Business process guide

This reference guide gives instructions to create and modify positions and establish funding sources. It also illustrates the procedural steps and the PeopleSoft screens used by departmental position managers to:

- Approve and manage position changes.
- Create and modify positions that will or will not be integrated into Kenexa.
- Maintain position accounting.
- Understand the relationship between position and job data.
- Review position cross-reference.

Please refer to the Data Management staff directory for the Data Management specialist responsible for your department.

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Preparation

Roles you will need

The security roles should be distributed according to your department's internal business processes. There is a hierarchy of access for the three available roles, where the financial manager gives you all access while the position view grants view-only access. Departments may assign different individuals to specific roles. In this case, some users will need to work with others in the department to complete the entire process.

Position Management requires specific roles to complete the necessary transactions. Depending on your purpose for accessing Position Management, it may be more appropriate to have one role versus another. The following is a list of all possible roles from the least access to the most access:

- HCM Dept Position View.
- HCM Dept Position Manager.
- HCM Dept Financial Manager.

How to apply for these roles

To check which roles you currently have, log in to PeopleSoft and navigate to:

1. ASU Customizations.
2. ASU Security.
3. Manage Security Requests.
4. My Security Access Roles.

You may also choose the PeopleSoft "Submit a Role Request" catalog item in ServiceNow. You will be prompted to log in to PeopleSoft if you are not already.

Note: The HCM Dept Financial Manager and HCM Dept Position Manager roles require training to obtain the role. The training is available on Career EDGE by:

1. Clicking on the "learning" menu header and selecting "learner home."
2. Searching for "HRIS: Department Position Manager."
3. Selecting the "launch" button to start the course.

Access to these roles will provide

HCM Dept Position View role — grants view-only access to Position Management to review HR positions and position funding.

HCM Dept Position Manager — grants view, add and update access to Position Management to execute HR position transactions and view-only access to position funding. Access to the position worklist is also granted.

HCM Dept Financial Manager — grants view, add and update access to Position Management to execute HR position transactions and position funding. Access to the position worklist is also granted.

Before you start

Department procedures

Departments should follow their current internal business processes to comply with university policies and obtain all necessary documented approvals before submitting position number requests. Reference the following guidelines for more information on position reclassifications:

- ACD 507-07: Academic Professional Promotion.
- SPP 402-01: Classification of Positions.
- SPP 402-02: Establishing and Revising University Staff.

Additional information

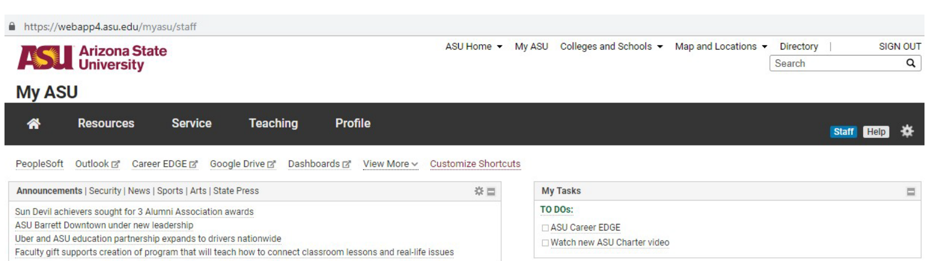
The PTR and Position Management FAQs are posted on the Data Management webpage. They may provide additional information if you have questions or errors while using any position management pages in PeopleSoft.

Please refer to the employee data management webpage, select "Resources," and click "BPG — How to process worklist transactions" for more details about the Personnel Transaction Request and position worklists. The position worklist is used for positions that have been marked for recruitment.

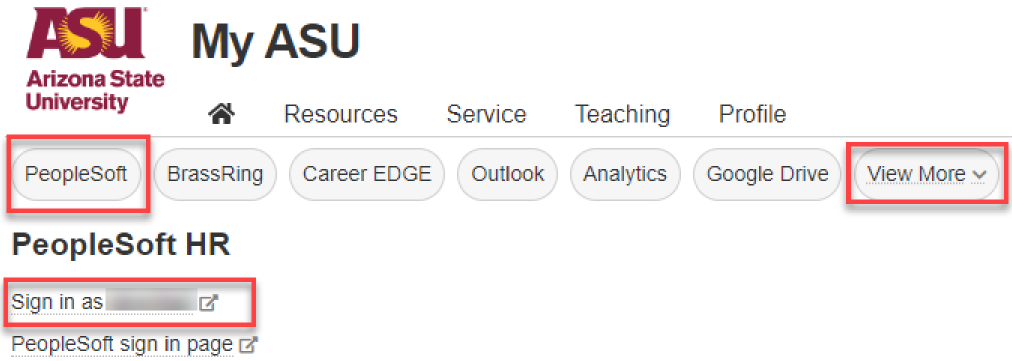
Access the system

Step one — sign in to PeopleSoft

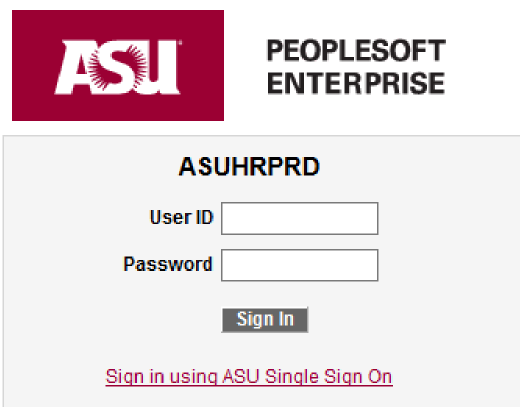
1. Sign in to My ASU.



2. In the shortcut menu, click on “PeopleSoft." You may need to click "view more" to select the "PeopleSoft" link. You can also click "Customize Shortcuts" to move the link into the menu bar.

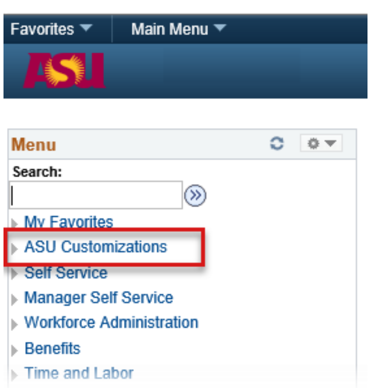


3. Click the "sign in as" link to log in using single sign-on or go to the "PeopleSoft sign-in page" and enter your ASURITE and password.

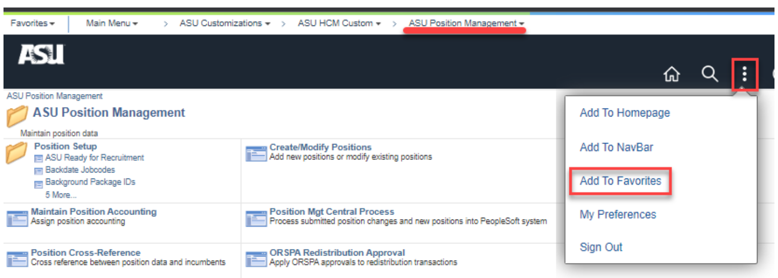


Step two — navigate to position management

1. Select ASU Customizations.

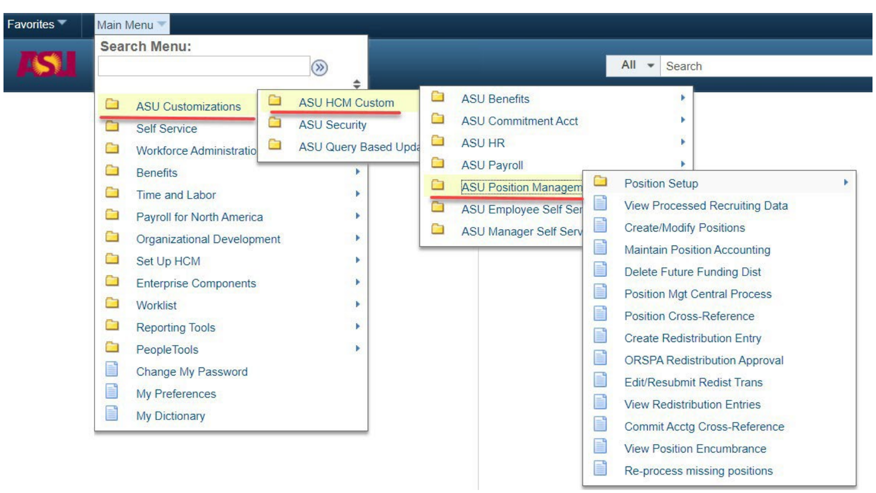


2. Select ASU Position Management.

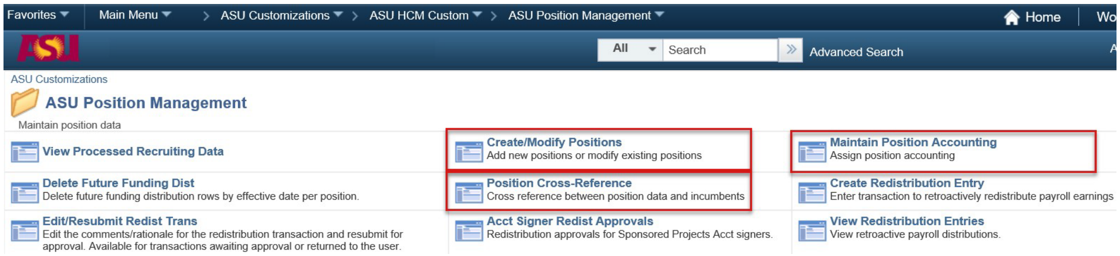


Note: Once you have reached the main Position Management menu, you can click on the "Add to Favorites" link at the top right-hand corner of the page.

The menu column on the left will disappear after you start navigating, but you can still access it by clicking on the main menu link at the top of the screen. Once you have clicked on the main menu link, click on each of the main menu items to open the contents of each folder.



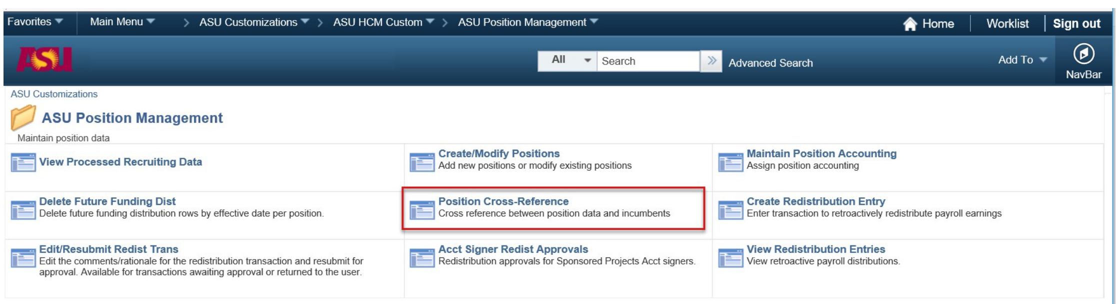
The main ASU Position Management menu is comprised of three sections. Please save this page to your favorites.



Verify a position using position cross-reference

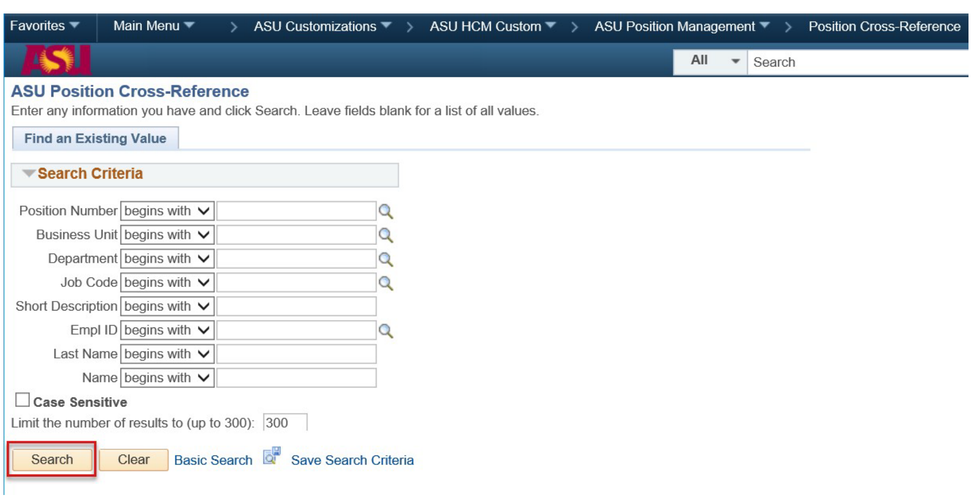
The minimum role you will need to view position cross-reference is HCM Dept Position View. This role can also be given separately to others in your department who need to view the information without being directly involved.

Step one — select position cross reference



Step two — enter search parameters and click the search button

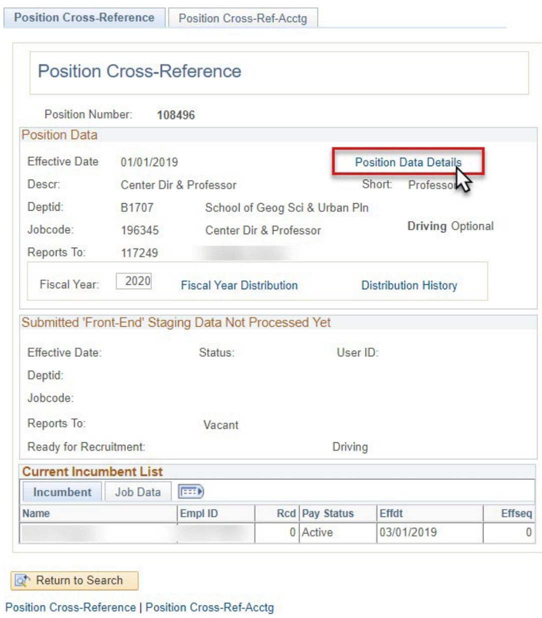
A position number value can be looked up by position number, business unit, department, job code, employee ID, last name or the employee's full name. Once a position number has been selected, employees with that number are listed and linked to the position data details and fiscal year distribution.



You can find positions by entering one or more criteria with the information you know and clicking the search button.

Step three — click on the position data details button

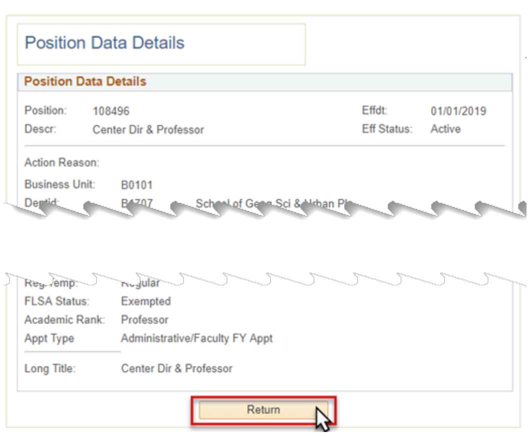
Position summary information will be displayed on the first screen, and a listing of the employees on that position number. To look at the attributes, click on "Position Data Details."



Step four — click on the return button

This screen shows the current position details like the description, department, location, standard hours and recruitment information. This information is set up through "Create/Modify Position."

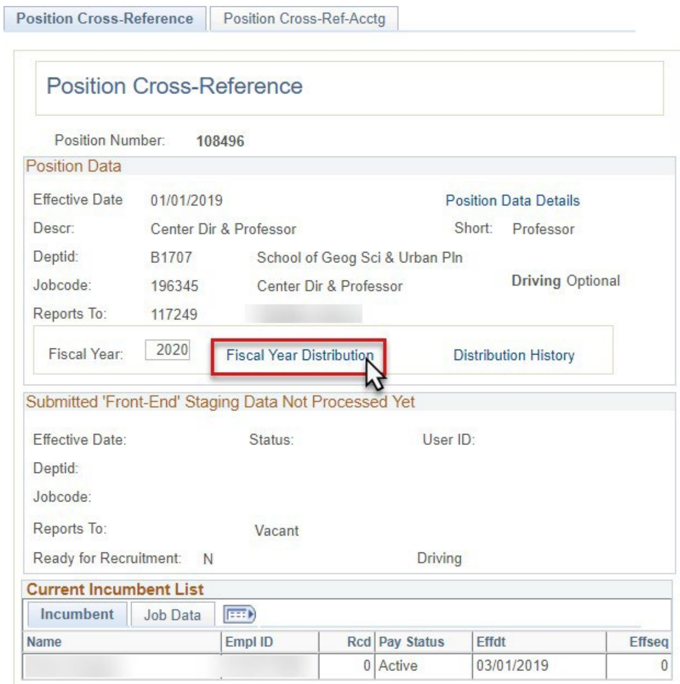
Click the "Return" button to go back to the general information screen.



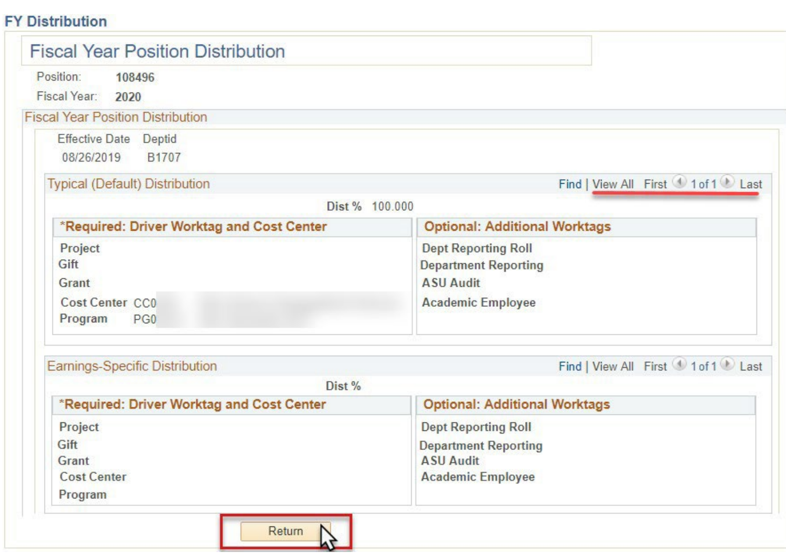
Step five — review fiscal year distribution and distribution history

You can view account information related to this position from two different links:

- Fiscal Year Distribution.
- Distribution History.



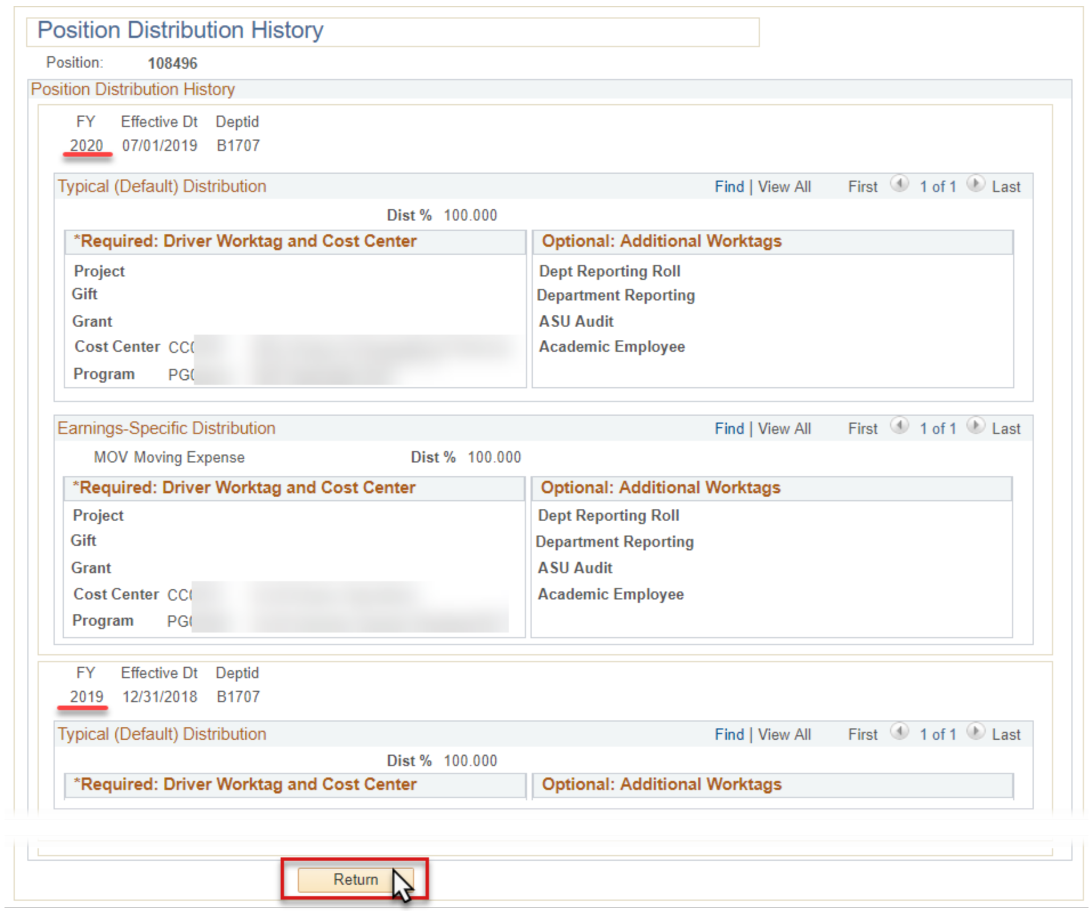
The following screen shows the current fiscal year's accounting information for the given position. For positions with distribution from multiple worktags or cost centers, you may need to click "View All" to see additional percentages and accounting details. Click "Return" to get back to the "Position Cross-Reference" view.



Next, click the "Distribution History" link.

The following screen is an example of what you see by clicking on the "Distribution History" link, which displays all accounting modifications for the entire position history. For dates with distribution from multiple worktags or cost centers, you may need to click "View All" to see additional percentages and accounting details.

Click the "Return" button to navigate back to the cross-reference screen.

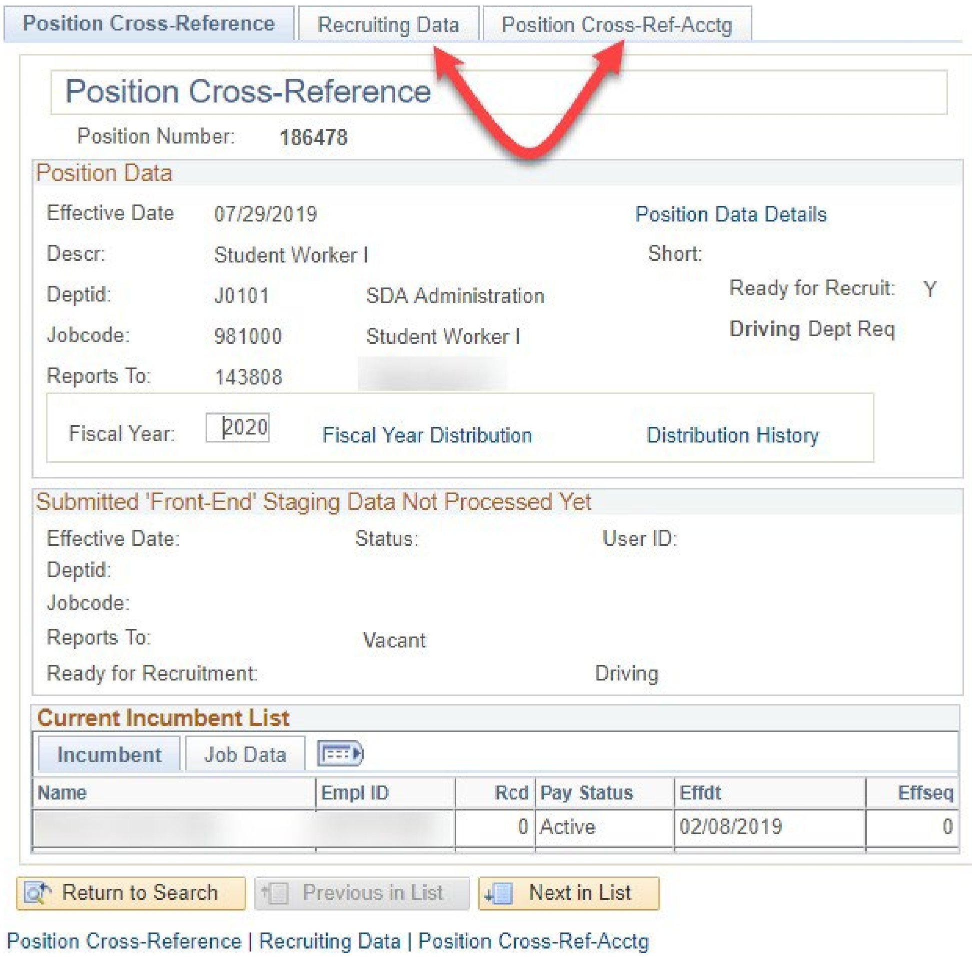


Step six — review recruiting data and position cross-reference accounting tabs

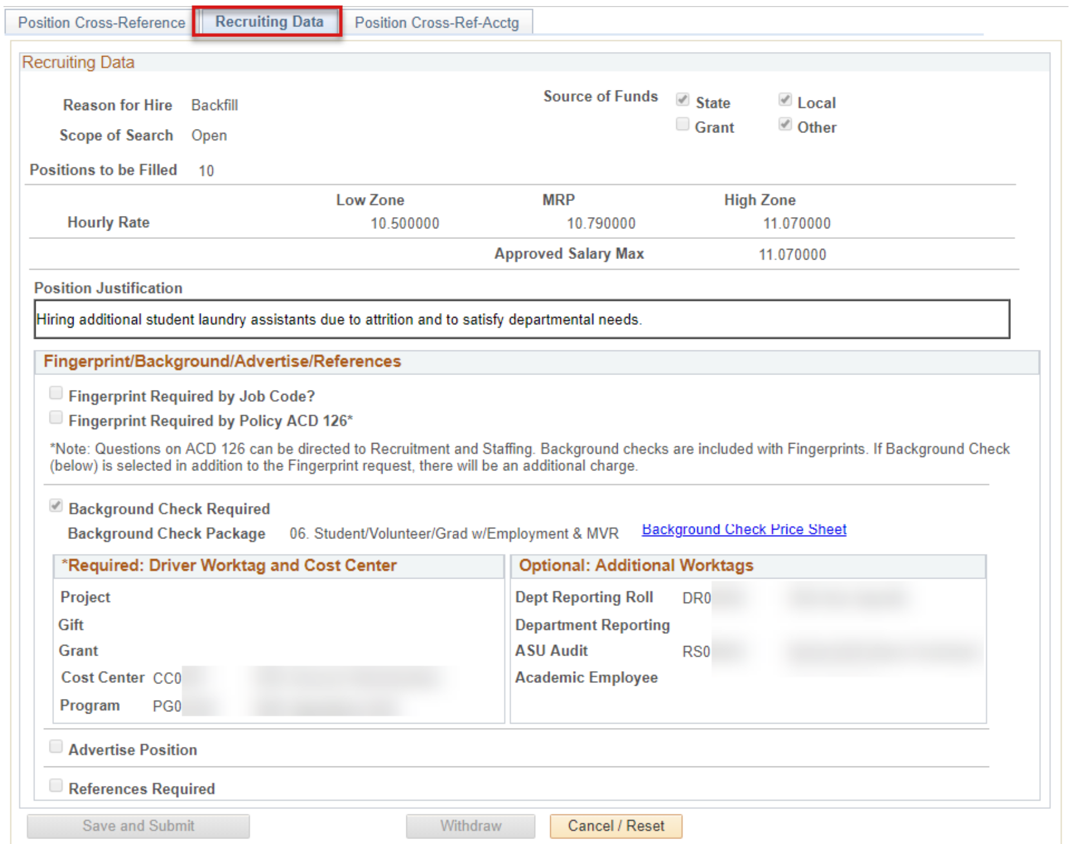
You can view additional information related to this position from two different tabs:

- Recruiting Data tab — used for processing certain competitive hires through Kenexa BrassRing and will only appear for positions marked as "Ready for Recruitment."

- Position Cross-Ref-Acctg — available for all positions.



The following screenshot shows the "Recruiting Data" for the position. This tab is only available for positions created or modified to be integrated into Kenexa BrassRing. Depending on the selected employee class and scope of search, this screen may appear differently.


Position Cross-Reference | Recruiting Data | Position Cross-Ref-Acctg

Recruiting Data

Reason for Hire Backfill
Scope of Search Open
Source of Funds: State (checked), Local (checked), Grant, Other (checked)
Positions to be Filled 10

	Low Zone	MRP	High Zone
Hourly Rate	10.500000	10.790000	11.070000
		Approved Salary Max	11.070000

Position Justification
Hiring additional student laundry assistants due to attrition and to satisfy departmental needs.

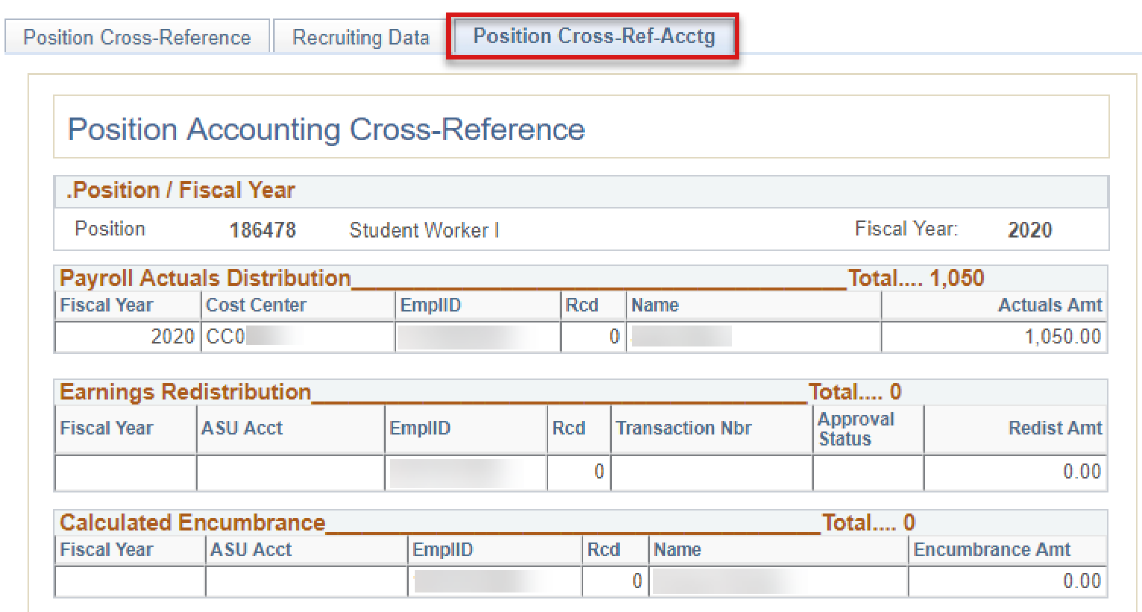
Fingerprint/Background/Advertise/References
Fingerprint Required by Job Code?
Fingerprint Required by Policy ACD 126*
*Note: Questions on ACD 126 can be directed to Recruitment and Staffing. Background checks are included with Fingerprints. If Background Check (below) is selected in addition to the Fingerprint request, there will be an additional charge.

Background Check Required
Background Check Package 06. Student/Volunteer/Grad w/Employment & MVR Background Check Price Sheet

*Required: Driver Worktag and Cost Center	Optional: Additional Worktags
Project	Dept Reporting Roll DR0
Gift	Department Reporting
Grant	ASU Audit RS0
Cost Center CC0	Academic Employee
Program PG0	

Advertise Position
References Required
Save and Submit | Withdraw | Cancel / Reset

The following screenshot shows what you will see when you click on the "Position Cross-Ref-Acctg tab. This tab provides information for the actual fiscal year-to-date gross paid to the employees on the position, any earnings redistributions and the encumbrance for the fiscal year.


Position Cross-Reference | Recruiting Data | Position Cross-Ref-Acctg

Position Accounting Cross-Reference

.Position / Fiscal Year
Position 186478 Student Worker I Fiscal Year: 2020

Payroll Actuals Distribution Total.... 1,050

Fiscal Year	Cost Center	EmplID	Rcd	Name	Actuals Amt
2020	CC0		0		1,050.00

Earnings Redistribution Total.... 0

Fiscal Year	ASU Acct	EmplID	Rcd	Transaction Nbr	Approval Status	Redist Amt
			0			0.00

Calculated Encumbrance Total.... 0

Fiscal Year	ASU Acct	EmplID	Rcd	Name	Encumbrance Amt
			0		0.00

You can return to the previous screen by clicking on the "Position Cross-Reference" or "Recruiting Data" tab. Use the "Position Cross-Reference" tab to review data on a position and review the current status and workflow approval step for the position being integrated into Kenexa BrassRing.

Maintain position accounting

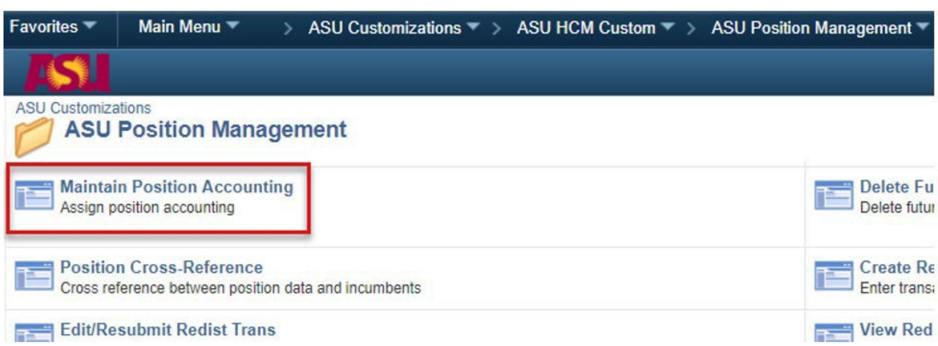
The minimum role you will need to access position accounting is Dept Financial Mgr.

Maintain Position Accounting is used to set up and modify the funding source on a position. A position cannot be used in PeopleSoft without funding. Positions appear in a "Submitted" status without processing until the funding is added or confirmed and may eventually be returned to the originator. The funding is also used to determine approval routing for various workflow processes throughout PeopleSoft. Multiple users may be involved in completing a position transaction, depending on how departments assign roles and access.

Distribution cannot be changed for a previously distributed payroll for a filled position.

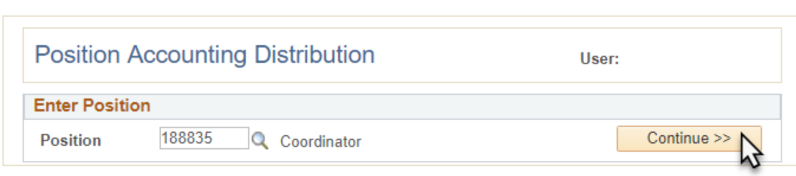
Step one — navigate to maintain position accounting

Sign in to PeopleSoft, navigate to ASU Position Management and click on "Maintain Position Accounting."



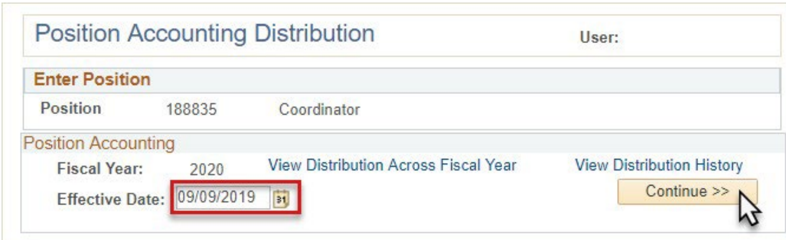
Step two — enter position number

You can type in the position number or search for it by clicking on the magnifying glass and selecting "Continue."



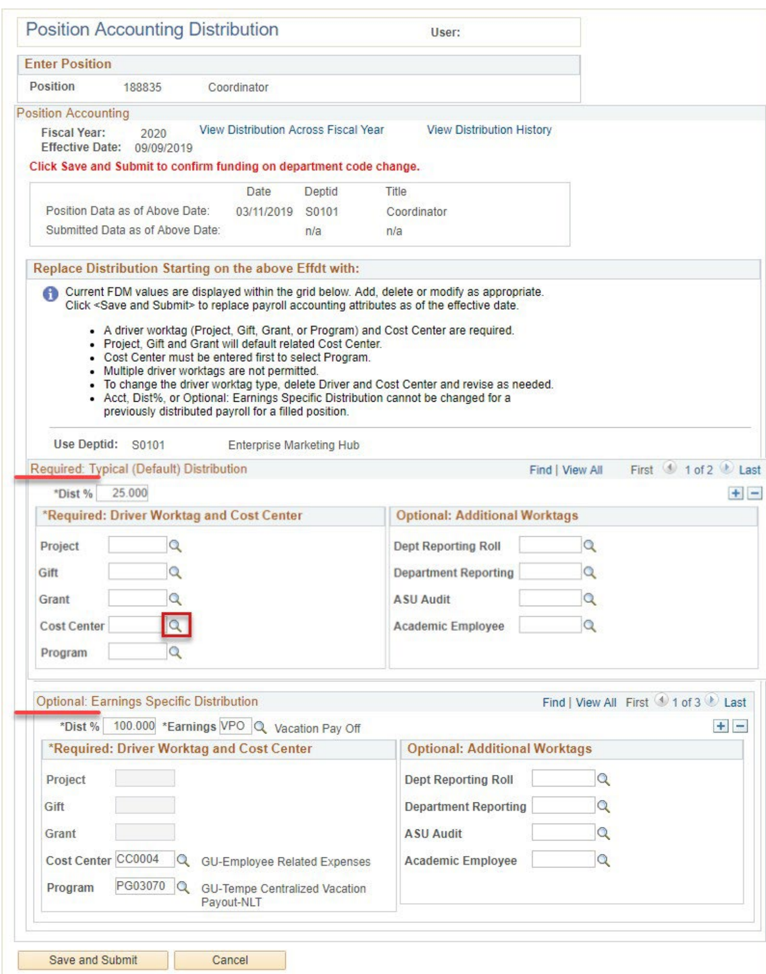
Step three — enter the effective date and click on the continue button

Enter the date you want the position distribution to reflect the change and click "Continue." The effective date may automatically populate if the position has been submitted for certain transactions.



Step four — enter account information

You can type the cost center and worktag or look it up by clicking on the magnifying glass. Every field with a magnifying glass in PeopleSoft allows you to perform a lookup. In the "Required" row, enter the account that will pay the position. If a position number is being paid from more than one account, the total distribution percentages from all accounts must add up to 100%.



If a position is paid from more than one account, click the "+" sign, and a new grid will appear for entry. Changes to existing funding do not require approval in the system.

A driver worktag — a project, gift, grant or program — and cost center are required. Once you select a project, gift or grant, the cost center will automatically populate. The cost center must be entered first to select "Program." Multiple driver worktags are not permitted in a single row and must be separated according to their percentage.

To change the driver worktag type, delete "Driver" and "Cost Center" or delete the row by clicking on the "-" sign. Then, you can enter the new distribution information. If you delete the row, you must re-enter the distribution percentage.

In the "Optional" row, you can identify separate funding for different earnings codes like vacation payout and additional payments. You can also fund an earnings code from multiple accounts, but each earnings code must be funded to 100%.

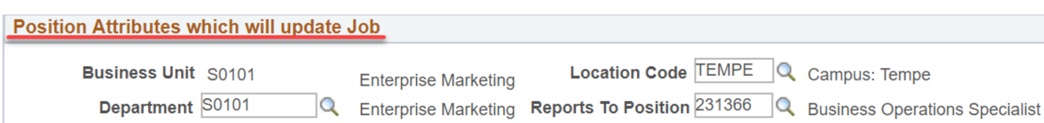
Distribution details for the Health Incentive Program and Vacation Pay Off earnings codes are automatically generated for eligible positions when position accounting is created or modified. This will occur whether a position is vacant or filled. These earnings codes will not be charged unless an employee is identified as a HIP recipient or a personnel action like termination or FTE changes results in VPO.

Please do not remove the HIP or VPO earnings codes from eligible positions. Removing the codes from eligible positions may cause delays in processing related transactions. You may be required to complete redistribution if a payment is processed and applied to the position's default funding.

Note: Departments cannot change account information on filled positions for previously distributed payrolls. Mistakes in funding should be addressed with redistribution.

Changes to position management

As of May 2013, position and job data are decoupled, so most job information is pulled from the job code rather than what is on the position. Once a position is filled, the only fields that will update job data from a position modification are the department code, reports to position and location code.



For example, changes to standard hours, job code and title on a filled position do not automatically update job data. Changes to job data must be requested via the Personnel Transaction Request. The reverse is true if you update an employee's job data FTE or job code and title via the PTR, the position will not be affected.

As of July 2013, for staff positions, a conversion to the university staff classification occurred to replace most classified positions. This also means that any vacant positions with an employee class of "classified" a department wishes to reuse must be modified for university staff.

As of November 2013, Kenexa BrassRing is the university hiring system for student workers and university staff positions. Departments must begin in Position Management before a requisition can be created. The progression is:

1. Create or modify a position in Position Management.
2. Wait for the system to integrate the position into Kenexa BrassRing.
3. Create a new requisition using the position.
4. Work with recruitment to post the job.
5. Progress candidates within Kenexa BrassRing.
6. Hire your candidate and close the requisition.

Positions should now be created with recruitment data that will automatically integrate into Kenexa. Pre-existing positions that will be reused for a new, competitive hire, promotion, reassignment or transfer will need this recruitment information to be updated. For more information on the hiring process in Kenexa, please visit the recruitment webpage.

October 2016 ASU position modifications

Position data:

- Current incumbents view added.
- Extra validations:
  - Student workers must be "variable" and "part-time."
  - SWS split code must be "none" for a waiver.
- New "Special FLSA Provision" field.
- Section designated to indicate which fields update job data.
- Workers' compensation code and SWS split code changed to a dropdown.

Recruitment data:

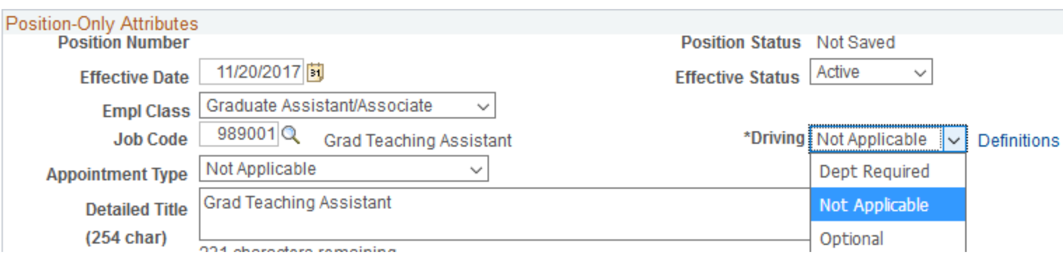
- Auto-populated fields for additional hires based on the posted position number entered.
- Extra validations:
  - Student hourly rate must be within the job code range.
  - Waiver information is required for students.
  - ABOR cannot be selected for students.
  - Fingerprints on BGC are required for staff.
- Reason for hire and BGC package changed to a dropdown.
- Updated low zone, MRP and high zone section.
  - Calculated min fields.

Recruitment data:

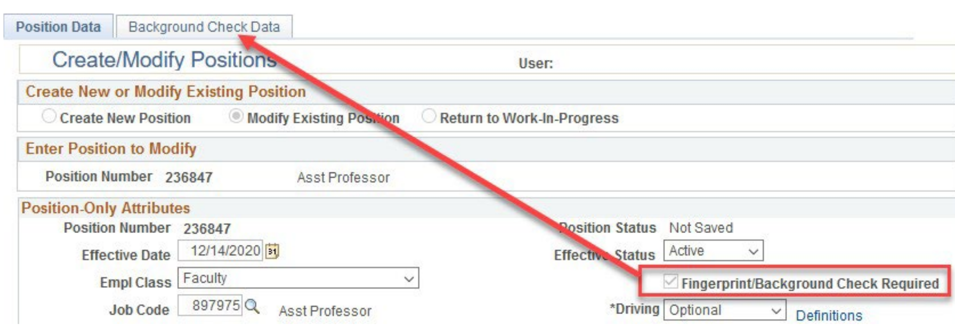
- A position can only have one FLSA status at a given time and must correspond to the FLSA status on the job data for the position's incumbents.

As of October 2017, Position Management has been modified to maintain the identification of required or optional drivers to ensure the employee has completed all requirements to be an authorized driver for ASU. Changes include:

- A background check package with motor vehicle record options will be available based on the position driving field.
- Driving required field — the department must select an appropriate designation for all positions through "Create/Modify Positions." Available options are "Dept Required," "Not Applicable" and "Optional."
  - Positions using a job code designated as "Driving Required" will automatically be designated as "Required."
  - The driving designation cannot be backdated before the current position date.
  - The selection made on the position will affect the background check options for your recruitment.
- The "Position Cross Reference" page displays a "Driving" field.



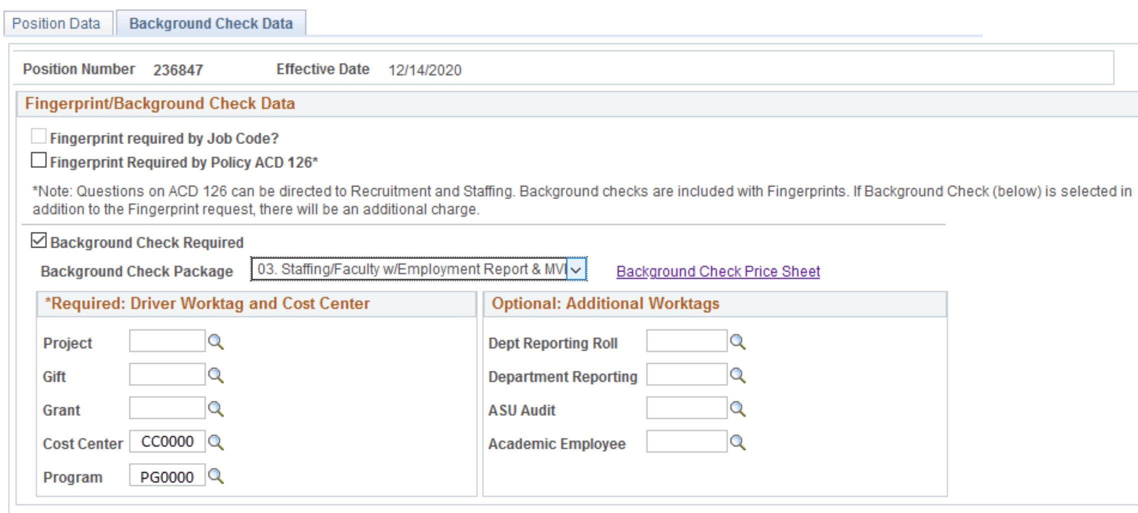
As of February 2021, Position Management will be used to collect fingerprint and background check billing data for faculty and other academic positions.



- Academic professionals and faculty, including those with administrative appointments, will require details to be entered on the "Background Check Data" tab when creating or modifying positions.
  - Background check funding details for most active positions were uploaded using the position's default accounting when this function went "live" in

PeopleSoft. Positions not updated with the default values will require background check data to be entered when the position is modified next, regardless of recruitment status.

- Graduate and post-doctoral positions will provide the option to enter background check data by selecting the checkbox when creating or modifying positions and adding details on the "Background Check Data" tab.
- New or modified positions will display the fingerprint and background check required box on the "Position Data" tab once the employee class, job code and driving tag are entered, if applicable. The "Background Check Data" tab will appear when the box is checked.
- Background check data can be updated at any time. Once details have been added, they will not require modification unless other changes to the position invalidate the fingerprint or background check option that was previously selected, like a driving requirement.
- Background check data should not be backdated.
    - Position Management will display the most recently entered background check data account details, but the background check team will use the accounts with the recent effective date for new charges.



Background checks and fingerprints are completed before the hire is processed by completing the background check request form and emailing it to the Office of Human Resources. If you already sent HR the background check request form when creating the position, enter the same account for billing in the "Background Check Data." If a PTR is processed and a required background check is not complete, HR will send a background check and bill according to the "Background Check Data." Additional details regarding this process can be located in the background check guide and background check FAQs.

To view the results of a recent employee's background check and fingerprint results, navigate to:

1. Human Resources webpage.

2. HR reports.
3. HR ASU Department Reports.
4. Fingerprint Status Report.

Modify a position

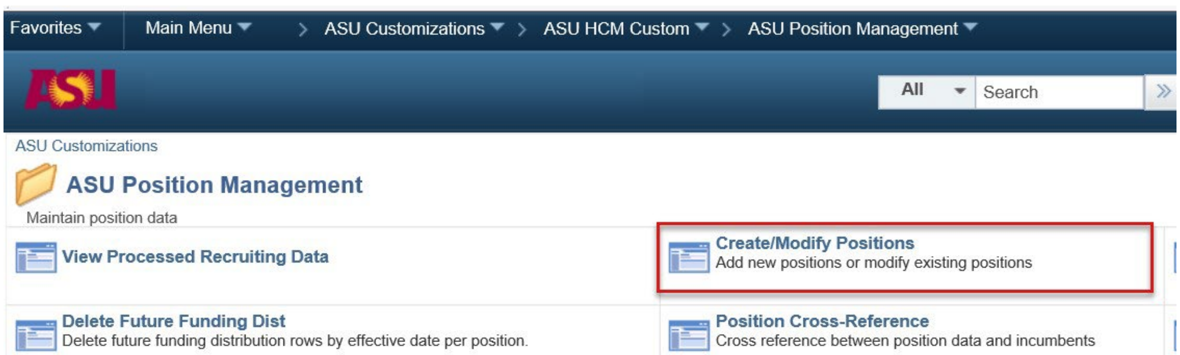
The minimum role you will need to modify a position is HCM Department Position Mgr.

"Modify a Position" is often used to edit attributes on an active position or to prepare a position to be vacated for a new incumbent. Positions that have been vacated for some time may be reused for new hires, promotions, reassignments and transfers, but the position should be budgeted.

Step one — navigate to create/modify a position

After signing into PeopleSoft, click on the following menus:

1. ASU Customizations.
2. ASU HCM Custom.
3. ASU Position Management.
4. Create/Modify Positions.

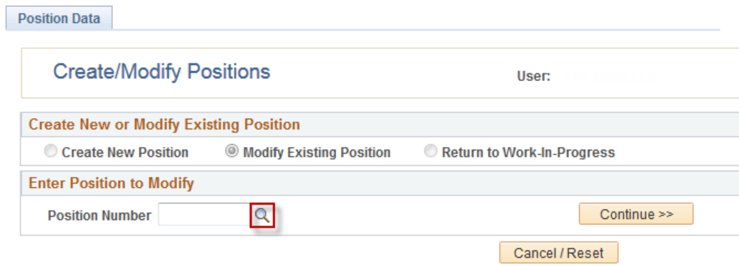


Step two — click on modify existing position

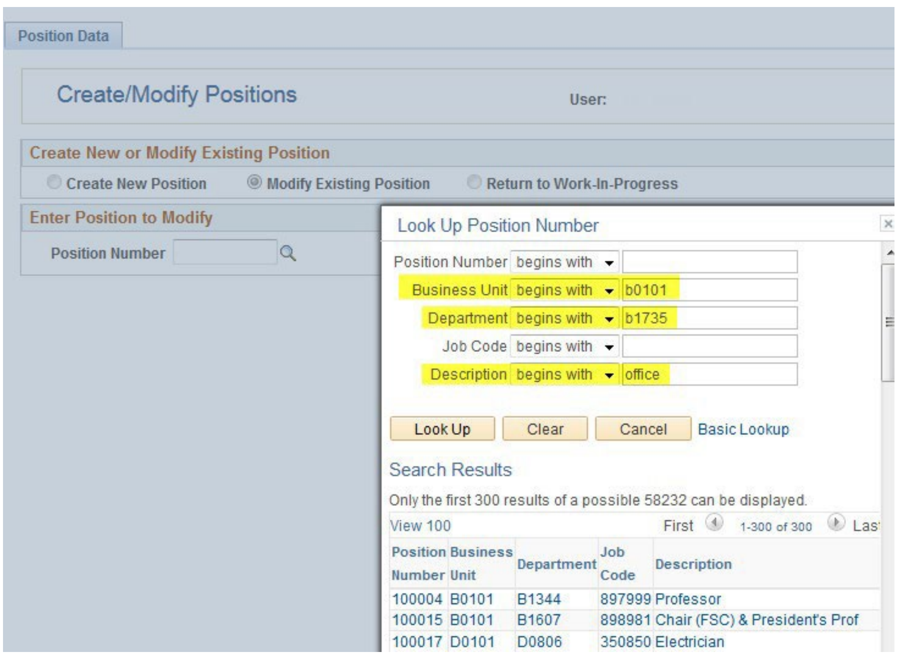
This is the starting page for "Create/Modify Positions." A "Return to Work-In-Progress" button will also appear if you have positions in progress. In the following example, click the "Modify Existing Position" button.

Step three — enter the position to be modified

Type the position number or use the lookup to select the position.

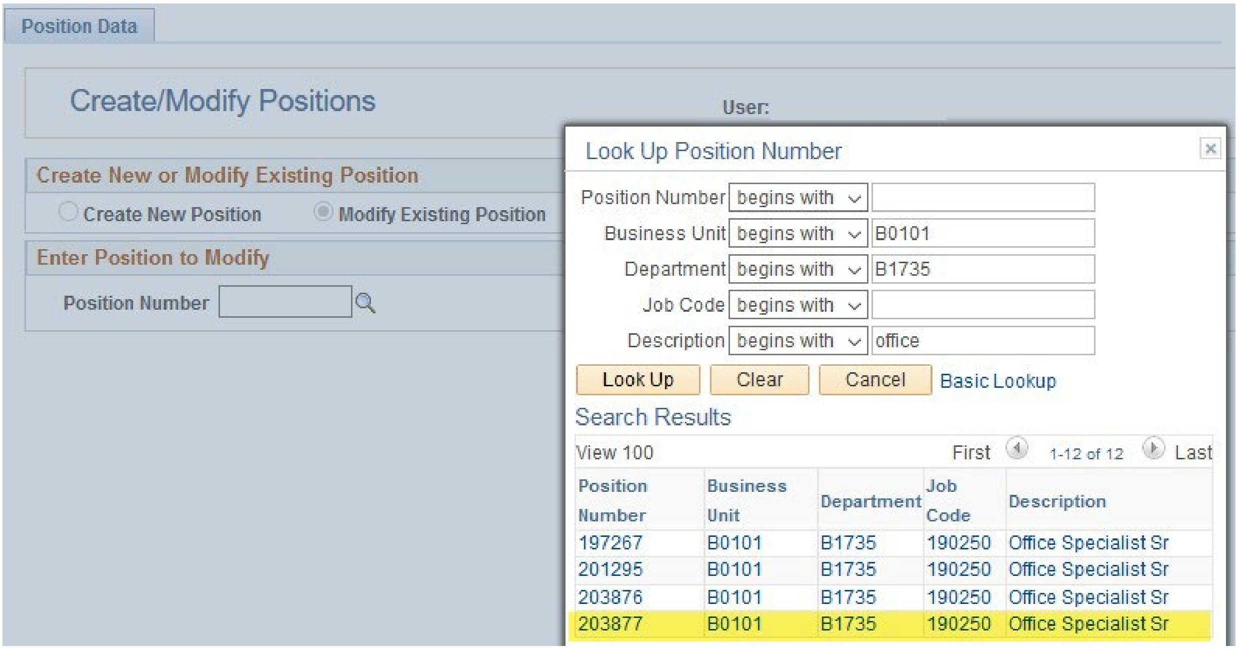


For our example, we want to modify the position of one of the senior office specialists in our department — B1735. We know our business unit, department code and position we want to modify has the word "office" in the description. Therefore, we set the search criteria to search for that position.



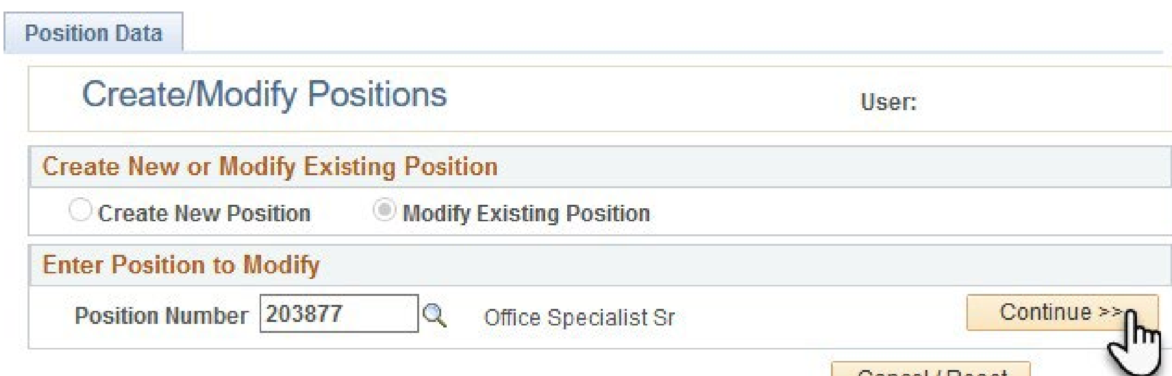
Click on the "Look Up" button.

Note: By entering only your department, you can see all the positions currently in your department.



Click on the row of your choice.

Step four — click on the continue button



Please note the following restrictions in Position Management:

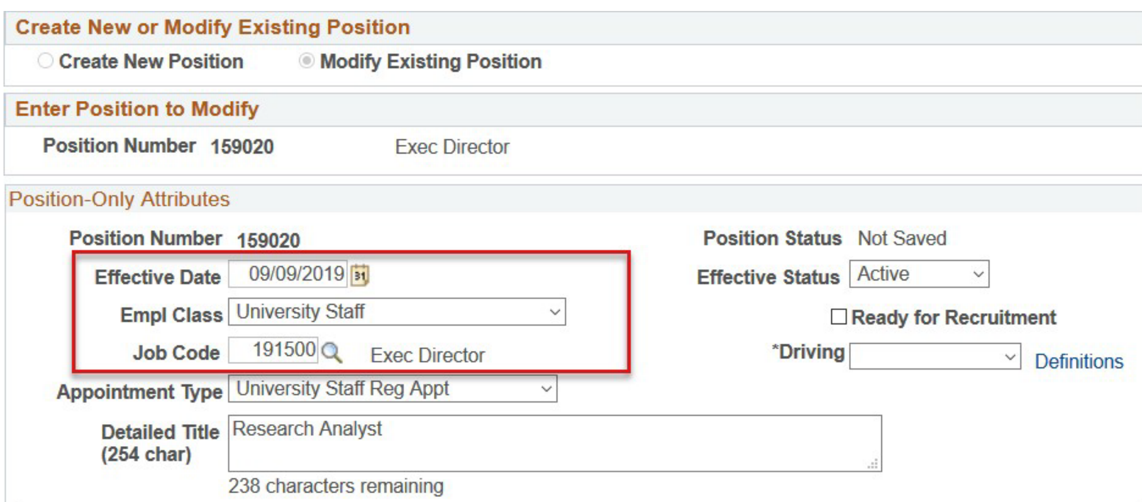
- Changes to department codes on filled positions will be locked down for six business days between when the payroll process begins on Thursday night until the evening of the following Friday when the distribution process is complete.
    - The lockdown will happen only for department code changes with an effective date before or within the payroll currently being processed. During this period, departments can enter department code changes on filled positions for future payroll, vacant and new positions. Once the distribution process has been confirmed, departments can enter

department code changes on positions with adequate data for the recently distributed payroll.

- Departments cannot change the account information on filled positions for previously distributed payrolls.
    - If a different account should have funded a previously distributed paycheck, the department must address the issue by account redistribution.
- Changes made to filled positions will not be applied to job data.
    - Only changes to the department code, reports to position and location code will update job data for incumbents. All other changes to filled positions will require a PTR to update the job data.
- Department code, reports to and location values will not update job data for future incumbents. These changes must be submitted after the hire effective date is met.
- Departments cannot future date new position numbers.
    - Creating a position equal to or less than the current date will allow departments to modify and post the position. The effective date of the position has nothing to do with the hire or job transaction date.
    - **Note**: Positions will not encumber until they have been tied to an active employee.

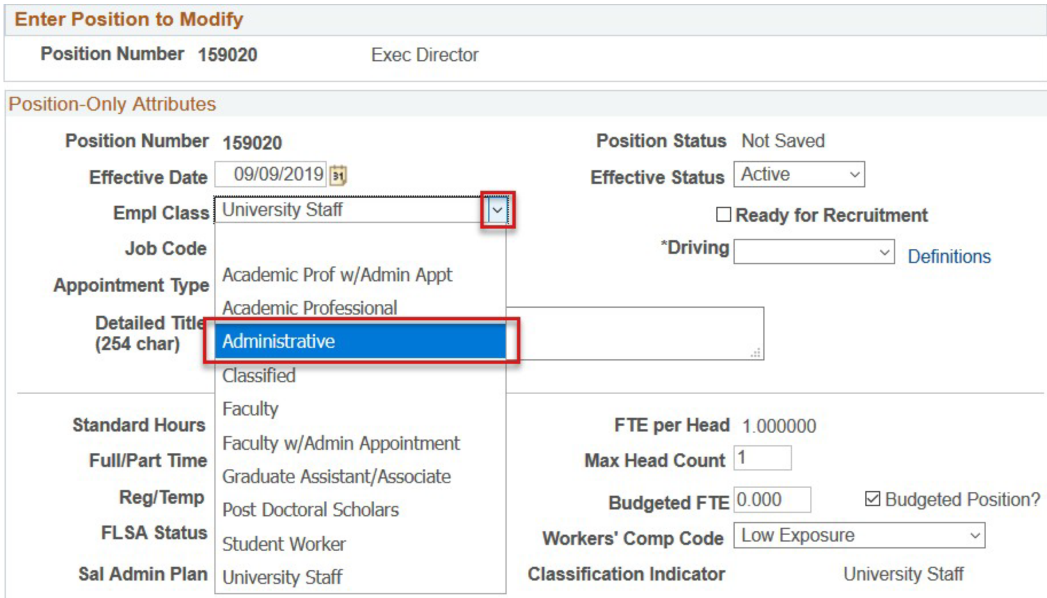
Step five — update appropriate fields that need modification

In this example, we will convert a university staff position to administrative and modify other main fields. The most important fields for this change are the employee class, job code and effective date.

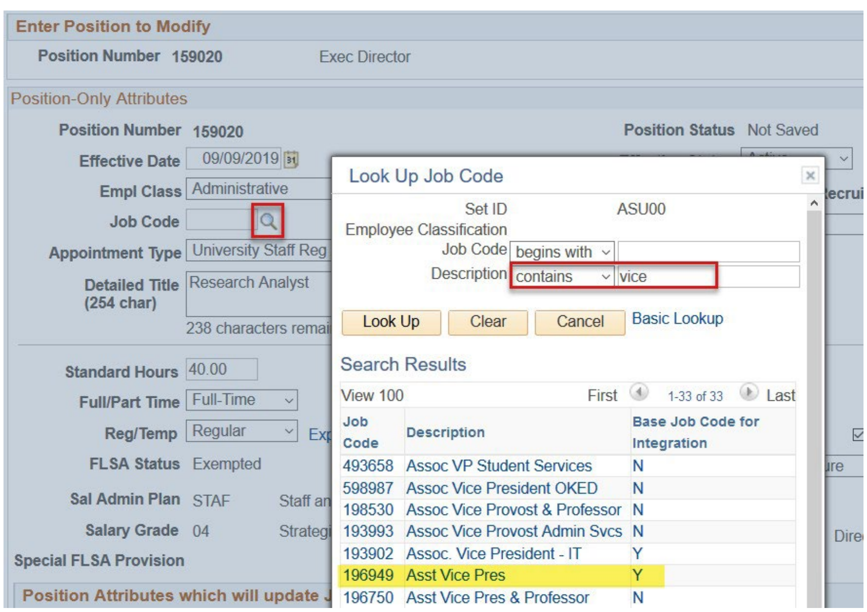


Note: A Notice of Appointment is not required for staff positions — only faculty, academic professionals and dual administrative positions. You can leave the appointment type field as its default. It will not affect your position or employee.

Begin by selecting the appropriate employee class, in this case, administrative. This will limit which jobcodes are available for the position.

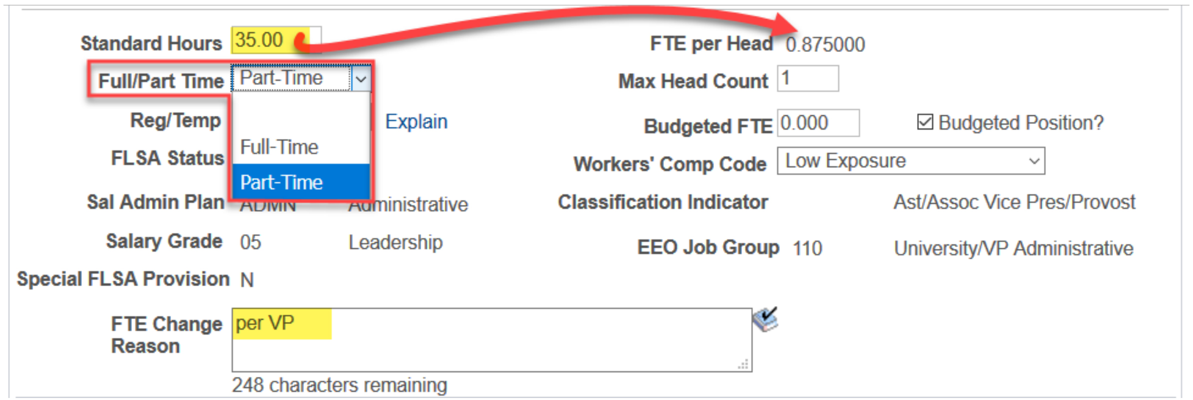


Use the job code lookup to search for a job code that matches the desired description. You can narrow the search by typing part or all of the job description. Then you can click the link.



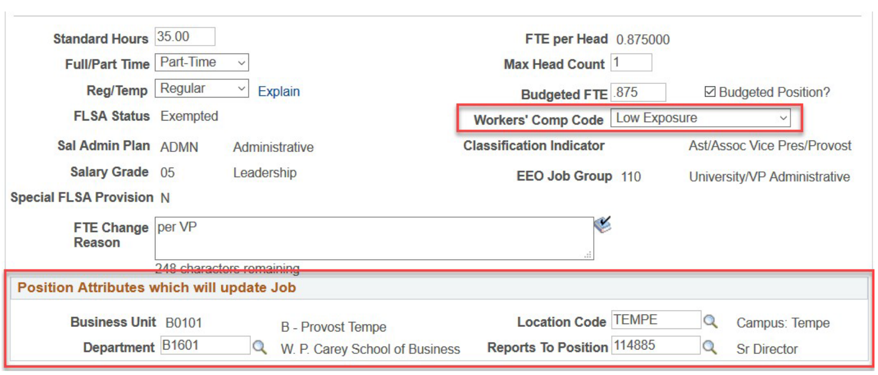
Note: The "Base Job Code for Integration Field" will be marked "Y" if this job code can be processed in Kenexa. Please contact HR compensation for help with finding appropriate job codes.

Review the remaining fields for any needed changes. In this example, we will change the FTE to 0.75. After you tab out of the "Standard Hours" field, the FTE field will automatically re-calculate. The "FTE Change Reason" field will also be required before saving. The "Full/Part Time" field must be adjusted once the FTE is changed since they are no longer full-time at 35 hours.



Since the position has been changed to 35 standard hours, you will change the "Full/Part Time" field to part-time. In Position Management, part-time is anything less than 40 hours. Refer to Appendix A for more information. You can also click "Explain" next to the "Reg/Temp" field for more information about the options listed in the dropdown.

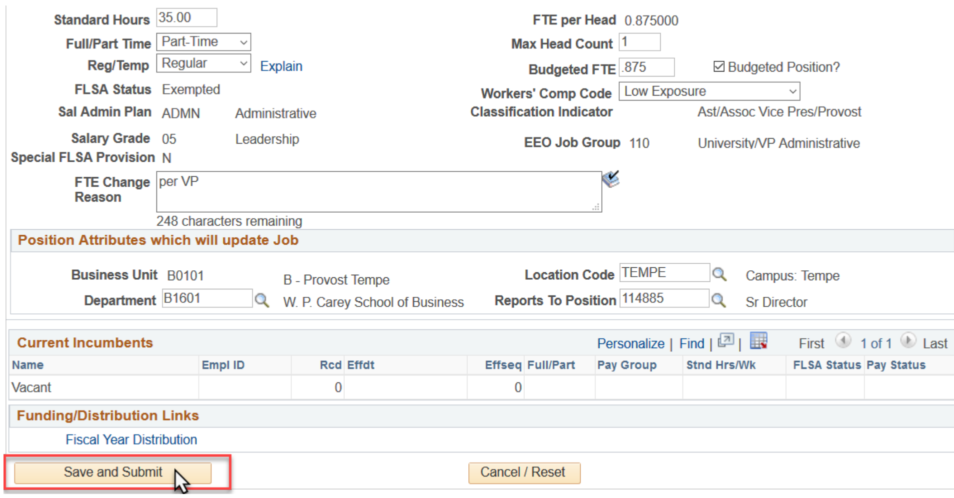
Ensure the workers' compensation code matches the "Position Attributes." Then review who the position reports to, the department and the location, which are the only fields that will update job data for filled positions.



Note: If a change is being made to the department code, you will need to confirm the funding on the position to the new department code before your position modification can be processed. You can do this by clicking on the "Create Distribution Funding" link when you click submit or by using the menu to navigate to "Maintain Position Accounting."

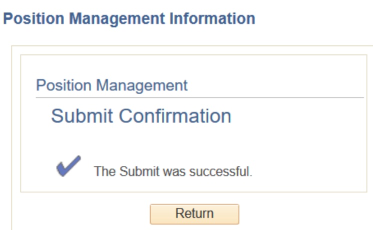
Step six — click on the save and submit button

You will need to enter recruiting information if you modify a position to create a new job posting. Refer to the "Create a New Position" section for more information.

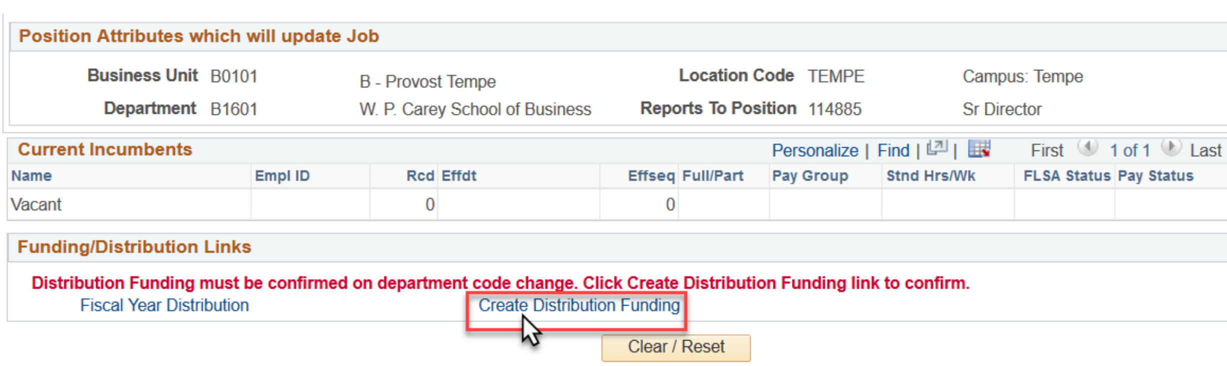


When you have completed the modification of all necessary fields, click "Save and Submit."

Click the "Return" button on the pop-up.



Click "Create Distribution Funding" to edit or confirm the accounting if necessary.



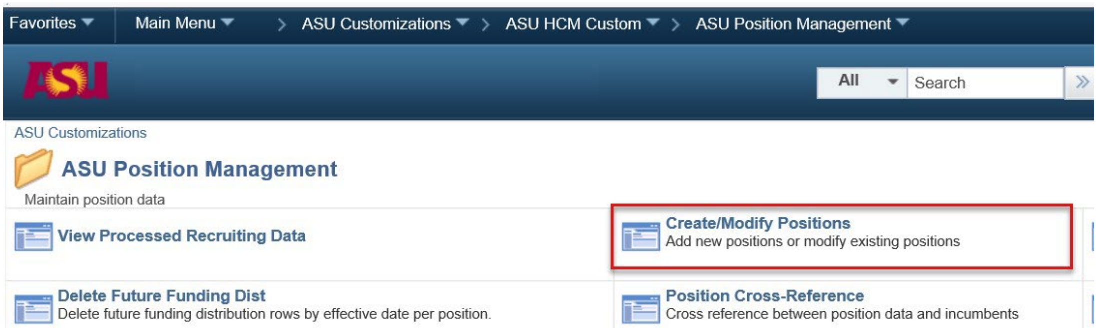
Positions that are modified with recruitment data entered to be integrated into Kenexa BrassRing will require workflow approvals. Refer to the "Create a New Position" section for more information.

Positions modified without recruiting data do not require approvals and will automatically process when all steps are completed or show a "Batch" status if payroll is open. Refer to Appendix C for more information on position statuses.

Create a new position

The minimum role you will need to create a position is HCM Department Position Mgr.

Step one — navigate to create/modify a position



Step two — click on create new position

Typically, "Create a New Position" will be chosen for new hires rather than modifying an existing position when one or more of the five main criteria for a position number do not correspond to an existing position number within the department. The five main criteria are:

1. Employee class and job code — job title.
2. Department code.
3. Reports to.
4. Funding — accounts and percentages.
5. Value of the "Reg/Temp" field.

A position number can be created by cloning an existing position number and then changing the attributes of the position number or by creating it from scratch.

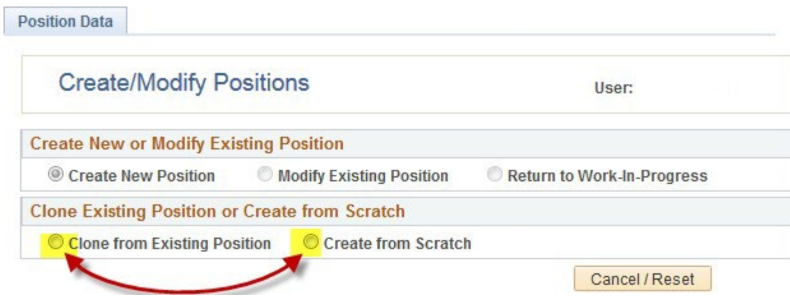
To change an existing position number's attributes like the reporting structure or to reuse it for a new hire, select "Modify Existing Position."

To return to position number updates in progress, select "Return to Work-In-Progress" to see a listing of position numbers that have been saved.

Step three — clone from existing position or create from scratch

Whether you have an existing position with similar attributes, you may "clone" an existing position or create a position from scratch.

Cloning a position is useful when you already know of a position with similar attributes to the one(s) you need to create because this will save time and reduce date entry errors.

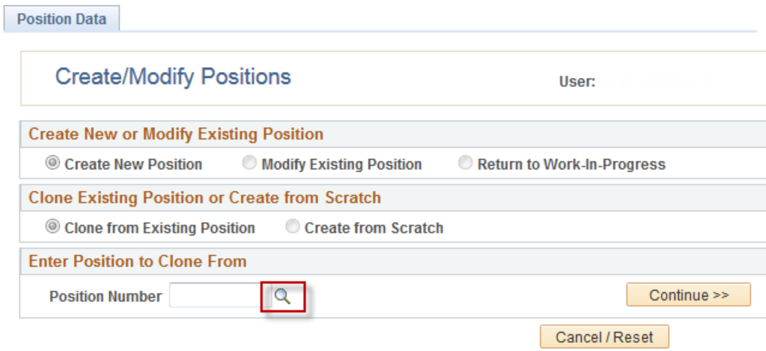


A message will appear indicating you will be creating a new position number. Position numbers are auto-assigned. It is not possible to choose a specific number for the new position.

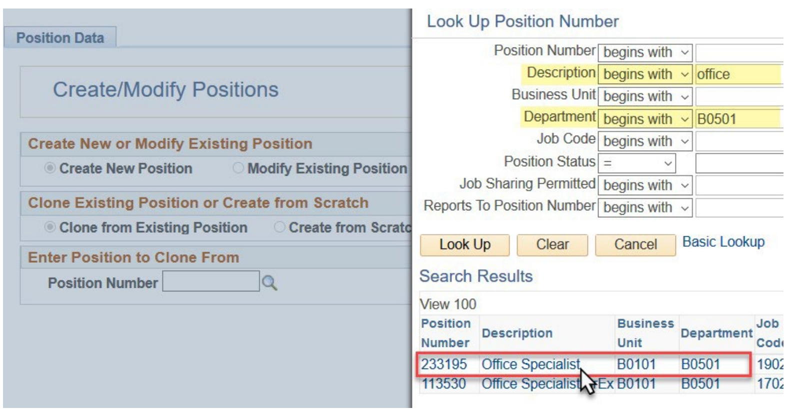
Click on the "Return" button.

Cloning an existing position

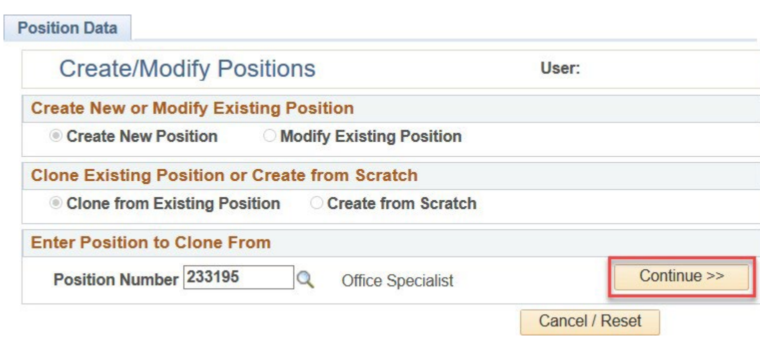
Enter the position number to be cloned. If you do not know the position number, click the "Look Up" button. Enter the criteria, and a list of position numbers fitting the criteria you entered will appear.



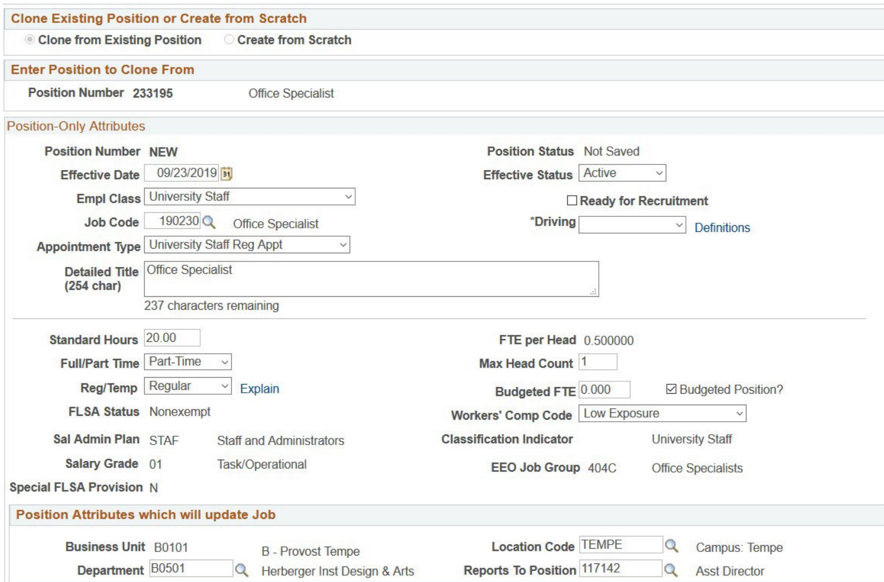
In this example, our information is limited, but we know our department — B0501 — and the job title — office specialist — of the position we want to clone.



Upon selecting the position number, you want to clone, tab out of the field, and the title will appear. Most of the attributes have been copied to the new position number. Review the attributes that have auto-populated. The attributes you can change are easy to identify.

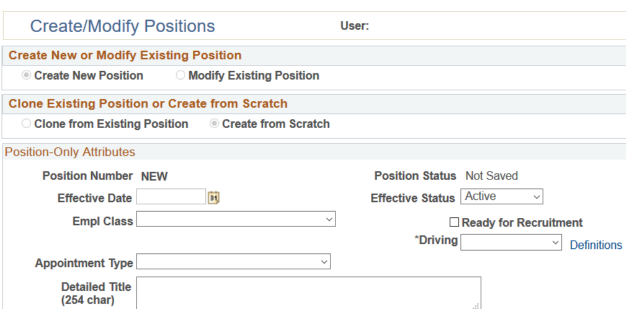


The screenshot below shows you additional information about the position attribute fields.



Creating a position from scratch

When you create a position from scratch, the position attributes page will open and the fields will be blank.



Step four — enter position attributes

If you are cloning a position, you must review the populated attributes and edit them as needed. All fields must be manually entered if you create a position from scratch.

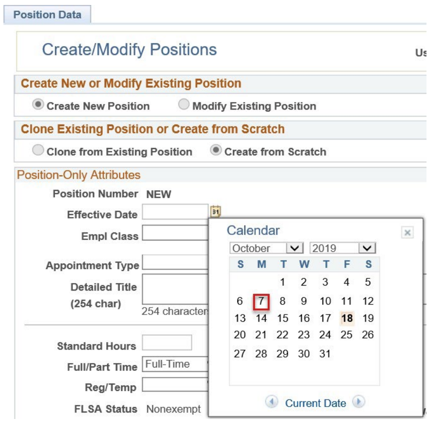
Attributes of a position number

The job code contains HR attributes that apply to all positions, such as employee class and grade. Once a position number has been set up with auto-populated fields from the job code and fields with department-selected values like location, FTE, etc., the position is ready to use in the PTR or Kenexa after the recruitment tab is completed. Otherwise, the new position attributes will not change job data. Thus, departments can have positions with attributes that do not match job data attributes for all the incumbents.

Employees in group positions must have the same department code, location, reports to position, FLSA status and funding.

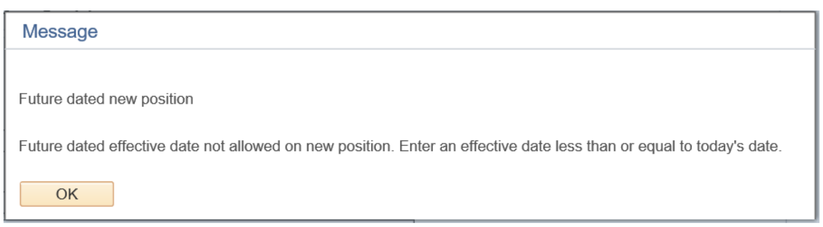
Effective date

To enter the effective date, select the calendar icon.

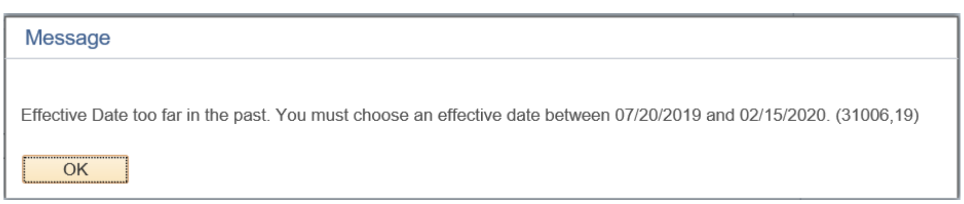


For new positions, the start date can be the present day's date or a previous date within the current payroll. Backdating to a prior payroll is only allowed for positions that will not integrate into Kenexa BrassRing and waivers.

If you enter a future date for a new position, you will receive the following error message.



If you enter a backdated effective date, you will receive the following message once you try to enter information on the "Recruiting Data" tab.

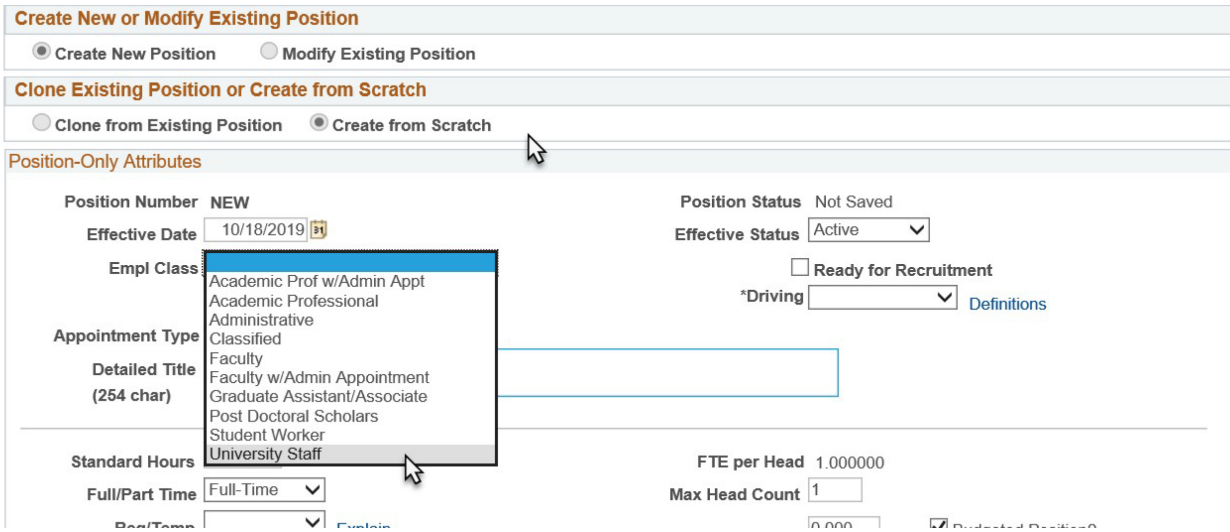


In this example, we will create a new position with the following attributes:

- ASU Gammage GA department.
- Reporting to position 100252.
- Specialist job code.
- University staff employee class.

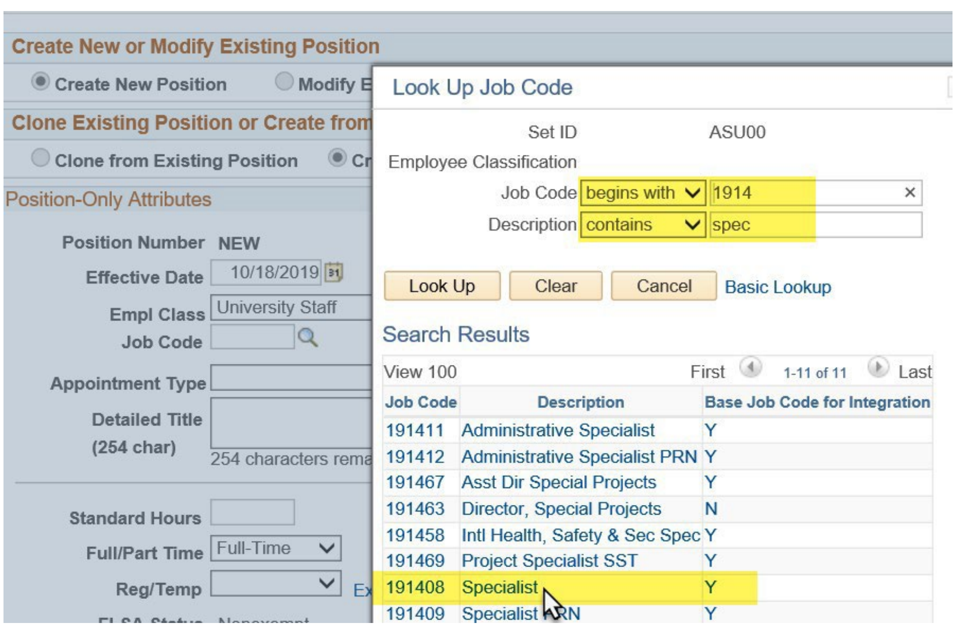
Employee class

Select the employee class by clicking the dropdown menu button. The employee class field is locked once a selection is made. You must cancel and restart the request if you realize a change is needed after the field is locked. The selected employee class will also limit which job codes are available for your position.



Job code

Next, you will select a job code within the employee class you selected. Click on the job code lookup icon. You can focus your search if you know part of the job code or description. In the following example, we want to create a specialist position.



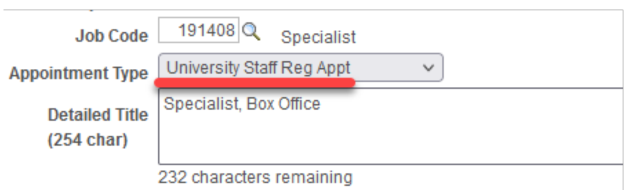
The list of job codes that appear after clicking the lookup icon will all be university staff active job codes because of the employee class field selection. Alternatively, if you had set the employee class field to student worker, all the job codes listed would be student worker codes.

Click on the row for the job code you want.

The "Base Job Code for Integration" field with be marked "Y" if it can be processed in Kenexa. Otherwise, once entering the position, you cannot enter recruiting data.

Appointment type

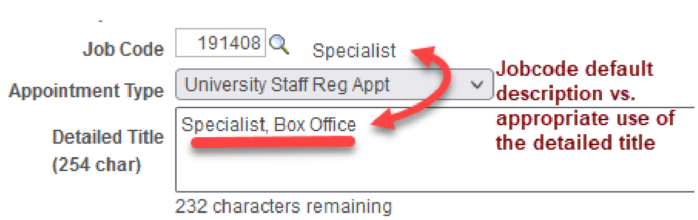
The appointment type in Position Management determines the template and language used for faculty and academic positions that receive an NOA. Changes to the appointment type on the "NOA MSS Employee List" will update Position Management using the current date as the effective date. Appointment type changes do not need to be backdated and should not be future-dated. Refer to the Notice of Appointment training for more information.



For positions that do not receive an NOA, like university staff, graduate and student positions, the default appointment type that populates with the job code should be used.

Detailed title or working title

A detailed title is automatically populated based on the default description for the selected job code. The detailed title is sometimes referred to as the working or long title. This title will appear in the ASU Outlook address book and may appear in the ASU directory. The detailed title can be modified to add detail to the job code title for a particular incumbent or recruitment. Remember that changing the detailed title does not update the employee's job code in job data, and position changes may need to be accompanied by a PTR.



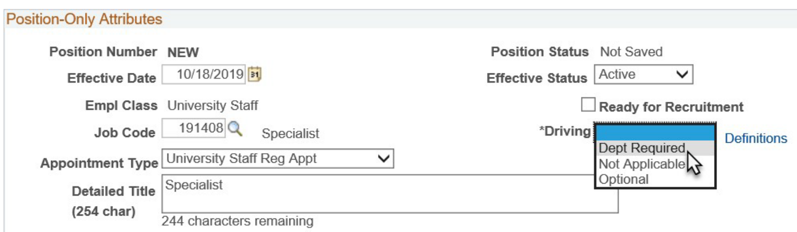
Use the following guidelines when modifying a detailed title:

- Do not paste values in this field, as it can cause system errors.
- It cannot be more than 35 characters. Only the first 35 characters will be displayed in Outlook or the ASU Directory.
    - Spaces and punctuation are counted in the character limit.
- It cannot be the actual job title of a different job code. For example, a position with the "Supervisor" job code cannot use a "Director" working title.
- It should be an enhanced job code title structured, so the enhancement follows the original title.
- Titles containing "Chief" or "Managing Director" requires the president's office approval.

Please contact HR compensation for questions or more information. Reach out to your department administrator to update the directory if it is manually maintained in your unit.

Driving

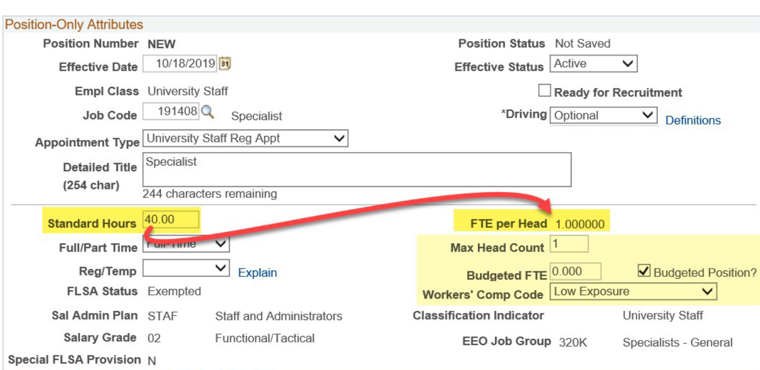
Specific job codes have been designated as "driving required" and will default the position to "required." Otherwise, the the dropdown menu will display available options. All ASU employees who drive university-owned leased or rented vehicles, including electric carts, for official business must complete the Authorized Driver Program.



Employees with a position identifying them as drivers for official business are notified by email with instructions to complete the Authorized Driver Program.

Standard hours and FTE

The standard hours for academic and staff positions will default to 40 — change as necessary. Student worker positions will default to 20 hours. This field should reflect the average hours incumbents will be scheduled or expected to work per week.

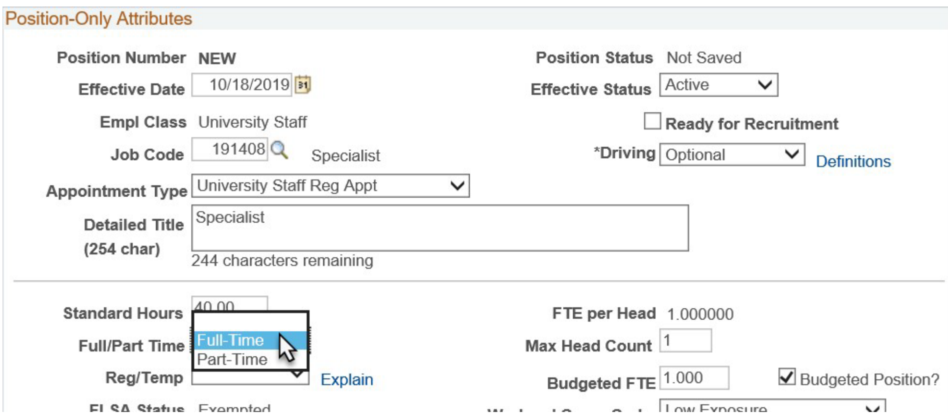


If you change the "Standard Hours", tab out of the field to ensure that the FTE field recalculates. Standard hours can affect the benefits eligibility. Refer to Appendix A for more information.

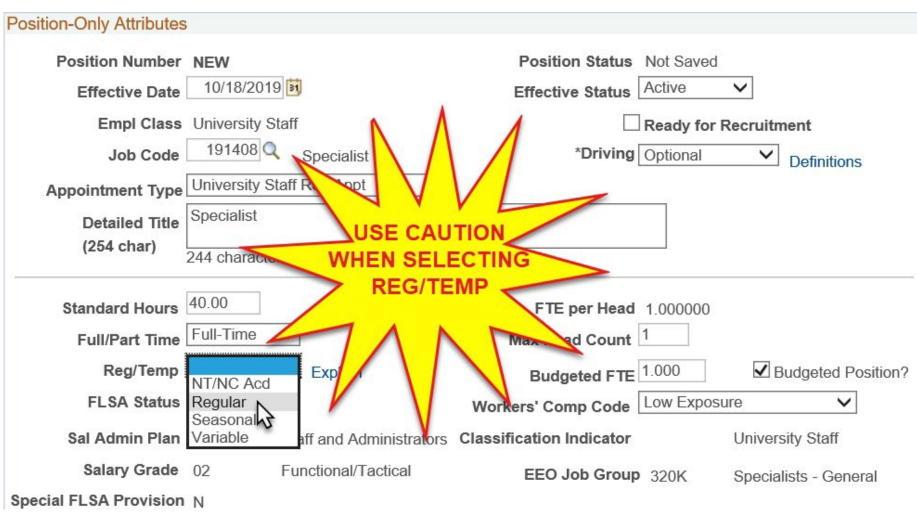
Update the "Max Head Count" and "Budgeted FTE" as necessary and ensure the "Workers' Comp Code" matches the position attributes.

Reg/Temp and Full/Part-time

"Full/Part Time" should reflect the standard hours or FTE selected above — anything less than 40 hours is considered part-time. The fields automatically populate for student workers as "Part/Time Variable." In this example, the position has 40 standard hours, so the default of "Full-Time" is correct.



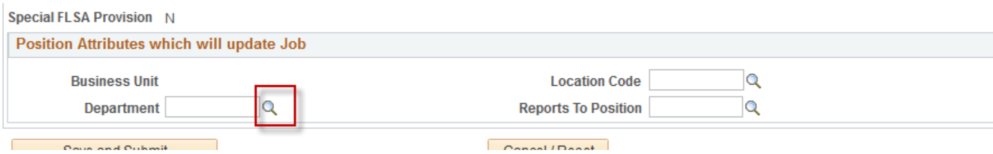
Select "Reg/Temp" from the dropdown menu. Be cautious when selecting this value, as it will affect benefits eligibility. Once the benefits eligibility has been set on a position, it cannot be modified.



Refer to the benefits chart in Appendix A for more information about the ramifications to benefits if you change data in this area.

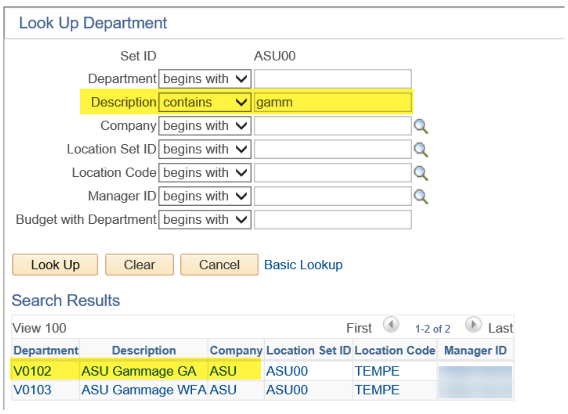
Department code

In the final section of this page, you can select the department for the new position.



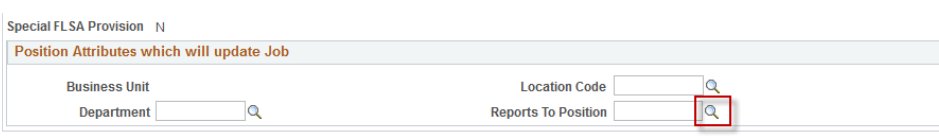
Type the department code or click on the lookup icon.

In this example, our department description contains “Gamm.” Type in your search criteria and click the row for your department.



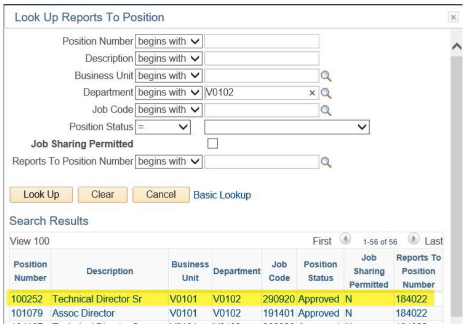
Reports to position

Next, you will enter the position number to which employees in this position will report. The incumbent in the “Reports to Position” tab will be granted specific access like reviewing job data, timesheets and workflows.

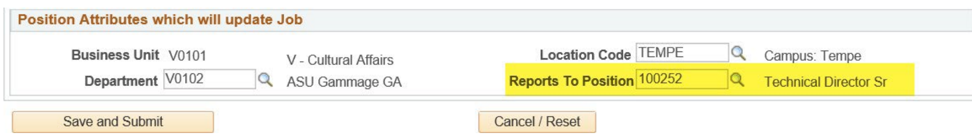


You can type in the position number or click the lookup icon to find a position. The lookup option does not display the incumbent’s name and details which may make it challenging to identify the correct position, especially if there are several positions with the same title in the department. You may prefer to identify the “Reports to Position” before you begin modifying or creating a position.

In this example, we will use the lookup icon and enter the department code to narrow the search. Click on the desired row.

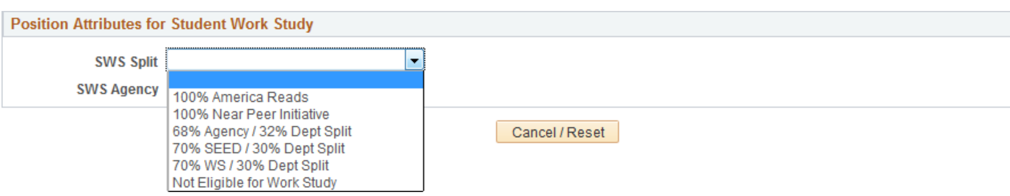


After you enter a position number and press the “Tab” key, the title from the “Reports to Position” will appear.

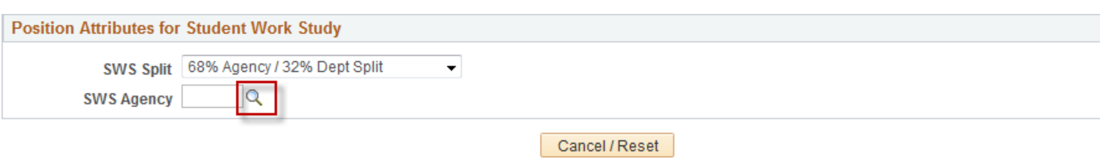


Student work-study — if applicable

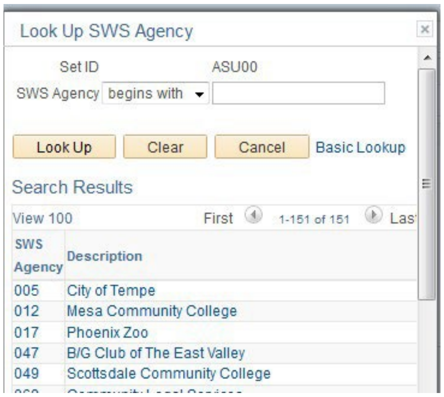
These fields will only appear when the student worker employee class is selected. Select the appropriate “SWS Split” from the dropdown menu.



Search for the “SWS Agency” if applicable using the lookup or enter the agency code if known.

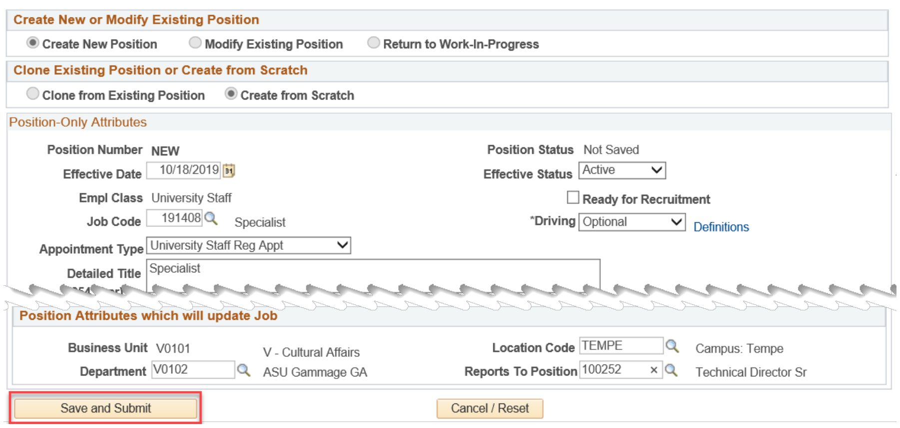


The field will be hidden unless applicable after the SWS split is selected.

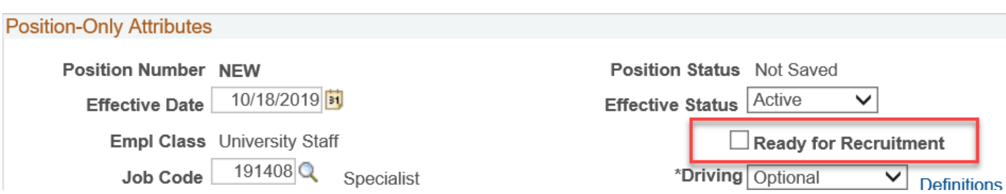


Step five — click save and submit

After reviewing the position attributes and making any necessary edits or entries, click "Save and Submit."

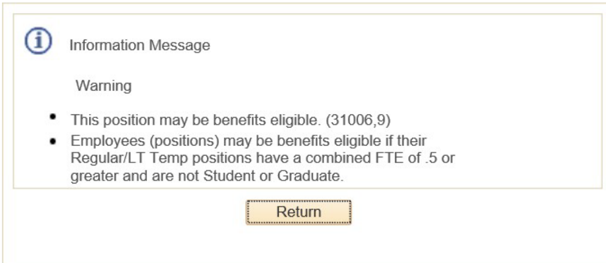


If you plan to create a new job posting in Kenexa BrassRing, you need to enter recruiting information as explained in step eight.

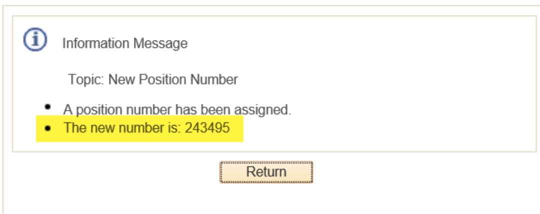


Step six — take note of the new position number

If eligible for benefits, you will receive the following message and one containing the position number you created. Review the message and click the "Return" button.



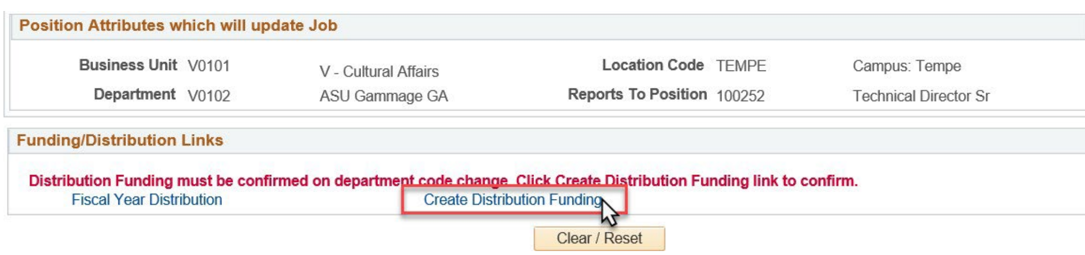
The following message contains the position number that you created. Please write this number down. Click the “Return” button when you are finished.



Click the “Return” button on the next window to confirm the position submission.

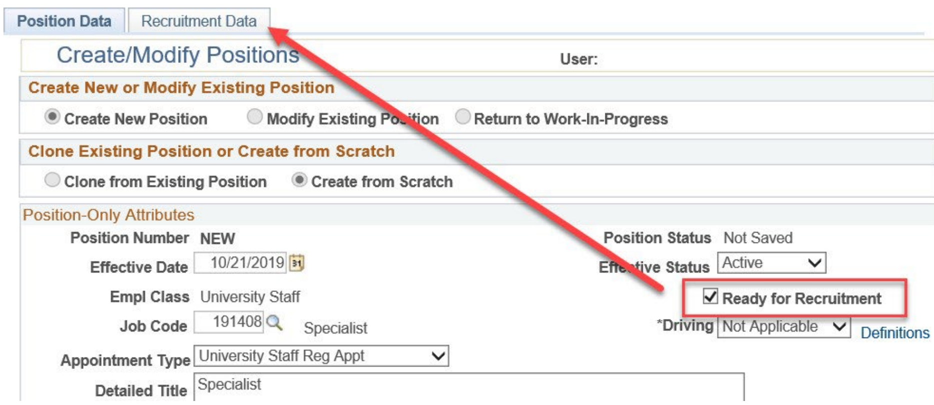
Step seven — add position funding

Ensure you add the funding distribution for the new position — only the Financial Manager can do this. If funding is not added to a new position, it will not process, and Data Management may return it to the originator. For step-by-step instructions, please refer to the Maintain Position Accounting section.

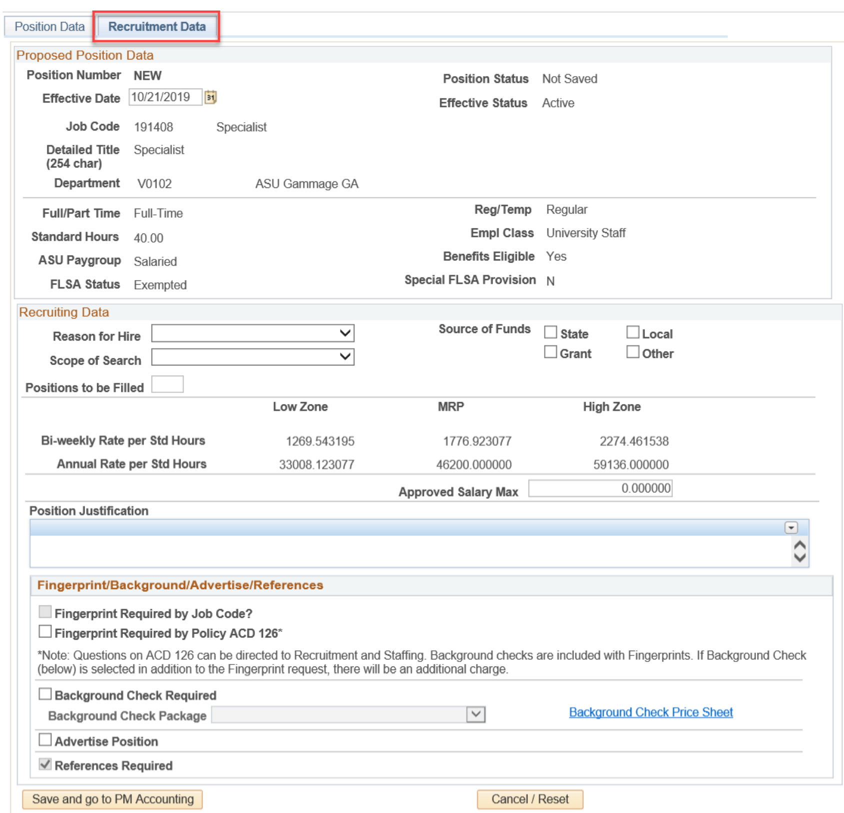


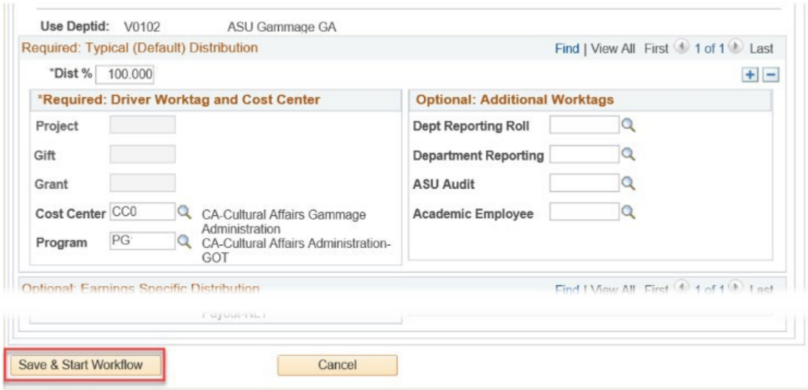
Step eight — enter recruitment data if applicable

If you are posting the position in Kenexa, click the “Ready for Recruitment” button.The “Recruitment Data” tab is integrated into Kenexa BrassRing so hiring managers can create a requisition using the position. If you are creating a position for a competitive or waiver university staff or student hire, then the “Recruitment Data” tab should be filled out. The tab is generated after clicking the “Ready for Recruitment” button. If the job code cannot be integrated into Kenexa, this button will not appear. Currently, grad student positions and most academic professional and faculty job codes are not recruited in Kenexa.



After clicking the “Ready for Recruitment” button, the “Recruitment Data” tab will be created. You will need to click on the tab and enter the required details.





Recruitment data tab

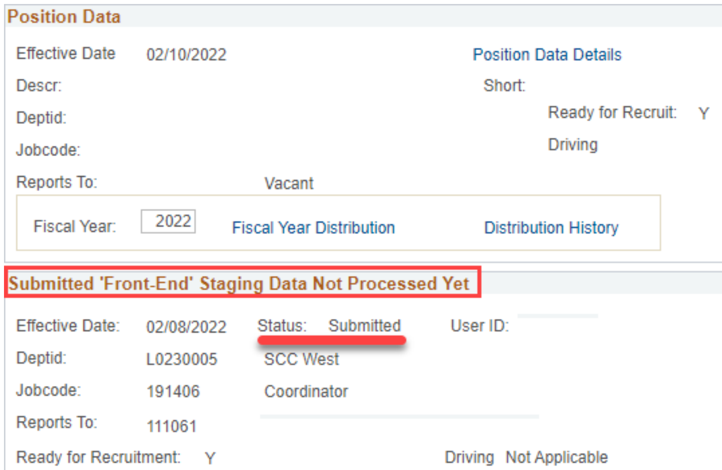
The top section includes details entered on the “Position Data” tab, including the effective date, job code and detailed title. You will need to add the following:

- Fingerprint, background, advertisement and references.
- Maximum salary or hourly rate of the position.
- Number of positions to be filled.
- Position justification or reason for the job opening.
- Reason for hire.
- Scope of search.
- Source of funds.

Once the information above is entered, you can save and navigate to “PM Accounting.” This will bring you to the “Maintain Position Accounting” page, where you must enter or confirm the funding details and click “Save and Start Workflow.” The position will not integrate into Kenexa until the position funding is saved and all the required approvals are applied.

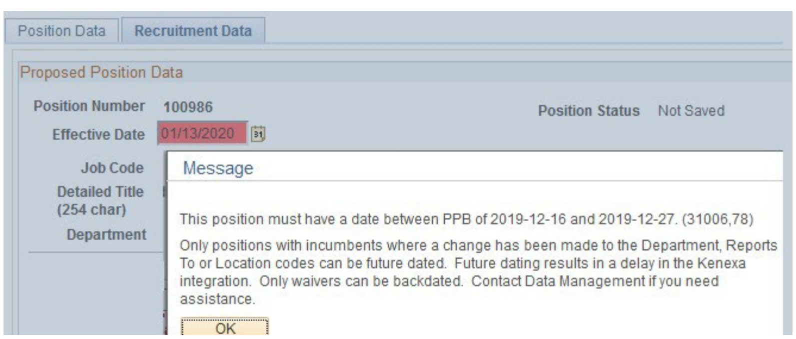
A process will run every 15–30 minutes to integrate the data from wholly approved positions into Kenexa. The integration only applies to positions with recruiting information that has been processed. This means all approvals have been received.

You can review the position status on the “Position Cross-Reference” page to determine why a position has not been integrated yet. Approval details can be reviewed on the “Recruitment Data” tab if the position has “WF Approve” status. Refer to the Position Workflow section for more information.



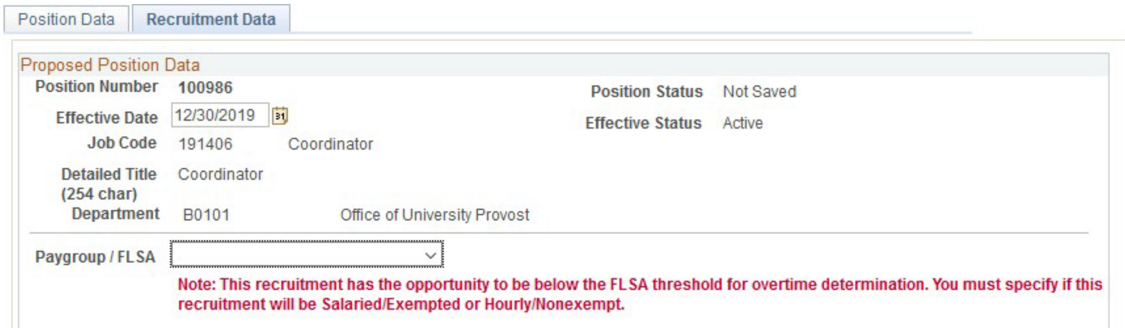
Recruitment tab details

The recruitment effective date will automatically populate to match the new position effective date. It should fall within the current pay period, and the best practice is to use the pay period's begin date. Waivers are the only type of recruitment that can be backdated. Recruitment cannot be submitted with a future effective date.



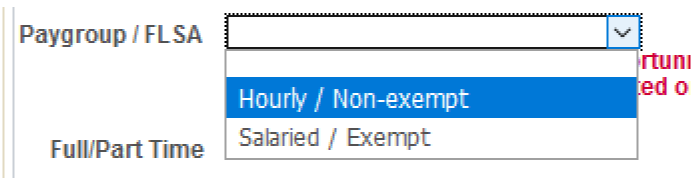
Once you have entered or reviewed the effective date, you may need to select the pay group and FLSA status in the “Proposed Position Data” section. This option will appear if your position uses a job code designated exempt based on the duties test but has a minimum range below the current threshold for the salary test.

The field and notification only appear if a “Paygroup/FLSA” selection is required.



The “Paygroup/FLSA” dropdown menu offers two options:

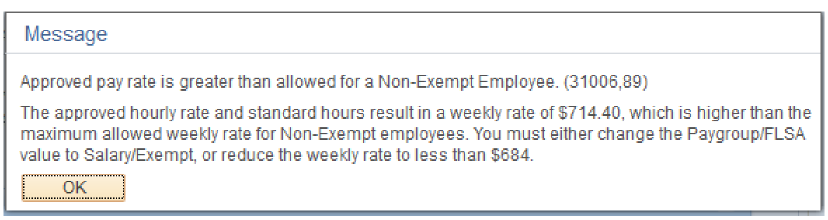
- Hourly/Non-exempt.
- Salaried/Exempt.

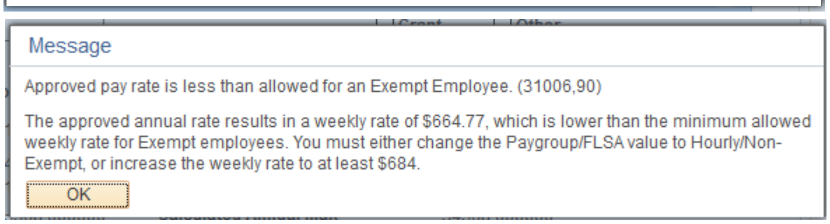


The selection made in this field limits the maximum rate you can select for recruitment.

If you select a “Paygroup/FLSA” value that conflicts with the maximum salary entered, you must choose a new “Paygroup/FLSA” value or maximum rate.

One of the following messages will inform you of the necessary action.





The “Reason for Hire” dropdown menu has five choices available, and the selection should be based on what is most appropriate. The list includes:

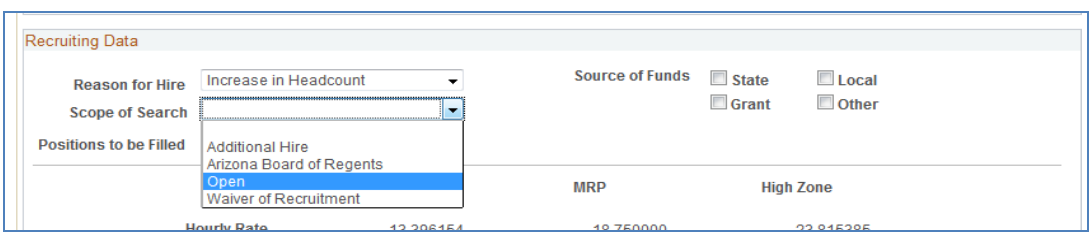
- **Backfill** is used to create a job posting for an existing, budgeted position, when the job code and FTE will not change. It should be used when an incumbent leaves the position and the department wants to fill it with a new employee.
- **Change in FTE** is used to create a job posting for an existing, budgeted position where the FTE will be changing — this is required.
- **An increase in headcount indicates a department** requesting an additional position number not currently budgeted in their area.
- **Reclassification backfill** creates a job posting for an existing, budgeted position, and the job code will change.
- **Temporary** is used for short-term positions with change(s) or no change(s) to the attributes. It can be used for both modified and new positions, regardless of the data entered on the previous tab.

You cannot select specific reasons depending on the information you entered on the "Position Data" tab. For instance, "increase in headcount" is only applicable for newly created positions and "backfill," "change in FTE," and "reclassification backfill" are only valid reasons for modified positions.

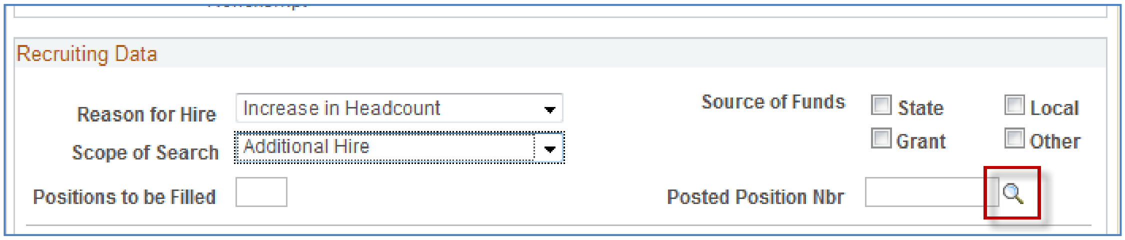
New Positions	Modified Positions
• Temporary • Increase in Headcount	• Temporary • Backfill • Change in FTE • Reclassification Backfill

In the example, we select a common reason for a new hire "increase in headcount."

For the "Scope of Search," you have the option to select "Additional Hire," "Arizona Board of Regents," "Open," or "Waiver of Recruitment." Your selection should be based on what is most appropriate.

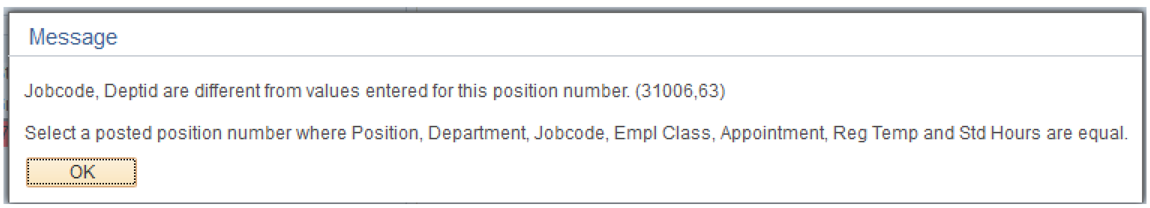


An "Additional Hire" is a position that is available for hire in addition to the job that is posted but is not posted on its own. If you want to hire three accountants but only want the job to post once, you create the posted position with an open scope. Then create two more identical positions with the "Additional Hire" scope.



After selecting this option, you must enter the corresponding “Posted Position Number.” The positions must have the same employee class, job code, appointment type, Reg/Temp status and standard hours. The new position attributes will auto-populate based on the posted position number.

If a position selected from the lookup does not have the exact attributes, a message will appear to indicate the mismatched fields.

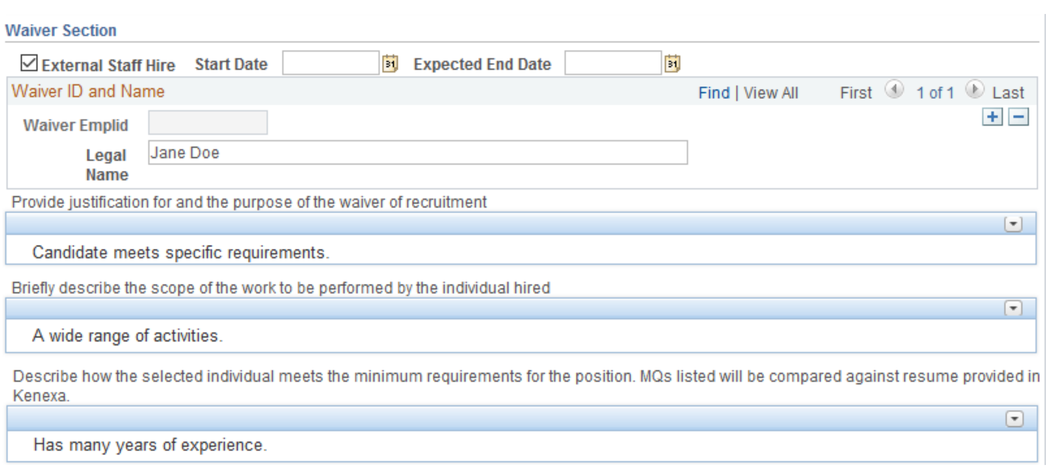


Arizona Board of Regents is only appropriate for ABOR job codes. This option is not available for student worker recruitment.

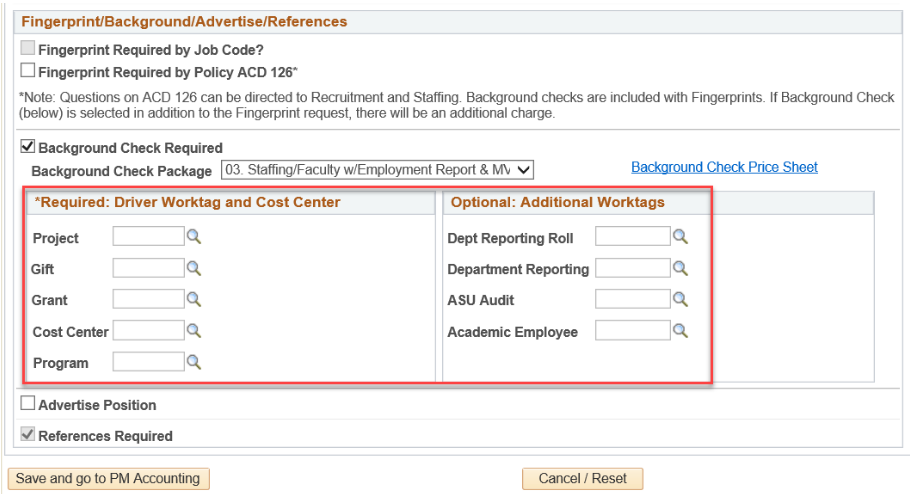
The open scope is the most common for competitive hires, and the position is open to all applicants.

“Waiver of Recruitment” will require additional information. If the employee has an affiliate ID, you can look it up with the magnifying glass or type it in and tab out. Once you do, the name field will auto-populate. Check the “External Staff Hire” button if the employee does not have an affiliate ID, and then type the employee’s legal name.

The example below sets the waiver for an external staff hire.



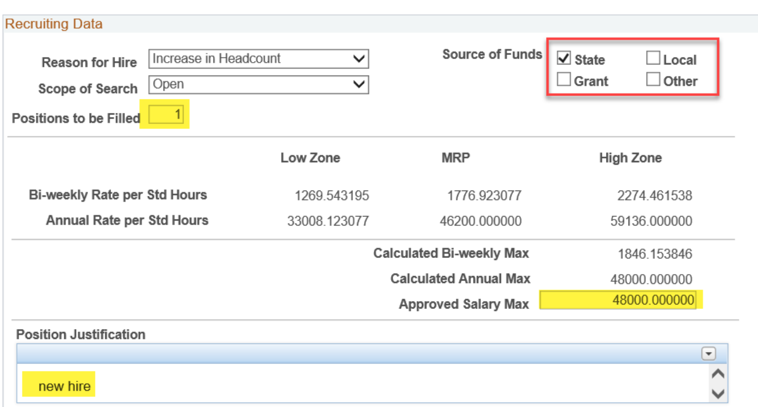
Next, if you want to add fingerprint or background check requirements or advertise the position, you may select the options seen in the screenshot below. Once select fingerprints, background check, or advertise, the cost center and worktag will be required.



A package is also required if the “Background Check Required” button is selected. Use the dropdown menu to view the package options. The available package options will be limited based on whether or not the position is marked as “Driving Required.” For assistance in selecting a package, contact your recruiter.

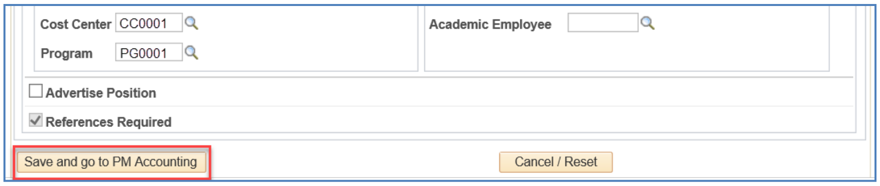
Note: Fingerprints are only required in Kenexa BrassRing if selected for the position. Kenexa will automatically determine if a background check is needed, but all candidates will require a background check if selected for the position. For staff positions, fingerprints or a background check are required.

After you have selected the “Scope of Search” from the dropdown menu, enter the “Positions to be Filled” amount. The “Approved Salary Max” amount must be within the appropriate range for the job code and the maximum amount the position can be paid — not the starting amount.



Step nine — click on save and go to PM accounting

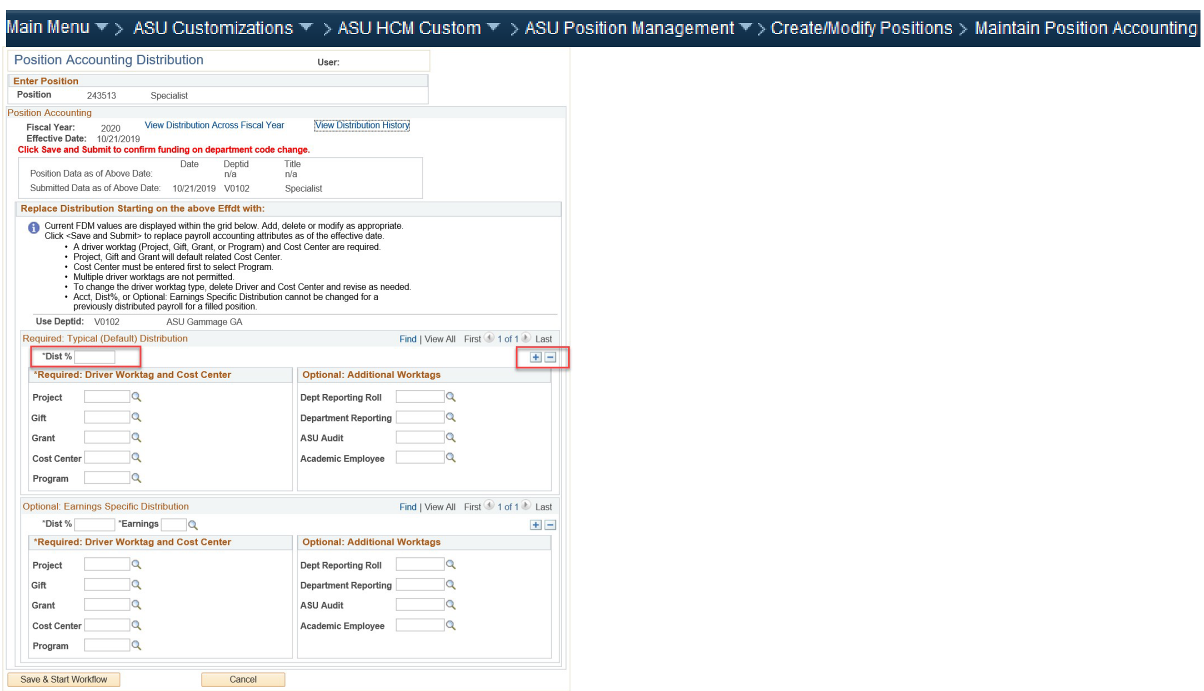
Double-check your data by clicking on the “Position Data” tab. Once you have verified everything, click the “Save and go to PM Accounting” button.



Caution: At this point, you have created the position but have not included any funding sources. The position will not be submitted for approval until you identify those sources. If you do not have access to this screen, then someone in your department will need to update this information in “Maintain Position Accounting” as soon as possible. Positions without funding will not process and will eventually be returned by Data Management if they are not updated promptly.

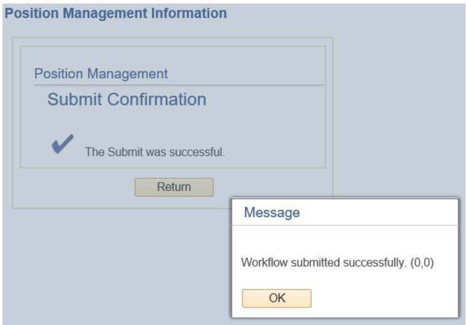
Step ten — enter position accounting distribution data

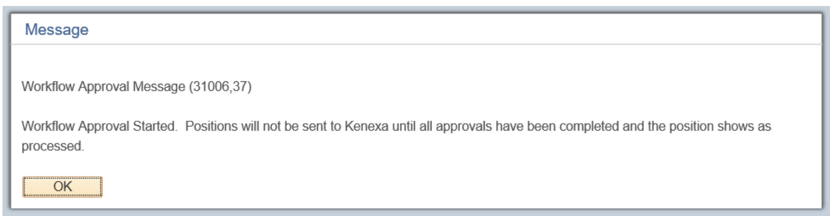
You will automatically be taken to the following screen if you have the Dept Financial Manager role. For this example, we assume you have Dept Financial Manager access and can complete the process. Next, fill in the accounts that will fund the position.



Step eleven — click on save and start the workflow

Click the “Save and Start Workflow” button at the bottom when you have all of the accounts identified.





Click the “OK” in each pop-up window and then click the “Return” button.

The position has now been sent to the approvers for the funding entered on the position. Additional approval levels may be required based on the position attributes and scope of search.

Position workflow

The minimum role you will need to access the following pages is HCM Department Position Mgr.

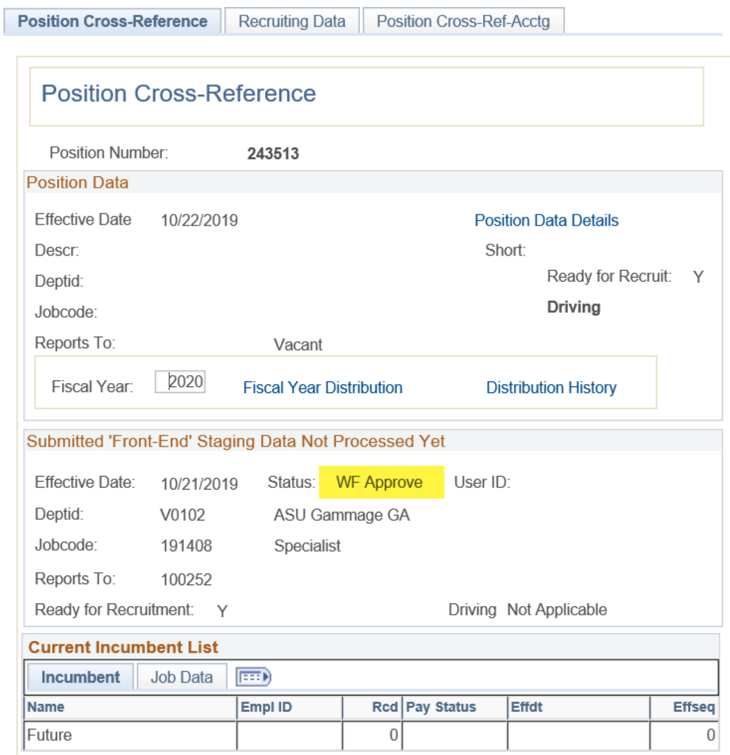
After submitting a position for workflow approvals, it is a good practice to navigate to “Position Cross-Reference” and begin monitoring the position status. You can also use the “Position Worklist” to monitor the positions you have submitted. The following steps outline this process:

Step one: Navigate to “Position Cross-Reference” to verify the data after submitting a position. Once you sign in to PeopleSoft, click on the following menus:

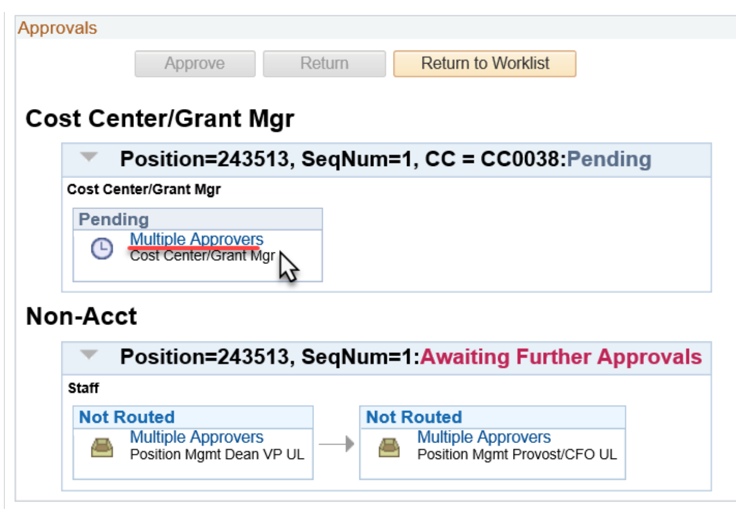
1. ASU Customizations.
2. ASU HCM Custom.
3. ASU Position Management.
4. Position Cross-Reference.

Enter the recently submitted position number and click the “Search” button.

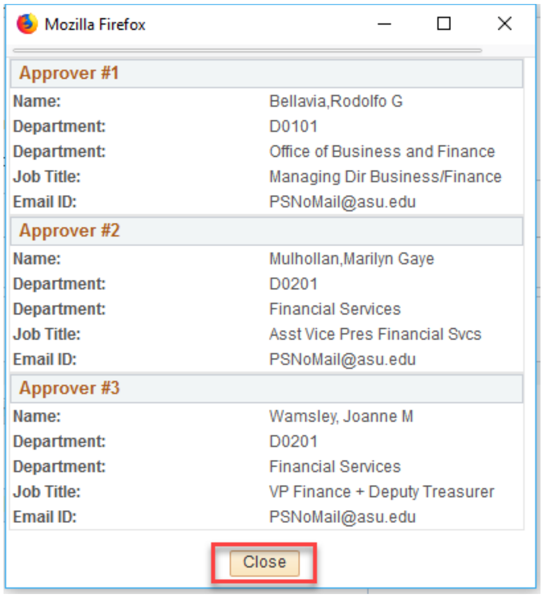
Step two: Verify the correct data in the “Submitted Front End Staging Data” field and notice the current status.



Step three: On the “Recruiting Data” tab, scroll down to “Approvals.” To view more information on the approvers at each level, click on the link.

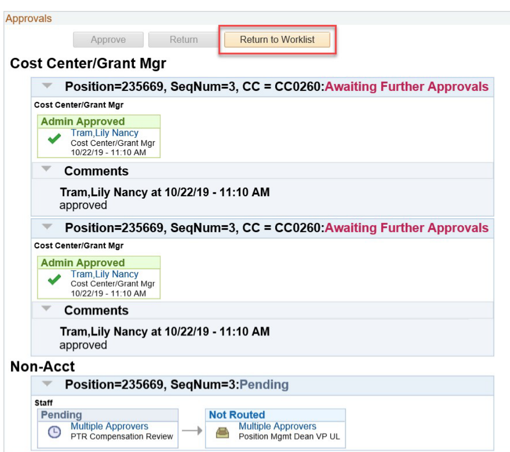


If there is only one approver at a given level, their name will appear in the box. The “Multiple Approvers” link will appear if there is more than one approver. After clicking on it, a box similar to the following will pop up.



After viewing the information, click the “Close” button.

Step four: Periodically revisit the approval monitor to see if the position has gathered approvals. Each box will turn green as a position receives approvals, and the heading on the next level of approvals will change from “Awaiting Further Approvals” to “Pending.”

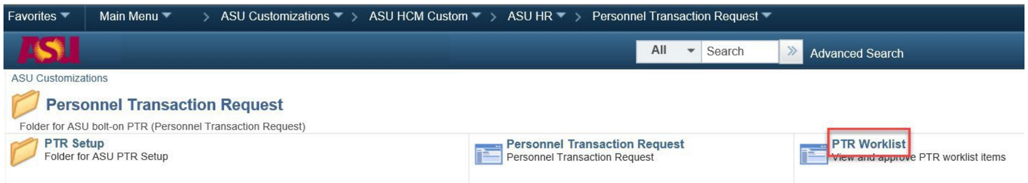


You can click “Return to Worklist” to view all submitted pending positions.

Step five: Navigate to your “Position Worklist” by clicking the “Return to Worklist” button within “Position Cross-Reference” or navigate directly by clicking on the following menus:

1. ASU Customizations.
2. ASU HCM Custom.
3. ASU HR.

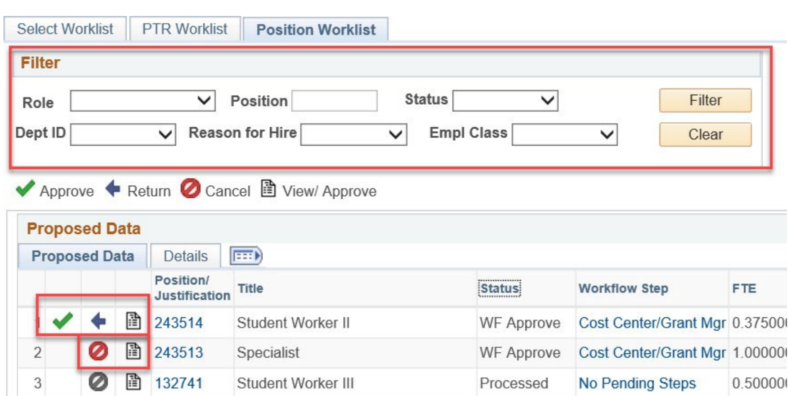
4. Personnel Transaction Request.
5. PTR Worklist.



Since the “Position Worklist” is connected to the “PTR Worklist,” you will be taken to the following menu, which gives a summary of the total transactions you have on each work list, the transactions you have as an approver and the transactions you have as an originator.

To view your “Position Worklist,” click on the link or tab. For more information on the PTR worklist, please refer to the employee data management webpage, select “Resources,” and click “BPG — How to process worklist transactions.”

Step six: Review the details of a position using the icons and links.



You can use the filter to narrow your results. In this example, the results have been narrowed to positions with the “Reason for Hire” of “Increase in Headcount” and the employee class of university staff.

Clickable icons allow you to take specific actions on a position. You can find the meaning of each beneath the filter button and at the bottom of the page.

As an approver, you may approve or return a position:

- Approve.
- Return.

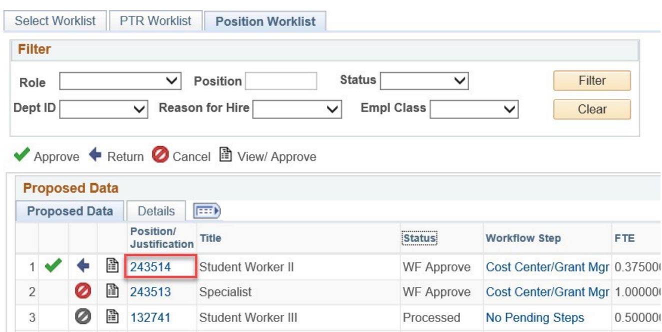
As an originator, you can cancel a new position that has not been approved.

- Cancel.

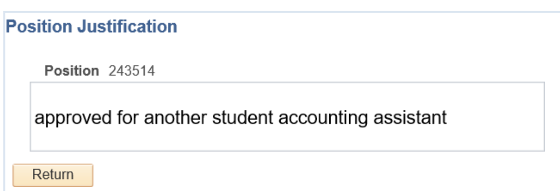
The “View/Approve” button will take you to the “Position Cross-Reference” screen.

- View/approve.

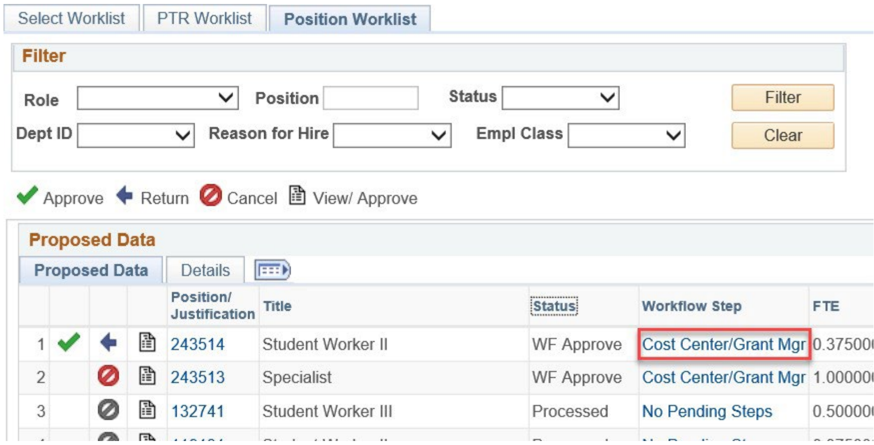
Note: Since modified positions that require workflow approval cannot be canceled, originators should contact an approver to return the position, which can then be withdrawn.



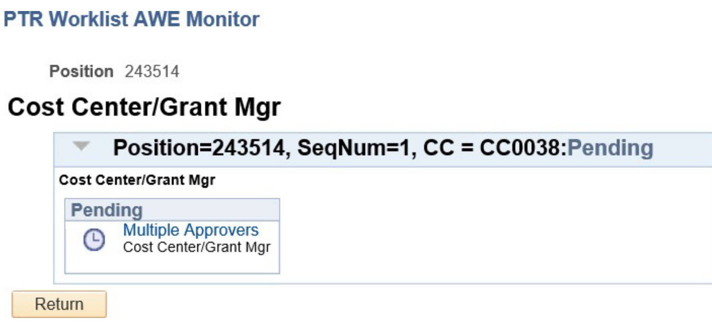
By clicking on the “Position Justification” link, you can quickly see what the originator entered on the “Recruitment” tab for that section.



Click the “Return” button to go back to your waitlist.



You can see the approval monitor quickly by clicking on the “Workflow Step” link.

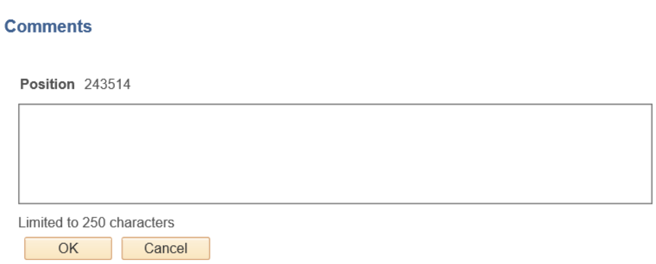


The Cost Center/Grant Mgr section will have a box for each current funding source used on the position. The box that is marked “Pending” is the current level of approvals. Approval at this level is required before the position can move onto the next level that says “Not Routed.”

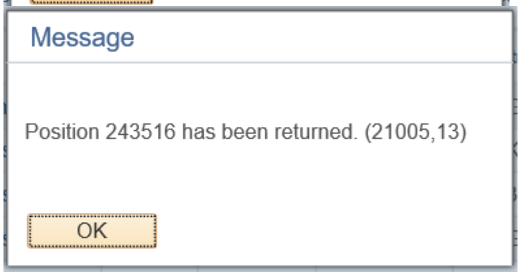
If there is only one approver for a given level, that person’s name will display in the box, but if there is more than one approver, the “Multiple Approvers” link will appear. Click the “Multiple Approvers” link to show more information on all approvers for this step.

Step seven: Act on positions where needed.

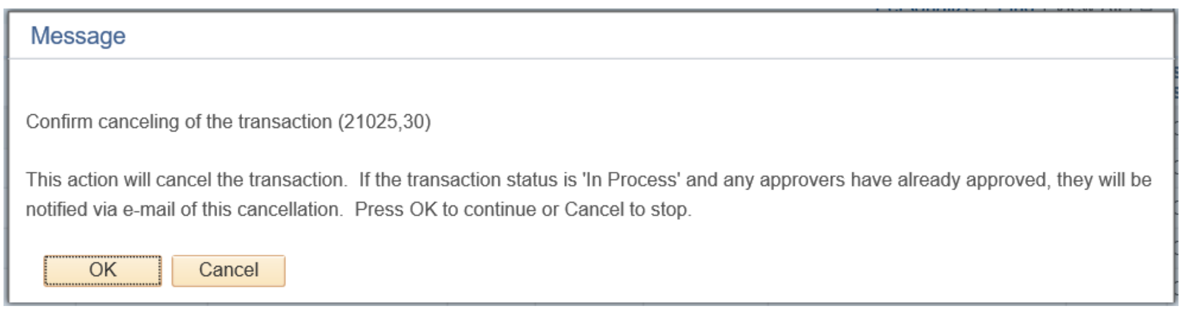
You will be taken to the comments page if you elect to “Approve” or “Return” a position.



After entering comments, click "OK." You will receive one of the following messages:



If you elect to "Cancel" a position, you will receive the following message:



Click "OK" to confirm the cancelation.

Note: Once a position receives approval at any level, it can no longer be canceled. Originators must contact an approver at the current level and request that the position be returned.

Returned position numbers

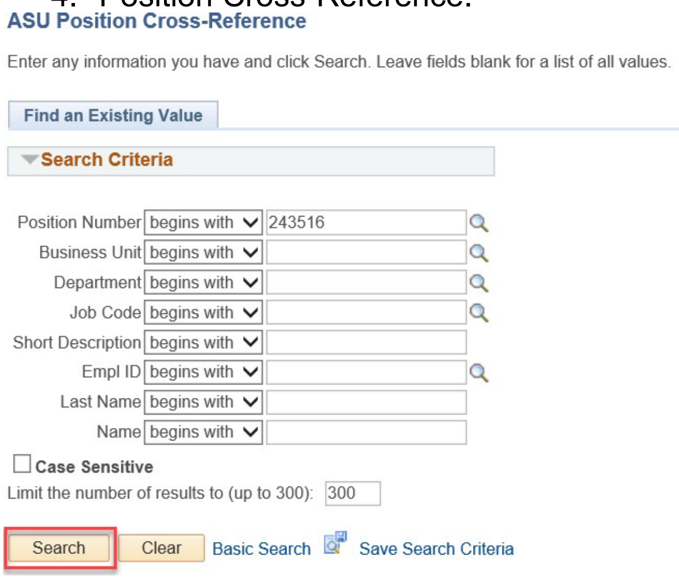
A returned position has been denied approval and will not process unless further action is taken. Approvers such as cost center or grant manager, dean, provost and Data Management can return a position. There are various reasons why a position number may be returned to the user. The following are common reasons position numbers are returned:

- The approver finds fault with the position data entered.
- The funding source used is incorrect.

When a position number is returned to the user, the user will get an email. The following steps will help you to determine why a position number has been returned.

Step one: Navigate to the “Position Cross-Reference” for more information on the returned position. After signing in to PeopleSoft, click on the following menus:

1. ASU Customizations.
2. ASU HCM Custom.
3. ASU Position Management.
4. Position Cross-Reference.

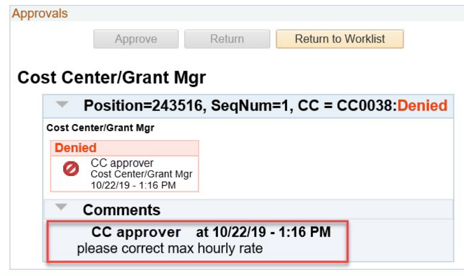


Enter the returned position number you were notified of by email. Click on the “Search” button.

Step two: Scroll to the bottom of the “Recruiting Data” tab to view the approval monitor.

The approver who returned the position is indicated in the box marked “Denied.” Their comments are also displayed there.

Step three: Review the comments to determine why the position was returned.

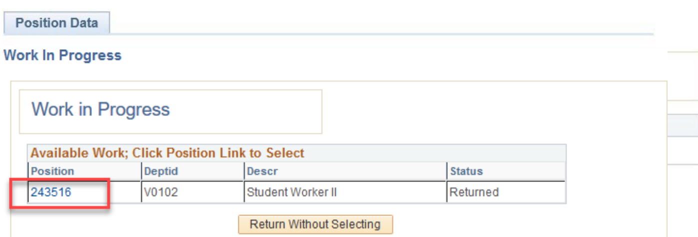


In this example, the cost center approver returned the position for the originator to correct the maximum hourly rate.

Since this position number has been returned to adjust the hourly rate, it will need to be resubmitted for recruitment. To put the position number back in a submitted status, you must re-enter the position, make the necessary corrections, scroll to the bottom of the page and click on the “Submit” button.

Step four: Navigate to “Create/Modify Position” and click on the “Return to Work-In-Progress” button. Click on the following:

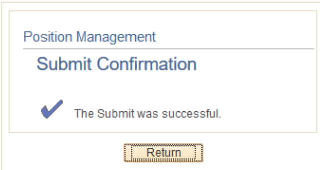
1. ASU Customizations.
2. ASU HCM Custom.
3. ASU Position Management.
4. Create/Modify Position.



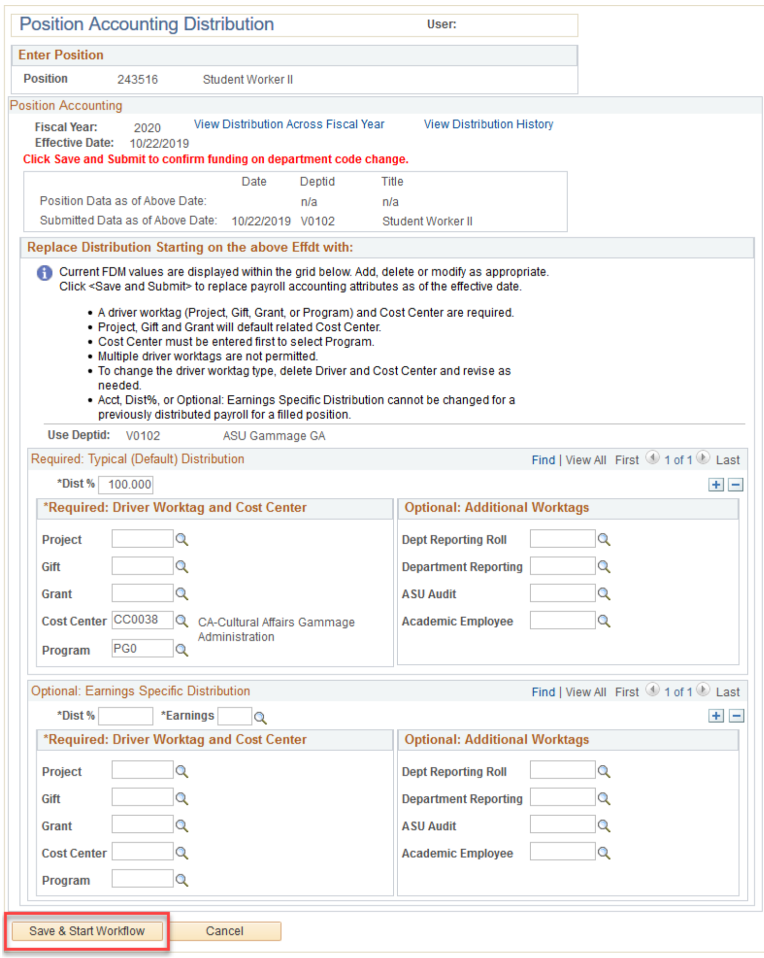
Click on the position number of the returned position.

Step five: Edit position details if needed. Click on “Save and go to PM Accounting” at the bottom of the page.

Click the "Return" button.



Enter the correct accounting information and ensure the distribution equals 100%.



You are automatically taken to the above screen whether you need to make changes or not. If not, leave the account information and click the "Save and Start Workflow" button.

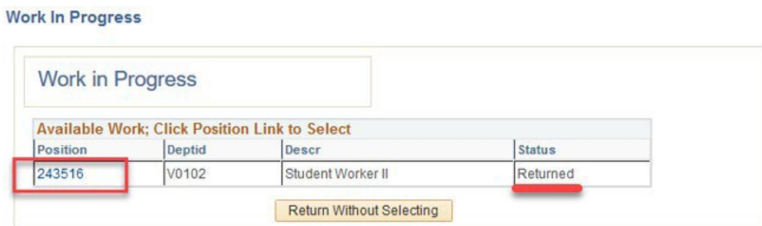
Withdrawing a position number

A position should be withdrawn when the user wants to cancel the transaction before it can process. If the position number is new, once it is withdrawn, it no longer exists. If the position existed before you made changes, withdrawing would cancel your changes. Only the originator of a position change can withdraw, and the position number needs to be in a "Not Saved" or "Returned" status.

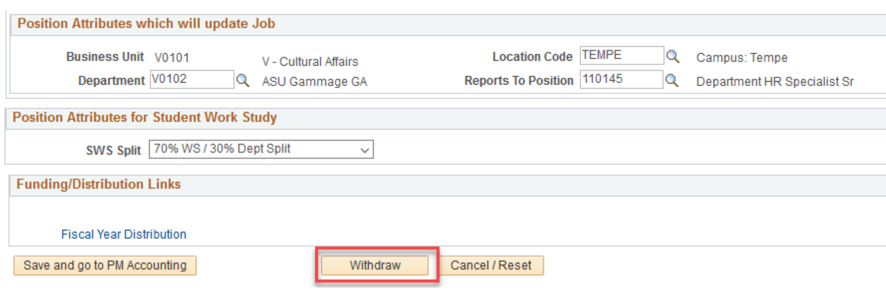
Step one: Go to “Create/Modify Positions” and select the “Return to Work-In-Progress” button. After signing in to PeopleSoft, click on the following menus:

1. ASU Customizations.
2. ASU HCM Custom.
3. ASU Position Management.
4. Create/Modify Positions.

Step two: Click on the position number with the functional status you want to withdraw.

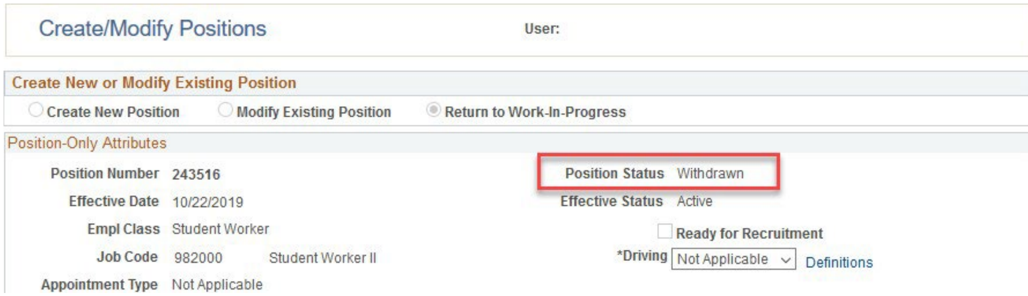


Step three: Click the “Withdraw” button at the bottom of the screen.



Step four: The following warning message will appear. Click “Continue Withdrawal” to process the withdrawal.

Step five: The status will change to "Withdrawn" and will no longer be in the user's work in progress.



Once a position requiring workflow approval has been submitted, a user can click the "Cancel" button on their worklist, which will have the same effect as withdrawing. This must be done before the position gathers all of its approvals because, after that, the position will be integrated into Kenexa and will no longer be possible to cancel without Data Management's assistance.

Note: If you find a problem with a submitted position and you would like to edit, not cancel it, you will need to contact one of the approvers to return the position to you.

Appendix A

Benefit record

The benefit record field will indicate if an employee may be benefits eligible. It is determined by the employee classification, the standard hours of the positions and the "Reg/Temp" fields. It cannot be changed once it has been set on a position number or job record.

Employees may be benefits eligible if they have a combined FTE of 0.5 or greater. Not all employee classes are eligible for benefits. FTEs are only aggregated within certain employee classes and not within other classes. Likewise, an employee's compensation contributes to benefits only within certain employee classes. With the multiple benefit record numbers, the system correctly computes benefits and retirement eligibility, coverage levels, benefits deductions and leave accruals when an employee has multiple jobs across multiple employee classes.

It is common at ASU for a single employee to have multiple jobs across multiple employee classes. Changing an employee's benefit record number would be a disconnection from their benefits selections and history since all benefit enrollments are tied to the benefits record number.

PeopleSoft has been configured to use the following benefit records:

BEN RCD	Description	Benefits Eligible
0 =	Regular or long term temp employee who is not a student, graduate, or PSPRS.	If an employee is in BEN RCD 0, **AND** has one or more job records with a combined standard hours of 20 or more, the employee will be benefits eligible.
1 =	Seasonal or short term temp employee who is not a student, graduate, or PSPRS.	Not Benefits Eligible
2 =	Certified Peace Officer participating in Public Safety Personnel Retirement System (PSPRS)	If an employee is in BEN RCD 2, **AND** has one or more job records with a combined standard hours of 20 or more, the employee will be benefits eligible.
3 =	Student or Graduate	Not Benefits Eligible

Appendix B

Full-time, part-time and PRN

Full-time — any employee who works a planned and consistent work schedule at 1.0 FTE or 40 hours a week.

Part-time — any employee who works a planned and consistent work schedule of less than 1.0 FTE or less than 40 hours a week.

PRN — unplanned, unscheduled and unexpected staffing needs that meet all of the following criteria:
- Has a varying number of hours per week.
- Non-recurring work schedule with no guarantee of continued employment.
- Paid on an hourly basis.

Note: Positions with planned work schedules or hours are either part-time or full-time, depending on FTE or standard hours.

Reg/temp

Regular:
- Academic personnel who are tenured, tenure track, continuing status eligible or continuing status, regardless of FTE.
- All staff with a consistent work schedule for 90 days or longer, regardless of FTE.
- Never used for graduate or student workers.

NT/NC Acd:
- Academic personnel and postdoctoral scholars who are non-tenure track, non-tenured, non-continuing status-eligible or non-continuing status for 90 days or longer.
    - Includes lecturers, instructors, professors of practice and other academic personnel — except faculty associates and academic associates — on semester, annual and multi-year contracts.

Variable — all employees who meet one or more of the following criteria:
- Inconsistent weekly work schedule — PRN positions.
- Short-duration positions less than 90 days regardless of FTE — SUM/WTR positions, seasonal employees under 90 days and academic personnel with a one-session contract.
- All faculty associates, faculty research and academic associates .40 FTE or less. If the employee has an FTE of .50 or more, they must use another title.
- All graduate and student worker positions.
    - .41–.48 FTE requires advance approval from the provost's office and the ASU ACA Compliance team.

Appendix C

Below is a list of statuses you may encounter with a position. If a position will be integrated into Kenexa BrassRing, then the statuses you will want to see are “Submitted,” “WF Approve,” and “Processed.” Timing and request details will affect the status flow.

Status	What this means to you
Batch — B	The position has an effective date set for the future and will process at that time. Positions changes that will update Job Data will proces overnight or the evening after payroll confirmation.
Error — E	A problem occurred during processing, which will need to be addressed by Data Management. This status will only occur for filled positions.
Manual — M	The position requires manual intervention by Data Management. This status will occur for filled positions.
Not Saved — NV	The position has not been submitted and will not process until you save and submit it. This status occurs when you click into an open field in Create/Modify Positions and navigate away from the page without saving or canceling.
Processed — P	The position has received all needed approvals, if applicable, or was automatically approved by the system and is ready for use.
Returned — R	An approver or Data Management has denied the position, and it has been returned for your review. You must edit and resubmit to continue processing, or you can choose to cancel the transaction by withdrawing the position.
Submitted — S	The position has been submitted, but account funding has not yet been added. This status occurs when you choose to save and submit but have not yet added or confirmed funding through Maintain Position Accounting.
WF Approve — K	Accounting funding has been added to the position, and it has been submitted for workflow approval. The position will appear on the originator’s worklist.
Withdrawn — W	Changes you have made no longer exist, and the transaction will be removed from your work-in-progress folder. This status occurs when you choose to withdraw a position. You can only withdraw a position with “NV” or “R” status.