Positions

Section 3

Introduction

Positions are all of the jobs within a department, both encumbered and vacant. There is a one-to-one relationship between Positions and employees in that a Position cannot be filled by more than one employee. An exception to this rule is if two employees job share one Position.

In EHRP, there are five pages in the Position Data page group. Information is entered into the first four pages of the page group. Many of the fields on these pages default from the associated job code.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

Navigational Path

Home ➔ Develop Workforce ➔ Manage Positions (USF) Use ➔ Position Data

Navigational Tips

- The icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

- The icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

Does the Position Already Exist?

To determine whether a specific position already exists in the system or to determine the position number for a position, perform the following steps:

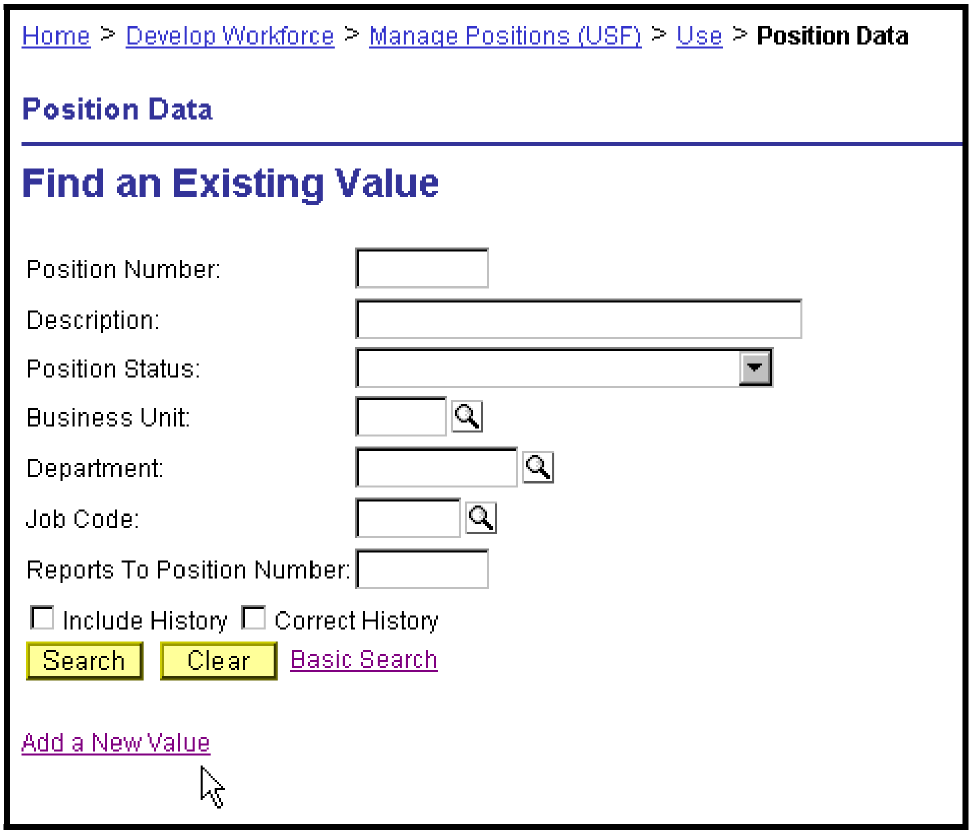
- Follow the navigational path to the **Position Data** page group:
  Home ➔ Develop Workforce ➔ Manage Positions
  Use ➔ Position Data
- Click on the **Advanced Search** hyperlink.
- Enter the **Business Unit**.
- Enter the DHHS Admin Code in the **Department** field.
- Click **Search**.
- A list of positions from that department appears.
- Use the **Description** column to determine the appropriate position.
- Note the position number and job code number.

Procedure The following steps detail the procedure for creating a position:

1 Follow the navigational path:

Home ➔ Develop Workforce ➔ Manage Positions (USF)
Use ➔ Position Data

The following sub-page appears:



Home > Develop Workforce > Manage Positions (USF) > Use > **Position Data**

Position Data

Find an Existing Value

Position Number:

Description:

Position Status:

Business Unit:

Department:

Job Code:

Reports To Position Number:

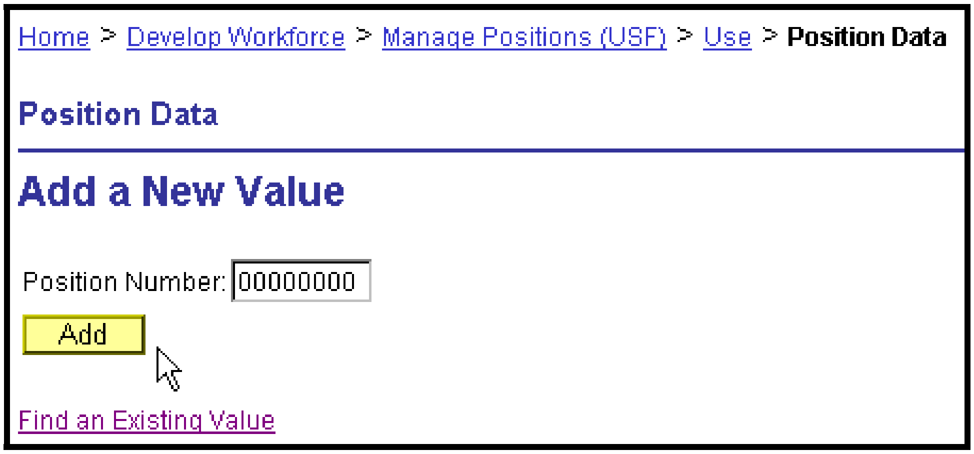
☐ Include History ☐ Correct History

Search Clear Basic Search

Add a New Value

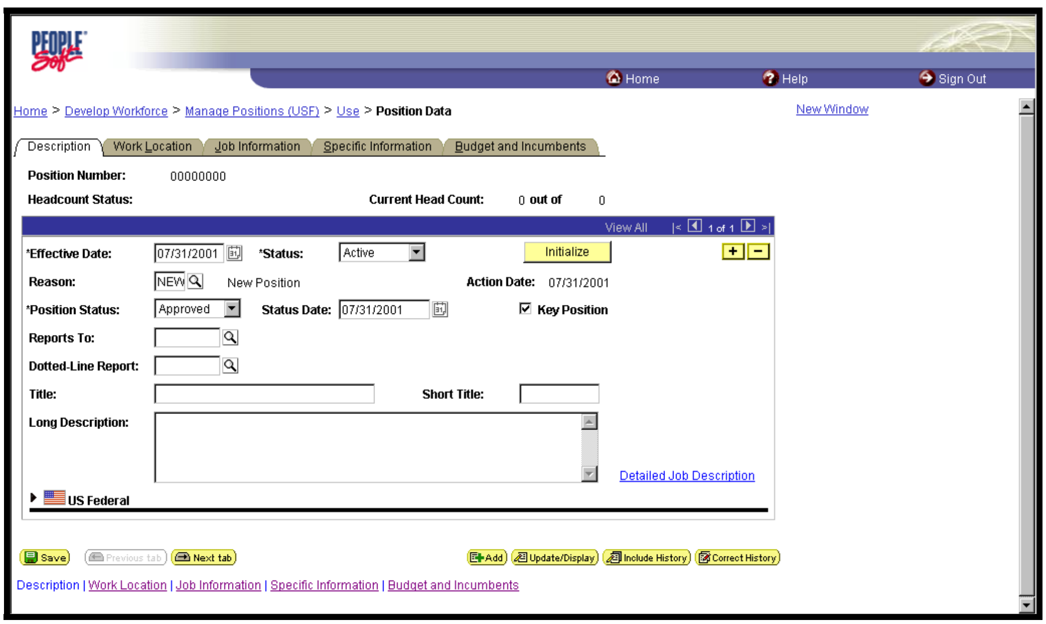
2 Click the **Add a New Value** hyperlink.

The following sub-page appears:



3 **DO NOT** enter a Position Number! It will autogenerate when you save. Click Add.

The following **Description** page appears:



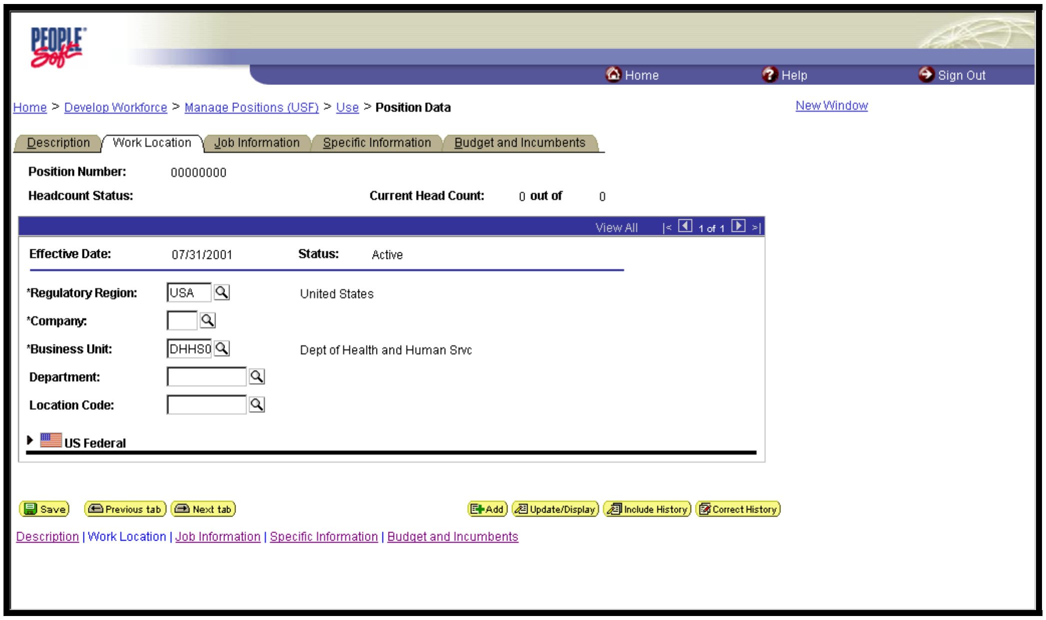
*NOTE: The **Position Number** will remain at "00000000" until the user saves the page group. At that point, a new position number will be sequentially autogenerated for the position.*

4 In the **Effective Date** field, enter the date that this action was authorized if it differs from the defaulted date, which is today's date.

NOTE: This date must be effective before the effective date of the action. For example, if the hire date is before the effective date of the position, it will not be *accessible.*

5 Click on the Work Location tab.

The following **Work Location** page appears:



6 Enter the **Company** of “HE.”

7 Enter the **Business Unit**.

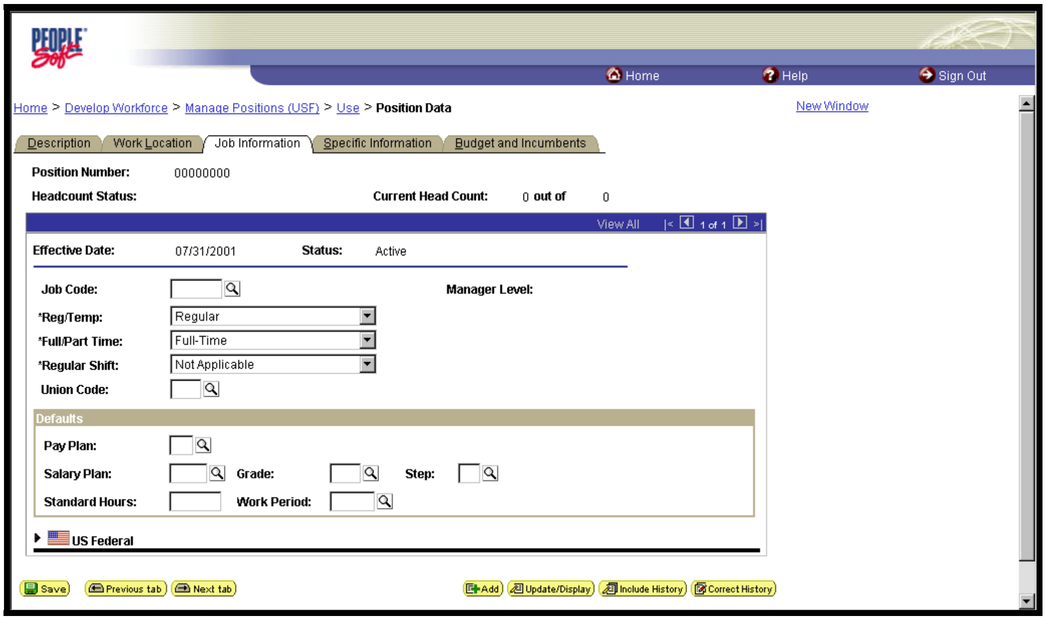
The following are valid options:

Business Unit	Description
ACF00	Admn for Children and Families
AHRQ0	Agcy for Health Rsrch and Qlty
AOA00	Administration on Aging
CDC00	Centers for Disease Control
DHHS0	Dept of Health and Human Srvc
FDA00	Food and Drug Administration
HCFA0	Health Care Finance Admin
HE	Dept of Health and Human Srvc
HRSA0	Health Resources Srvc Admin
IHS00	Indian Health Services
NIH00	National Institutes of Health
OS000	Office of the Secretary
PSC00	Program Support Center
SAMHS	Substnc Abuse Mental Hlth Srvc

NOTE: Business units serve as data filters within the EHRP system. Therefore, this step is required before the appropriate job code can be selected.

8 Click on the Job Information tab.

The following **Job Information** page appears:



9 Enter the **Job Code**.

NOTE: Numerous field values default throughout the Position Data page group but may be overwritten if necessary.

NOTE: The job code number should be entered in all caps.

10 Click on the Description tab.

This returns the user to the **Description** page.

11 Enter a position number in the **Reports To** field to designate the position to which this new position reports.

For example, Sally Smith encumbers position # 123, and David Myers incumbers position #789. David reports to Sally. Therefore, position #789 reports to position #123. When creating position #789, an end-user would indicate "123" in the **Reports To** field. Even if both David and Sally retire from the Department, position #789 would continue to report to position #123.

NOTE: The data contained in this field enables EHRP to drive automatic *actions, like Within Grade Increases. This information can be overwritten at the employee level if necessary.*

12 Enter the **Title** of the new position if the default value is not correct.

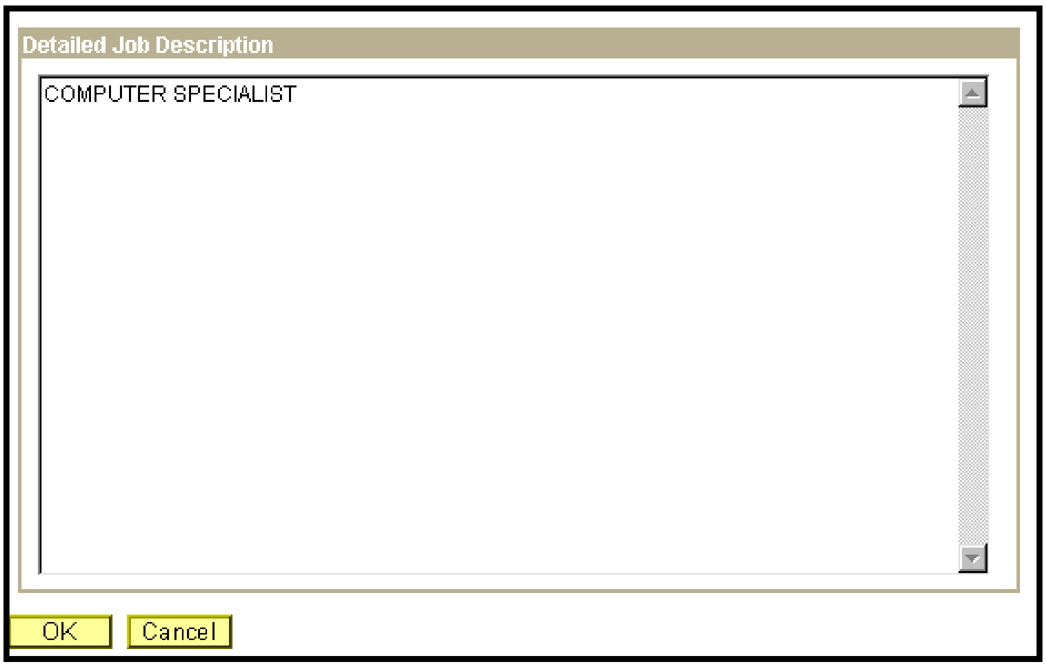
*NOTE: The **Official Position Title** from the job code is the default.*

13 If there is a **Short Title**, enter it also.

14 Type a job code description in the **Long Description** field, if applicable.

15 If more detailed text is required, click on the **Detailed Job Description** hyperlink. Otherwise skip to step # 18.

The following **Detailed Job Description** sub-page appears:



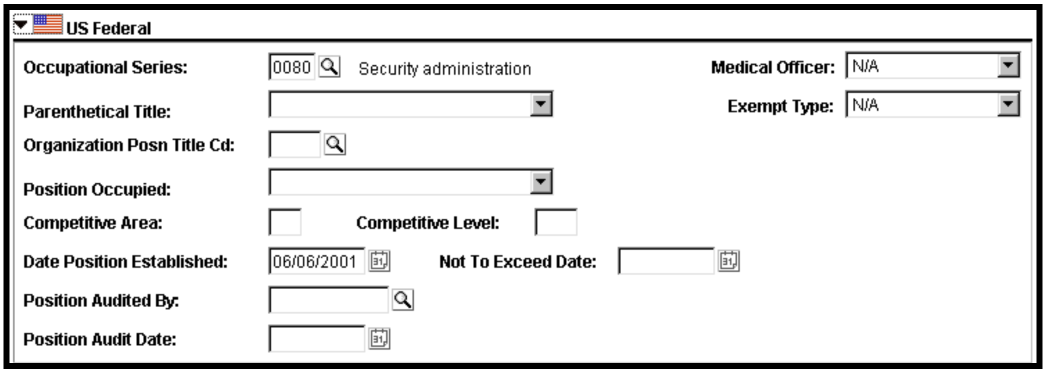
16 Type the PD text.

*NOTE: The **Official Position Title** from the job code defaults in and can be typed over. Text can be cut and pasted from Microsoft Word or another word processing application if necessary.*

17 Click <OK>.

18 Click on the **US Federal** flag link.

The following page expansion appears:



NOTE: The Occupational Series from the job code defaults.

19 Enter the **Organization Posn Title Cd** (Code).

20 Select the **Position Occupied** from the dropdown menu.

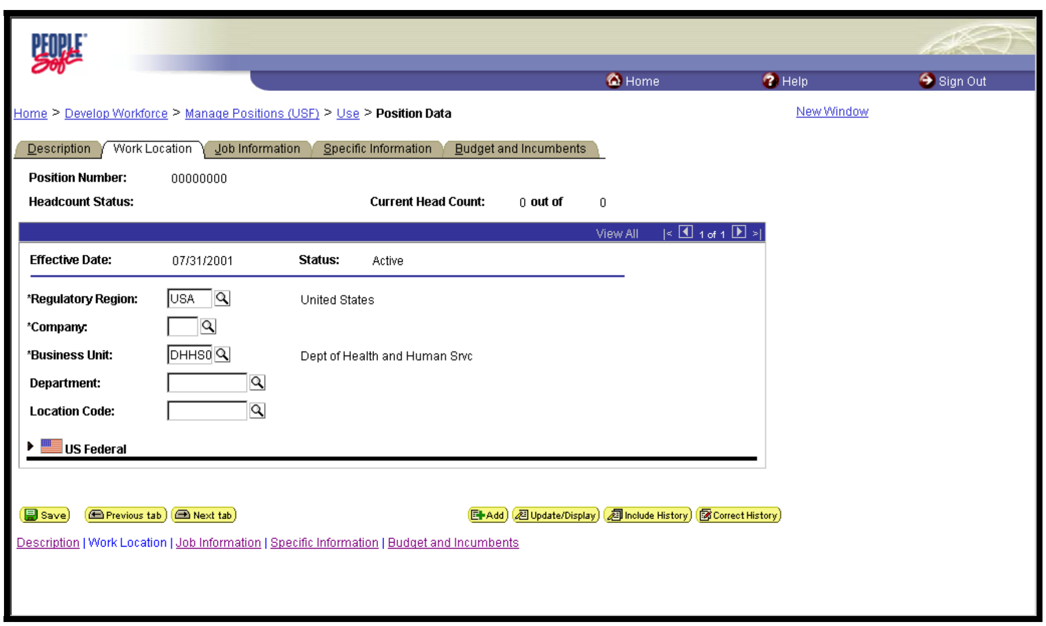
*NOTE: The **Date Position Established** defaults to the effective date.*

21 Select the **Medical Officer** indicator from the dropdown menu if applicable.

22 Select the **Exempt Type** from the dropdown menu if applicable.

23 Click on the **Work Location** tab.

The following **Work Location** page appears:

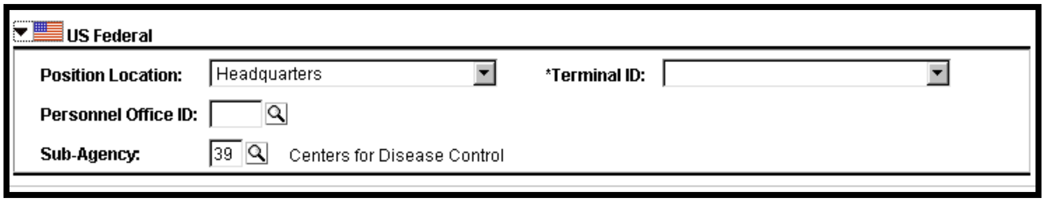


24 Enter the DHHS Admin Code in the **Department** field.

25 Enter the Geo Loc Code in the **Location Code** field.

26 Click on the **US Federal** flag link.

The following page expansion appears:



27 Confirm or modify the **Sub-Agency**.

NOTE: The Sub-Agency is equivalent to a DHHS Agency, e.g., NIH. The sub-agency from the job code is the default.

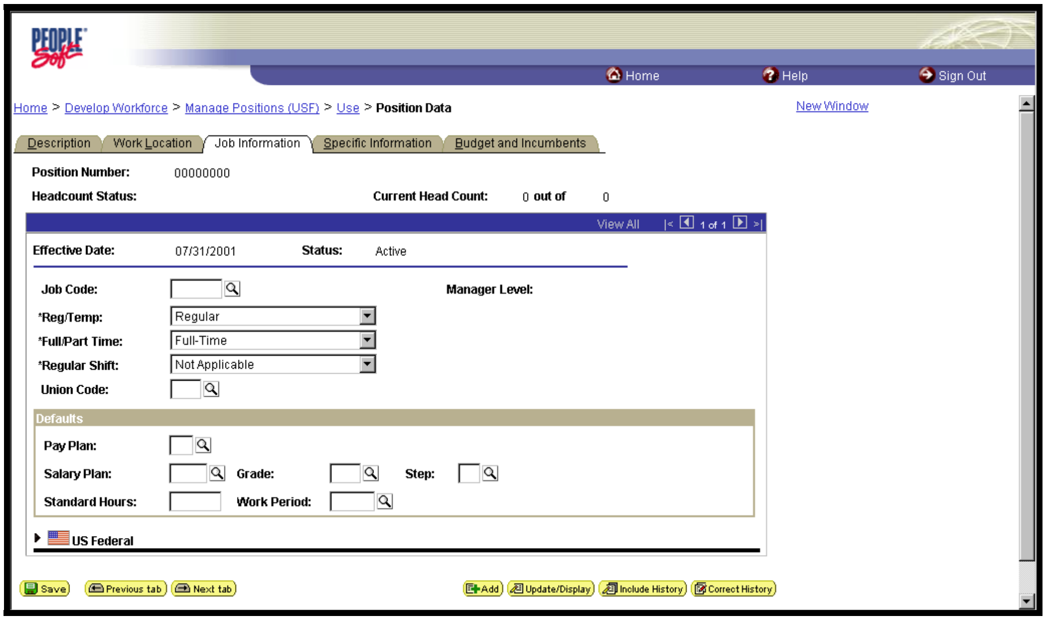
Valid Sub-Agency codes are as follows:

Sub-Agency	Description
10	Office of the Secretary of Hea
11	Program Support Center
12	Administration on Aging
31	Office of the Assistant Secret
32	Alcohol, Drug Abuse and Mental
33	Agency for Health Care Policy
34	Health Resources and Services
35	Agency for Toxic Substances an
36	Food and Drug Administration
37	Indian Health Service
38	National Institutes of Health
39	Centers for Disease Control
70	Health Care Financing Administ
90	Administration for Children an

29 Select the **Terminal ID** from the dropdown menu.

30 Click on the Job Information tab.

The following **Job Information** page appears:



31 Confirm the value in the **Reg/Temp.** field**.**

NOTE: The value defaults from the job code. This field is not to be used to identify the work schedule.

32 Select whether the position is either full-time or part-time in the **Full/Part Time** field.

NOTE: This field is not to be used to identify the work schedule.

33 Select the **Regular Shift** from the drop down menu.

NOTE: The ***Pay Plan****,* ***Salary Plan****, and* ***Grade*** *default from the associated job code default.*

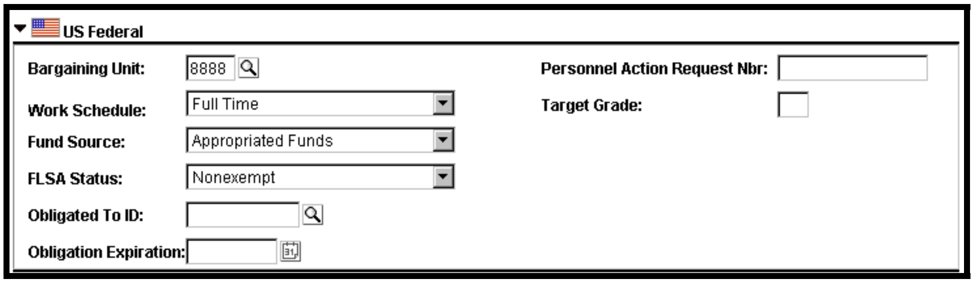
34 Enter the **Standard Hours** "40."

NOTE: Users are able to increase the available hours in a pay period for a specific job. For example, if a firefighter position requires 72 hours, the user would enter 72 hours in the Standard Hours field.

35 Enter the **Work Period** "W."

36 Click on the **US Federal** flag link.

The following page expansion appears:



37 Confirm or modify the **Bargaining Unit.**

NOTE: The Bargaining Unit from the job code is the default.

38 Select the **Work Schedule** from the dropdown menu**.**

NOTE: This is the Federal work schedule identifier.

39 Confirm or modify the **Fund Source.**

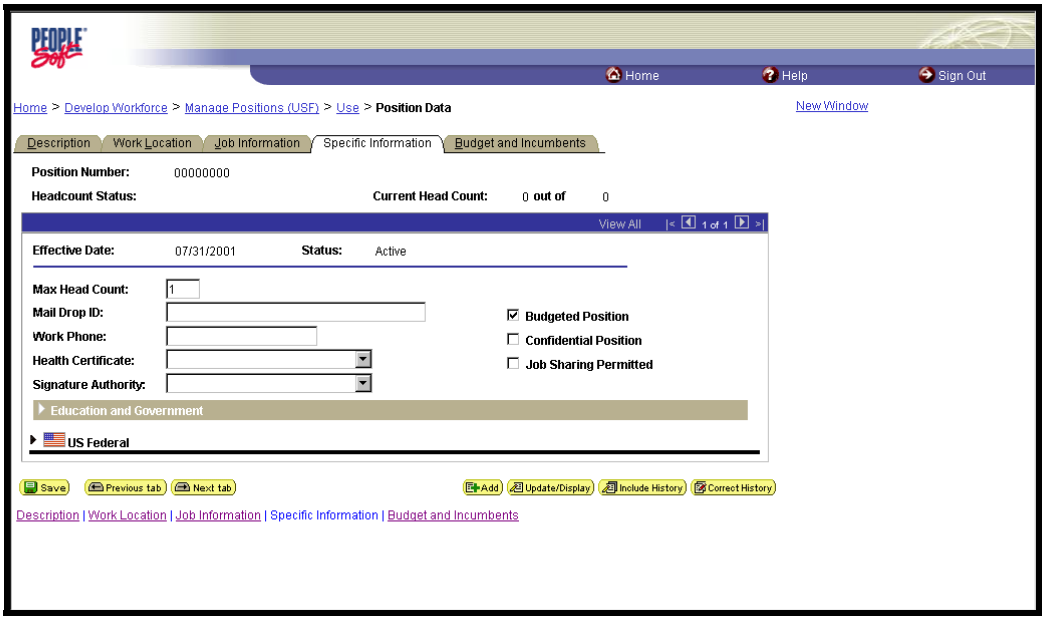
NOTE: The Fund Source from the job code is the default.

40 Validate the **FLSA Status** that defaults from the Job Code.

*NOTE: The **Target Grade** from the associated job code defaults. This field is indicative of a career ladder job code.*

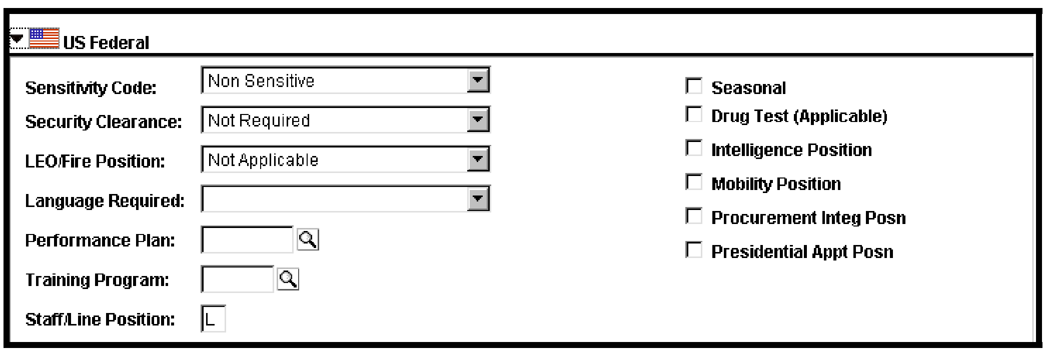
41 Click on the Specific Information tab.

The **Specific Information** page appears:



42 Click on the **US Federal** flag link.

The following page expansion appears:



43 Select the **Sensitivity Code** from the dropdown menu.

NOTE: The Sensitivity Code from the job code is the default.

44 Select the **Security Clearance** from the dropdown menu.

45 Select the **LEO/Fire Position** from the dropdown menu.

NOTE: The LEO/Fire Position from the job code is the default.

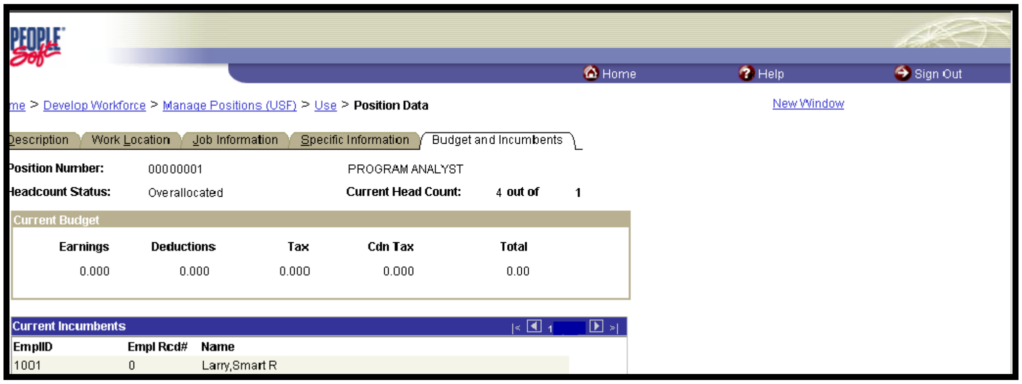
46 Check the **Drug Test (Applicable)** checkbox, if necessary.

47 Click Save.

NOTE: Saving assigns a number to the position.

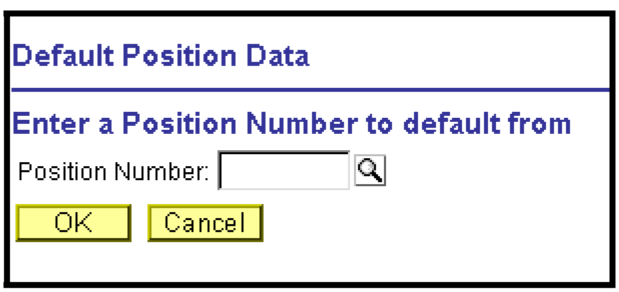
Budget and Incumbents Page

The **Budget and Incumbents** page provides information on whether a position is encumbered and by whom.



Initializing Positions

If a user is creating a new position, Initialize is displayed on the **Description** page of the **Position Data** page group. A user should select this button if the s/he wants to copy all or many of the characteristics of a similar existing position. When a user clicks Initialize, the following dialog box appears, prompting the user for the **Position Number** of the position s/he wants to copy. Upon clicking OK, the system populates the pages with the position information of the position that was selected. A user may override any information that does not apply to the new position as necessary.



NOTE: This feature serves as a valuable time-saver when a user is required to create numerous similar positions.

Modifying Position Data

To modify data on an active position, perform the following steps:

- Follow the navigational path to the **Position Data** page group: Home ➔ Develop Workforce ➔ Manage Positions (USF) ➔ Use ➔ Position Data
- Enter the job code number in the **Job Code** field.
- Click Search. The **Description** page appears.
- Select the appropriate position.
- Click + to insert a row.
- Update the **Effective Date.**
- Navigate to appropriate page and field.
- Make necessary changes.
- Click Save .

NOTE: Changes made to position data will not be automatically applied to related employees. Manual updates to the employees are required.

Changing Reports To Information

Changing Reports To information is a two-step process. First, the position number must be changed at the Position level. Second, the Reports To information must be changed at the employee level. Perform the following steps:

- Follow the navigational path to the **Position Data** page group:
  Home ➔ Develop Workforce ➔ Manage Positions (USF) ➔ Use ➔ Position Data
- Enter the job code number in the **Job Code** field.
- Click Search**.** The **Description** page appears.
- Select the appropriate position.
- Click + to insert a row.
- Update the **Effective Date.**
- Locate the Reports To field on the Description Tab.
- Make necessary changes.
- Click Save .
- Follow the navigational path to the employee record: **Home>Administer Workforce>Administer Workforce>HR Processing**
- On the **Find an Existing Value** screen, check "**Correct History**" and search for the appropriate employee.
- Go to the **Job Page**.
- Click the **Position Overrride** checkbox.
- Go to the **Employment 2** page and modify the **Reports To** position number.
- Return to the **Job Page**.
- Uncheck the **Position Override** checkbox.
- Click Save .

NOTE: Changes made to position data will not be automatically applied to related employees. Manual updates to the employees are required.

Inactivating Positions

To retain an accurate system history, an end-user should never delete a position. Instead when a position is no longer needed, it should be inactivated.

To inactivate a position, perform the following steps:

- Follow the navigational path to the **Position Data** page group:
  Home ➔ Develop Workforce ➔ Manage Positions (USF)
  Use ➔ Position Data
- Enter the job code number in the **Job Code** field.
- Click Search. The **Description** page appears.
- Select the appropriate position.
- Navigate to the **Budget and Incumbents Page** and verify that the position is not encumbered.
- Navigate back to the **Description** page.
- Click + to insert a row.
- Update the **Effective Date.**
- Change **Status** to "Inactive."
- Click Save .

NOTE: Users will receive a warning that confirms there are no employees attached to the position.

Reactivating Inactive Positions

Inactive positions can be reactivated if necessary. To reactivate an inactive position, perform the following steps:

- Follow the navigational path to the **Position Data** page group:
  Home ➔ Develop Workforce ➔ Manage Positions (USF) ➔
  Use ➔ Position Data
- Enter the job code number in the **Job Code** field.
- Click Search. The **Description** page appears.
- Select the appropriate position.
- Click + to insert a row.
- Update the **Effective Date.**
- Change **Status** to "Active."

Click Save .

Recruit 52 Processing Overview

Introduction	Once your Job Codes and Positions have been created, you will be able to use them for purposes of Recruit Actions. This section provides a high-level overview of Recruit 52 processing in the EHRP system. Specifically, this section will define and describe Recruit 52 processing and how Workflow is utilized during the creation and approval of Recruit 52's.
Recruit 52 Processing	The Recruit 52 processing module is the mechanism for initiating the Recruit actions within EHRP.

Workflow

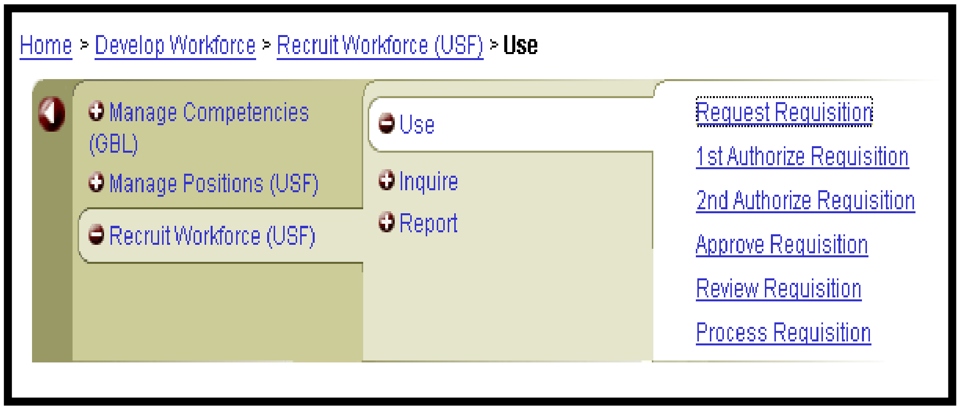
As in the PAR process, workflow automates, streamlines and controls the flow of information throughout the organization. Workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize and approve requests. Workflow then sends the requests on to human resources for final processing. The automated workflow process ensures the Recruit action request goes through all the reviews the agency requires until it is complete.

Workflow Roles

The system is designed around users' roles in the system; when an action is created in the system, it will follow a prescribed path through the chain from the initiation of the action through to final approval and entry by HR personnel.

Workflow in EHRP is based upon six system roles: Requester ("REQ"), 1st Authorizer ("1st"), 2nd Authorizer ("2nd"), Approver ("SIG"), HR Reviewer ("REV"), and HR Processor ("PRO").

There are 6 RECRUIT menu paths associated with the 6 RECRUIT workflow roles.



The following routing options are available for each Recruit action:

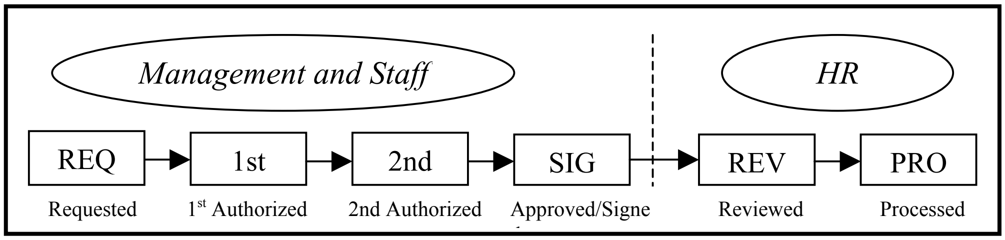
Workflow Routing Options

- 6-step process
- 5- step process
- 4-step process
- 3-step process
- 2-step process (two methods available)
- 1-step process

In the paths below, the "Management and Staff" team processes the Recruit action first, before moving it across the dotted line to the "HR" team for final processing. Alternately, the Recruit action can be disapproved or returned to the requester at any point in the process.

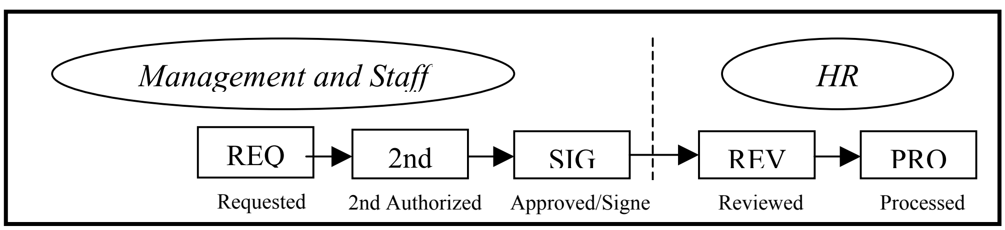
Sample workflow routes are shown below.

6-Step Workflow Process



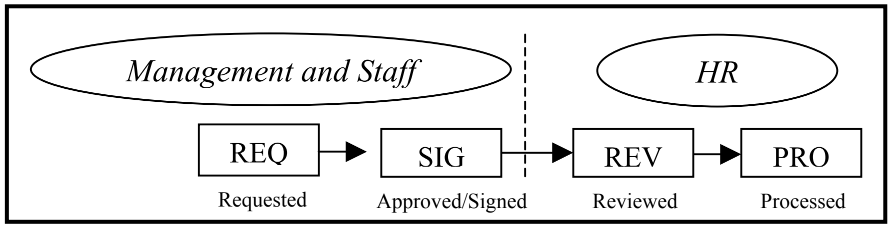
For example, a supervisor initiates a request for Recruit. The request is forwarded for 1^{st} Authorization. Upon approval by the 1^{st} authorizer, the Recruit action is forwarded for 2^{nd} Authorization. When that individual approves the Recruit action, the Approver receives it. The Approver than forwards the Recruit action to HR for completion.

5-Step Workflow Process



For example, a supervisor requests a Recruit action. The request is forwarded for 2^{nd} Authorization. When that individual approves the Recruit action, the Approver receives it. The Approver than forwards the Recruit action to HR for completion.

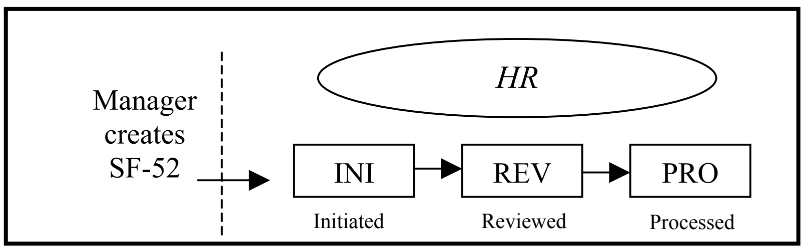
4-Step Workflow Process



In this scenario, a supervisor makes the Request for promotion. That request would be forwarded directly to the Approver. The Approver would the forward it to HR for completion.

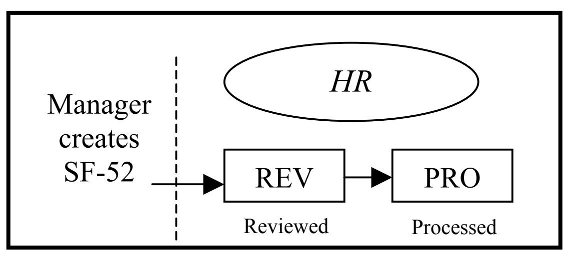
3-Step Workflow Process

3-Step Workflow process



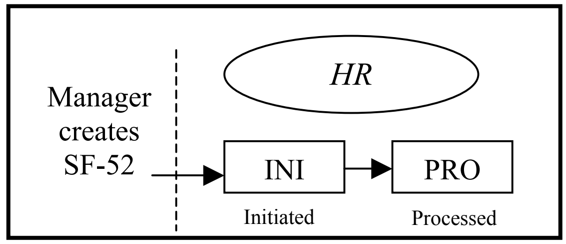
In this example, the process consists of the Manager creating a paper SF-52 request and forwarding that request to HR. HR REV uses the INI status to put the action on hold until they are ready to process that action in EHRP.

2-Step Workflow Process – Method 1



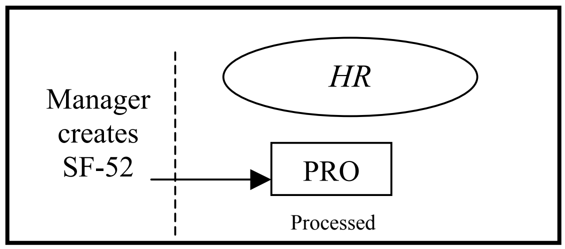
In this example, the process consists of the Manager creating a paper SF-52 Recruit request and forwarding that request to HR. HR will then process that Recruitn action in EHRP.

2-Step Workflow Process – Method 2



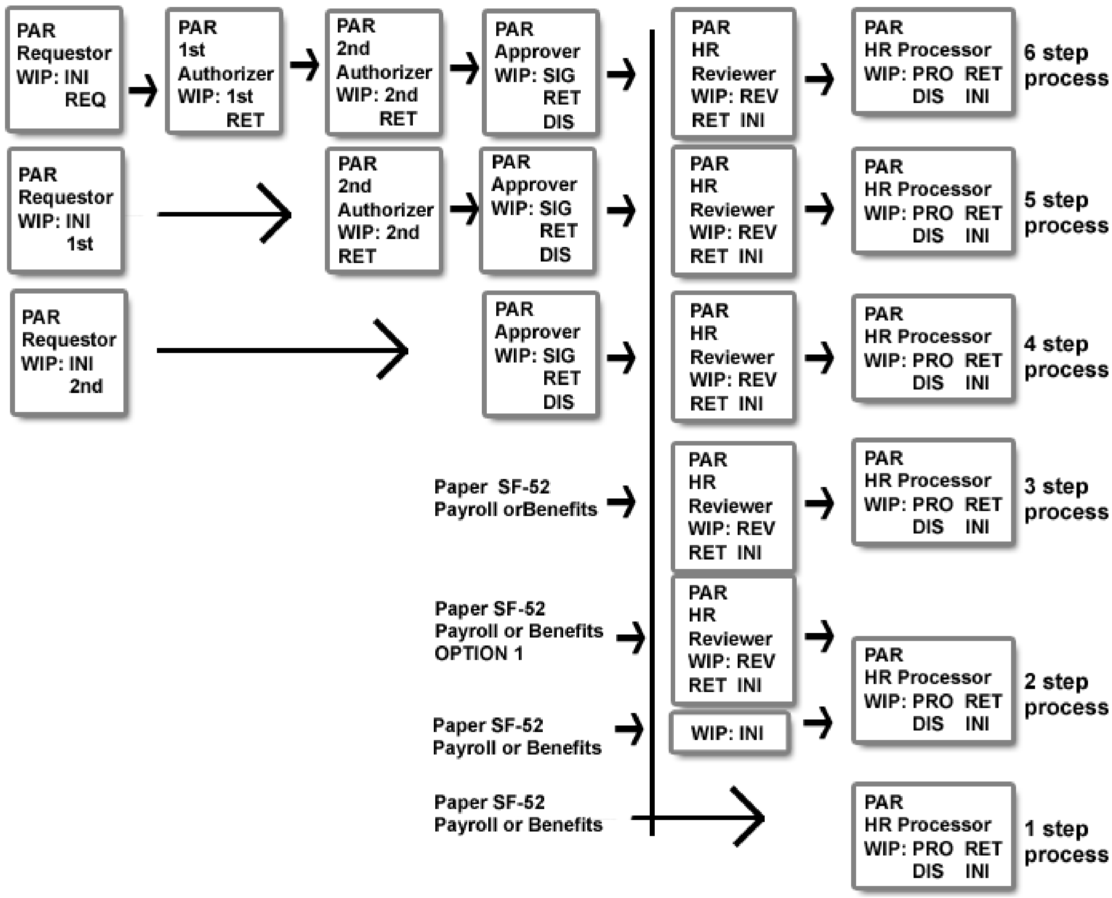
In this example, the process consists of the Manager creating a paper SF-52 Recruit request and forwarding that request to HR. The HR Processor can enter the Recruit action in EHRP as an INI, and then process that action in EHRP.

1-Step Workflow Process



In this instance, the Recruit action is entered directly into the system under PRO status.

The diagram on the following page indicates the Workflow paths available in the Recruit 52 process.


PAR Requestor WIP: INI REQ
PAR 1st Authorizer WIP: 1st RET
PAR 2nd Authorizer WIP: 2nd RET
PAR Approver WIP: SIG RET DIS
PAR HR Reviewer WIP: REV RET INI
PAR HR Processor WIP: PRO RET DIS INI
6 step process
PAR Requestor WIP: INI 1st
PAR 2nd Authorizer WIP: 2nd RET
PAR Approver WIP: SIG RET DIS
PAR HR Reviewer WIP: REV RET INI
PAR HR Processor WIP: PRO RET DIS INI
5 step process
PAR Requestor WIP: INI 2nd
PAR Approver WIP: SIG RET DIS
PAR HR Reviewer WIP: REV RET INI
PAR HR Processor WIP: PRO RET DIS INI
4 step process
Paper SF-52 Payroll orBenefits
PAR HR Reviewer WIP: REV RET INI
PAR HR Processor WIP: PRO RET DIS INI
3 step process
Paper SF-52 Payroll or Benefits OPTION 1
PAR HR Reviewer WIP: REV RET INI
Paper SF-52 Payroll or Benefits
WIP: INI
PAR HR Processor WIP: PRO RET DIS INI
2 step process
Paper SF-52 Payroll or Benefits
PAR HR Processor WIP: PRO RET DIS INI
1 step process

WIP Statuses

Behind the scenes of the EHRP system's business processes are the controls that enable you to track and process Recruit Actions in a streamlined, flexible manner. WIP (Work-In-Progress) Statuses enable system users to pinpoint the standing of an action in the EHRP system.

Paired with the Work-In-Progress Status is a Status Code. For an overview of the relationship between WIP and status codes, as well as working definitions, see the chart below.

Work-In-Progress Status	Status Code	Definition
Initiated	INI	An Initiated status indicates a Recruit action is open, but not yet submitted as a request. By assigning a status of Initiated, originators can leave the request open until it is ready to submit
Requested	REQ	To submit a Recruit request, assign a status of Requested. The request will then go automatically to the next review level.
1st Authorized	1st	The first-level reviewer assigns a status of 1st Authorization to send a Recruit request forward to the next review level.
2nd Authorized	2nd	The second-level reviewer sends a Recruit request forward to the approval level by assigning a status of 2nd Authorization.
Approved/Signed	SIG	The approver sends a Recruit request forward to a human resources official to be processed by assigning a status of Approved/Signed.
Reviewed by Human Resources	REV	When the Recruit action has been approved, it flows to the HR Reviewer. Additional data may be entered at this point; the request is checked for any last minute changes that may be necessary. The Recruit request is then forwarded to the HR Processor.
Processed By Human Resources	PRO	Only human resources officials can assign the status PRO. They first review and complete the request. They indicate final approval by assigning the status of PRO.
Returned for More Information	RET	Anywhere in the process, a reviewer can request more information or clarification by assigning a status of Returned for More Information. The user can include a comment, requesting additional information. The request goes back to the originator. When an originator gets the returned request, they add the information, reassign a status of Requested, and the process begins again.

Work-In-Progress Status	Status Code	Definition
Disapproved	DIS	Only the HR Processor or the Approver can disapprove a request. To disapprove a request, the user assigns a status of Disapproved and enters the reason in the comments field. The request is routed back to the Requester, and CANNOT be modified or re-routed back into workflow..

Electronic SF52

An electronic SF52 will replace your paper 52's. This is an OPM approved electronic document. The user is not required to print this document. The electronic signature in Part A, Item 6 on the SF52 is that of the Approver.

Printing the SF-52

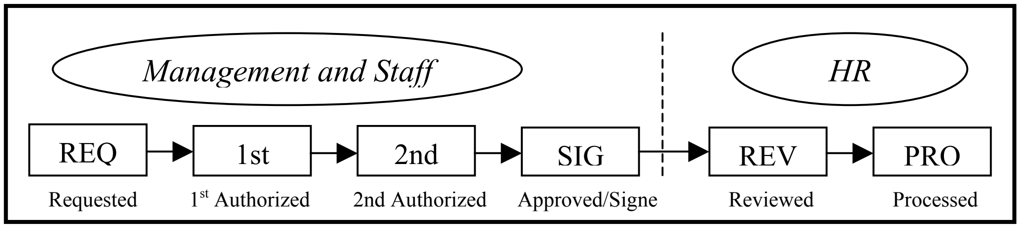
Batch SF-52s can be printed via the following menu path:

Develop Workforce > Recruit Workforce USF > Report > Recruit 52

Reviewing and Processing Recruit Actions

Introduction

As discussed in the Recruit Processing Overview section of this chapter, actions move through EHRP via workflow, a process that is driven by users' roles in the system. While the full path of a request in workflow moves through six standard steps, several different processes are available for management and HR staff use as well.



The procedure below covers the remaining steps utilized by the HR department when they receive an approved Recruit 52 action from the Approving manager. The Recruit Requests that have been approved will be routed toHR staff via the Worklist functionality of EHRP.

Navigational Tips

- When accessing a field in EHRP that requires entry, there may be a button available for use. Clicking this button will open a window with a list of possible entry options for this field.
- When accessing a date field in EHRP (for example, Effective **Date**, etc.), the button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date.

Access to data fields

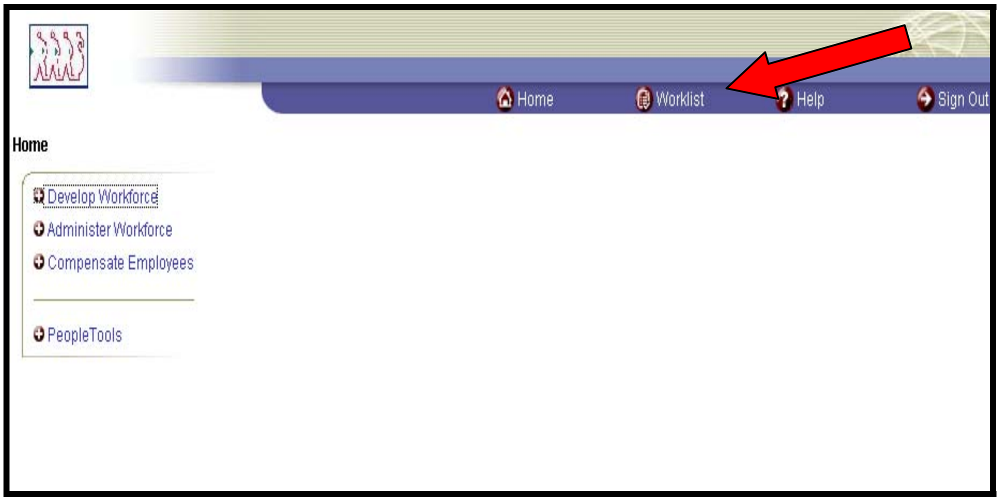
There are three pages available for Recruit requests (requisitions): Job Requisition 1, Job Requisition 2, and Job Requisition 3. Each of the six Recruit menu paths leads to these pages.

HR Reviewers and HR Processors have the capability of modifying any of the fields in the recruit page group.

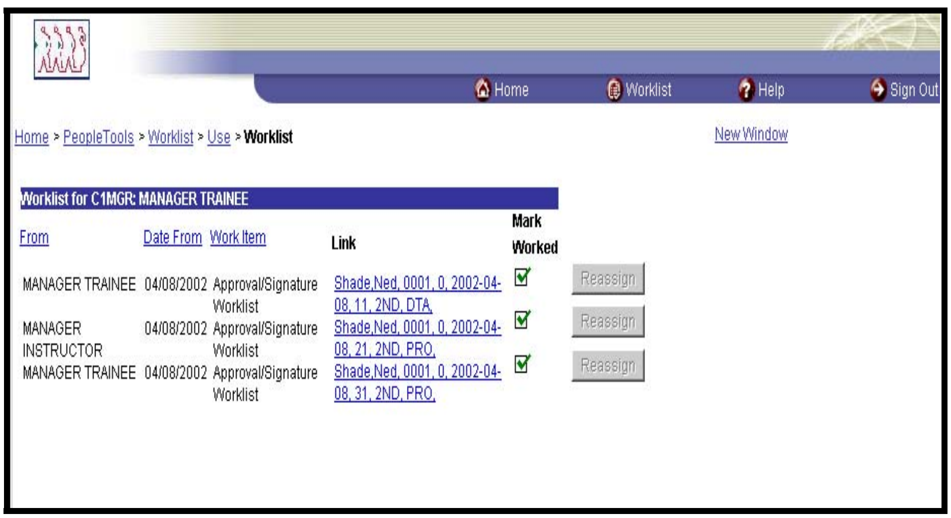
Procedure

The following steps detail the procedure for Reviewing or Processing an approved Recruit action in EHRP:

1 Access the worklist by using the hyperlink on the main menu of EHRP:



The following **Worklist** page appears:



Worklist fields

The **Worklist** page will populate with all work items assigned to the user in order of the oldest to the newest.

The **From** column shows who routed the work item to you. You can sort work items according to this data.

The **Date From** field indicates when the work item was routed to you. You can sort work items according to this data.

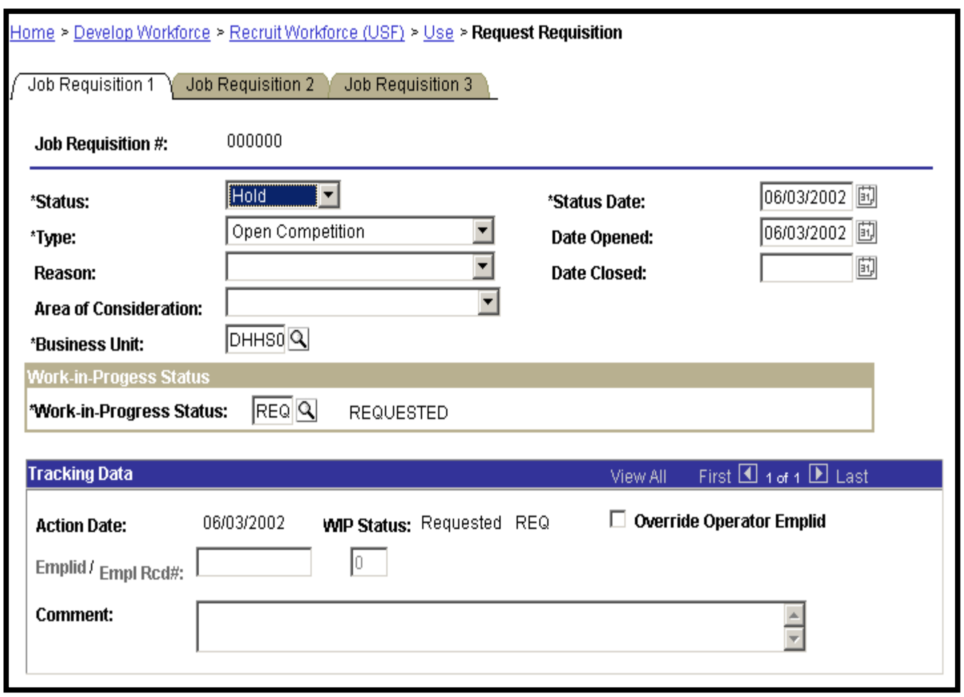
The **Work Item** indicates the Workflow role under which you have received the action (this is useful for users with multiple roles).

The **Link** contains Effective date, Transaction/sequence number, and Current PAR status. Clicking this link takes the user to the Job Requisition 1 page for the Recruit Request.

2 Click the hyperlink of the item to be worked.

The following **Job Requisition 1** page appears:

Job Requisition 1 page

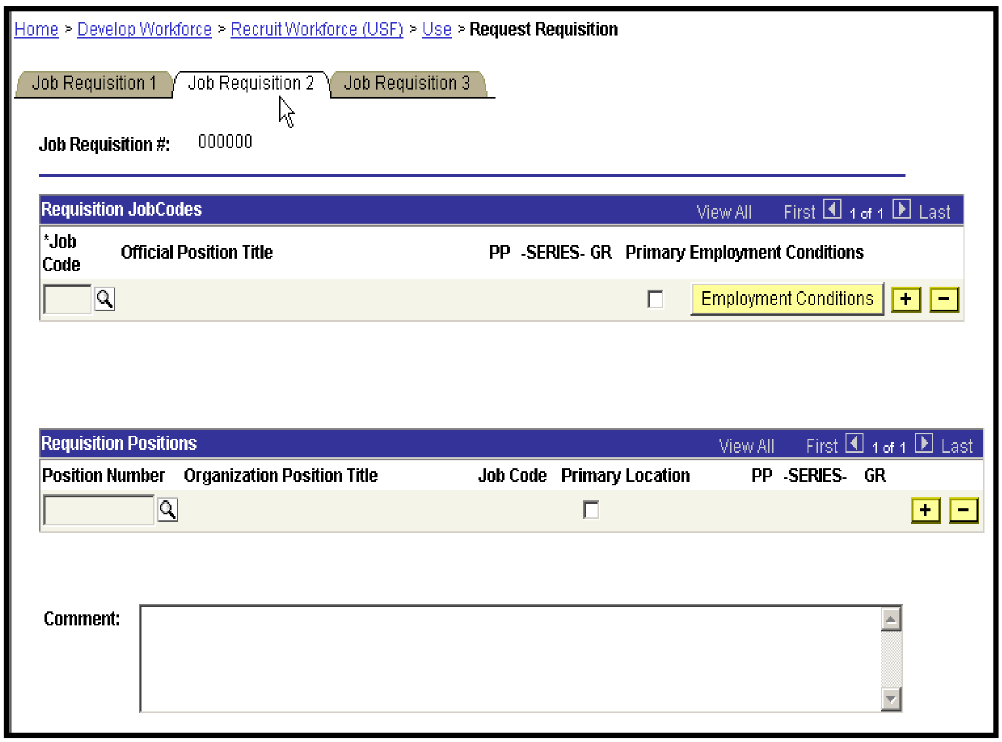


3 Enter the appropriate **WIP status**, as well as any relevant **Comment**. For example, if you are an HR Reviewer, you will select the WIP status **"REV"** to update the record. If you are functioning as the HR Processor , you will select the WIP status **"PRO"** to update the record.

*NOTE: By modifying the **PAR Status**, the work item is moved to the stage in the workflow process identified by the status. For example, the action being worked is in the **"SIG"** (Approved) stage and the user role is the HR Reviewer, then the user will enter **"REV"** in the **WIP Status** field.*

4 Click on the **Job Requisition 2** tab.

Job Requisition 2 page



5 If appropriate, update Job Code, Position Number and Comments fields.

NOTE: When a Recruit action is Processed by HR, the Job Code and Position Number field MUST be populated, if they are not already.

6 Click 

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Routing Actions to HR Processors

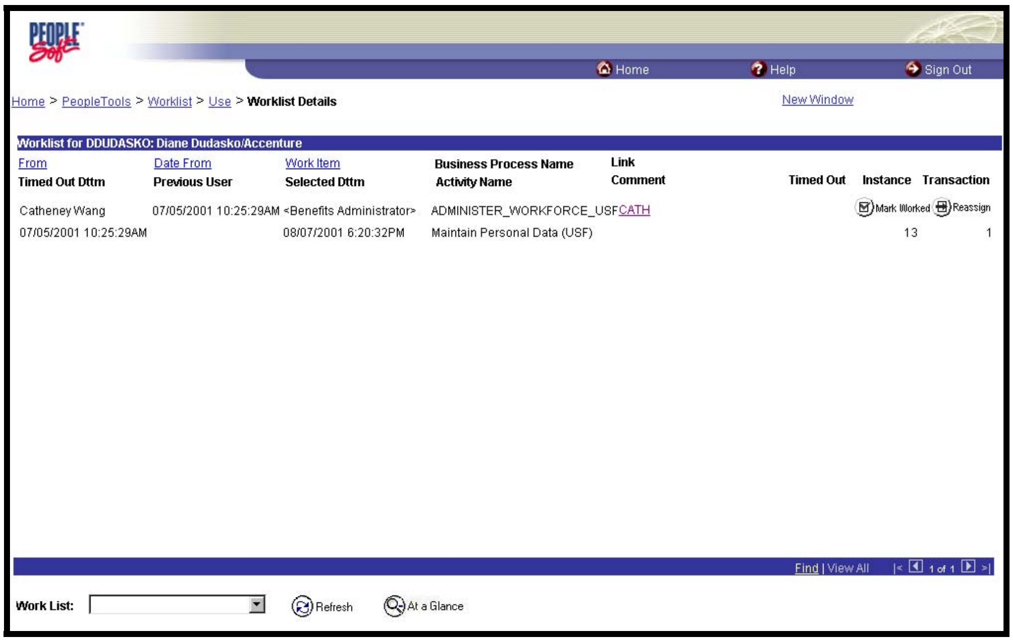
When the HR Reviewer has saved the page group, the action will be routed to the pooled worklist of the HR Processors. The HR Processor will access the record in the same manner the HR Reviewer does – by using the Worklist.

Removing items from the Worklist

Once the item is worked, it will automatically disappear from the user's worklist.

Obtaining Details

You can access additional information about the worklist items by clicking on the Detail View hyperlink at the bottom of the Worklist page.



Detail View – field names	**Timed Out Dttm - Provides** the date and time when the item will time out if it isn't worked.
	Originating User - Identifies whose action triggered this item.
	Selected Dttm - Provides the date and time when the user first selected this item (in order to work it).
	Comment - Displays any comments entered by the previous user.
	Timed Out - Indicates if the item has timed out.
	Instance - Unique identifier for each item of the same type.
	Transaction - Unique identifier for each item in the worklist.

As with the **Worklist** page, clicking the **Link** hyperlink will take the user to where the item needs to be worked.

Clicking **At a Glance** will return the user to the worklist page.

Interim Saving

If a user wants to save a request, but not submit it to the next workflow user, they can use an interim save. They should access the items via the worklist, make their changes and save without modifying the WIP status. When they are ready to complete processing, they can return to the action, make their changes, update the PAR status, and save. This will route the action for further processing via workflow.

Checking status of Recruit Actions

All workflow roles can check the status of requisitions using the menu path and Tracking Data information. This data can be found on the **Job Requisition 1** page.