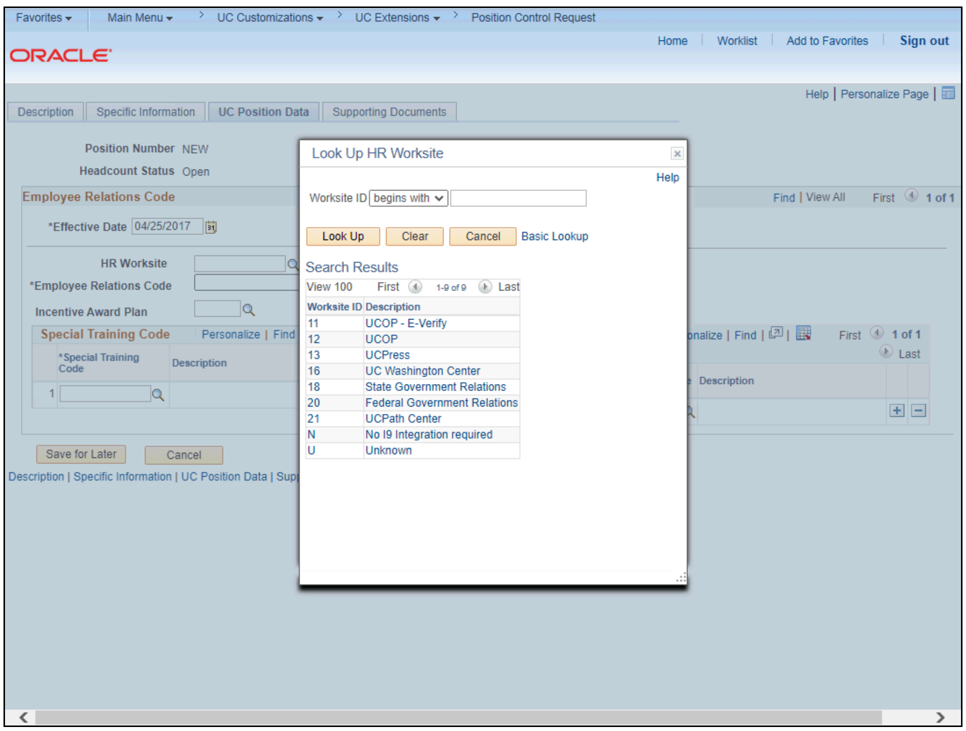
Step	Action
34.	Use the **Specific Information** page to identify the **Max Head Count** and **FTE** (full-time equivalency) for the position.
35.	The **Max Head Count** field defaults to **1**, but you can update it if necessary for multi-head count positions. For this example, accept the default value.
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. 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. ☐

Step	Action
41.	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. **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.
42.	Click the **UC Position Data** tab. 

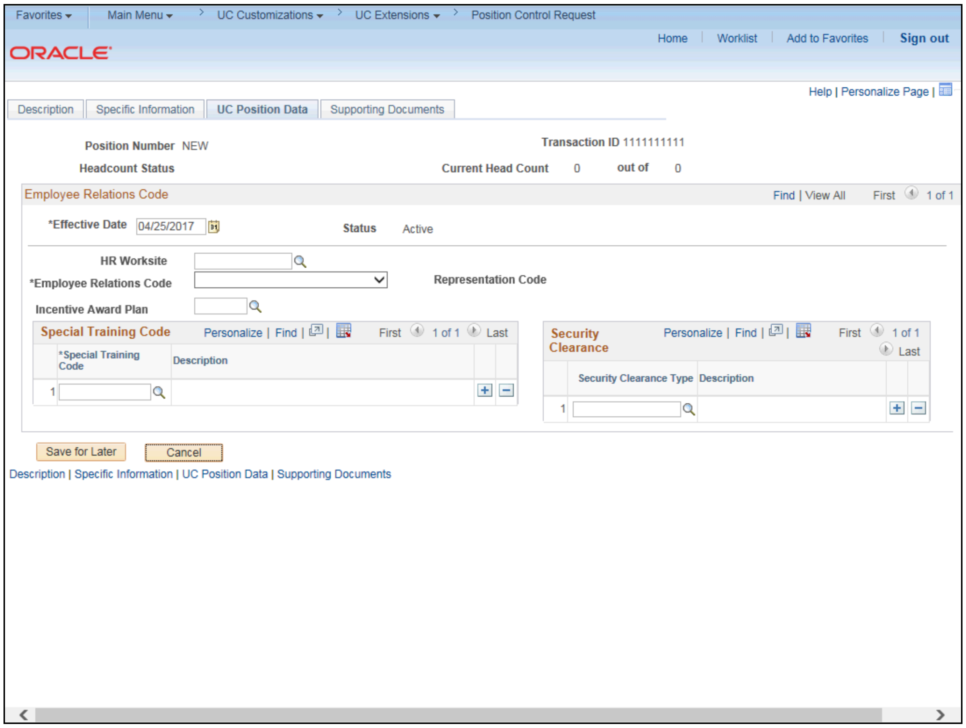


Step	Action
43.	Use the **UC Position Data** page to enter the **HR Worksite**, **Employee Relations Code**, **Incentive Award Plan** (if applicable) and if there are any special training or security clearances required for the position. **Note:** For Lawrence Berkeley National Lab (LBNL1) an additional section appears at the bottom of the page to track **Secondary Org Department** and **Description**.

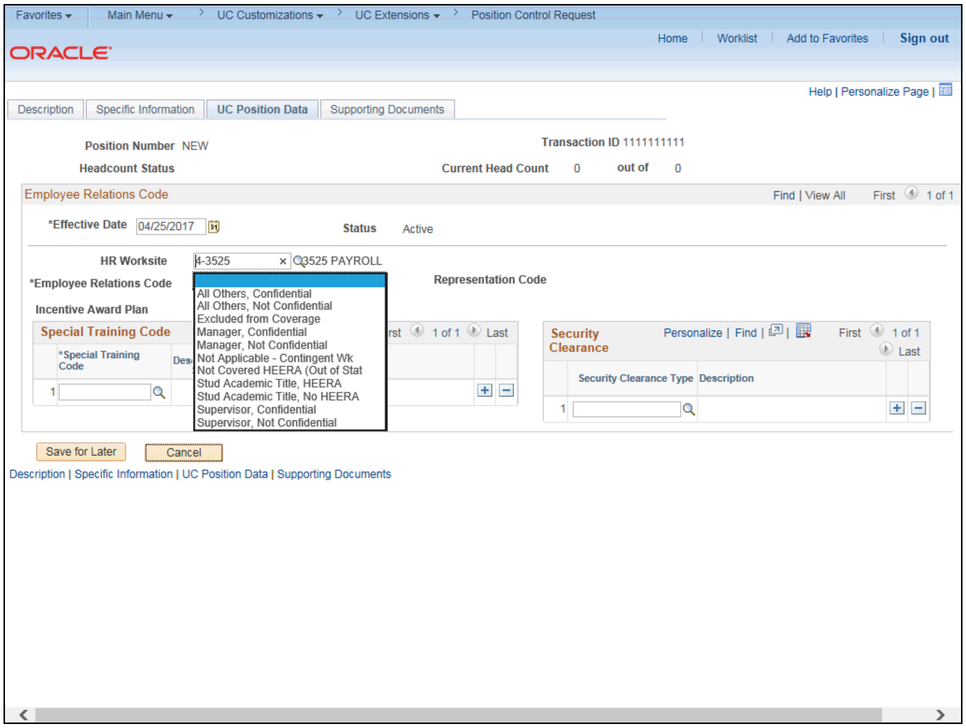
Step	Action
44.	The **HR Worksite** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the new hire I-9 email is auto-generated from Tracker. • If the position requires E-Verify authorization through Tracker. • If a new I-9 will be used for employees rehired within three years. Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate **HR Worksite**.
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.	Click the **Look Up HR Worksite** button. 



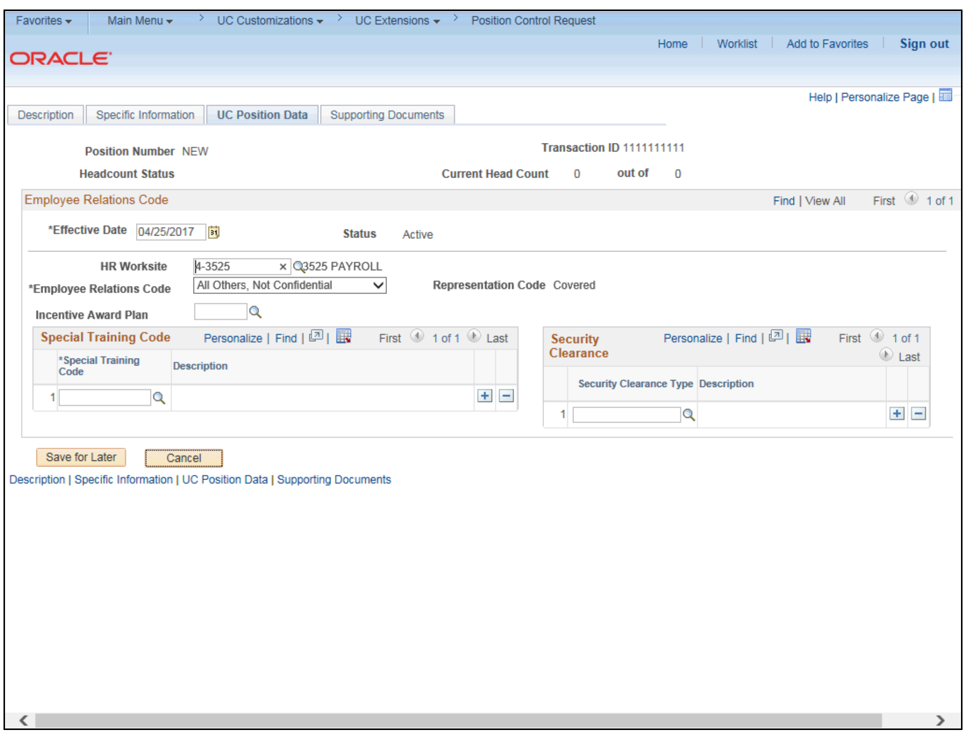
Step	Action
47.	If the position does not require a **HR Worksite** value, choose the value **N - No I9 Integration required**. Do not use the value **U - Unknown** as it is for administrator use only. For this example, enter a **HR Worksite value** directly in the field.



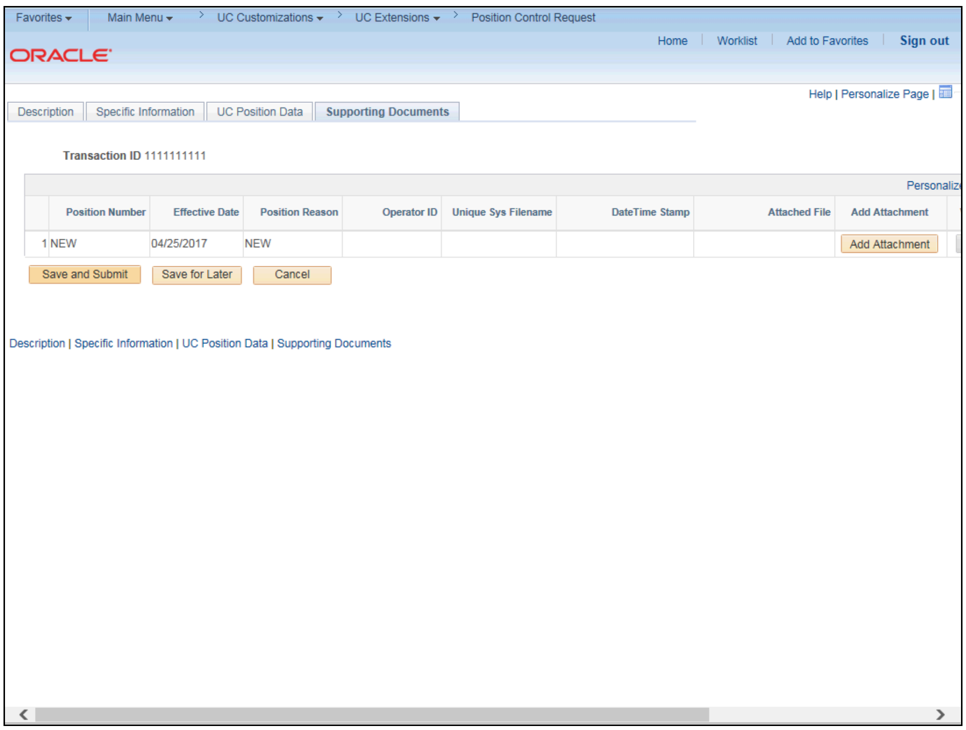
Step	Action
48.	Click in the **HR Worksite** field.
49.	Enter the desired information into the **HR Worksite** field. For this example, enter **4-3525**.
50.	Click the button to the right of the **Employee Relations Code** field.
51.	When the **Job Code** is changed, the **Employee Relations Code** is removed and required to be re-entered. **Notes:** • 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**.



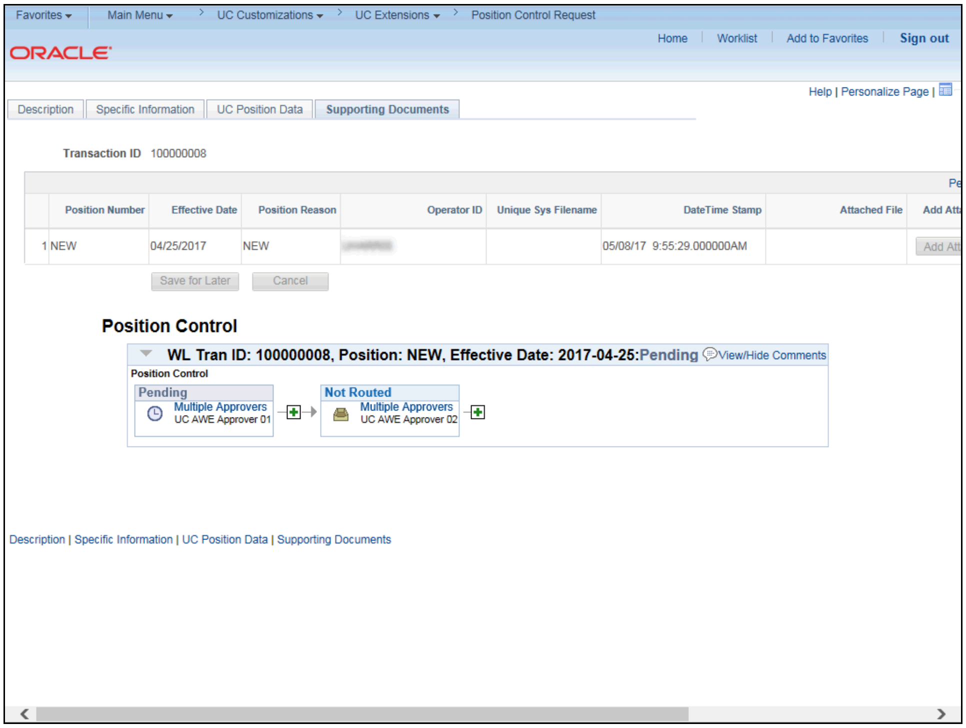
Step	Action
52.	For this example, click the **All Others, Not Confidential** list item. All Others, Not Confidential



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



Step	Action
55.	Use the **Supporting Documents** page to attach one or more supporting documents to your request. To begin the steps for uploading a document, click the **Add Attachment** button. In this example, you will not attach supporting documentation.
56.	When you are finished entering position details, click the **Save and Submit** button. Save and Submit



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.**