Position Description Module
People Admin
Business Rules

Purpose

This document is to provide the business rules and supporting processes for positions:

- New Position Description – Staff
- New Position Description – Faculty
- Modify/Reclassify Position – Staff
- Modify/Reclassify Incumbent
- Modify/Reclassify Position – Faculty
- Refill Position – Staff
- Refill Position – Faculty

Rules

1. Modify/Reclassify Position or Modify/Reclassify Incumbent is submitted when there is a significant change in duties/responsibilities.
2. Refill Position – Staff and Refill Position – Faculty is used to post for the exact same position that was previously occupied.
3. Employee may only submit a request for position review once a year.
4. An audit will be performed at the discretion of the Compensation staff.
5. Classified Position
   a. An employee serving a probationary period is not eligible for reclassification.
   b. The base salary of an employee whose position has been reclassified to a higher classification shall be increased to the post probation rate of the new pay range or five percent, whichever is greater. However, the new base rate of pay will not exceed the maximum of the new pay range. Note: Associated pay adjustment for represented employees is per the bargaining unit agreement.
c. When a position is reclassified to a classification within the same pay grade (or equivalent), there is no change in the pay rate.
d. When a position is demoted (voluntarily or involuntarily) or reclassified to a lower classification, the employee’s pay will be reduced by at least five percent or established at a rate within the new range that is deemed appropriate by the Compensation Department, not to exceed the maximum of the range.
e. The effective date of the new reclassification and any accompanying pay adjustment shall be the beginning of the pay period following the earlier of either the date on which the completed Position Description Questionnaire (e-PDQ), with appropriate signatures, was received by the Compensation Department, or thirty days following receipt of the e-PDQ by the employee’s supervisor. Note: Effective date of reclassification and associated pay adjustment for represented employees is per the bargaining unit agreement.

6. Unclassified Position
   a. The pay for a position that has been reclassified to a higher classification will be increased by five percent or established at a rate within the new range that is deemed appropriate by the Compensation Department.
   b. When the position is reclassified to a position at the same pay grade, in most cases, there is no change in salary. However, the Compensation Department will conduct a salary review based on internal equity.
   c. The effective date of the new classification will be based on the date the PDQ was submitted to the supervisor by the employee.

7. Budget – departments MUST have sufficient funds to cover the cost of the position:
   a. General Funds – all positions must be fully funded i.e. salary budgets must be greater than or equal to position budgets. (Ref: BW report PBC6169)
   b. Non General Funds – must have sufficient cash balance and appropriate budget to cover existing and new position. (Ref: BW report CM214)

8. Positions must be reviewed and determined by Compensation. Faculty Affairs, Provost, and VP designees determine faculty and/or non-faculty academic staff positions (e.g. pay grade 66, 77, 98 & 99) prior to being created. The Research/Academic Broadband Type should be indicated in the Position Details tab in PeopleAdmin for these positions.

9. Positions must follow the naming convention as determined by Compensation

10. New position effective date may not be retroactive.

11. Planned Compensation (budget) must exist for all paid positions, except hourly student positions and Visiting Faculty positions
   a. Planned compensation on the position should be greater than or equal to the holder’s annual salary.
b. Departments may update planned compensation prior to the start of budget formulation, or in the case of filling an existing vacant position.

c. Funding (budget) for secondary appointments (e.g. Department Head) should be attached to the secondary appointment (position) not the primary appointment (position).

d. For vacant positions, planned compensation should at least be equal to the minimum starting salary/wage.

12. All positions must belong to an organizational unit

13. All non-pooled positions may only have a single, active holder.

14. Position cost distribution:
   e. Must equal 100%
   f. Must be on validation table
   g. Must use 'ZPOSDEFU'/C/R in the “order” field for positions funded by a grant
   h. Cannot use a grant number on the cost distribution
   i. Will not be updated retroactively beyond the current month, depending on date payroll runs

15. Pooled Positions
   j. Must not exceed 20 holders
   k. The following titles qualify for pooled position status:
      i. Term Adjunct Faculty
         (1) Vacant adjunct pools should be budgeted at the minimum rate of one adjunct.
         (2) Occupied adjunct pools should be budgeted based on the combined salary amount of the holders.
      ii. Student positions (including Graduate Assistant & Resident Advisor)
      iii. Auxiliary Officer
      iv. Clinical Instructor

16. Obsolete Positions
   a. Positions will NOT be made obsolete until all active holders have been separated or moved. Requests should be sent following the separation or reassignment of the existing holder(s).
   b. Positions will be made obsolete when the effective date has elapsed.
   c. Positions that have been vacant for 2 years will be made obsolete prior to budget formulation by Office of Budget Management (OBM).

17. Custom Relationships (PCR Initiator/Approver/Kronos/Salary Leave)
   a. Will not be established on the position until UC Flex training requirements are met and the department initiates and submits the HR Role Request Form.
   b. Do not expire when the position becomes vacant nor do they automatically follow the holder to a new position.
   c. Departments must notify UC Flex when custom relationships need to be delimited or transferred.