The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

1.0 SCOPE:

1.1 This work instruction discusses the process that is used for Position Control for Sacramento City Unified School District.

2.0 RESPONSIBILITY:

2.1 Budget Department

3.0 APPROVAL AUTHORITY:

Signature _____ Date _____

3.1 Budget Director

4.0 DEFINITIONS:

4.1 Account Code – Standardized Account Code Structure (SACS)

4.2 Position Control Report – A list of positions, can be sorted by various information, such as Site, Job Classification, etc.

4.3 Assignment Record – This screen ties the “person/employee” to the “position”.

5.0 PROCEDURE:

5.1 Creating a New Position – Information is obtained from the position requisition form submitted by site. Before you begin to create a position:

5.1.1 Verify if an existing position is set up of “like position” by running a Position Control Report.

5.1.2 Verify account code, salary & fringe benefits are set up

5.2 Create the Position – You must be in the HR/Payroll activity in the Escape Online System.

5.2.1 Use Escape Online’s “How To” tutorial for detailed work instructions for setting up a position.

5.2.2 System automatically assigns the position number – It is located at the top of the screen.

5.2.3 Position End Date – An end date is required only when position is needed on a one time basis and/or availability of funds are uncertain from year to year.

5.3 Increasing or Decreasing FTE to a Position – Information is obtained from the position requisition form submitted by site.

5.3.1 Use Escape Online’s “How To” tutorial for detailed work instructions for changing the FTE to a position.

5.3.2 FTE is adjusted in the detail tab of the position. Note reason for change in the detail tab.

5.4 Completed Position Requisition Form:

5.4.1 Indicate position number at the top left corner of form, initial & date.

5.4.2 Keep original for file, send copy to appropriate personnel analyst and originating site.

6.0 ASSOCIATED DOCUMENTS:

6.1 Position Control Report – generated in Escape Online

6.2 Position Requisition (BUD-F001)

7.0 RECORD RETENTION TABLE:

Identification	Storage	Retention	Disposition	Protection
Current Year: Position Requisition Forms	File cabinet at each individual technician's area	One year	Discard as desired	Access limited to Budget Staff
Prior Year: Position Requisition Forms	File cabinet at common area in the Budget Department.	One year	Discard as desired	Access limited to Budget Staff
Two Years Prior Position Requisition Forms	File cabinet in file room for Budget Department.	OneYear	Discard as desired	Access limited to Budget Staff
Three Years Prior to Current: Position Requisition Form	Warehouse	One year	Discard as desired	Access limited to Budget Staff

8.0 REVISION HISTORY:

Date:	Rev.	Description of Revision:
3/30/11	A	Initial Release

End of procedure