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) In UTShare, navigate to the Action Request page

   Navbar > Menu > HRMS > UTZ
   Customizations > eForms for HR/Payroll
   Actions > Action Request

2) Click the Add a New Value tab.

3) Select the Modify Position Request Form

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).

C. Enter the **Effective Date** for the change.

D. Select a change **Reason** from the drop-down menu. Screenshots for each **Reason** can be seen in Step 5. The options are:
   - Activate or Inactivate Position
   - FTE/Ben Elig/Reg/Temp
   - Location/Campus Box Changes
   - Position (Working) Title Change
   - Re-Organization/Restructure
   - Reclassification
   - Reports To Changes
   - Transfer Vacant Position to New Dept
   - Working Retiree POS Chg

5) Complete the Proposed Position Information Section based on the selected Reason.

   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 vary.

**REASON: 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.
REASON: 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.
REASON: 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.
REASON: 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.
**REASON: 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.
**REASON: 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.
REASON: 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.
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.
REASON: 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.
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/Benefits 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:

a. Select a Pay Change Reason.

b. The Compensation Frequency and FTE (Full Time Equivalency) defaults with the appropriate value based on the Position number.

c. 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:

a. Select a Pay Change Reason from the drop-down menu.

b. 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

   a. Enter the effective date for the Proposed Funding in the Start Date field.
      Note: The Start Date for the funding change should be the beginning of the Fiscal Year (September 1. eForms that change funding must show the funding for the entire Fiscal Year. If the position was made effective during the Fiscal Year, the funding should start with the effective date of the position.
   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.
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”.

8) 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.

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**Blue** = the current eForm request

**Pink** = other pending eForm requests

**Yellow** = the budgetary account line is overdrawn (e.g. A1200)

**Red** = the overall budget is overdrawn

9) Expand the **Attachments** section and click the **Add/Delete** button to upload relevant support documentation. (Optional)
10) Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)

11) If applicable, expand the Contact Information section to add the name and telephone number of a secondary contact for the Modify Position form.

12) 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.