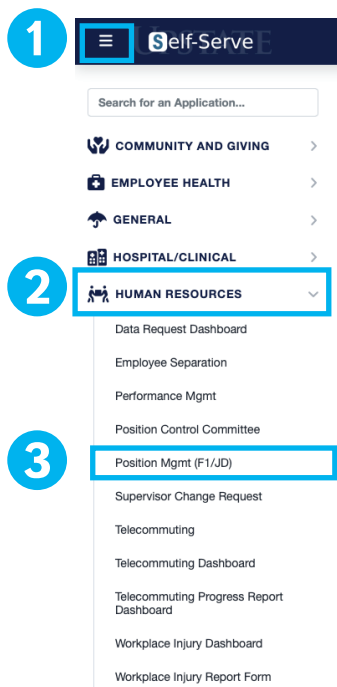# Position Request & Approval

Creating a position requisition (F1) in SelfServe

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First, log in to Self Serve. Under the menu on the left, select Human Resources then Position Management (F1/JD). Click "Create New Position".
Use the following definitions when determining what type of request is to be submitted:

- **Replacement (State or RF only):** Vacated position with **NO** changes to the position duties or responsibilities.
- **Reclassification (State or RF only):** Vacated budgeted positions with modifications to the position duties or responsibilities, which **MAY** or **MAY NOT** require payroll title or grade change, as determined by HR. *Reclassifications are only allowed within the same bargaining unit as the prior incumbent.*
- **New Budgeted (State or RF only):** A new position that is within the Department's established Budget.*
- **New Unbudgeted (State or RF only):** A new position that is **NOT** part of your Department's established Budget.*
- **MedBest:** Any position being created with MedBest funding
- **Faculty:** Any new or replacement Faculty Position.
- **Temp Agency:** For State funded temporary agency requests, except for RN Travelers.

New positions require a review to determine the appropriate title/classification. This includes, but is not limited to, a funding change for a vacated full time employee (FTE) positions, an additional FTE or a newly created position for the department.

Creating a new position? Hiring managers should be prepared to describe in ***as much detail as possible*** the essential functions of the position, through the Position Questionnaire (PQ). The PQ and the Job Description prepared by the supervisor are the two tools that assist HR in determining the correct classification. If a PQ lacks sufficient detail, the process will reflect delays. Additional process information is on the next page.

DID YOU KNOW...? The job description is initially developed from the PQ, and is a crucial part of employee performance evaluations. The more detailed the job description, the easier it is to measure and document employee performance.

Fiscal Approval

Hospital Funded Positions: Once the F1 has been submitted, the F1 will be automatically sent to those in your fiscal hierarchy (based on accounts), and will create a request in the Position Control Committee (PCC) system. Some positions will be approved automatically, however some, such as new positions, will need to be reviewed by the PCC. Please note that PCC meets every 2 weeks on Thursday. Once fully approved, the F1 will be sent through the system to Human Resources. For PCC review deadlines, please click here: **https://adobe.ly/4aYiz0c**.

Campus Funded Positions: Once the F1 has been submitted, the F1 will automatically be sent to those in your fiscal hierarchy (based on accounts). Once fully approved, the F1 will be sent through the system to Human Resources.
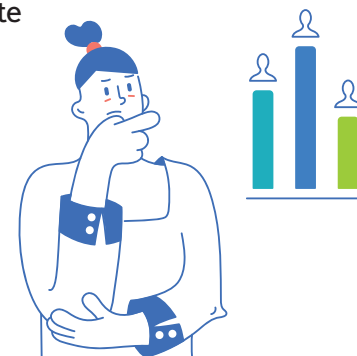
Review and Posting Positions

Position Review

Once fiscal approval is granted, HR will initate a position review before assigning to a recruiter. If the position requires classification, HR will perform a more comprehensive review. The PQ and Job Description, are the two tools that assist HR in determining the correct classification.

Classification

Classification is a systematic process of evaluating the duties, responsibilities, scope, and complexity of a position description to determine the appropriate bargaining unit, payroll title and salary grade that most appropriately matches the job specifications and standards. Upstate is allowed to use payroll titles already established by the NYS Department of Civil Service, SUNY and the Research Foundation of SUNY. HR will compare these documents with the established job standards for each payroll title.

Since a supervisor determines work assignments for employees they supervise, they are best prepared to complete the Position Questionnaire, and ensure that job descriptions accurately describe the duties and responsibilities required and are performed. Some of the criteria reviewed while classifying a position are as follows:

Complexity	Scope of Responsibility	Accountability	Results
• Difficulty of tasks • Assignments scope and range • Knowledge • Skills • Abilities	• Position responsibilities • Number of direct reports • Budgetary impact • Department Organizational Chart	• Leadership • Judgment • Decision-making • Independence of action	• Impact of actions • Effect of services • Consequences of error

Posting Requirements

All positions: Job posting previews will be sent to hiring managers to approve before posting to the careers page.

Each position is required to be posted for a designated period of time, and is dependent upon bargaining unit or affiliation and if candidate is external or internal. *Minimum post period must be met before a candidate can be selected for hiring.*

Want to advertise your job posting? **If you would like to run an ad, please discuss this with your Recruiter.** Fees associated with advertisements are the responsibility of the hiring department.

Candidate Interviews & Selection

Reviewing Applicants

We strongly encourage reviewing applicants along with the following items:

- Job Description/Job Posting
- Applicant Screening Tool: **https://bit.ly/3TGAaDu**
- Submitted Application Materials
- Answering questions like:
  - Are Minimum Qualifications met?
  - Reasons for leaving prior employment?
  - Gaps in employment history?
  - Have they been terminated prior?
  - Job Hopping?
  - Previous Upstate employment?
  - Inconsistent information?
  - Do they have any preferred qualifications based on posting?

AVOID DELAYS WITH YOUR SELECTED CANDIDATE

If a candidate does not meet minimum requirements or lists inconsistent information, they will be flagged in review. Make sure to check for *any potential red flags* that will create hiccups in the process!

Need help reviewing applicants?

If you need assistance with the review of applicants please contact your Recruiter.

Interview Questions

When writing interview questions, reference the job description/posting. We also recommend reading *Prepare your interview questions* listed under AskHR which can be accessed by scanning the QR Code to the right or click **https://bit.ly/3whHwnN** .

Scheduling Interviews

UUP, RF & M/C positions: Hiring managers are in charge of reviewing applicants and scheduling interviews.

CSEA & PEF positions*: Human resources will pre-screen applicants and pass along to hiring managers to set up interviews. *Internal candidates must be reviewed before externally posting.*
*PEF RN positions are handled by nursing recruitment

What to bring to the interview:

1. Prepared interview questions
2. Applicants' application
3. Applicants' cover letter & resume
4. Job posting with the description

Update Candidate Status

Once all interviews are completed and the team has selected a candidate, the hiring manager will need to update the candidate status in PageUp. A selection **CANNOT** be made if posting period has not been met.

SELECTED CANDIDATE: Hiring Managers will need to update status to **"Interviewed - Department Selection"**.

NOT SELECTED CANDIDATES: Hiring Managers will need to update status to *"Interviewed/Not Selected..."*.

Ready to Offer? <u>**WAIT!**</u> Hiring managers **cannot** provide an offer to candidates during the interview. Please contact your recruiter.

Candidate Review & Onboarding

Ready to Offer? **WAIT!** Hiring managers **cannot** provide an offer to candidates during the interview. Please contact your recruiter.

Candidate Review

All positions: Candidate selection automatically sends a notification to your recruiter to review the selected candidate. Per Upstate Policy, minimum qualifications ***must be met***. In most cases, candidates **are not screened** by HR staff, instead PageUp asks pre-qualified questions for candidates to respond as ***they*** feel are appropriate. Given this information, hiring managers must also review all materials to determine if the candidate meets the posted qualifications. HR will conduct a review later in the process. The Office of Diversity, Equity & Inclusion reviews for most positions, references checked and salary determined. Your recruiter will reach out to the candidate to submit references for review.

Internal candidates: HR internal employee file must be reviewed.

ODEI Review & Approval

UUP, M/C & RF Positions ONLY.
CSEA & PEF Positions do not require ODEI approval.

Office of Diversity, Equity & Inclusion (ODEI) Documentation of Search Info: **https://bit.ly/47OykF1**
Certain positions are subject to a documented formal search process according to the Affirmative Action Plan and Equal Employment Opportunity Laws. Affected departments are informed of hiring obligations for open positions. **Questions?** ODI@upstate.edu

Hiring managers need upload interview questions, candidate evaluations and justification to the **Documentation of Search** tab in the Online Employment System. Please follow the steps below to load all necessary documentation.

1. Click **Jobs Open**, then select **View** next to the position that has a selected a candidate.
2. Select **Documents** and from the drop-down menu, choose the appropriate document type.
3. Upload the documents and label them appropriately
4. Click **DONE** when finished uploading
5. Inform the Recruiter that the upload is completed

Your recruiter will send your selected candidate(s) to ODEI for review. Once approved, ODEI will notify your recruiter.

Offering & Onboarding

Your recruiter will make the official offer verbally. If your candidate accepts, they will be in touch with an onboarder who will follow up with an offer letter and schedule employment prerequisites.

Before an employee's first day, they need to complete the below:
- Pre-Employment Health Assessment
- Drug Test
- Criminal Background Check
- Confirm Employment Credentials
- Ensure Employment Eligibility

Failure of candidate to complete prerequisites will result in rescinded offer.

NOTE: All employees will be scheduled for the new employee orientation for their first day.