

4. Requesting Position Changes for Tenure/Tenure Track Positions

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4.1. What is E-TRAC Vacant Position Change Request

The Vacant Position Change Request module is used to change vacant positions only. A vacant position is a position that does not have an employee currently working in it. If the position does have an employee occupying it, then the Employee Change Request should be used to change the position details in the employee record.

The Vacant Position Change Request module is also used to maintain vacant positions in your department by allowing you to make changes that include reclassifications, temporary reclassifications, end of temporary reclassifications, range elevations, or other elements of a position.

If the position is a pooled position and has more than one incumbent, then a new position number will be given to the change request, and the rest of the employees in a pooled position will remain in the previous position number. For example, position number 00001303 has three employees, A, B, and C. If A gets reclassified, then A will get a new position number; B and C remain in position number 00001303.

4.2. Types of Vacant Position Changes

There are four main categories of Vacant Position Changes: job reclassification, in-class progress/range elevation, temporary reclassification, and end temporary reclassification.

End Temporary (Job Code Change) Reclassification

End Temporary Reclassification signifies that a temporary change in job code occurred and had ended. The job code may return to its previous job code. The position salary minimum and maximum may change. After the college or department revises the position description, HR will review and approve the change in job code (classification).

In-Class Progress/Range (Grade/Skill Level) Elevation

In this situation the job code remains the same and only the grade (skill/range) level changes. The position salary minimum and maximum may change. After the college or department revises the position description, HR will review and/or approve the change in grade (skill/range). Then, you may request a position change in E-TRAC.

Job Reclassification

A job reclassification is a change in job code where the position salary minimum and/or maximum may change. After the college or department revises the position description, HR will review and approve the change in job code. Then, you may request a position change in E-TRAC.

Temporary (Job Code Change) Reclassification

In this case, a temporary change in job code, the position salary minimum and maximum may change. After the college or department revises the position description, HR will review and approve the change in job code. You may then request a position change in E-TRAC.

4.3. Criteria for Using a Vacant Position Change for Faculty Lecturers

Before you begin, verify that all positions that you make changes to need to be vacant. If there is an employee in that position, you need to request an employee change.

A vacant position change is requested in the following situations:

- When you need to change the range of the position which is reflected in a position description.
- When you need to temporarily change the job code of a vacant position with an appointment end date. The position change must reflect the position description.
- When the position is vacant and you need to change the grade of the position which is found in the position description.
- When the position's job code change was temporary and you are returning the position to its previous job code. This occurs when the operational need of that position no longer exists in your college or department.

4.4. Vacant Position Change Request Overview

Ensure that you complete the following steps outside of the system before you begin.

- 1 All E-TRAC vacant position changes or employee changes must be reviewed and approved by a Faculty Affairs.
- 2 A position description must be completed and reviewed prior to requesting a position change. Once the Faculty Affairs Representative approves the change in job code (classification) and/or grade (skill/range) level, you may then request a vacant position change through E-TRAC.

- 3 The requester submits the position change request.
- 4 Department approvers review and approve the position change request and forward the transaction to Faculty Affairs.
- 5 Faculty Affairs approvers evaluate, add data to the request, approve, and forward the transaction to Academic Affairs.
- 6 Academic Affairs reviews, approves, and loads the E-TRAC transaction to the HRMS system.
- 7 The requester receives an e-mail notification when the transaction is complete (loaded into the HRMS system).

4.5. Exploring the Vacant Position Change Request Page

After arriving to the first Position Change Request page, you will see two sections: Position Change Information and Notes.

4.5.1. Vacant Positions Change Information

The Position Change Information section is a search page for the position that you will be changing.

| Search Criteria | Definition |
|-----------------------|--|
| Effective Date | This field contains the date when the employee change becomes or became effective. |
| Position | If you know the position number, you may type it here. If you do not know the position number, you may search for it by clicking the search icon (magnifying glass). |
| Action | Default and read only. Position Change. |
| Reason | End Temp Job Reclassification In-Class Progress/Range Elev Temporary Job Reclassification Job Reclassification Reorganization |

| |
|------------------------|
| Proposed Values |
|------------------------|

| | |
|----------------|---|
| Reports To | The Reports To field is used to indicate the position number that the new position will report to, which is used in organization reporting. This selection should contain the appropriate administrator supervising this position. |
| Department | The value in the Department ID field will default from the department of the E-TRAC user. This department can be changed in the event that you are a user who requests positions for multiple departments. |
| Job Code | The Job Code is the same as the CSU Classification Code that corresponds to classifications in the CSU Salary Schedule. If you know this classification code you can simply type it in the Job Code field, and the value will be validated by the system. However, if you do not know the job code, click the search icon and search by Description . |
| Title | The title will default from the job code. This should be changed for MPP positions only and when necessary. |
| Short Title | Automatically defaults based on CSU Salary Schedule. |
| Reg/Temp | This field identifies the position as Regular or Temporary. The default of this field is Regular; override if necessary. Positions are defined as permanently or temporarily funded, not whether the employee assigned to the position is regular or temporary. |
| Full/Part-time | |
| Max Head Cnt | This is used for pooled positions only. Max head count for pooled positions is 999. |
| FTE | This field contains the calculated percentage of standard hours for the position and the standard work period. A position with an FTE of 1.00 (100% of the full-time equivalency) equals a full-time time base. |
| Unit | State Controller Office (SCO), Payroll Unit |
| Grade | The Grade defaults based on the Job Code entered. |
| Step | The Step defaults based on the Job Code entered |
| FLSA status | Driven by Grade and Job Code. |
| Min/Hour | |

| | |
|----------------|---|
| Max/Hour | |
| Funding Source | The Funding Source code is required to advise the Budget Office how the position will be funded. Your options for funding source codes are: NG001, NR001, DH201, TL006, TL008, TL016, TL017, TL033, TP201, TP202, and TD001 . These funding sources will not require a project ID. If the funding source is tied to a Project ID, the Project ID will be required. Inquiry regarding funding source, contact the Budget Office. |
| Project ID | Project ID will be required for funding sources not listed above. Project IDs will be comprised of 8 numbers. |

4.6. Requesting a Vacant Position Change

Requesting a Vacant Position Change is intended specifically for individuals authorized to request a vacant position change.

- 1 Navigate to the E-TRAC home page: **SFO Self-Service > E-TRAC > E-TRAC Home > E-TRAC Transactions.**
- 2 Select **Change Vacant Position.**
- 3 Click **Add a New Value.** The Position Change Request Page displays.
- 4 Type the Effective Date of the position change, or choose the Effective Date by clicking the calendar icon and selecting the date from the calendar dialog box. The date displays in the **Effective Date** field box.
- 5 If you do not know the position number, click the search icon (magnifying glass) to display the Lookup Position page. The Lookup Position module displays.
- 6 At this point you may enter the position number or just click the Lookup button. In the **Lookup Position** page you may search by the criteria Department, Description Job Code, or Position Number.

Note: It is most helpful to search by Department since this will narrow the search results to only those vacant positions for your department. Pooled positions (positions with multiple headcount) will also display on this list and can be changed. Pooled positions appear on this list since they have an open headcount, up to 999.

- 7 Click the value you wish to search by and click **Look Up.** Search results display in ascending order by Position Number.
- 8 Find the Position Number for the position you would like to change, and click the underlined link.

The **Position Change Request Page** displays. The Position Number automatically populates the **Position Number** field in the **Position Change Request Page**.

Notice that in the Position Change Information section, the action displays as **Position Change**. At this point, the action field is display only. The Reason field, however, contains four values:

- End Temp Job Reclassification
 - In-Class Progress/Range Elevation
 - Job Reclassification
 - Temporary Job Reclassification
- 9 Select the Reason for the position change. For this example Job Reclassification will be used.

The Position Change Request Page will display with the appropriate Current Values section and a corresponding Proposed Values section.

4.6.1. **Current Values and Proposed Values**

The Current Values section is a read only section and is meant as a reference. The Proposed Values is where you would enter the information that needs to be updated.

- 1 Only update the fields in the Proposed Values section that will change and are most appropriate for the reason you selected.
- 2 In the example of job reclassification you would be changing the job code. Once you select the new job code, the title, short title, and grade default based on the job code you select.

4.6.2. **Notes and Final Confirmation**

In the Notes section enter information that you would like the subsequent approver to know about that particular E-TRAC transaction.

- 1 In the Notes section enter any relevant information that you would like the subsequent approver to view.
- 2 Click **Save Work**.

Note: If the **Submit** button is not pressed after the **Save Work** button is pressed, the transaction will be saved without going to the approver and will appear in the "My E-TRAC Transactions" listing with a status of "New E-TRAC" available for editing or submitting at a later time. This is a helpful if you are uncertain about any piece of data in your request. However, you must complete all of the required fields in the request prior to clicking **Save Work**. You must enter something in the required

fields as the system will not allow you to save an E-TRAC record unless it is complete.

- 3 A Save Confirmation screen appears. Your transaction is not submitted until you have received this confirmation screen.
- 4 Click **OK**.
- 5 After pressing the **OK** button, the **Submit** button will appear for submitting the E-TRAC transaction for approval.
- 6 If you are ready to submit the transaction, click **Submit**. A read only view of the transaction will appear. Notice the E-TRAC ID number in the top left portion of the page.
- 7 Make note of E-TRAC ID in order to track the status of your request.

4.6.3. The E-TRAC ID Number

Near the top of the E-TRAC page, the system has generated a unique E-TRAC ID for the transaction. You may want to note this number in order to easily locate your request once it is submitted.

From this point, your request goes to the first level approver designated for your department.

Notice that in the Approval History section, under the **Approval Status** column the text reads, **Submitted by Creator**. This section also indicates where this transaction will go next. In the event that one of your transaction approvers makes any changes to your request, you will receive an e-mail notification.

4.7. After the E-TRAC is Submitted

After your E-TRAC request is submitted it is no longer available for you to update. You will receive an e-mail notification that your E-TRAC was successfully submitted. The E-TRAC request will be routed automatically to the first department approver for your area. They will also receive an e-mail notification, which will let them know that a transaction is waiting in their worklist for approval.

Each approver will have the ability to review and make changes to the E-TRAC request. Therefore, if you determine after you submitted the E-TRAC that you made a mistake, you can always ask one of your approvers to make the necessary change. You will receive an e-mail in the event that any changes were made to your E-TRAC request.

Approvers are asked to either approve or reject each transaction. If a transaction is rejected, it is closed to any further updates, and cannot be reused.

After your department approvers have approved the transaction, it will be routed to the Budget Office and Human Resources, Safety and Risk Management. The transaction is finalized only after Human Resources, Safety and Risk Management has approved the

transaction and loaded the record to the database. You will receive an e-mail message to let you know when this has happened and any new position or employee IDs that were created as a result of the process.

Note: The E-TRAC transaction that you have submitted will be viewable in the My E-TRAC Transactions section for 30 days. After 30 days you will have to select the Include Completed, then specify the number of days in the advanced mode of Sort/Filter My E-TRAC Transactions. For more information on viewing your E-TRAC Transactions see Chapter 3 Approving a Vacant Position Change.

4.8. Vacant Position Change Field Definitions

The following field definitions are provided for your reference. Depending on the E-TRAC action-reason combination you select, any number of the following fields may display and/or be available for update.

Effective Date

| | |
|--------------|--|
| Display Only | No |
| Required | Yes |
| Default | None |
| SFSU Use | This field contains the date when the employee change becomes or became effective. |
| Values | Reference table for values. |

Department

| | |
|--------------|---|
| Display Only | None |
| Required | Yes |
| Default | The Department ID will default to the department of the E-TRAC user. |
| SFSU Use | The Department ID is the basic component of the organization structure and security hierarchy. Users will only be able to create E-TRAC transactions for their own departments. |
| Values | Reference table for values. |

Location

| | |
|--------------|---|
| Display Only | No |
| Required | Yes |
| Default | The Location Code defaults to On Campus . |
| SFSU Use | This field displays the job location for the position being created. The default for this field is On Campus which can be overwritten if necessary. |
| Values | There are three values to select from: ORSP for ORSP employees only Off Campus for employees who work off campus On Campus for employees that work at the main campus |

Job Code

| | |
|--------------|---|
| Display Only | No |
| Required | Yes |
| Default | None |
| SFSU Use | This field identifies the job classification of the employee per the CSU salary schedule. |
| Values | Reference table for values. |

Regular/Temporary

| | |
|--------------|------------------------------|
| Display Only | No |
| Required | Yes |
| Default | Defaults to Regular . |

| | |
|----------|---|
| SFSU Use | This field identifies the position as regular or temporary. The default of this field is Regular ; override if necessary. Positions are defined as permanently or temporarily funded, not whether the employee assigned to the position is regular or temporary. |
| Values | There are two values for this field: Regular and Temporary . |

Full-Time / Part-Time

| | |
|--------------|---|
| Display Only | No |
| Required | Yes |
| Default | Defaults to Full-Time |
| SFSU Use | This field indicates whether the position is full-time or part-time based on a standard 40 hour work week. The default is Full-Time ; override if necessary. Therefore, if the position is less than 40 hours a week it should be identified as a Part-Time position. |
| Values | Reference table for values. |

Reports To

| | |
|--------------|---|
| Display Only | No |
| Required | Yes |
| Default | None |
| SFSU Use | The Reports To field is used to indicate the position number that the new position will report to, which is used in organization reporting. This section should contain the appropriate administrator supervising this position. |
| Values | The valid values for this field will be M80s (MPP) and Department Chairs. The user may have to search by incumbent name to locate the Reports To position number. |

Title

| | |
|--------------|---|
| Display Only | No |
| Required | Yes |
| Default | Defaults to the description for the job code. |
| SFSU Use | The title should reflect the official title of the job code; with the exception of MPP positions. |
| Values | Reference table for values. |

Max/Month

| | |
|--------------|---|
| Display Only | Yes |
| Required | Yes |
| Default | Defaults to the maximum salary amount for the job code/range selected. |
| SFSU Use | This field contains the minimum salary amount allowed for the position based on a combination of the Job Code/Range. If a new range is selected the screen will update with a new minimum value. This data displays in order to provide the user with the information necessary to determine the correct salary amount for this position. |
| Values | Reference table for values. |

Full/Part-Time

| | |
|--------------|-----|
| Display Only | No |
| Required | Yes |

| | |
|----------|--|
| Default | Defaults to Full-Time |
| SFSU Use | This field indicates whether the position is Full-Time or Part-Time based on a standard 40 hour work week. The default is Full-Time ; override if necessary. Therefore, if the position is less than 40 hours a week it should be identified as a Part-Time position. |
| Values | |

Funding Source

| | |
|--------------|--|
| Display Only | No |
| Required | Yes |
| Default | None |
| SFSU Use | This field is used by the department to indicate the funding source for the position. This is a free form field, which serves as a link back to the current accounting system. |
| Values | Reference table for values. |