Modify Position

The Modify Position form is used to change the attributes on a vacant or filled position (i.e. Reports To change, Reorganization, Reclassification, Inactivate/Activate a Position, Transfer a Position, etc.). To modify a position, complete the following steps:

1) Begin by navigating to the Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

   Alternate Navigation: From the eForms pagelet, located on the UT Share homepage, click “Create New Request”. Proceed to step three.

   Note: If the eForms pagelet is not appearing on the homepage, click the “Content” link, in the upper-left corner of the homepage, to add the pagelet.

2) Click the Add New Value tab.

3) The Initiate New eForms Request page is displayed. Select Modify Position from the Actions drop-down menu.

   - The Status displays the current status of the eForm once saved and/or submitted.
   - The Request ID number and Request Date are assigned once saved and/or submitted. This number may be used to identify and track the request.
   - The Processing Messages link displays messages (i.e. warnings) received after the form has been fully processed.
   - The Request History link provides workflow history; which includes names, dates, times and actions taken.

4) In the Action section, complete the following fields.
   a. Use the Justification text box to explain or justify the reason for the request. (Required)
b. Enter or lookup the **Position** number receiving the change. The associated table displays the employee assigned to the position (if filled).

![Position Lookup and Effective Date](image)

**Current and Future Incumbents**

- Position: 10010599
- Effective Date: 03/07/2018

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Empl Rcd</th>
<th>Name</th>
<th>Position Entry Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td></td>
<td>0</td>
</tr>
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<table>
<thead>
<tr>
<th><em>Reason</em></th>
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<tbody>
<tr>
<td></td>
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</tbody>
</table>

5) The **Current Position Information** is displayed. Use the **Proposed Position Information** section to make changes. Depending on the **Reason** selected, the fields available to edit will be editable:

**Activate or Inactivate Position:**

Select this reason code if activating or inactivating a position. Update the **Status** field. In addition, you can update the Reports To, Location Code and Mail Drop ID (if applicable). Proceed to step six.

![Activate/Inactivate Position](image)
FTE/Ben Elig/Reg/Temp

Select this reason code if making changes to the Full Time Equivalent or Regular/Temporary status. Update the Reg/Temp, Full/Part Time status, FTE and/or Stand Hrs/Wk fields. In addition, you can update the Reports To, Location Code and Mail Drop ID (if applicable). Proceed to step six.

Location/Campus Box Changes

Select this reason code if making changes to the Location/Campus Box. Update the Location Code and/or Mail Drop ID fields. In addition, you can update the Reports To (if applicable). Proceed to step six.
Position (Working) Title Change
Select this reason code if changing the Position (Working) Title. Update the Job Title field. In addition, you can update the Reports To, Location Code and Mail Drop ID (if applicable). Proceed to step six.

Re-Organization/Restructure
Select this reason code if Re-Organization/Restructure changes are required. Update the Business Unit and/or Department number fields. In addition, you can update the Job Code, FTE, Stnd Hrs/Wk, Reports To, Location Code and Mail Drop ID (if applicable). Proceed to step six.
Reclassification
Select this reason code if processing a reclassification. Update the Job Code field. In addition, you can update the Job Title, Reg/Temp. Full/Part Time status, FTE, Stnd Hrs/Wk, Reports To, Location Code and Mail Drop ID (if applicable). Proceed to step six.

Reports to Changes
Select this reason code if changing the Reports To on a position. Update the Reports To Pos field. In addition, you can update Location Code and Mail Drop ID (if applicable). Proceed to step six.
Transfer Vacant Position to New Dept
Select this reason code if transferring a vacant position to a new department. Update the Business Unit and/or Department number fields. In addition, you can update the Job Code, FTE, Stnd Hrs/Wk, Reports To, Location Code and Mail Drop ID (if applicable). Proceed to step six.

Working Retiree POS Chg
Select this reason code if making changes to a working retiree position. Update the appropriate fields (i.e. Reg/Temp, Full/Part Time status, FTE, Stnd Hrs/Wk, etc.). Proceed to step six.
6) If changes are required, use the **Proposed Job Information** section to modify compensation details. The Proposed Funding section is available for entry when the following **Reason** codes are selected:

- FTE/Ben Elig/Reg/Temp
- Re-Organization/Restructure
- Reclassification
- Transfer Vacant Position to New Dept
- Working Retiree POS Chg

**If the request is for a Staff or Student**, complete the following fields and proceed to step seven:

- Select a **Pay Change Reason**.
- **The Compensation Frequency** and **FTE (Full Time Equivalency)** defaults with the appropriate value based on the Position number.
- Depending on the position type, enter the **Annual Rate** or **Hourly**.

**If the request is for a Faculty**, complete the following fields and then proceed to step seven:

- Select a **Pay Change Reason** from the drop-down menu.
- **Proposed 9 MO Academic Rate @ 100%**: Use this field to provide the proposed salary based on a 100% appointment.

  **Note**: Instead of entering the **9 mo Academic Rate** or **Monthly Rate**, complete the **Contract Information** section. Once the **Contract Worth** is entered, the 9 mo Academic and Monthly Rate will default with the appropriate values.
c. In the **Contract Information** section complete the following field, if necessary:
   - Enter the **Contract Worth**.

7) The funding section displays **Current Funding** and **Proposed Funding**. If changes are required, use the **Proposed Funding** section to update the existing funding source and/or distribution. The Proposed Funding section is available for entry when the following **Reason** codes are selected:
   - FTE/Ben Elig/Reg/Temp
   - Re-Organization/Restructure
   - Reclassification
   - Transfer Vacant Position to New Dept
   - Working Retiree POS Chg

   ![Current Funding](image1)
   ![Proposed Funding](image2)

   a. Enter the effective date for the Proposed Funding in the **Start Date** field.

   b. Enter the **Cost Center, Cost Share or Project/Grant** funding the position.

   c. Enter the **Funding End Date**.
      
      **Note:** The **Funding End Date** for Projects or Cost Shares should be the end of the assignment, the project or fiscal year; whichever date is first. If the funding source is a Cost Center, leave the Funding End Date field blank.

   d. Enter the funding **Distribution %**.
      
      **Note:** Funding may be split between different Cost Centers, Cost Shares or Projects. The total distribution percentage must equal 100%. Use the plus `[+]` or minus sign `[-]` to add/remove an additional funding source.

      If you need to enter funding with a different **Start Date**, click the plus sign `[+]` in the upper-right corner of the **Proposed Funding** section to insert a new row.
8) Once the required fields (indicated with an *asterisk) are completed, click **Save**. Notice, a **Request ID** number (e.g. 00002621) is assigned and the form status is displaying “Saved”.

9) Next, click the **Check Funds** button to view available funds for the Cost Center, Cost Share, and/or Project used in the Proposed Funding section. The **Review Available Funds** page is used to view the current condition of your Budget.

   - The **Requested Amount** column displays the estimated expense for the current request and the estimated expenses for any other pending requests on the same cost center or project.
   - Click **OK** to return to the main page of the form.

   **Note:** Currently, the **Check Funds** button is not a hard stop for the eForm request. If the Cost Center or Project is overdrawn, the form will still move forward. The end user will only receive a warning.

10) Expand the **Attachments** section and click the **Add/Delete** button to upload relevant support documentation. (Optional)

11) Expand the **Comments** section and click the **Add/Edit** button to include any special remarks. (Optional)
12) If applicable, expand the Contact Information section to add the name and telephone number of a secondary contact for the Modify Position form.

13) After completing the eForm, click the Submit button to send the document for approval. The eForm Status changes to “Pending Approvals” and the current routing is displayed.