|  |  |  |  |
| --- | --- | --- | --- |
| **PBM Action Items** | **DESCRIPTIONS** | **ETRAC****(future actions)** | **LCD ADJUSTMENT (payroll adjustment)** |
| **1. New Position Number** | **When to create a new position number**  |  |  |
| * A new position number should be created when one does not exist or is Active that matches the combination of the fields below;

a. **Job Code**b. Departmentc. Funding sourceExample: If an employee is temporarily not active due to leave, temporary reassignment, etc., a new temporary position number should be created for the replacement. The employee on leave would retain the original position number. (permanent vacant needs to hire temporary Position will need a new position #)  | YES | NO |
| **2. Update Existing Position** | **When to update an existing position** |  |  |
| * Any data element on a vacant and existing position, can be updated; the first four items below impact Job.

a. Reports to b. Reclass / Grade / Step changec. Reg/Temp changed. Reorg* Classification Conversion (drive by the system)
* Update Funding
* Adjust actuals (Retro)
 | YESYESYESNO | NONONOYES |
| **PBM Action Items** | **DESCRIPTIONS** | **ETRAC****(future actions)** | **LCD ADJUSTMENT (payroll adjustment)** |
| **3. Inactivate Position** | **When to inactivate a position** |  |  |
| * Loss of Funding
* Vacant temporary with no plan to fill
* Discontinuation of Job Code

If a position is filled and a job code is discontinued, it should be updated with the new classification. Note: In most cases, when one job code is discontinued, it would be converted to another; therefore, this situation may never occur. | NO*Inactivate positions in the Position Data Management module not through the ETRAC page by inserting a new effective date and changing a position number’s status from active to inactive.* | NO*BAO inactivates a position after budget planning/submission is final.* |
| **4. Reactivate Position** | **When to reactivate a position** |  |  |
| * No, recycle the inactivated Position
 | NO | NO |

**SPECIAL CASES:**

* Single incumbent vs. Pooled Position - A job code/classification typically a pooled position will have to be created as a single Incumbent Position when an employee from a pooled position needs to be a time approver. (This is an unusual case)
* Tenure/Tenure Track (T/T) faculty with 2 appointments – T/T faculty can have 2 positions when they are appointed as part-time into a chair position and appointed as part-time into a T/T faculty position.
* Staff with 2 appointments - An employee can have 2 positions when appointed in a position/department and another part-time or hourly appointment in a different position/department as long as the total appointment adds up to 1.0 FTE. Approval is needed if it is more than 1.0 FTE.
	+ Appointment on 1.25 FTE:
	+ Custodian – additional appointment to the base, use the pooled Position.

* + Faculty – as a general practice, an appointment should not exceed 1.0 FTE; additional assignments should be temporary. For example faculty in grants.