

## **What is a Position Administration Form?**

You must complete a position administration form when you create a NEW position within your structure or if you want to AMEND an existing position.

## **When do I complete Position Administration Form?**

**NEW Position Form** is anything relating to your structure:-

- You have a brand new position to add to your structure
- Where a new JDQ is created through a service review/grade change
- An existing position is changing cost centre and supervisory to a different tier 4 area
- A job role that currently exists that many people occupy within the same team. All positions are occupied, however an additional person is being recruited as additional budget is available.

**AMEND Position Form** is anything relating to changes to a position:-

- Permanent change in hours
- Change in work location
- Change in line management (same cost centre)

## **Tips for completing the form**

### **Space bar and Tab**

- You can press space bar in all the fields which will display a drop-down list of options (if available) some fields will be free text.
- When you have populated a field press the 'tab' button to move to the next one.
- If you press space bar and are unable to see the option needed, you can start to type it and it should populate (if the option is available)

### **Finding Historic Forms**

- You can find historic forms to check the detail once by pressing a space bar in 'Form ID' where it details (NEW)
- You can also use the field help and search options
- Status will show as 'N' for all active forms in workflow and 'C' for any forms that have been completed

## How to complete a Position Administration Form

- Select Forms from the home screen Unit4 menu
- Select Position Administration

Before requesting a new position **ALWAYS** check first if there is a relevant vacant position which can be used instead of requesting a new position be built.

There are 2 reports you can run to check for vacant positions:

### R2R317 Enhanced Establishment Report

[Guidance on running R2R317 report](#) Password:Unit4

### Positions by Line Manager Report

This report is for managers who sit outside of tiers 4,5 and 6 who do not have access to the R2R317 Enhanced Establishment Report.

[Guidance on running the Positions by Line Manager Report](#) Password:Unit4

## Information Tab

- In the Form ID field leave as (NEW) - this will populate a position form number when submitted
- Free text in the Form description field for a description of who the form is for (if known),
- Press tab once complete
- The Form owner field will auto populate with your details

## Request Details tab

- Requester field will auto populate with your details
- Press the space bar in the Requester position field to populate with your position ID
- Press tab
- Press the space bar in the Line Manager fields to populate
- Press tab
- Press the space bar in the Line Manager Position Field to populate
- Press tab
- The submission date field will auto populate with the date of form completion
- In the Change Type field press the space bar and choose New Position
- Press tab
- Complete the comments field with any information to help the position build

## New Position tab

- In the Start Date field enter the date you want the position to start from,
- Press tab
- The End Date field will auto-populate as 31/12/2099 **\*\*do not change this\*\***  
*If the position is temporary the end date is entered on an Employment Admin Form*
- Press tab
- In the JDQ Ref. No field enter a valid evaluated JDQ reference
- Press tab

- In the Job Title field end the evaluated job title
- Press tab
- Press the space bar in the Position Authorisation field and select what you need
- Press tab
- Press the space bar in the Appointment Type field and select what you need
- Press tab
- Press the space bar in the Position Code field and select what you need
- Press tab
- In the Budgeted Hours tab enter the budgeted hours for this position,
- Press tab
- Press the space bar in the Paid Weeks field for options - weeks per year budgeted for the position  
*If the option you need is not on the drop down list start typing and it will populate (if available)*
- Press tab
- In the Pay Scale field enter the grade the position has been evaluated
- Press tab
- In the Pay Step field **always** choose the bottom pay step
- Press Tab
- In the Cost Centre field press a space bar to view the options and select the required option  
*When selecting a Cost Centre do not pick one that starts with 'C' or a 'B'*
- Press Tab
- Press the space bar in the Work Location field and select what you need
- Press tab
- Press the space bar OHU Profile, DBS Required, DBS 3 Year Renewal field and select required option
- Press tab
- In the Supervisor Name field enter the name of the person will line manage the position,
- press tab
- In the Supervisor Position field enter the details of the person line managing the position,
- press tab
- Press the space bar in the Teaching position field to view and select the option required.
- press tab
- Press the space bar in the Political restriction field to view and select the option required
- Press tab
- Staff Type **\*\*Academies only\*\*** - press the space bar to view and select the option required
- Press tab
- Allowances – free text, enter any allowances that apply to the position i.e., local living wage, casual holiday pay
- Job Description – free text, enter a basic job description
- Press tab
- Complete the comments field with any information to help the position build

## Position Access tab

- This tab will determine whether a position requires access to Unit4 and what access is required.
- Review each field and complete relevant information.
- If no information is provided the position will be built without access to Unit4
- Any 'new' user accounts will need to be requested via Halo once the resource has been linked to the position

## Finance Review tab

- This tab is for Finance review only

## How to complete an Amend Position Form

- Select Forms from the home screen Unit4 menu
- Select Position Administration

## Information tab

- In the Form ID field leave as (NEW) - this will populate a position form number when submitted
- Free text in the Form description field for a description of who the form is for (if known),
- Press tab
- The Form owner field will auto populate with your details

## Request Details tab

- Requester field will auto populate with your details
- Press the space bar in the Requester position field to populate with your position ID
- Press tab
- Press the space bar in the Line Manager fields to populate
- Press tab
- Press the space bar in the Line Manager Position Field to populate
- Press tab
- The submission date field will auto populate with the date of form completion
- In the Change Type field press the space bar and choose AMEND Position
- Press tab
- In the Change effective from field enter the date the change becomes effective
- Press tab
- Complete the comments field with any information to help the position build
- In the Affected Position field enter the position number you need to amend  
*you can only amend positions within your data control area*
- Press tab
- Complete the comments field with any information to help the position build

## Position Update tab

- The Current Position field will display the relations currently attached to the position
- You must use the Update Position fields to complete changes

### Update Position

- Budgeted Hours field is completed if the budget hours for the position is permanently increasing or decreasing
- Pay scale and Pay step field is **only** to amend Teaching positions other position grade changes will need a new position form to be completed

- Appointment type is completed where there is a permanent change to the position press the space bar to view and select the required option
- Press tab
- End date is auto populated and should be left as 31/12/2099
- **Amended Date field PLEASE LEAVE THIS BLANK**
- Press tab
- Cost centre can only be amended to another cost centre within your area, press the space bar in this box to view and scroll to select the option required  
*When selecting a Cost Centre do not pick one that starts with 'C' or a 'B'*
- Press tab
- Work Location, Paid weeks, Disclosure Required, DBS 3 Year Renewal, Political Restricted if any of these relations need updating press a space bar to view the options and select the one required
- Press tab
- Staff Type **\*\*Academies only\*\*** press the space bar to view the options and select the one required
- Press tab

## **Supervisory Changes tab**

The current manager should be completing this form if a position is changing line management to another supervisor in the same area. If the new line manager position is vacant fields below will remain blank

- In the Line Manager field press the space bar to populate the current line manager of the position
- Press tab
- In the Line Manager Position field press the space bar to populate the current line manager's position,
- Press tab
- In the New Line Manager field enter the new line managers details,
- Press tab
- In the Line Manager Position field enter the new line managers position
- Press tab
- In the Effective Date field enter the effective date of the change
- Press tab
- Press the space bar in the Perm or Temp Change field and choose the appropriate option
- Press tab
- If it is a temporary change enter the End Date
- Press tab
- Provide details in the Reason for Change in this field
- Press tab
- Current and New Cost Centre field this is for information only
- Are there any structure or role related changes field enter any structure changes that need to happen as part of this request
- Complete the affected line managed position field if the change in line management affects more than 1 position i.e. 10 positions are moving from line manager A to Line manager B  
*this can only be used if they are moving to and from the same 2 managers, if several positions are moving to different managers separate forms will need to be completed.*

## **Position Access tab**

- This tab will determine whether a position requires access to Unit4 and what access is required.
- Review each field and complete relevant information.

- If no information is provided the position will be built without access to Unit4
- Any 'new' user accounts will need to be requested via Halo once the resource has been linked to the position

## **Finance Review tab**

- This tab is for Finance review only

After clicking on Submit form and submitting the position administration form, you will receive a position form ID. You will receive a notification in Unit 4 to confirm the position number once it has been set up or confirmation that it has been amended if you have submitted a position amendment.

## **Closing a position**

To close a position the process is as follows:-

- Select Forms, then Position Administration Form from the main Unit4 menu
- Enter a form description
- Complete the Request Details tab
- Next complete the Position Update tab, entering a position end date and add in the comments section that you wish to close the position
- Once you have submitted the form this can be actioned by Governance & Support

You can enter details of other positions to be closed in the comments box, confirming the end dates.

The end date is processed by Governance & Support team 3 months after the position was last occupied. They won't end date it earlier than that.

