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| --- | --- | --- | --- |
| **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. Department  c. Funding source  Example: 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 change  c. Reg/Temp change  d. Reorg   * Classification Conversion (drive by the system) * Update Funding * Adjust actuals (Retro) | YES  YES  YES  NO | NO  NO  NO  YES |
| **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.