POSITION REQUESTS

Training Document
Office of Human Resources

For more information about HR Payroll processing Requirements visit the HR Web site: Binghamton.edu/human-resources/hr-masters-and-coordinators/payroll_processing_requirements.html

02/21/2017

What is a Position Request?

Position Request Forms are forms submitted by a department to obtain appropriate approvals (HR, Budget Office, and VP and/or Dean's Office) for all faculty/staff transactions. An ***approved*** Position request is required ***before*** a HR transaction form may be submitted for the following:

- **Requesting a new position**
- **Changing the org or funding of a position**
- **Requesting a reclassification of an existing position**
- **Requesting approval to fill an existing (vacant) position**
- **Requesting approval to pay Chair/Director stipends and Also Receives**

A line number will be established or updated by HR and financial records will be updated by the Budget office, all based on the information provided in each form. It is imperative that each form submitted is complete and correct.

Any end-users questions should be addressed with the HR Master in your area, prior to the submission of any form.

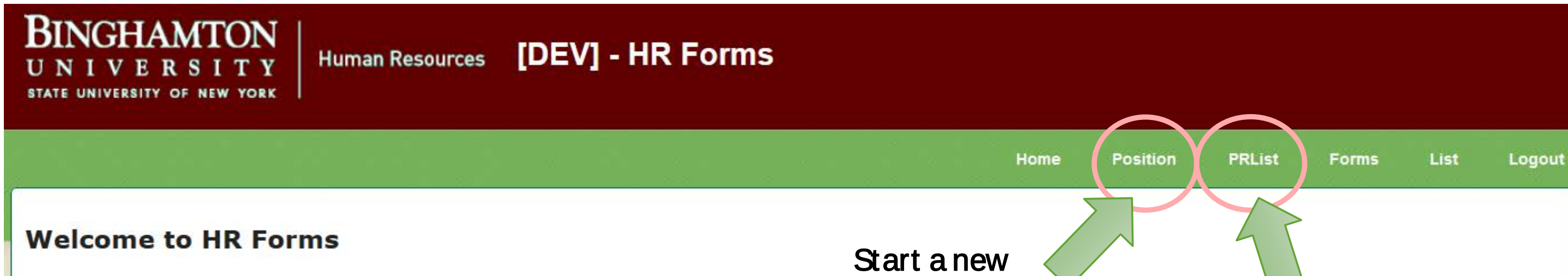
Accessing the Forms

Position Requests can be accessed within the HR Forms transaction application: hrforms.binghamton.edu

The application is web based. You will sign in with your **PODS username and password**.

Any questions regarding your PODS username or password may be directed to the ITS Help Desk at 777-6420.

Home Page: **Menu Bar**



Start a new Position Request here.

View your Position Requests Lists here

Home: The main dashboard

Position (*NEW): Click to start a new Position Request

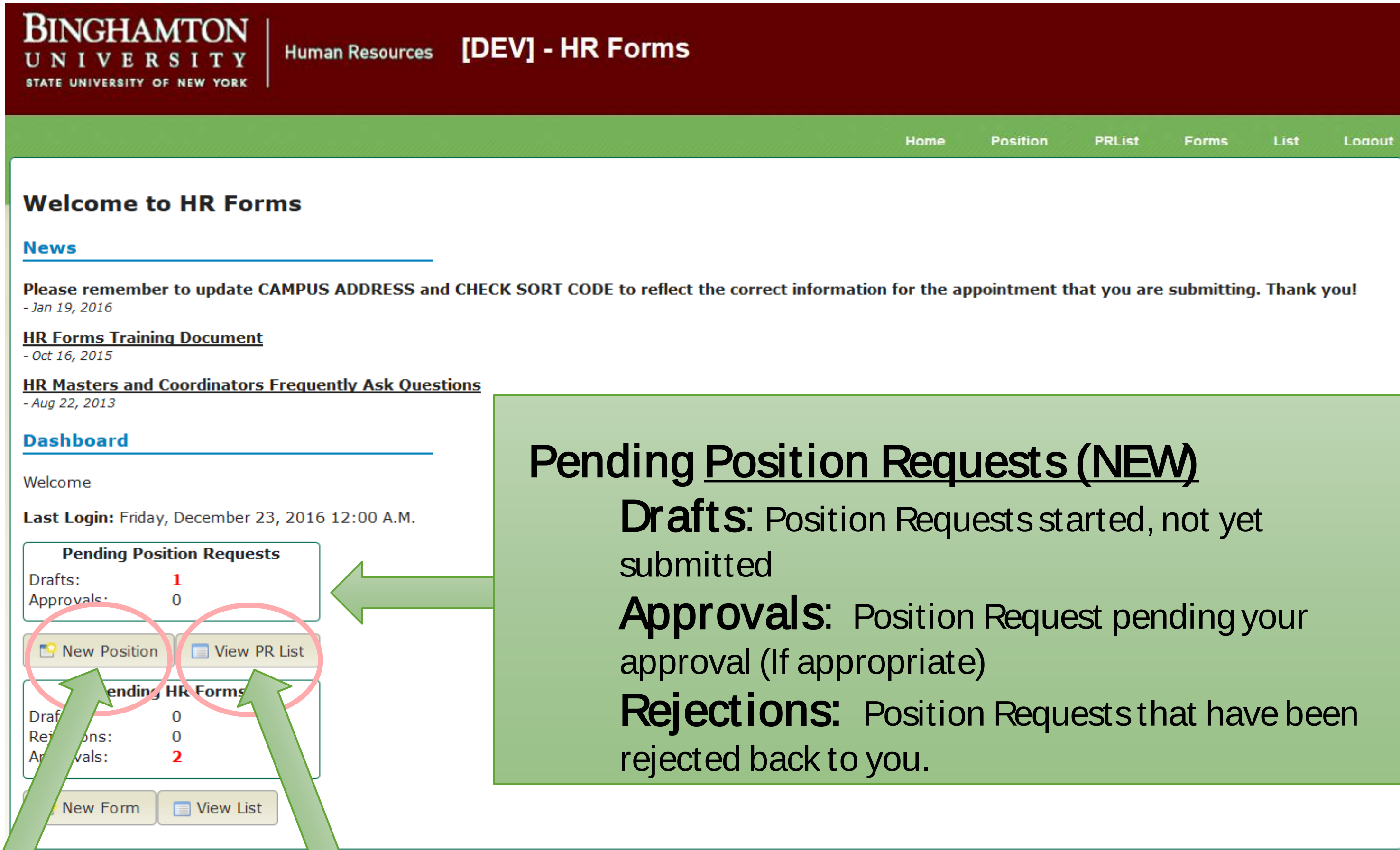
PR List (*NEW): Click to view position requests including drafts, submitted, rejected, approvals (if appropriate) and archived (completed)

Forms: Click to submit a new HR transaction form

List: Click to view HR transaction forms including forms in process and/or completed

Logout: Sign out of the application

Home Page: **Dashboard**



Pending <u>Position Requests (NEW)</u>

Drafts: Position Requests started, not yet submitted

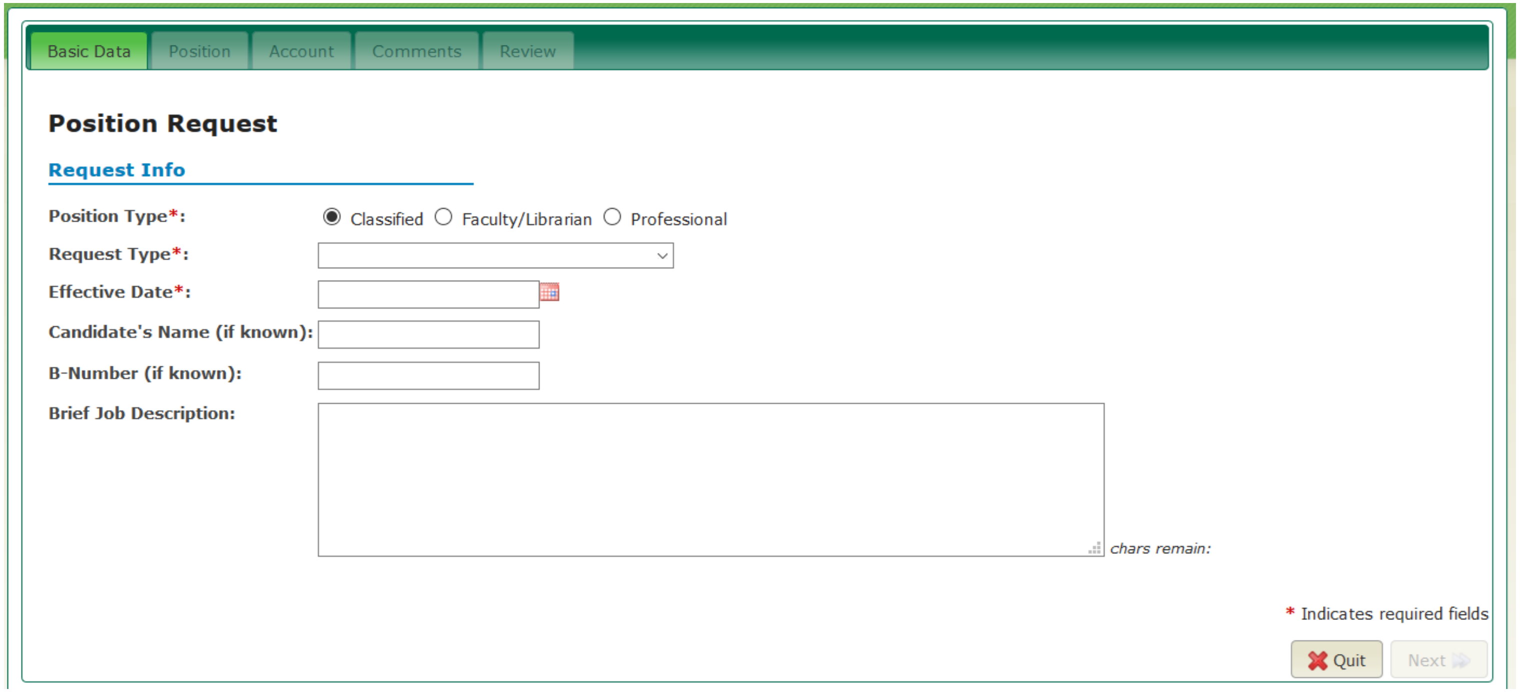
Approvals: Position Request pending your approval (If appropriate)

Rejections: Position Requests that have been rejected back to you.

You can also start a new Position Request here.

You can also view your Position Requests Lists here

Submitting a Position Request



1. **All three types of position requests are initiated from this page.**
2. Once the position type is chosen, the rest of the form will show the appropriate fields and information for that type of request.
3. Each submitted position request will follow an electronic approval path to route the form to the appropriate approvers, based on the position department.

Position Request Fields: **Basic Data Tab**

Select the **choice** that corresponds to your specific position request

Request Type: **Classified**

- **Extend Temp Position/Renew Term Appt:** Use to request an extension for a Temp Employee
- **Approval to Fill:** Use to request to fill a vacant line number
- **Change Org/Funding Source:** Use to change the department or funding on a position
- **New Position:** Use to request a line for a new position in your area
- **Position Changes:** Use to request any type of position changes for a current employee

Request Type: **Faculty**

- **Approval to Pay Also Receives:** Use to request additional (not added to base salary) stipend
- **Chair Stipend or Director:** Use to request additional (not added to base salary) Chair stipend
- **Extend Temp Position/Renew Term Appt:** Use to request an appointment extension
- **Approval to Fill:** Use to request to fill a vacant line number
- **Change Org/Funding Source:** Use to change the department or funding on a position
- **New Position:** Use to request a line for a new position in your area
- **Position Changes:** Use to request any type of position changes for a current employee

Request Type: **Professional**

- **Approval to Pay Also Receives:** Use to request additional (not added to base salary) stipend
- **Chair Stipend or Director:** Use to request additional (not added to base salary) stipend
- **Extend Temp Position/Renew Term Appt:** Use to request an appointment extension
- **Approval to Fill:** Use to request to fill a vacant line number
- **Change Org/Funding Source:** Use to Change the department or funding on a position
- **New Position:** Use to request a line for a new position in your area
- **Position Changes:** Use to request any type of position changes for a current employee

Position Request Fields: Basic Data Tab

Effective Date:

- **Professional & Classified:** Provide the date of the beginning of the pay period requested.
- **Faculty:** Use the appropriate date based on obligation dates provided by HR.

Candidate's Name (if known): If you know the Employee or Candidate's name, please include it.

B-Number (If known): If you know the Employee or Candidate's B-Number, please include it.

Brief Job Description:

Please complete every field that applies to your request throughout the form.

Position Request Fields: **Position tab**

Line Number: Please include for all position request types ***except*** new positions.

Is this a request for multiple duplicate lines? If yes, **ALL** requested positions must be exactly the same.

Requested salary: Allows for a salary range. If your request is for a set amount, fill in the ***first*** of the two fields.

FTE: Full Time Equivalency. This is the appointment percent (100%=full time, 75%=part time, etc…)

Pay Basis: Please note that while every employee is paid on a biweekly schedule, ***most do not have a biweekly pay basis***. (see chart on next slide)

- Please contact your VP/Dean's office financial expert with any questions regarding PSR or PST funding for your position ***prior to submitting your position request***.
- Contact HR if you still have pay basis questions after talking with your VP/Dean's office.

Position Request Fields: Position Tab, Pay Basis

Faculty:

- **ANN** (Annual) PSR funded, 12 Month work obligation
- **CAL** (Calendar) PSR funded, 10 month work obligation
- **BIW** (Biweekly) PST funded, typically used for Adjunct appts
- **FEE** PST funded, typically used for casual (CSL) appts

Professional:

- **ANN** (Annual) PSR funded, 12 Month work obligation
- **CYF** (College Year Full) PSR funded, 10 month work obligation
- **BIW** (Biweekly) PST funded, typically used for temporary positions
- **HRY** (Hourly) PST funded, used for temporary, hourly positions
- **FEE** PST funded, typically used for casual (CSL) appts

Classified:

- **ANN** (Annual) PSR funded, used for all annual appointments
- **HRY** PST funded, used for all temporary appointments

PSR = Personal Service Regular
PST = Personal Service Temporary
(temp service funding)

Position Request Fields: **Position** Cont..

Current Salary Grade (Classified Service Only):

New Salary Grade (Classified Service Only):

Requested Budget Title: Each form will populate the list of appropriate titles for the employment area chosen.

Appointment Status: This is the intended obligation status. ***Please do not guess***: Contact your HR Master for guidance on the expected obligation status for any new appointments (prior to submitting the Position Request).

- **Faculty:** Use Temporary, Term or Continuing
- **Professional:** Use Temporary, Term or Permanent
- **Classified:** Use Temporary, Perm or Contingent Permanent

Appointment Duration: Indicates the duration of the request if temporary or term.

Tentative End Date: Complete for temporary or term requests

Position Request Fields: **Account tab**

Please contact your VP/Dean's office financial expert with any funding or account questions regarding for your position, *prior to submitting your position request*.

Expenditure Type: Expenditure Type is determined by the position funding and Pay Basis. This field will **auto-populate** based on the Pay Basis chosen for all transactions ***except*** additional stipend payments.

- **Bi-weekly, Hourly and Fee are always PST**
  - *PST = Personal Service Temporary, Temporary Service Funds*
- **Annual, College-year Full and Calendar Year are always PSR**
  - *PSR = Personal Service Regular*
- *Additional stipends (not added to base) such as Also Receives and Chair or Director Stipends may be PST **or** PSR.*

Org Name: The position requests route through the appropriate approvals based on the Org Name. ***Org Name (on the Account tab)*** is ***required***.

SUNY Account: SUNY Account is a ***required*** field. It may not be left blank.

Position Request Fields: **Comments**

Comments: Comments are ***required*** at every step of submission, approval or rejection.

- Provide any additional comments concerning your request.
  - For **Faculty**, please indicate all courses (CRN - Course Reference Number, if known).
  - For **Classified** and **Professional** requests please include any additional comments about the position.
- Please indicate in comments if this is a position request to replace a current or previous employee.

Position Request Fields: **Review**

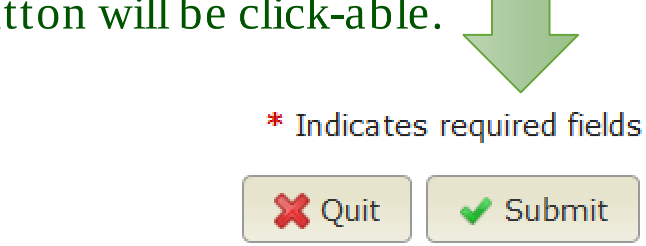
Review the page for accuracy.

When you are satisfied everything is correct you may click the submit button at the bottom.

If you receive the ***warning***: *Org Name and Comments are required*

- Click on the **Account tab** and *verify that you have provided the Org Name for the request*.
- Click on the **Comments tab** and *verify that a comment has been provided*.

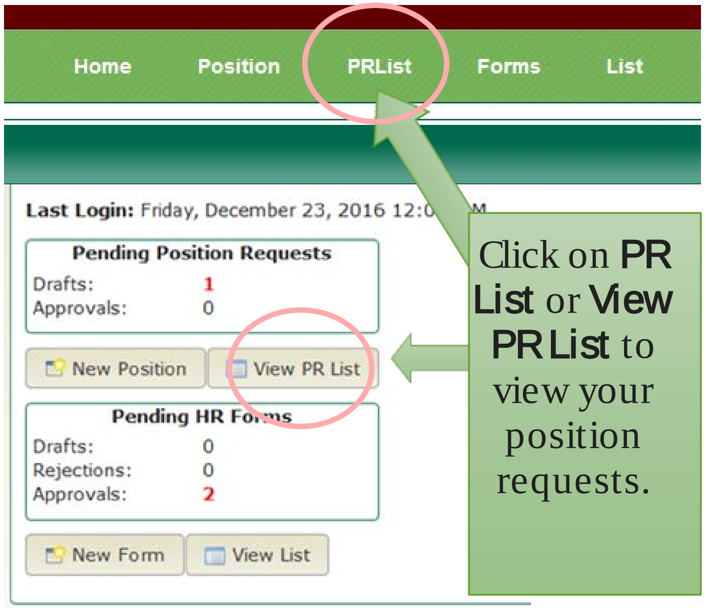
Once both of these fields are filled the Submit button will be click-able.



Rejections

If a PR form is rejected ***it can not be edited, it must be resubmitted***. The form will route to HR, who will notify the end user by email. Comments will be included to explain the reason for rejection.

PR List:



Click on **PR List** or **View PR List** to view your position requests.

My Position Requests: This view will show you every PR that you have submitted, approved or rejected.

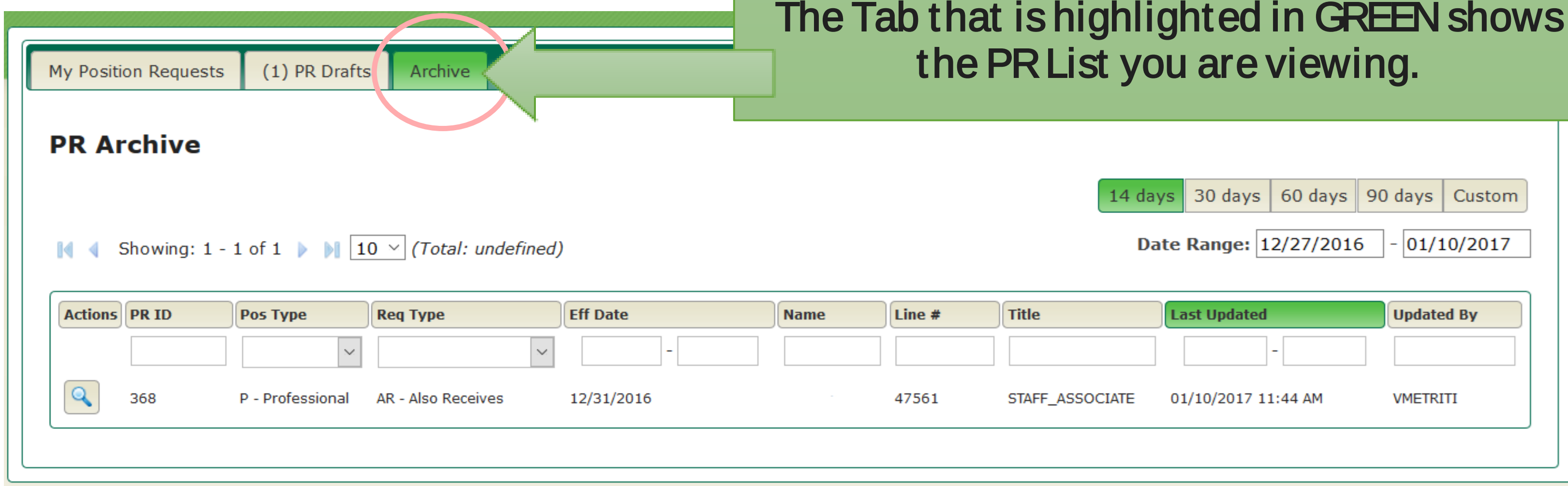
PR Drafts: PR forms that have been started but not submitted for approval yet.

PR Pending Approvals: (If appropriate) PR forms pending your approval.

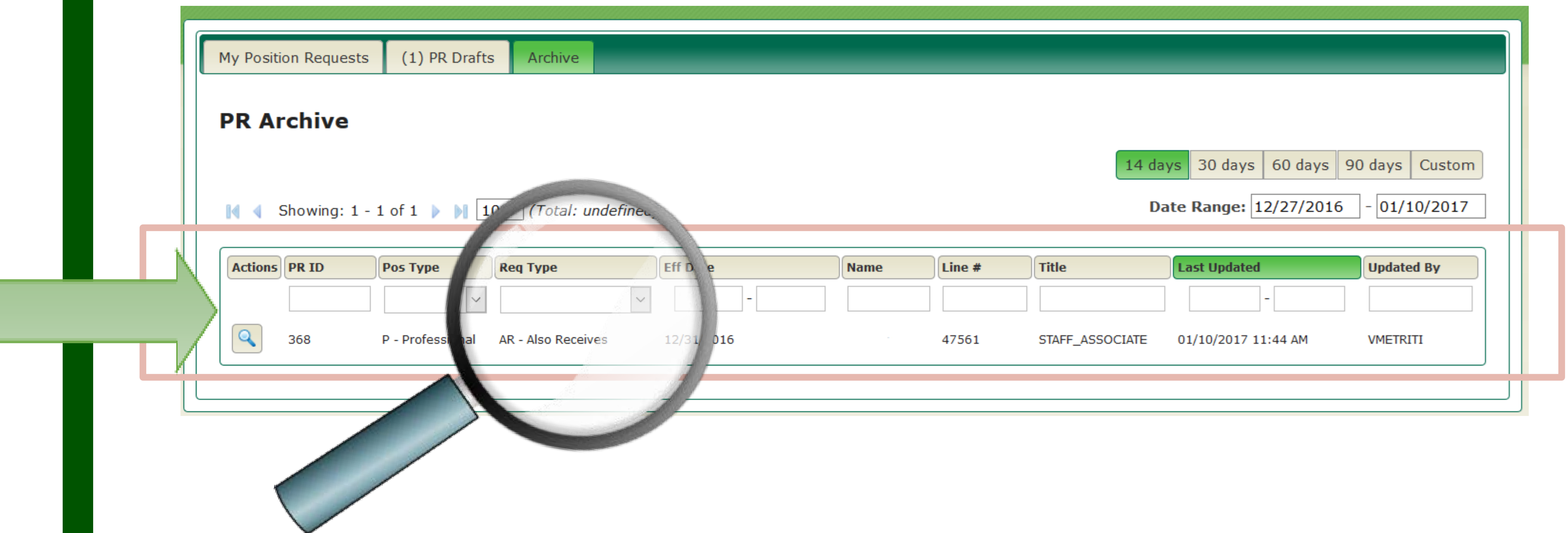
Rejections: Position Requests that have been rejected back to you.

Archive: PR forms that have been completed (approved or rejected)

The Tab that is highlighted in GREEN shows the PR List you are viewing.



PR List: Filters

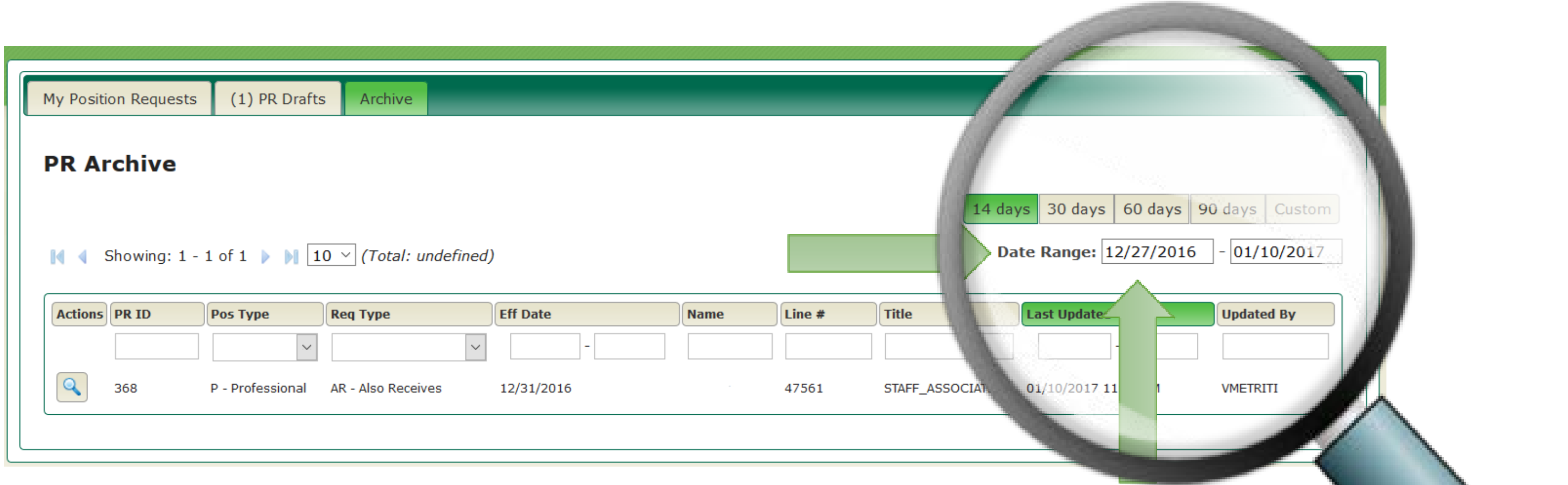


Looking for a Position Request?

If you have a long list of position requests in your tabs, you may search for specific requests by changing any the filters shown.

You may filter by: PR ID (form ID number), Pos type (Classified, Professional, or Faculty), Request type, Effective date, Name, Line #, Title, Last updated [date], or [Last] updated by [user].

PR List: Date Range Functionality



Still Looking for a Position Request? *Only forms updated within the last 14 days will appear in the default view.* If you cannot locate a form, you may need to change the filters in the Date Range. You may do this in one of two ways:

1. Click on one of the **Date Range** buttons:
   a. **30 days**, shows Position Request updated within the last 30 days
   b. **60 days**, shows Position Request updated within the last 60 days
   c. **90 days**, shows Position Request updated within the last 90 days

2. If you click **Custom** you must change the date ranges shown (using the calendar function rather than typing the dates).
   Please note that older forms may take longer to load.

Notifications:

You should receive an email notification for each form that you submit or needs approval (for approvers). You will also receive an email notification when your form is final approved or rejected.

Contacts:

Please contact the appropriate employment area professional with any questions or issues:

- *Vicki Metritikas, vmetriti@binghamton.edu, System questions, Faculty Employment*
- *Kathy Gallagher, kgallagh@binghamton.edu, System questions*
- *Christine Koban, ckoban@binghamton.edu, Faculty Employment*
- *Allison Johnson, agilli@binghamton.edu, Classified Employment*
- *Jon Roma, jroma@binghamton.edu, Professional Employment*


thank you
danke
謝謝
ngiyabonga
teşekkür ederim
gracias
merci
obrigado
bedankt
dziękuję
sukriya
kop khun krap
go raibh maith agat
mochchakkeram
terima kasih
grazie
arigatô
dakujem
takk
tapadh leat
dank je
спасибо
рахмат
Баярлалаа
mersi
barka
welalin
tack
spas
kia ora
faafetai lava
vinaka
спасибі
blagodaram
misaotra
matondo
paldies
grazzi
mahalo
хвала
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manana
obrigada
tenki
murakoze
mamnun
chokrane
trugarez
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shukriya
mercé
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