



Position Management Processing Scenario Guide

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1 Leave Replacement

To the same classification:

- If the replacement person is being hired at the same classification, then hire them into the same position #.
- For the duration of the leave, you will have 2 people assigned to the same position number: the person on leave, and the replacement.

To a different classification:

- If the replacement person is being hired at a different classification, then hire them into a new position #.
- The person on leave will be in the original position.
- The replacement person will be in a new Term position.
- On the Budget screen:
 - Identify in the Funding Source field that the funding is Existing Funds.
 - In the Comments field, note the position # of the person on leave so you know where the funds came from.

2 Temporary Promotion

Into another position at the same classification:

- If a person is being temporarily promoted to fill in for someone else and the classification they are going to is identical to the person normally in the job, then you can temporarily promote them into this person's position #.
- For the duration of the temporary promotion, you will have 2 people assigned to the same position number: the person on leave, and the person being temporarily promoted.

Into another position at a different classification:

- If a person is being temporarily promoted to fill in for someone else, and the classification they are going to is different than the person normally in the job, then a new position # is required.
- Create a new Term position for the person being temporarily promoted.
- On the Budget screen of the new Term position:
 - Identify in the Funding Source field that the funding is Existing Funds.
 - In the Comments field, note the position # of the person on leave so you know where the funds came from.
- Appoint the person being temporarily promoted into this new Term position.

Temporary extra duties not involving another position:

- If a person is being temporarily promoted because of extra duties, then a new position # is required.
- Create a new Term position for the person being temporarily promoted.
- On the Budget screen of the new Term position:
 - Identify in the Funding Source field that the funding is New Funds.
 - In the Comments field, note the reason for the new position.
- Appoint the person being temporarily promoted into this new Term position.

3 Reclassification and Promotion

- Where a position is being reclassified or promoted:
 - From one employment group to another,
 - To a higher pay grade within the same classification.
- Locate the existing position.
- Insert a new Event (Reclassify Position) and Event date.
- The Event date will default to today's date. You must change this to the start date of when you want the reclassification to be effective. It must match the start date of the reclassified appointment for the employee.

4 Reappointment and Extensions

To a Term position:

- Do your best to anticipate these changes at the start of the fiscal cycle so that your Budget is as accurate as possible.
- Locate the existing term position.
- Insert a new Event (Update Position) and Event date.
- The Event date will default to today's date. You must change this to the start date of when you want the reappointment or extension to be effective. It must match the start date of the appointment for the employee.
- Update the Position End Date on the Position Info tab.
- Budget tab:
 - The end-date on the Budget tab should adjust automatically.
 - Adjust other funding specifics if necessary.

5 Pool positions for recurring term appointments

Many departments have term appointments that occur regularly each year. For example: sessional appointments. The appointments themselves are term, but they happen every year and the need to budget for them is recurring.

- Define the pool as ongoing.
- Define the funding as ongoing.
- Ensure you include all speedcharts that fund this type of position.
- Each year, insert a new date range to reflect the budget amount required for the start of the upcoming fiscal year. By default, this will also include future fiscal years because the position is open ended.
- If some speedcharts are not valid in the future, insert a new date range and remove them.

6 Faculty Shadow Appointments

- In most cases, the shadow appointment and the regular appointment will each need their own positions.
- The exception to this is when there is reduced responsibilities in the same job. If this is the case, you can point both appointments at the same position.
- Change the 'Anticipated Hire Date' field on the original (on leave) position to the day the person is returning to work in their regular appointment. If you don't do this, the Hyperion interface will calculate budgets and commitments for both the original position and the replacement position.
- The 'Anticipated Hire Date' field in on the 'Position Info' Tab.