HRMS Position Procedures for Research Titles

Related Policies:

HOP 7-1020: Research Titles

and

Procedures for Research Titles

Executive Vice President and Provost

Vice President for Research

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THE UNIVERSITY OF TEXAS AT AUSTIN

RESEARCH TITLES – HRMS POSITION PROCEDURES FOR RESEARCH TITLES

Related Policies: HOP 7-1020 and Procedures for Research Titles

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General Information

This information is a supplement to the Help information in the HRMS document. The Help information gives you the technical information on how to complete the document. This information explains the reasoning behind the technical information.

Some of the information in this document is specific to the professional research titles and affiliated worker titles but the majority can be used for any position creation.

CSU stands for College/School/Unit and there may be additional instructions or information required by a CSU than what is stated.

NEW ASSIGNMENT TO POSITION

For Senior Research Fellow, Research Fellow and Postdoctoral Fellow **INITIAL** assignments to the title, the following information should be included in the Document Remarks space in the Document Review section:

> Initial (S)RF/PDF assignment (SRF for Sr. Research Fellow, RF for Research Fellow, PDF for Postdoctoral Fellow)
> Degree received date and university
> Expected length of assignment
> Permanent place of employment, if applicable

Example: Initial RF assignment. PHD received in 2004 from State University, State, Country. Assignment is expected to continue for 2 years. Permanent place of employment- Dept of Theoretical and Applied Mechanics-Cornell University.

For assignments to the Research Affiliate-Postdoctoral title in an individual position, the Document Remarks should include the source of external funding which is required for assignment to this title. In the Research Affiliate-Postdoctoral pooled positions, there is a place in the document to enter the external organization.

CSU's may require additional information be included.

An end date should be included in the Incumbent section. The end date can be extended in a modify document if the end date is later changed but still falls within the time limitation for the title (see instructions in the next section).

MODIFY DOCUMENT TO UPDATE FUNDING OR END DATE

For Senior Research Fellow (SRF), Research Fellow (RF) and Postdoctoral Fellow (PDF) positions, include the following information and a statement about what the document changes in the Document Remarks space in the Document Review section:

> Initial (S)RF/PDF: mm/dd/yy.
> This document updates funding only.
> This document updates funding and extends the end date of the assignment.

For all other research positions, include a statement about what the document changes in the Document Remarks space in the Document Review section:

> This document only updates funding.
>
> CSU's may require additional information be included.

When updating funding:

> If you are just changing the end date of a funding line where the account number and distribution percentage will stay the same AND the end date stated on that funding line has already passed, change the "view as of" date on the position details page, prior to creating a modify document, to a date within the original funding time frame so that the most recent funding lines will appear on your modify document. This will allow you to edit the funding line and just change the end date instead of adding additional lines to the funding section.

When extending an end date:

> A modify document should be done to update the end date in the incumbent section. A new assignment document should not be done. If the original end date has already passed, prior to creating a modify document, change the "view as of" date on the position details page, to a day that is within the original assignment period. This will bring up an action titled "Correct Ended Incumbent" that can be selected to create a modify document. Change the end date in the incumbent section and enter appropriate remarks in the Document Remarks section.

CREATE A NEW POSITION

Position Basis

Select the <u>Position Category</u> (Administrative & Professional, Classified, Student, Librarian, School Teacher, Affiliated Worker, Extension Instructor, or UTemp).

Several of the position categories have subtypes where a selection will need to be made. For example, Affiliated Worker has several different subtypes to select from.

OR a position can be created based on an already established Position ID.

Positions created in the conversion of Define to HRMS on 11/1/09, will generally not have position details that will populate the new position if the position creation is based on a current position. Positions created in HRMS after 11/1/09 will have position details that can be copied. When the choice is made to copy another position, all of the details will be copied except for the Background Check Account Number, the Salary and Funding section, the Justification section and the Recruiting section.

Position Details

<u>Origination Date.</u> This is the date the position will start. If the start date will be a date in the past, use an origination date in the past. This field cannot be changed once you leave this page.

<u>Creator Desk.</u> This will default to the desk the creator is currently on but can be changed.

Hours Per Week. 20-40 hours will be benefits eligible if the position is expected to continue or if it terminates on a date more than 135 days (4-1/2 months) out. 1-19 hours will not be benefits eligible.

Hours per week can be changed in a modify document, but the benefits eligibility of the position cannot be changed once this page is left. If a non-benefits eligible position is created and then later needs to be benefits eligible, a new position will have to be created.

Reports to Unit. Seven digit unit code that will "own" or control the position. Funding can come from any account on campus but only one unit owns the position.

Number of Positions. One document can create up to 4 positions that are exactly alike. The benefit of this option is that if more than one position is needed, up to 4 positions can be created in one document that routes for approval instead of having to create 4 documents. For positions that can be "pooled" including affiliated worker and student positions, there will be a check box that says "This will be a pooled position." The difference between creating up to 4 positions on one document and creating a pooled position is that once the positions are approved, the 4 positions created on the one document are individual stand-alone positions with unique position ID numbers and the pooled position is one position with one position ID that can have multiple incumbents assigned to it.

This field cannot be changed once this page is left.

Duration. "Expected to Continue" - the position will continue to be available as incumbents move in and out of the position.

"Terminates On" - the position will end as of that date. A modify document can be done to change the end date.

"Terminates on an Unknown Date" should not be selected.

Recruiting. If the position is eligible for recruiting, a screen will pop up that says whether recruiting is required or optional based on the attributes selected on the previous pages.

If the position requires recruiting, the screen will ask if you are ready to recruit now. If YES is selected, a recruiting document will be created. If NO is selected, a position document will be created without a recruiting section and a separate recruiting document will have to be done at the time the position is ready to be posted.

A UTemp representative can be notified to contact the creator if a UTemp is needed to fill the position until a hiring decision is made.

If the position is not eligible for recruiting, the position document will be created when Walk-Me-Through or All-in-One is selected.

Walk-Me-Through or All in One. Select "Walk-Me-Through" which will bring up each section individually as the document is worked through or "All-in-One" which will present the entire document allowing movement to any section to work on.

The document is now created. The following are sections within the document.

General

Background Check Account. An account number must be provided for the background check that will be done once an assignment is made to the position. When the assignment document is done, this account number will be included but it can be changed.

Position of Special Trust. A position of special trust gives the incumbent special privileges or elevated access to systems or Category-1 data. If this is selected, the incumbent must complete the "Position of Special Trust" form. Instructions and the form are located at: http://www.utexas.edu/cio/policies/uts165/specialtrust.php.

Work Schedule. This defaults to 8 a.m. to 5 p.m. but the actual work schedule should be selected here. This can be changed later with a modify document.

Reporting Structure. This is a horizontal reporting structure, not vertical. Only include a secondary reports to position ID if the person reports to more than one person.

Example 1. A researcher reports to a professor who reports to a center director or department chair. Use only the "Reports to Position ID" and put in the professor's position ID. Do not include the center director or department chair's position ID as a secondary reports to.

Example 2. A researcher is paid half-time from one professor's accounts and half-time from another professor's accounts. The incumbent reports directly to both professors. Use the "Reports to Position ID" for one professor and the "Secondary Reports to Position ID" for the second professor.

General Position Notes. Information in this space will be reflected in the official university posting notice available for everyone to see if the position will be posted. If posted, only special instructions or information should be included in this space. For example, if special testing is required to be done by applicants selected for an interview or will require samples of work production from applicants selected for an interview, a statement should be included here about what will be required in the future.

Salary and Funding

Pay Type. Select Monthly or Hourly.

UT Austin Pay Plan Information for Job Code. If the position has pay plan information, it will be included here. All classified positions will have a pay range specified. All administrative & professional (Code 1000) positions, except Research Associate, will not have a pay range specified.

This area only reflects official University pay plan information. CSU's may have their own internal pay ranges for positions that will not be reflected here.

Salary Range. If an amount is only entered in the "Proposed Salary Minimum" space and a maximum is not entered into the second or third line, only the amount in the first space can be offered to an applicant. An amount higher than what is reflected cannot be offered.

If an amount is entered into the "Proposed Salary Maximum (optional)" space, this amount will be reflected on the posting and will be available to applicants.

If an amount is entered into the "Proposed non-published maximum limit (optional)" space, this amount will not be reflected on the posting. Applicants will see "negotiable depending on qualifications" but will not see the maximum.

Funding Information.

Account Number. If this space is left blank, a warning will be issued when the creator approves the document that states that the position is unfunded. The document can reach final approval with the warning.

For Administrative and Professional (Code 1000) positions, assign on a subaccount ending in -09 (A&P Salaries), -12 (26 accounts), -51 (All Expenses), or various other subaccounts titled "All Expenses."

An unlimited number of account numbers can be used. Any valid account number at the University can be used and an account number does not have to belong to the unit that "owns" the position. If an account number is used that does not belong to the owning unit code, a statement in the Document Remarks should be included that states that the owner of the account number (state PI or department) approves the use of the account number. The document will route to that unit for approval and it helps the approver to know who approved the use of the account.

Distribution %. Funding distribution refers to the percentage that an account will fund the total hours of the position. The funding distribution must always equal 100% regardless of the number of hours on the position or the number of hours that the incumbent is assigned. If more than one account is funding the position, the percentages must equal 100%. If the funding distribution does not equal 100%, you will get a warning message that the position is not fully funded.

Eff. Date. The start date of the funding period from this account number.

End Date. The end date of the funding period from this account number. There is no requirement to provide an end date on certain accounts. 26 accounts will require an end date equal to or prior to the expiration date of the contract or grant.

Dept. Coding. Once the document has been saved, the option to enter departmental coding (formerly called Define coding) is presented.

Funding Statement. Enter "Funding will continue" unless there is some specific information to enter. A CSU may require specific information in this space.

Purpose and Functions

Position Title. This space is reserved for internal working titles that are not the same as the official university title and an official university title should not be used as an internal working title. For example, for a postdoctoral fellow position, "Research Associate" should not be entered in this field because there is an official "Research Associate" position. "Postdoctoral Fellow" should not be entered here because that is the official title and would just be a duplicate. For a Director title, "Director of Public Relations" can be entered here because that is not an official University title.

A title in this space is the title that will be reflected in the University Directory and will override the official university title.

Normally, this space will be left blank.

Purpose. Brief statement of the purpose of the position. This statement should include the general area of research and the name of the department. The supervising professor's name should not be used in this area (it is already in the Reporting Structure section).

Functions. Functions should be listed in highest percent time to lowest percent time order. Functions should be in the same tense and should not be a restatement of the Purpose. Functions detail the duties that the employee will perform. They do not need to be so detailed that every possible duty is covered but they need to give an idea of what the employee will be doing on a day to day basis. For example, if the Purpose Statement says the position will be "performing research," the functions may say

1. Make and interpret analytical data.
2. Purchase, operate and maintain specialized laboratory equipment.
3. Assist and guide graduate and undergraduate students in the research functions.
4. Publish results in high quality journals, attend professional conferences to present results, and acquire funding.

Under the Supervisory Information section, if supervision is reflected here, it should also be reflected in the Functions section.

If the position will be recruited for through the University recruiting system, the Purpose and Functions sections will need to be more professional than if the position will not post for recruiting.

Qualifications

Required Qualifications. An applicant must have these qualifications to be considered for the position. Indicate whether equivalent combination of relevant education and experience may be substituted as appropriate.

SPECIAL NOTE FOR POSTDOCTORAL FELLOW POSITIONS: A Ph.D. is required for this title and experience cannot be substituted for the degree. State that the Ph.D. is required and select NO for experience substitution.

Preferred Qualifications. These qualifications are used to determine if an applicant has experience and skills beyond the minimum requirements.

Qualifying Questions. This section will only appear if you are posting the position.

To assist with applicant screening, there can be up to six qualifying questions that each applicant will have to answer. Each question should be based on the Required or Preferred Qualifications in the posting and each should have a keyword. Select two to four possible answers.

Answers provided by applicants will not keep an applicant from being able to apply for the position. These answers are just to help the hiring department in screening applicants once they have applied.

Working Conditions

Applicable working conditions should be selected.

Justification

Description of Organizational Change. Describe how the position fits into the organization in the narrative space. This may be used to supplement or in place of the graphical representations.

Department Justification. State why the position is needed. Normally it is to fulfill sponsoring agency requirements.

Recruiting

Recruiting Type. There are 3 types of recruiting:

Open – will be open to all applicants.
University-wide only – only current employees in permanent positions are allowed to apply. This type of recruiting will not allow employees in temporary positions, such as postdoctoral fellow, research fellow or positions less than half-time to apply for the position.
Internal – only applicants in permanent positions within the hiring department will be allowed to apply. This type of recruiting will not allow employees in temporary positions, such as postdoctoral fellow, research fellow or positions less than half-time to apply for the position.

Document Review

In this section, a space for "Document Remarks" appears. This space should be used for any information related to the creation of the position. CSU's may require specific information in this area.