Position Requisition Process

This *Quick Guide* provides an overview of the process used to request a new position or to make changes to an existing position. It is intended for Hiring Managers and others who are involved in completing these types of requests (e.g. school site office managers, hiring administrators, budget and human resources staff, etc).

What is an HRA?

"HRA" is short for Human Resources Authorization, which is a new tool within the district's HR and Budgeting software (Escape) for automating HR processes. This Quick Guide provides information about using two specific types of HRAs: 1) New Position HRAs and 2) Position Change HRAs.

How does this process work?

An HRA must be created in Escape and routed for approval in order to create a new position or make a change to an existing position. The flow chart on the second page of this Quick Guide provides an overview of the approval process for both types of HRAs.

Please note that paper Vacancy Requisition forms are no longer being accepted for these types of requests.

When is a New Position HRA required?

A New Position HRA must be submitted in Escape for any *new* position that is being requested. Even if the new position is replacing an existing position, a New Position HRA is required. The position number of the position being closed and replaced should be noted in the HRA.

When is a Position Change HRA required?

A Position Change HRA is required for any change to an *existing* position. Common types of changes include increasing or decreasing the FTE, changing the position location, and adjusting the position term. The HRA form includes fields to indicate the specific changes being requested.

What is the Hiring Manager's role?

The Hiring Manager is typically the site or department administrator (e.g. principal, dept manager, etc) and is the first step in the Position Requisition approval process. If the Hiring Manager does not initiate the HRA from his/her own Escape account, he/she needs to approve it before it can route to the next approver (typically the Hiring Administrator).

The Hiring Manager can view the status of a request at any time by logging into Escape.

Where can I find help logging in to Escape?

All Hiring Managers should already have access to Escape. If you do not yet have an account or do not remember your log in information, the Technology Services Help Desk (x9445) can assist you.

How do I know which budget code to use in my request?

If you have questions about which specific budget code to use when requesting a particular position, please contact your Fund Specialist. In addition, the district offers monthly training that provides an overview of fund accounting, using budget codes, and other useful information. Please contact the Budget office (x9402) for more information.

Who do I contact for general help with HRAs?

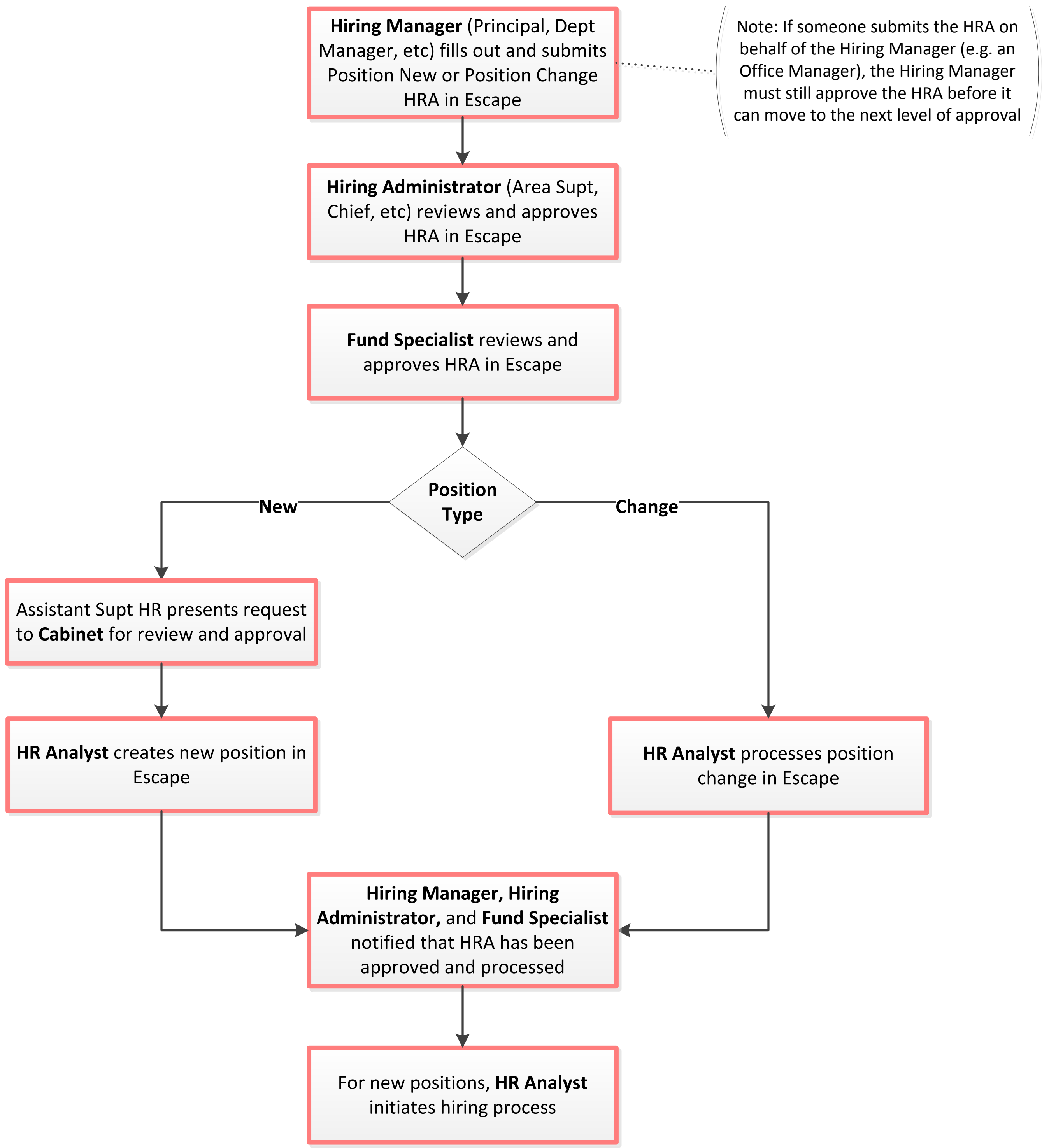
This Quick Guide provides detailed instructions on submitting and approving HRAs. If you have additional questions, please contact:

1. **Fund Specialist for Your Site/Dept**: With questions related to filling out the HRA.
2. **Technology Services Help Desk**: For technical support, access issues, and to report problems with software functionality.

What happens after the HRA is approved?

After the HRA has been approved, changes are automatically reflected in Escape and the Hiring Manager receives an automated Escape notification that the request has been processed. For new positions, the HR Analyst will then initiate the hiring process.

Position Requisition Process Flow Chart



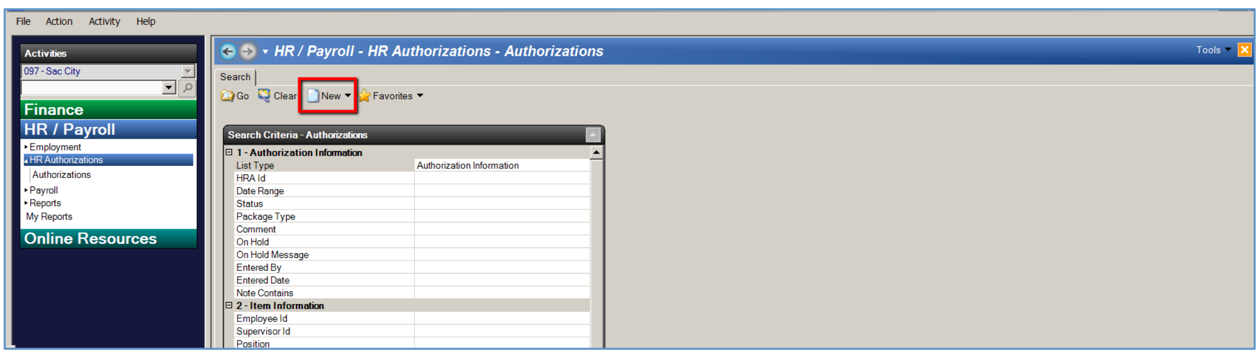
<u>Instructions</u>: New Position and Position Change HRAs

1. **<u>Hiring Manager Logs in to Escape</u>**: The Hiring Manager (e.g. Principal, department manager, etc) navigates to Escape Online and logs in using his/her unique user name and password.

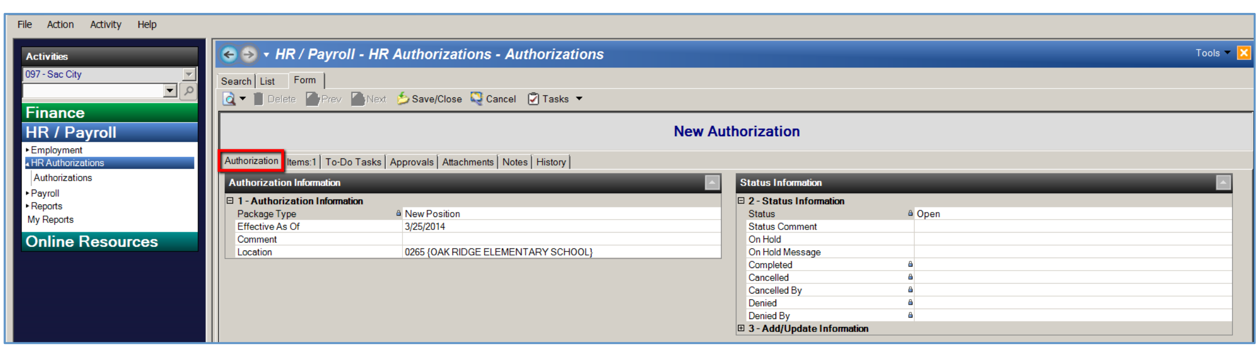
   Note: If someone other than the Hiring Manager wants to fill out and submit the HRA, it will automatically route to the Hiring Manager for approval before moving to the next step in the process.

2. **<u>Hiring Manager Creates HRA</u>**: To initiate a New Position HRA, the Hiring Manager navigates to "Activities" and selects "HR / Payroll > HR Authorizations > Authorizations > New > New Position".

   To initiate a Position Change HRA, follow the same path, choosing "Change Position" as the last step.



3. **<u>Hiring Manager Completes Authorization Tab</u>**: The "Authorization" tab displays todays date as the default "Effective As of Date". If this is a backdated transaction he/she changes to the desired effective date. The Hiring Managers default location is displayed. If he/she does not have a default location, the location of the position being requested must be selected from the "Location" drop-down menu.

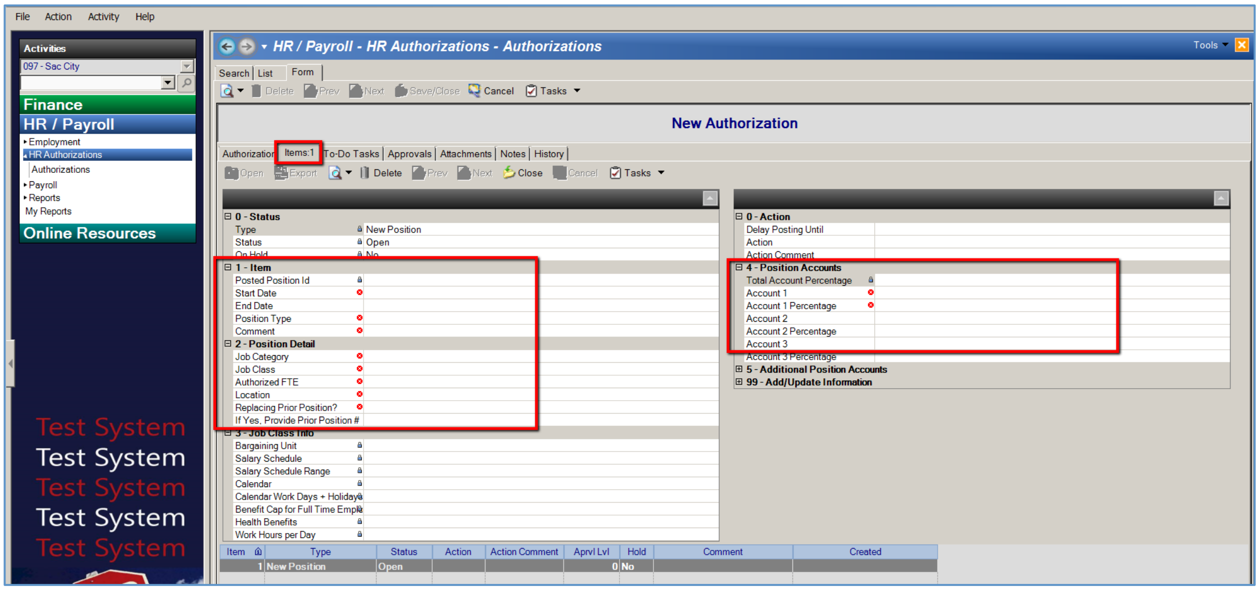


4. **Hiring Manager Completes Item Tab**: The "Item" tab displays the fields that must be completed to initiate the request. The Hiring Manager needs to complete all required fields under the sections circled below before submitting the HRA.

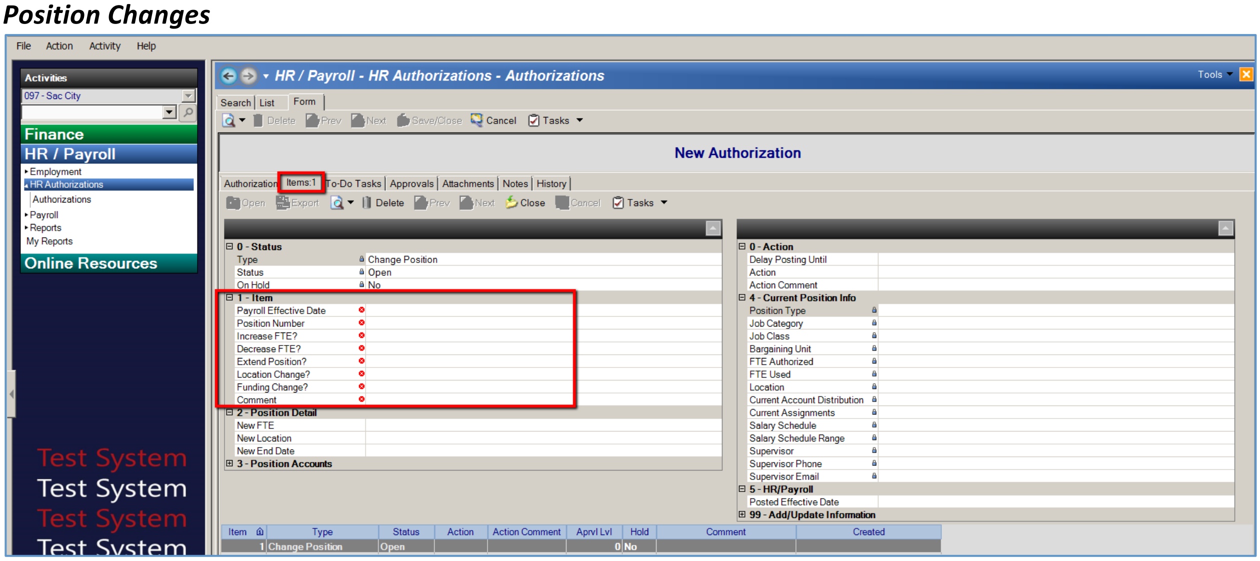
   Note: Some fields auto-populate based on the information entered into the other fields. Please review all fields to be sure that the information is accurate.

   Note: On the Change Position Item Tab, the questions you answer in section 1-Item determine which fields are required in section 2-Position Detail and 3-Position Accounts. All required fields must be completed before the HRA can be submitted.

New Positions

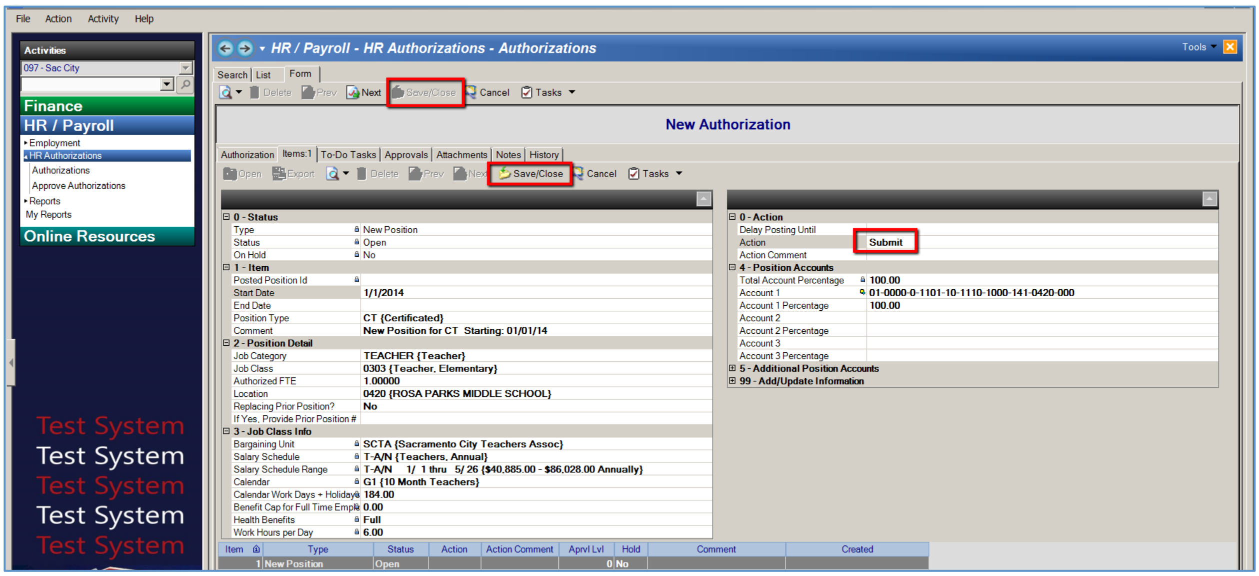


Position Changes

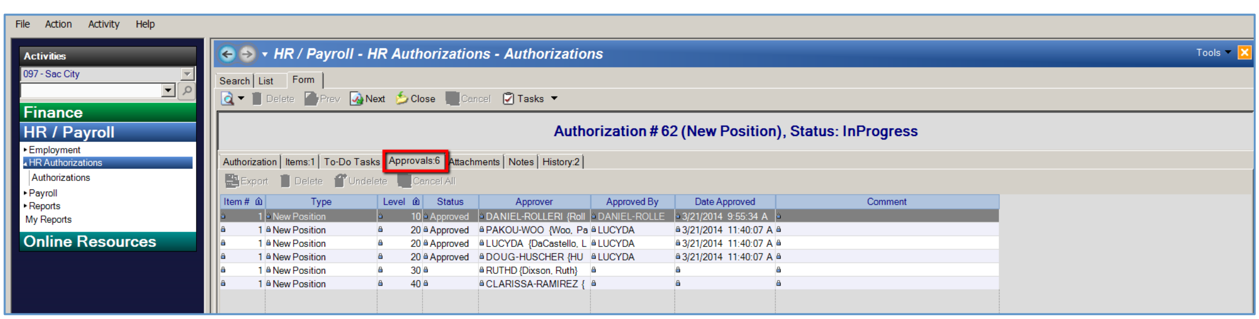


5. **<u>Hiring Manager Submits/Approves HRA</u>**: Once the New Position or Position Change Item is completed, the Hiring Manager selects "Submit" from the "Action" drop-down menu, then chooses "Save/Close" to save the <u>Item</u>, then chooses "Save/Close" to save the <u>HRA</u>. All 3 steps must be completed to successfully Submit the HRA.

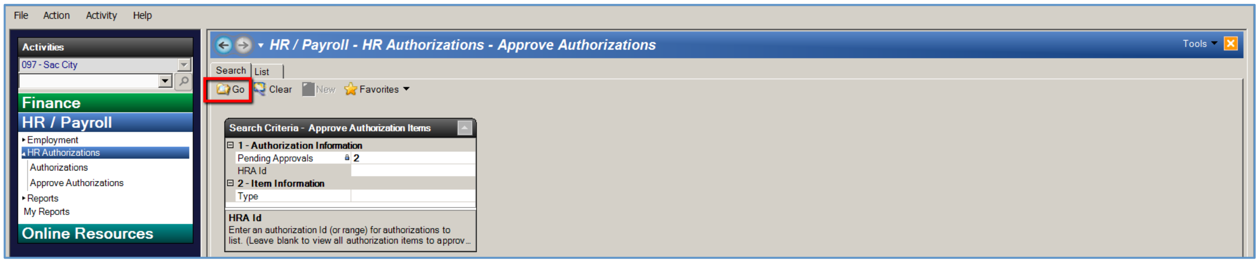
   Note: The Hiring Manager indicates his/her approval for the request by submitting the HRA from his/her own Escape account. If someone submits the HRA on behalf of the Hiring Manager (e.g. an Office Manager), the Hiring Manager will need to approve the HRA before it can move to the Hiring Administrator for approval.



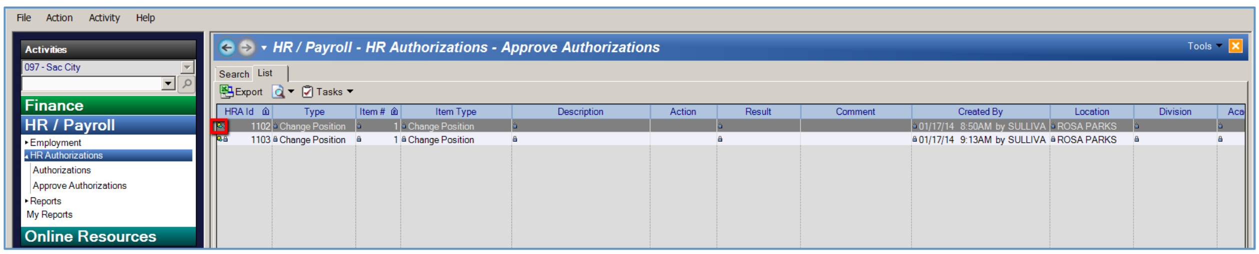
6. **<u>HRA Routes for Approval</u>**: At this point, the HRA is submitted and is routed for Hiring Administrator approval. A message is automatically sent through Escape to the Hiring Administrator as notification that the HRA is awaiting his/her approval. The status of the HRA and pending approvals can be viewed under the "Approvals" tab.



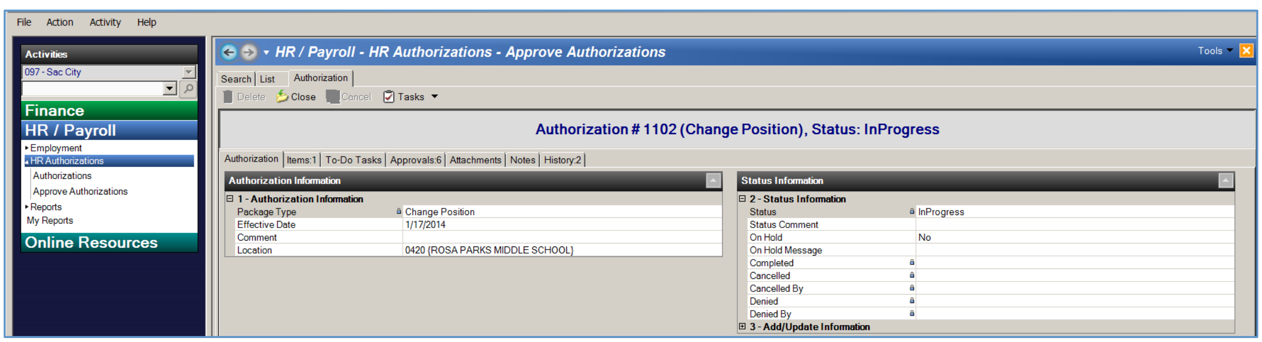
7. **Hiring Administrator Views HRA's Awaiting His/Her Approval**: To view pending HRAs, the Hiring Administrator logs in to Escape Online, navigates to "Activities", selects "HR / Payroll > HR Authorizations > Approves Authorizations", and pushes the "Go" button. (Note: The screen shows the number of Pending Approvals)



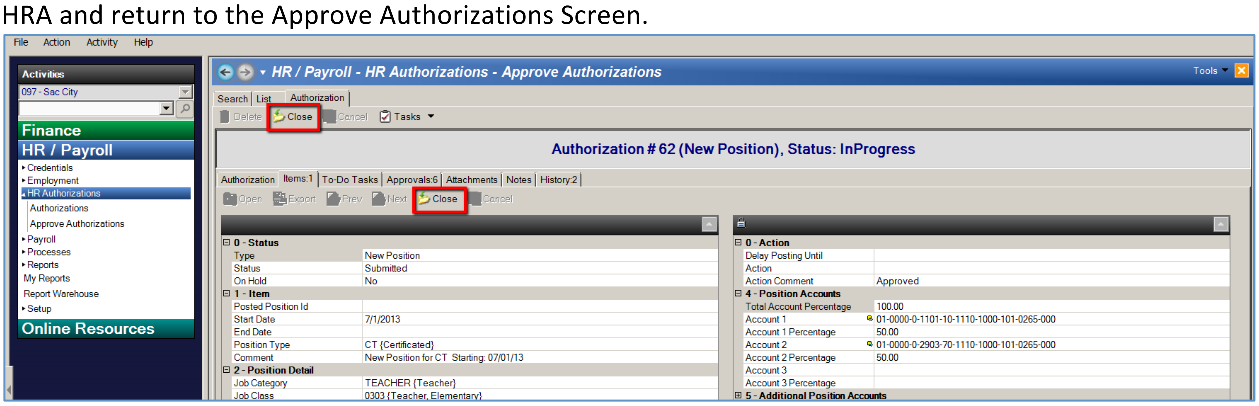
The Hiring Administrator may view the details of the HRA prior to approval by clicking on the "open link item" icon to the far left.



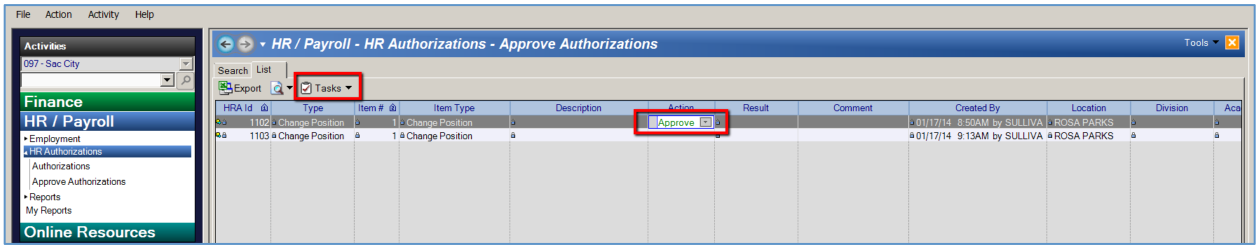
The link opens the HRA and the Hiring Administrator navigates to the Items tab and opens the item to review details of the request and determine whether to approve the HRA.



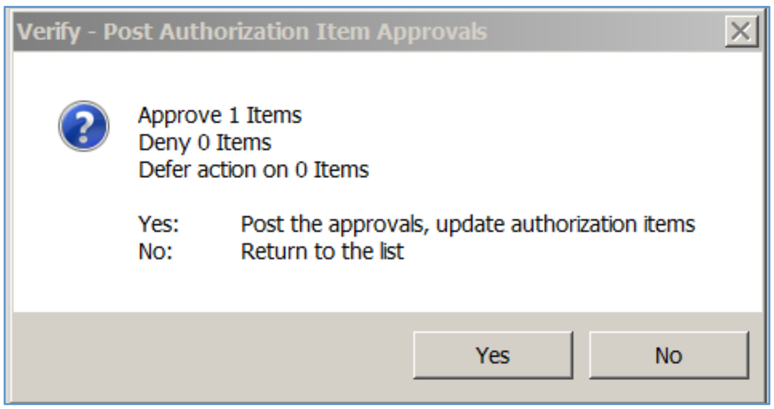
When review is complete, he/she selects "Close" to close the item and then "Close" again to close the HRA and return to the Approve Authorizations Screen.



8. **Hiring Administrator Approves HRA**: To approve the HRA, the Hiring Administrator selects "Approve" from the "Action" drop-down menu (or simply types "Approve"), then clicks on the "Tasks" drop-down menu and selects "Post Approvals/Denials".



The Hiring Administrator receives a Verification dialogue box and selects "Yes" to post the Approval(s).



9. **Budget & Human Resources Approval and Processing**: From here, the HRA is routed through the rest of the approval process, including Budget and HR review. Once the final approval is complete, a notification is automatically sent through Escape to the Hiring Manager as notification that the HRA has been processed.

10. **New Position Number is Displayed in HRA Item:** For New Position HRA's, when the HRA is complete Escape will automatically create the new position. The position number is displayed in the Item under Posted Position Id.