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Purpose

This job aid provides direction on how to create a request to staff (RTS) request for a position in STAR PeopleSoft, an overview of the information needed and the approval workflow. An RTS may be initiated by the hiring supervisor, HR or Budget staff and, in some cases, approved by the State Budget Office and/or DPM Classification Experts.

Unless the position is an LTE, all creation of new permanent or project positions, including fractionation, should occur in Position Data before submitting an RTS request. Existing position data will be defaulted to in the RTS based on the position number selected.

> ⚠ New position requests and requests for position fractionation for permanent, project-permanent or project-project must be created in Position Control and go through State Budget Office (SBO) approval prior to being available to select for an RTS request.

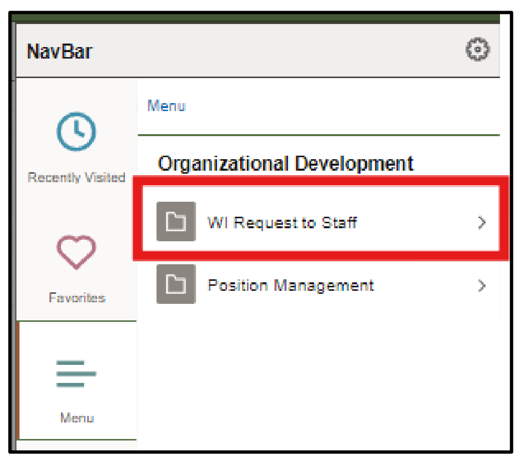
Security and Workflow Roles

Security Role	Description
WI_HR_RTS_USER	This is the base RTS role for submitting, viewing, and approving RTS requests; this role is automatically assigned to managers in your agency
WI_HR_RTS_AGENCY_HR	This role provides review and approval on behalf of your agency HR team, typically a pool approval; only user that can cancel requests and stop workflow
WI_HR_RTS_AGENCY_BUDGET	This role provides review and approval on behalf of your agency budget office, typically a pool approval

Navigation

1. **Main Menu** (NavBar) > **Organizational Development** > **WI Request to Staff** > **Request to Staff**

   Alternative HR: **Workforce Administrator Homepage** > **Request to Staff**
   Alternative Manager Self Service: **Manager Self Service Homepage** > **Request to Staff**
2. Search for an existing request or select **New Staffing Request** to create a new request.



Creating an RTS Request

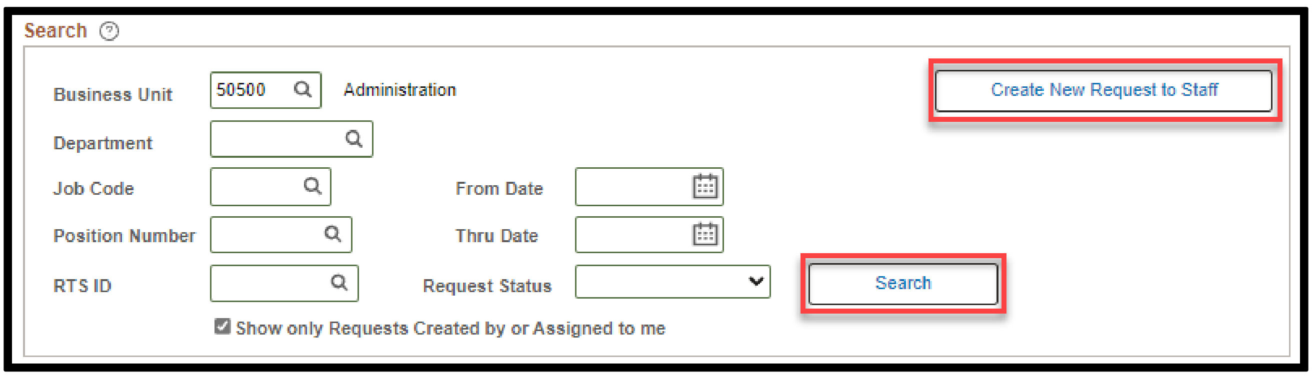
These steps should be used to create a new RTS request when requesting to replace a position and either change the job duties or replace with no changes to the job duties, or create a new LTE position (only available to select agencies). Most requests will use the following steps.

An RTS for a new position (i.e. new position number) should not be created until the new position has been created in Position Control and all necessary approvals have been received. You will need the new position number to be in HCM in order to proceed with an RTS.

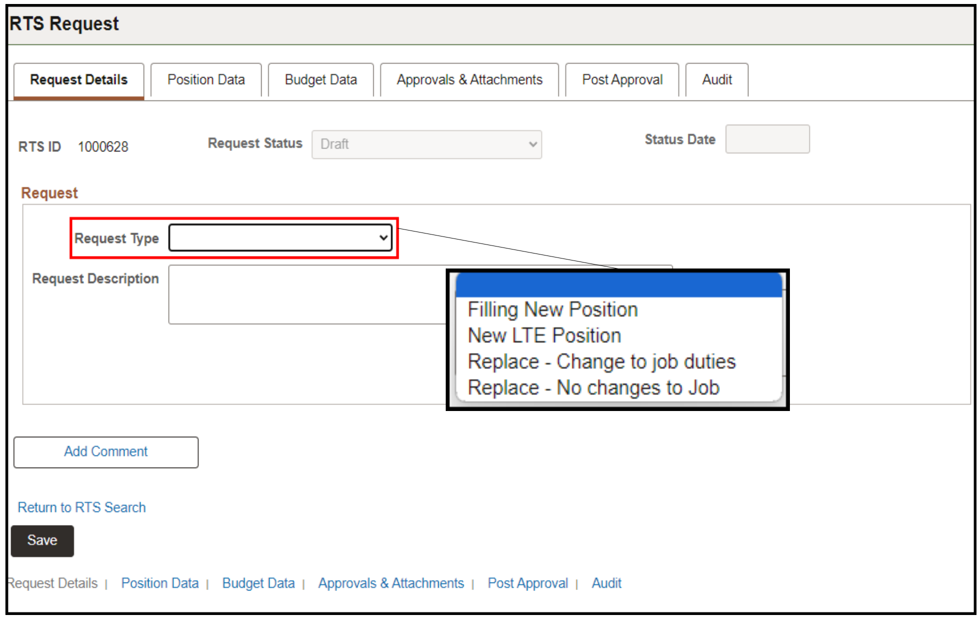
For future dated positions, you must be within 30 days of the position becoming active to submit an RTS request.

Before creating a new RTS request, you should search for existing open requests for a position number.

1. Select **Create New Request to Staff**.



2. On the Request Details section, select the appropriate **Request Type**.
    a. Filling New Position: Request to fill a newly created position
        - Position number is created through Position Control after a budgetary action has authorized the creation
    b. New LTE Position: Request to fill a newly created limited term employment position
        - An LTE cannot work more than 1039 hours in a year in the same position
    c. Replace – Change to job duties: Request to fill an existing position and changing the job duties assigned to the position
    d. Replace – No change to Job: Request to fill an existing position and there are no changes or minor changes to job duties
        - For questions on what constitutes minor or major changes to job duties, please contact your agency or region classification specialist



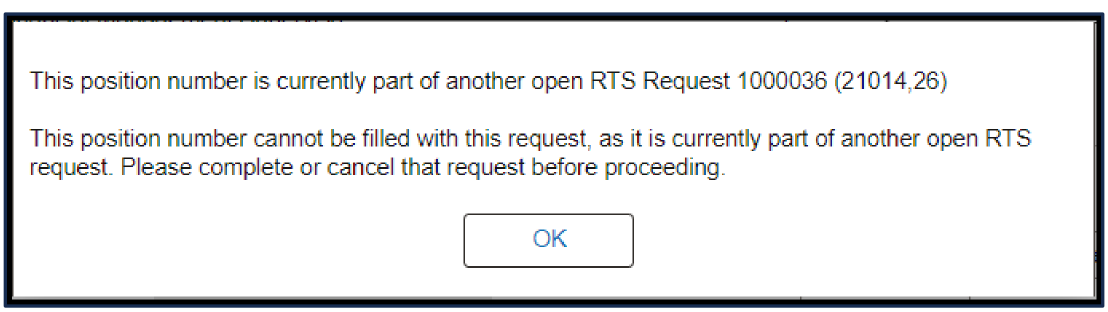
3. Enter a **Request Description/Justification** (expectations for this field can vary by agency, consult agency HR/Budget staff for more information). You may also **Add Comment**, if applicable, to communicate with users who will review and approve this request.
4. Select the Position Data tab.
5. Enter or search for the position number.

Note: You'll only be able to see the position numbers for your agency or row security.

   a. To search for a position number, select the hourglass next to the field and using any of the following fields to select the correct position: Position Number, Description (Job Title), Job Code, Business Unit, Department (ID), Department Description, Supervisor Name (Incumbent Supervisor Name), or Name (Incumbent Name).

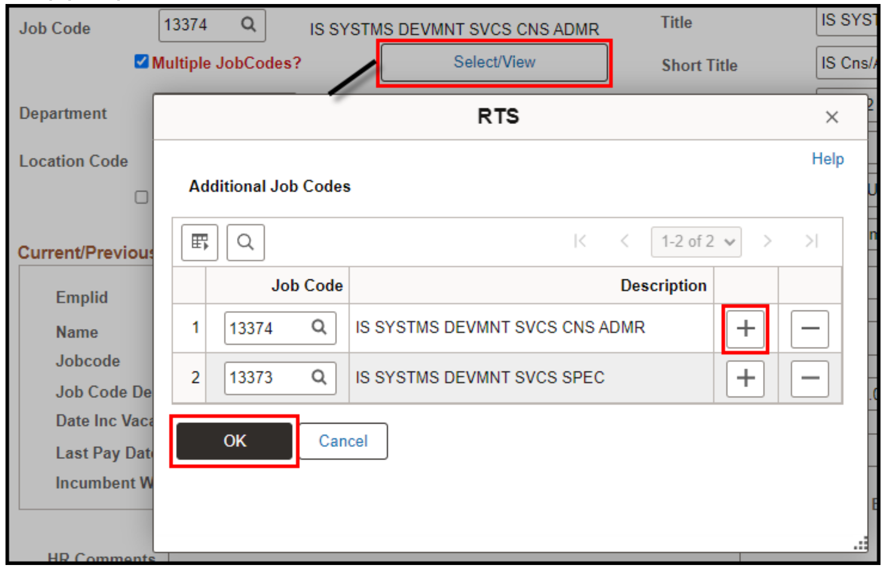
To quickly search for vacant position numbers, enter "vacant" into the Name field.

There can only be one open RTS per position number. If you attempt to submit an RTS for a position number included in a pending request, you will receive an error message, like that displayed below.

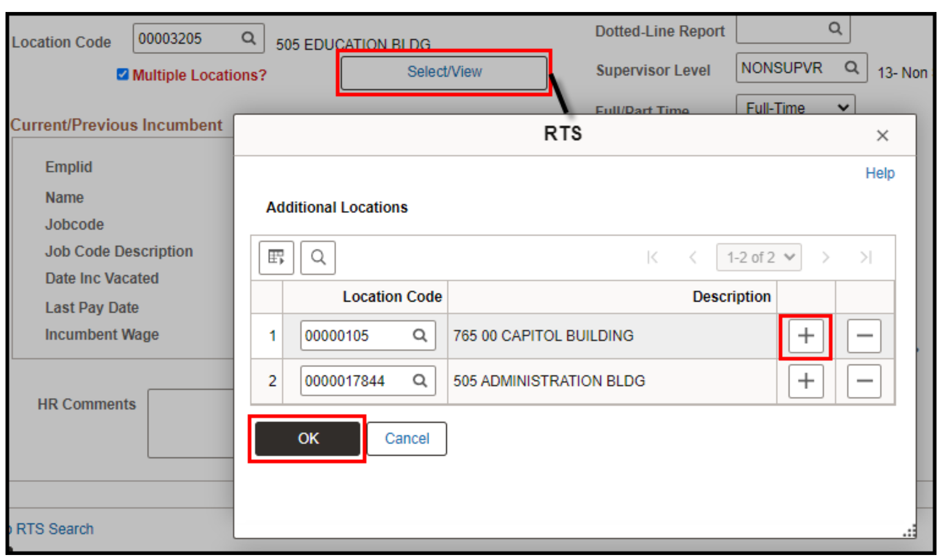


Any changes made to Position Data using the RTS request, will be applied directly to the position – please use caution when changing defaulted Position and/or Budget Data.

6. In the Position Data section, enter or update values for the following fields:
   a. Business Unit: Defaults from the position number selected unless the request is for a new LTE position to be created
   b. Job Code: Enter or select the appropriate value
      - Multiple Job Codes: click the checkbox and then **Select/View** to add multiple job codes for multi-level recruitments
      - Click the + symbol to add more job codes

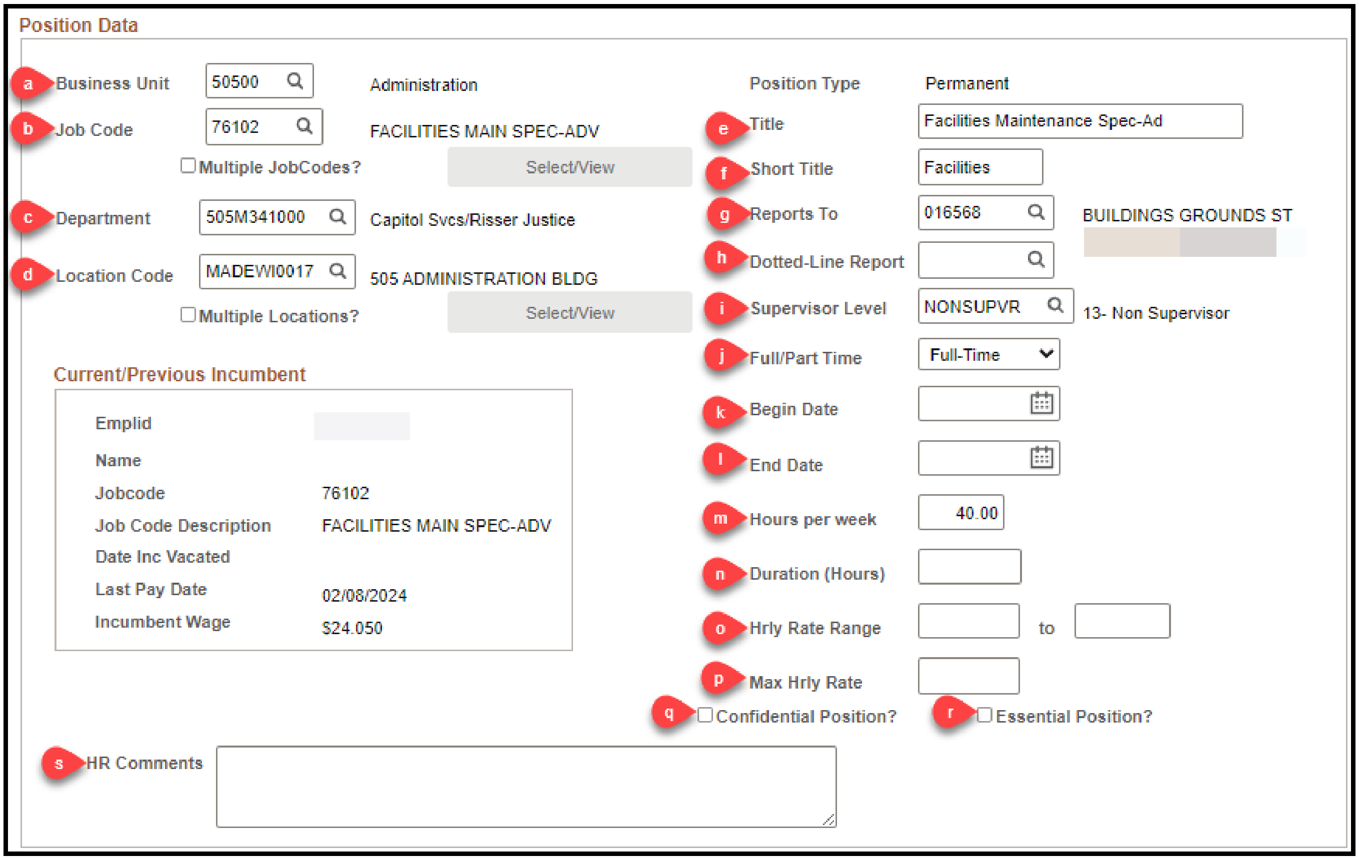


   c. Department: Enter or select the appropriate department ID representing the position's hierarchical relationship within the organization
   d. Location Code: Enter or select the appropriate department ID representing the position's hierarchical relationship within the organization
      - Multiple Locations: click the checkbox to add multiple locations for recruitments (functions identically to Job Code above). Additional locations will not be displayed from this section, you will need to click Select/View to see the additional location(s).



   e. Title: Defaults from Job Code, but may be overridden to reflect a working title
   f. Short Title: Defaults from Job Code

g. Reports To: Enter or select the position number to which the newly created position reports
h. Dotted-Line Report (optional): Enter or select the position number of an indirect supervisor or lead worker
    - This field is not on job data, and is for reporting purposes only
i. Supervisor Level: Enter or select the appropriate level
j. Full/Part Time
k. Begin Date (optional): Anticipated start date of the position
l. End Date: Permanent positions should NOT have an end date
    - Only applicable for positions with known or expected end dates, such as project positions
m. Hours per week: Enter the anticipated hours per week the position is expected to work
n. Duration (hours): Enter the total anticipated hours the position is expected to work over a calendar year - only applicable for LTE positions
o. Hrly (Hourly) Rate Range (optional): Desired minimum and maximum hourly rate
p. Max Hrly (Hourly) Rate (optional): Maximum hourly rate
q. Confidential Position?: When appropriate, select to designate the position and position incumbents as excluded from any external public databases, requires approval of DOA Legal
    - These are positions that perform duties that are confidential in nature, and it would be detrimental to the employee and employer to have information related to the position and incumbent released externally. Confidential exclusion form required.
r. Essential Position?: Not required in all departments
    - If your agency defines certain positions as essential you may indicate it here
s. HR Comments: Add comments for HR approvers to see



Position Data

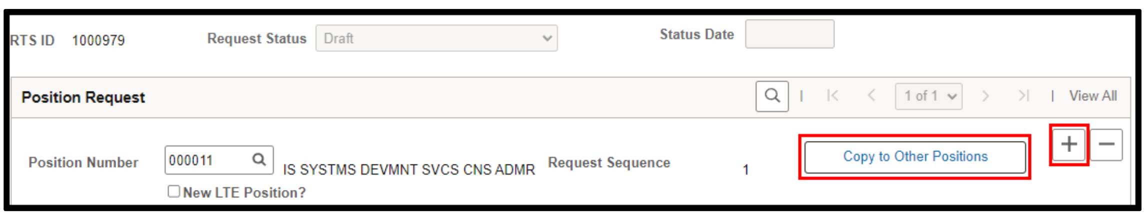
a Business Unit 50500 Administration
b Job Code 76102 FACILITIES MAIN SPEC-ADV
Multiple JobCodes? Select/View
c Department 505M341000 Capitol Svcs/Risser Justice
d Location Code MADEWI0017 505 ADMINISTRATION BLDG
Multiple Locations? Select/View

Current/Previous Incumbent

Emplid
Name
Jobcode 76102
Job Code Description FACILITIES MAIN SPEC-ADV
Date Inc Vacated
Last Pay Date 02/08/2024
Incumbent Wage $24.050

Position Type Permanent
e Title Facilities Maintenance Spec-Ad
f Short Title Facilities
g Reports To 016568 BUILDINGS GROUNDS ST
h Dotted-Line Report
i Supervisor Level NONSUPVR 13- Non Supervisor
j Full/Part Time Full-Time
k Begin Date
l End Date
m Hours per week 40.00
n Duration (Hours)
o Hrly Rate Range to
p Max Hrly Rate
q Confidential Position?
r Essential Position?
s HR Comments

7. If requesting to fill multiple positions, click the + button to add additional position numbers **Note**: All positions included on an RTS must have the same approval path (each step in the approval path must be identical – if there are any differences, those positions must be given a separate request.)



RTS ID 1000979 Request Status Draft Status Date

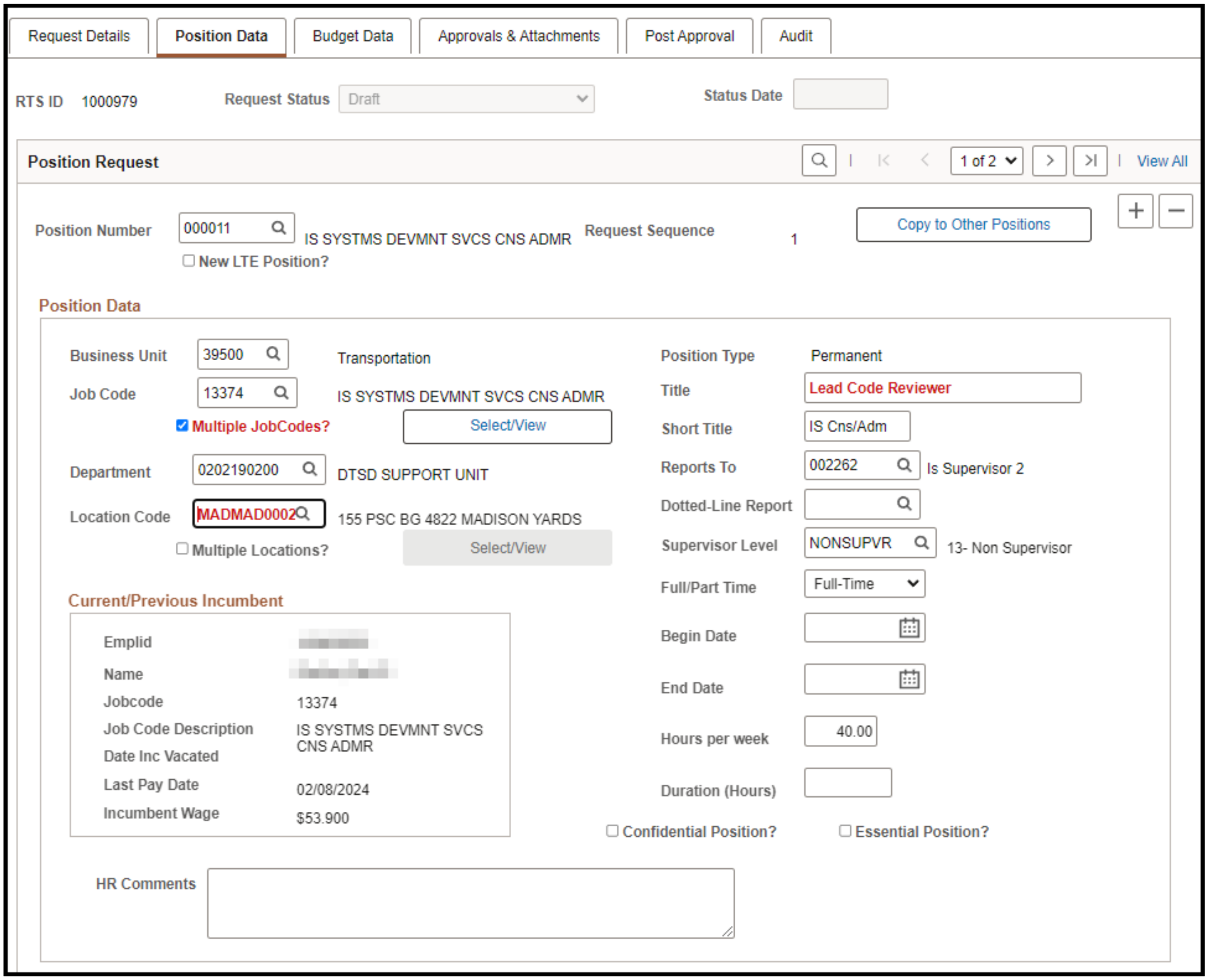
Position Request 1 of 1 View All

Position Number 000011 IS SYSTMS DEVMNT SVCS CNS ADMR Request Sequence 1 Copy to Other Positions + −
New LTE Position?

a. If all positions will have the same Position Data as the first, select **Copy to Other Positions** to copy all data to additional position numbers in the RTS.

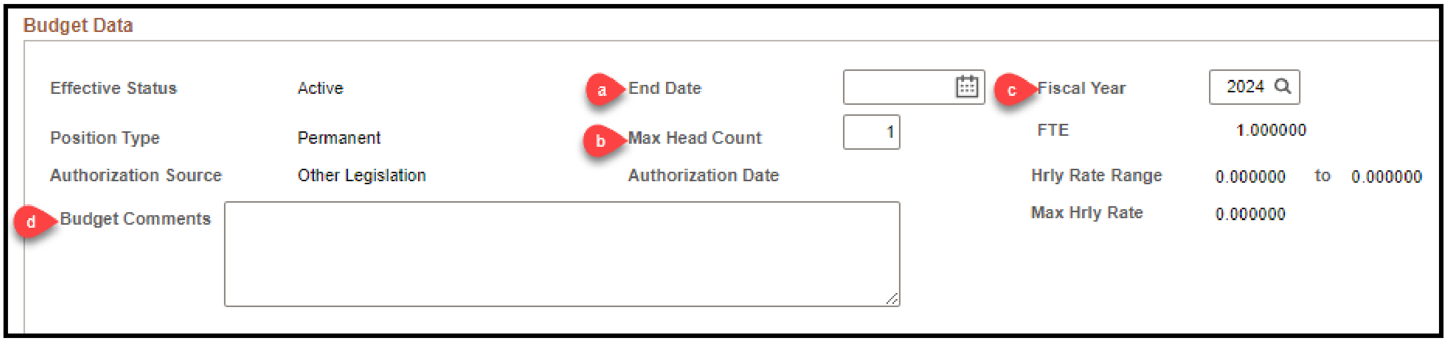
⚠ If you add the position numbers and then select **Copy to Other Positions**, all existing position data will be overwritten.

8. Any fields that were changed will display in **red**.



⚠ Save before completing additional sections of the request.

9. Select the Budget Data tab.
10. In the Budget Data section, enter or update values for the following fields:
    a. End Date: Position end date
        - Permanent positions should NOT have an end date
    b. Max Head Count: Defaults to 1, update when appropriate
    c. Fiscal Year: Defaults based on the position number selected, but may be overridden as needed if the position will be updated in the next fiscal year
    d. Budget Comments: Add comments for Budget approvers to review

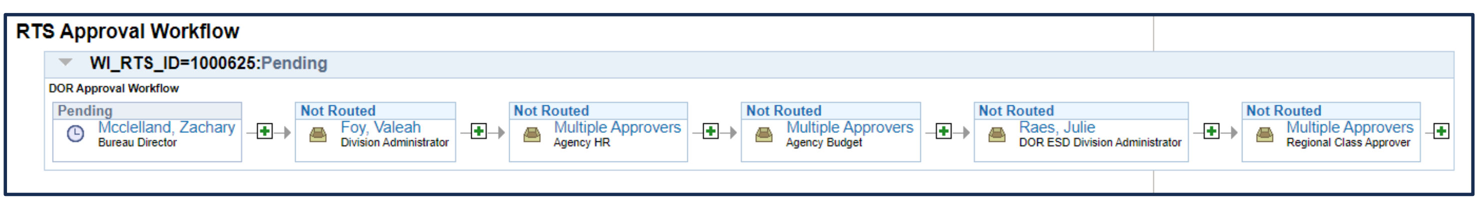


11. In the Distribution section, select **Chartfield Details** to enter or update the chartfield details.
    a. If **Copy to Other Positions** was selected on the Position Data tab, all prior budget data will also have been copied. Selecting **Copy to Other Positions** here will also overwrite Position Data values.
12. Any fields that were changed will display in **red**.

Note: Typically, Budget staff are responsible for making any necessary changes to request information. Please refer to your agency's Budget staff for specific procedures.

13. Select the Approvals & Attachments tab.
14. In the Approvals & Attachments section, add or remove attachments. Please refer to your agency's guidelines for what documents may be required at this step, (e.g., position description(s), org chart, exclusion forms, etc.).

15. Select **Submit** to submit the RTS to the next identified approver in your agency's workflow.
    a. The Request Status will change from Draft to Pending Approval, and the RTS Approval Workflow will appear, showing the approval path for the request.
16. If additional or ad hoc approvals are required for this position, you may add an approver by clicking the green + symbol before or after other approvals.
    - Below is an example of an extended approval process, your internal process may differ.

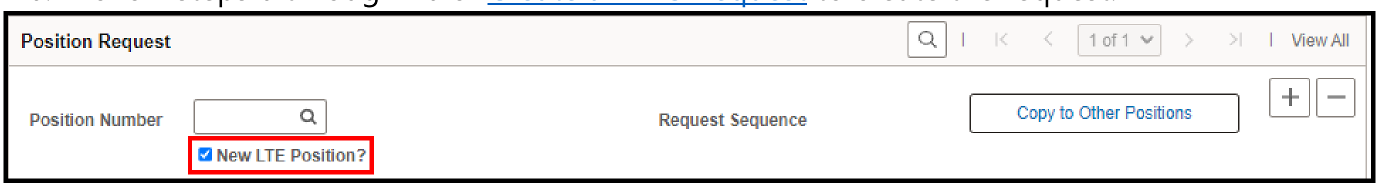


Creating a New LTE Position and RTS Request (Select Agencies Only)

Confirm with your agency's policy or Budget team regarding whether or not the practice is to recycle an active LTE position or create a new one. If it is your agency's practice to recycle LTE position numbers, follow steps 1 through 16 of Create an RTS Request, and search and select an existing LTE position number.

If you are not recycling an LTE position number, use the steps outlined below to create an RTS and generate a new LTE position number.

1. Select **New Staffing Request**.
2. From the **Request Type** dropdown, select **New LTE Position**.
3. Enter a **Request Description** (expectations for this field can vary by agency, consult agency HR/Budget staff for more information). You may also **Add Comment**, if applicable, to communicate with users who will review and approve this request.
4. Select the Position Data tab.
5. Check the **New LTE Position** box. This field is only applicable to agencies that allow the creation of new LTE positions through the RTS request process.
6. Follow steps 6 through 16 of Create an RTS Request to create the request.



Approvals and the Approval Process

RTS Requests can be accessed to approve through three methods: using the link in the email you received as an Approver, using the notifications icon (the bell icon in the upper right corner of PeopleSoft), or using the Approvals tile from the Manager Self Service or Workforce Administrator Homepages.

After Budget approval has been added, the Budget page will be locked from editing.

Required Conditional Approvals

There are three conditional approval steps at the end of every workflow: regional classification approval, DPM classification approval and State Budget Office approval. Please reach out to your HR and/or Budget staff for additional information.

Classification Job Code	No Approval Required	Regional (HRSS) Classification Approval Required	DPM Classification Approval Required
Delegated	X		
Not Delegated		X – Agencies in HRSS	X – All agencies

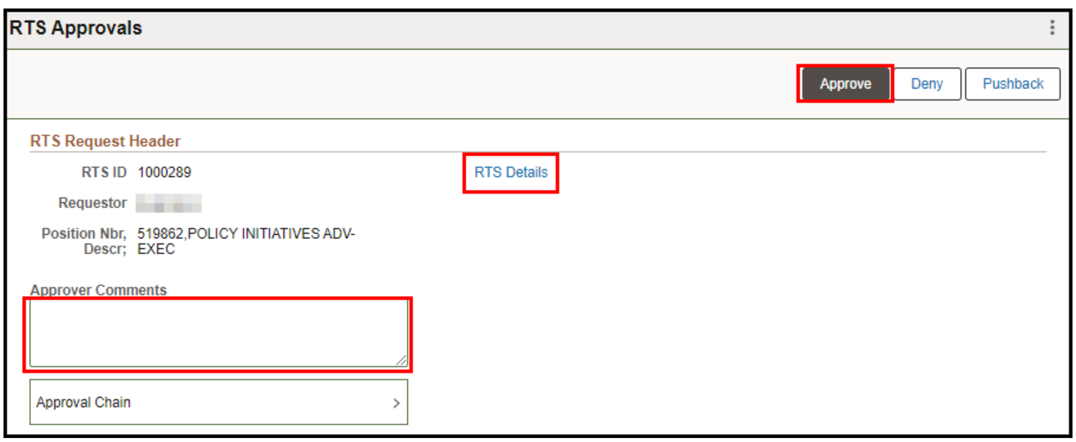
Note: If the Request Type is "Replace - No changes to Job" <u>and</u> there is no change to Department or Reports To, the request will be treated as delegated and will not require additional classification approval workflow steps.

Note: If the request includes multiple classification job codes <u>and</u> any of the classification job codes is not delegated, the request will require additional classification approval workflow steps.

Field Updated	**No State Budget Office (SBO) Approval Required**	**State Budget Office (SBO) Approval Required**
Changes to Appropriation		X
Changes to Distribution		X

Approving an RTS Request

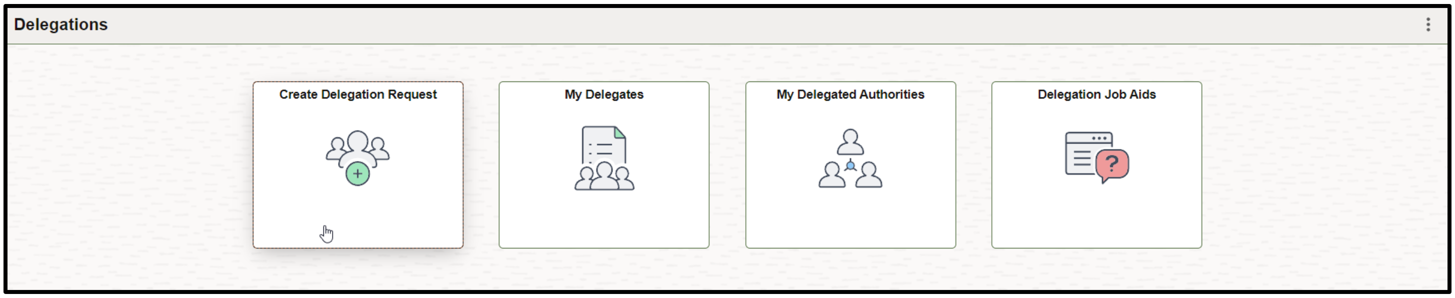
1. Navigate to the RTS request that needs to be approved. The most efficient way to access the request is to click on the link in the RTS Request Pending Approval email.
    a. Select RTS Details to view the RTS request and all completed information.
2. Select Approve.
3. Enter a Comment. Please refer to your agency policy for requirements on what information should be included in this field.



Defining Proxy/Delegates

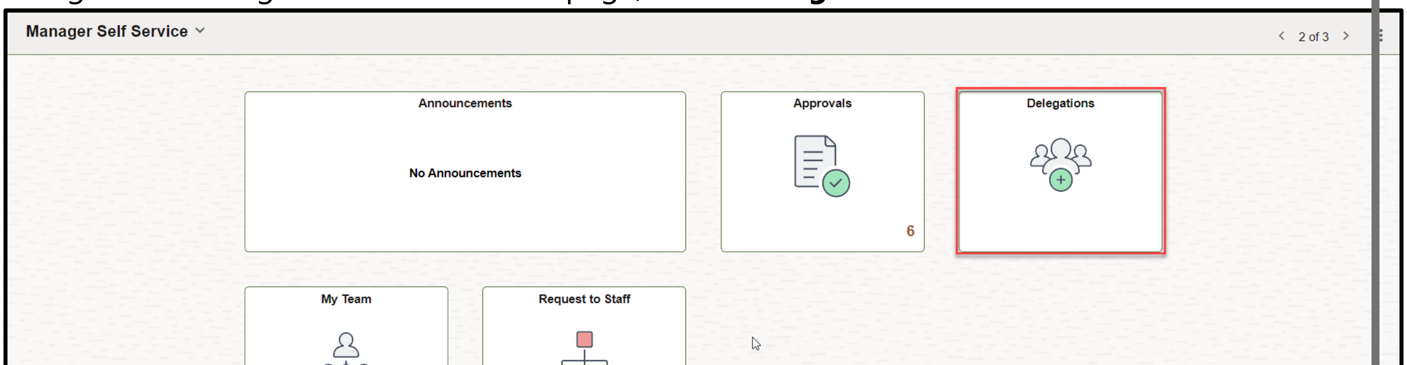
Request to Staff uses the delivered PeopleSoft Delegation process allowing the user to assign their RTS Requests to someone else in the organization to review/approve on behalf of them, for a period not to exceed one year in duration. Supervisors on a leave of absence are <u>not</u> able to set up a delegation, however a delegation request can be setup through a request to DPM.

Note: From **Delegations,** users can create a delegation, accept their delegations, revoke a delegation and review delegation job aids.

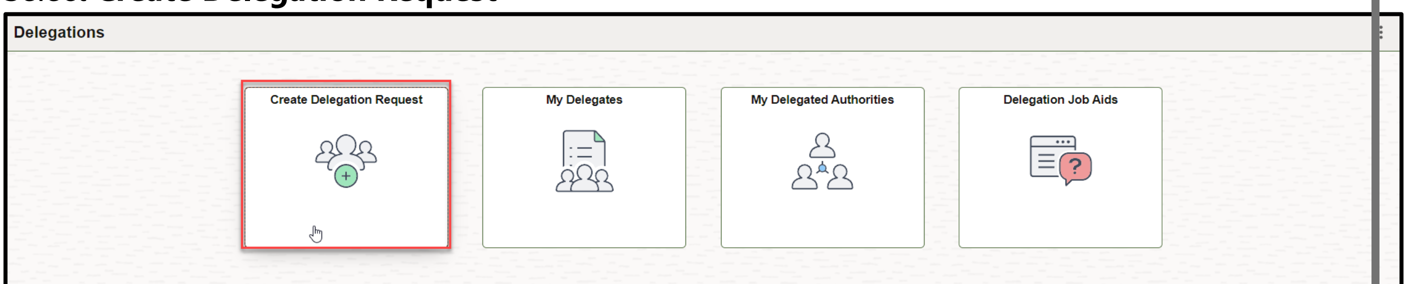


Create Delegation Request

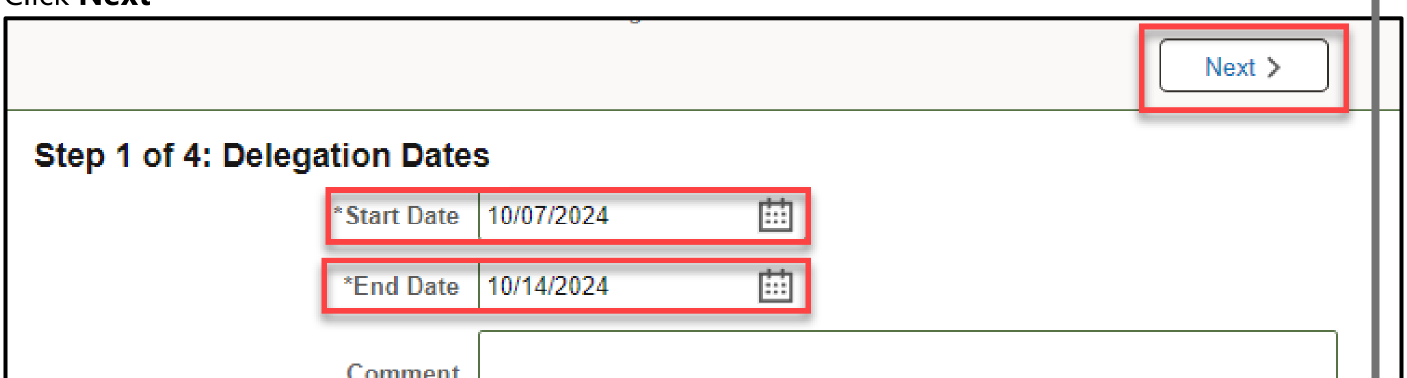
7. Navigate to Manager Self Service Homepage, select **Delegations**



8. Select **Create Delegation Request**

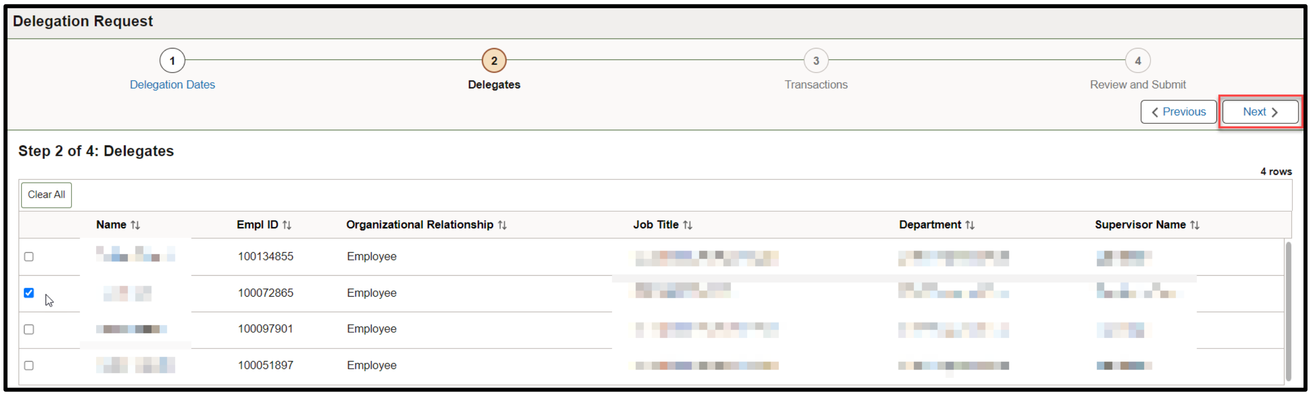


9. Enter a **Start Date** that is today or later
10. Enter an **End Date** that is the same day or later than your start date
11. Click **Next**

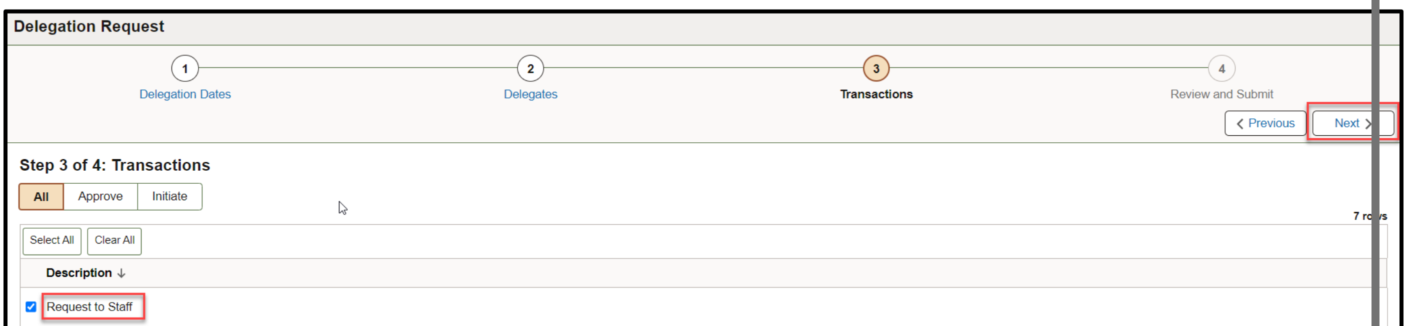


12. Choose the person you would like to request to be your delegate. You may only select one delegate.

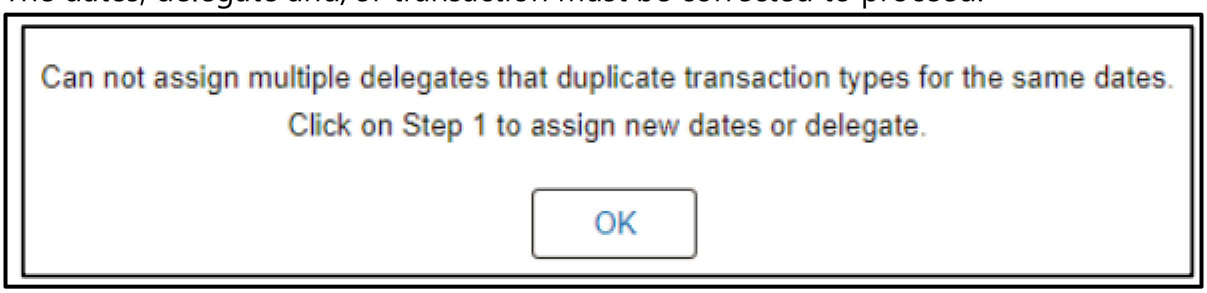
13. The list is pre-populated with employees that report to you (subordinates), supervisors that also report to your supervisor, and your direct supervisor. ***It is preferred to delegate to a supervisor, but a subordinate can be selected if your agency policy allows this.***
14. Click **Next**



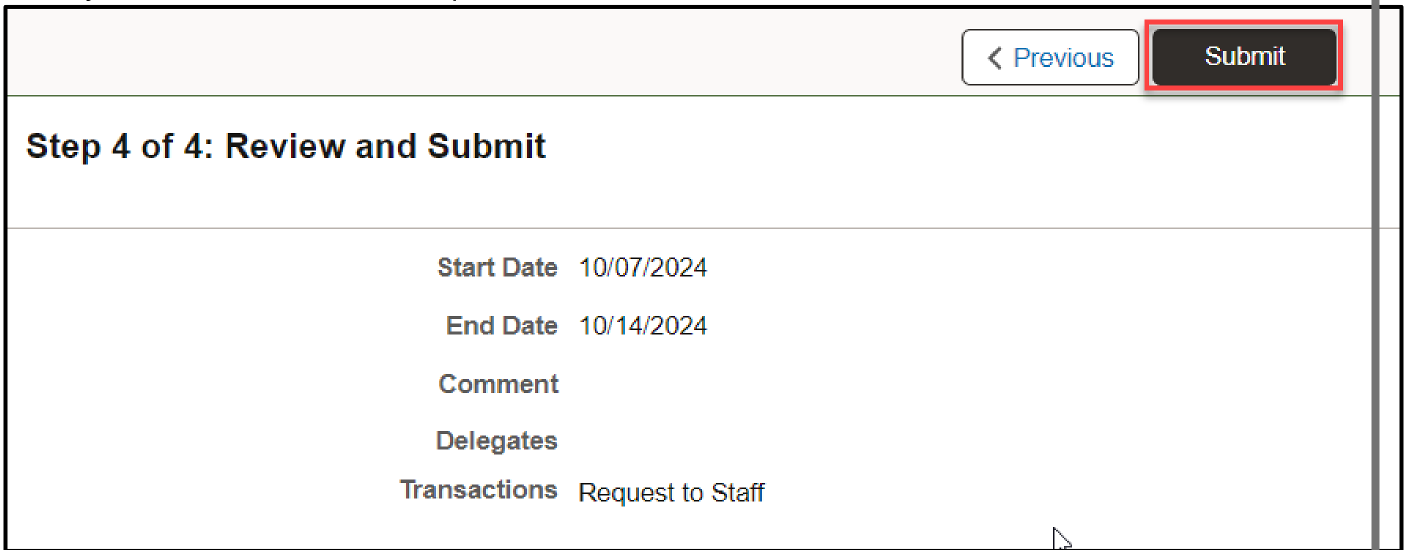
15. Select the checkbox next to Request to Staff
16. Click **Next**



17. **Note:** If the RTS has already been assigned, then you will receive the error message below. The dates, delegate and/or transaction must be corrected to proceed.



18. Once you have reviewed the request, click **Submit**



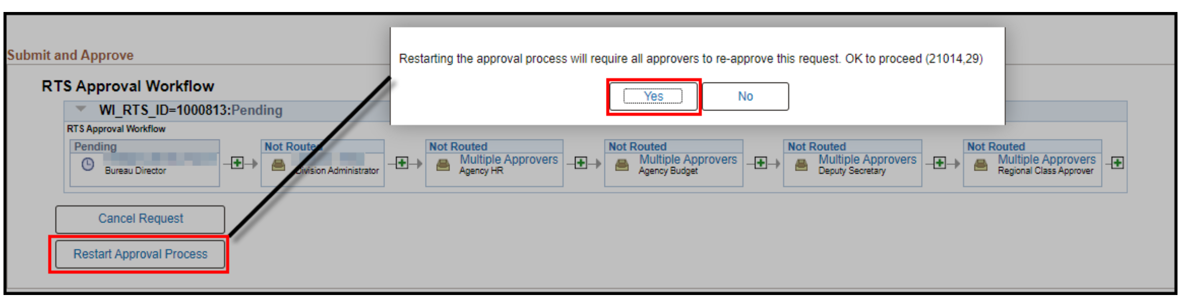
19. **Note:** The **delegate must accept the delegation** in order to have access to the delegator's RTS. An email will be sent to the delegate notifying them of your request.

Restarting the Approval Process (HR Security Role Only)

Only those with the WI_HR_RTS_AGENCY_HR security role (typically HR staff) can restart the approval process.

At times it may be necessary to restart the full approval process. It may be most appropriate to do so when one of the approvers is no longer available (termination or leave of absence) or if the position is reorganized to a different business unit.

1. Navigate to the RTS request for which you want to restart the approval process.
2. Select the Approvals & Attachments tab.
3. Select **Restart Approval Process**.
    a. You will receive a notification asking you to confirm that you want to restart the approval process. Select **Yes** to restart the process.



Cancelling an RTS Request (HR Security Role Only)

Only those with the WI_HR_RTS_AGENCY_HR security role (typically HR staff) can cancel a request once the approval workflow has been initiated.

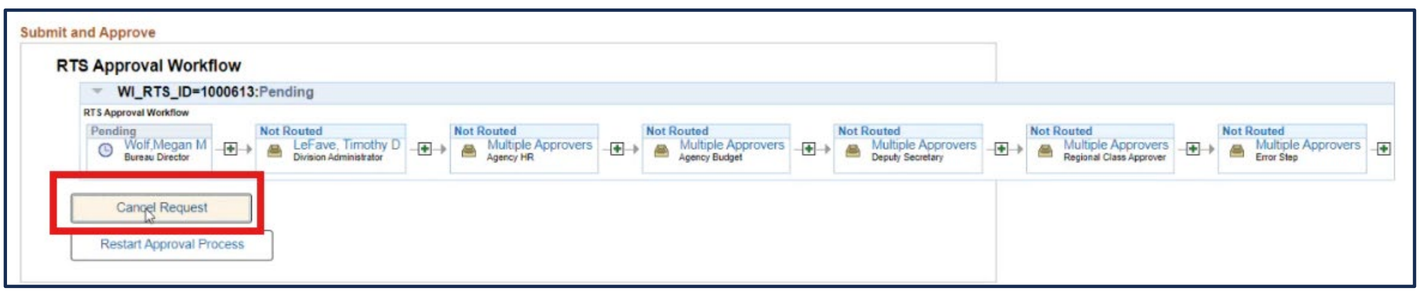
Cancelling may be most appropriate if the agency decides to not fill the position as requested, this includes choosing to fill it in a different business unit or using a different classification, or multiple edits/changes need to be made to the request. In these cases, it may be easier to start a new staffing request than trying to edit an existing request.

Requests that are cancelled cannot have the approval process restarted – a new staffing request must be created.

⚠ A cancelled RTS request **cannot** be restarted.

1. Navigate to the RTS request that you want to cancel.
2. Select the Approvals & Attachments tab.
3. Select **Cancel Request**.
   a. You will receive a notification asking you to confirm that you want to cancel the request.

Note: Changes made on Budget Data to pay rates do not require a request to be cancelled.

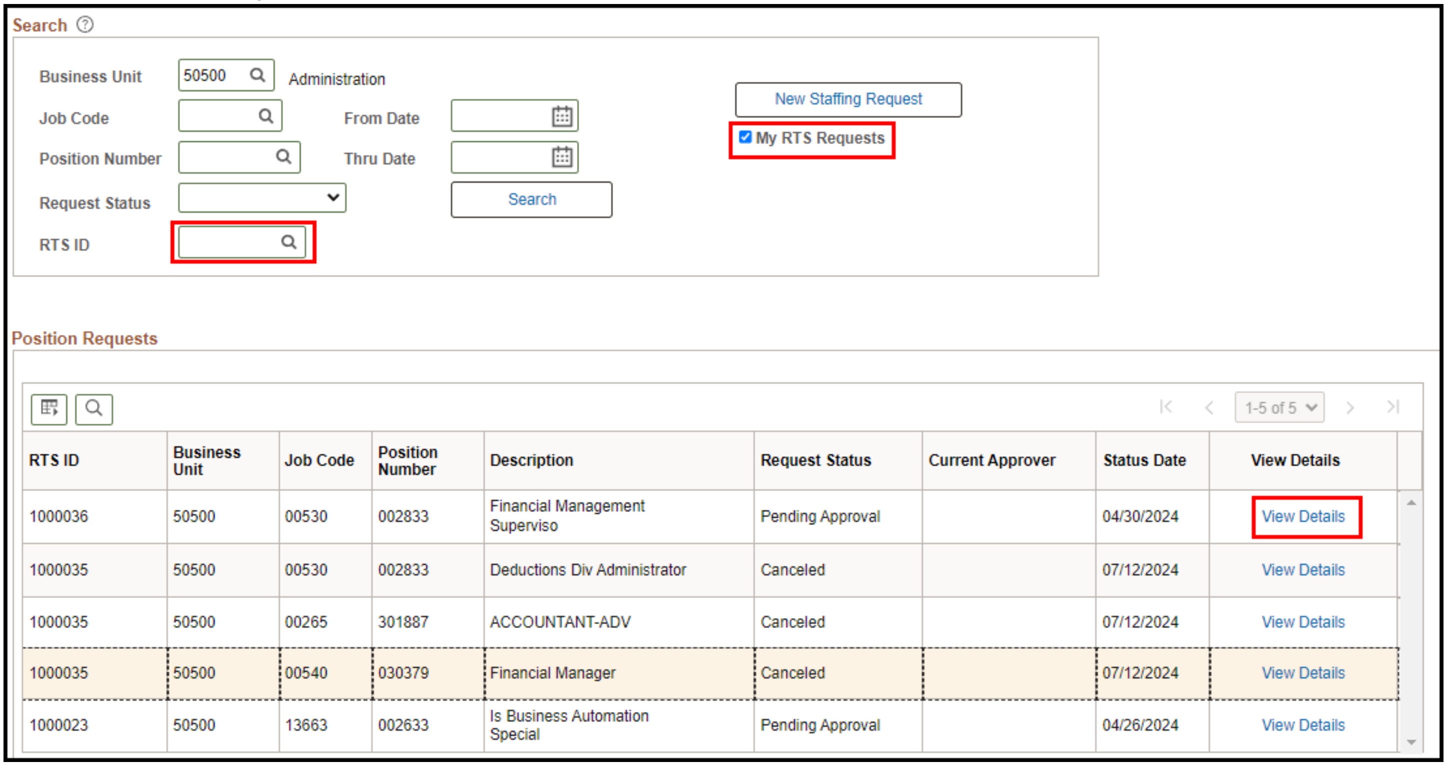


Searching for an Existing RTS Request

Use the steps outlined below if you need to find an RTS that has been drafted but not submitted for approval or need to make changes to a submitted RTS.

1. Navigate to the RTS homepage.
2. Enter the RTS number or select the spyglass to search for the RTS.
   a. If it is an RTS that you recently created, make sure the **My RTS Requests** box is checked above then under the Position Requests section, select **View Details** next to the RTS you want to edit.

b. If it is an RTS that someone in your agency recently created, uncheck the **My RTS Requests** box then under the Position Requests section, select **View Details** next to the RTS you want to edit.



RTS ID	Business Unit	Job Code	Position Number	Description	Request Status	Current Approver	Status Date	View Details
1000036	50500	00530	002833	Financial Management Superviso	Pending Approval		04/30/2024	View Details
1000035	50500	00530	002833	Deductions Div Administrator	Canceled		07/12/2024	View Details
1000035	50500	00265	301887	ACCOUNTANT-ADV	Canceled		07/12/2024	View Details
1000035	50500	00540	030379	Financial Manager	Canceled		07/12/2024	View Details
1000023	50500	13663	002633	Is Business Automation Special	Pending Approval		04/26/2024	View Details

Editing an RTS Request in Pending Approval Status

1. Use the steps outlined in [Searching for an Existing RTS Request] to access the RTS you want to edit.
2. Continue making edits to the RTS.
   a. If only editing an RTS that is Pending Approval, after making necessary edits, select Save at the bottom of the page. You do not need to restart the approval process.
   Note: Once Budget approval has been granted, the Budget Data page is locked and cannot be edited.
3. Select Save.

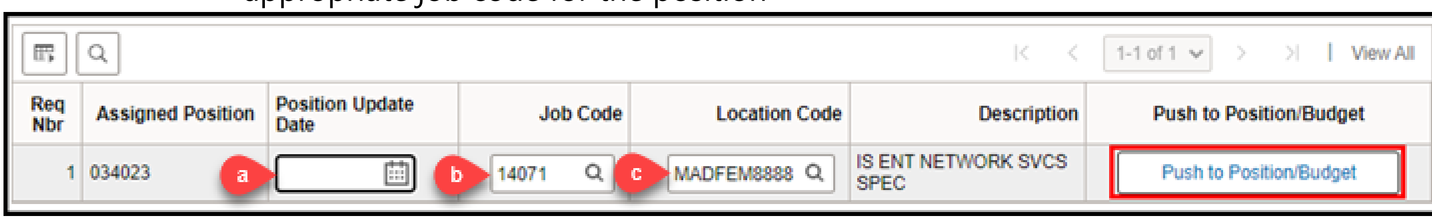
Completing a Draft RTS Request

1. Use the steps outlined in [Searching for an Existing RTS Request] to access the RTS you want to edit.
2. Continue entering data into the appropriate fields. Refer to the steps outlined in the [Creating an RTS Request] section for specific information and submitting your RTS for approval(s).

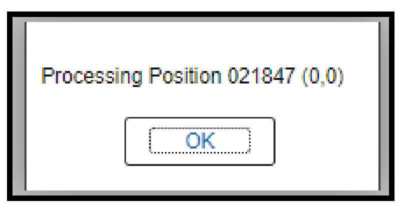
Post Approval - Transferring RTS Request Data to Position Data (HR Security Role Only)

After the RTS request has been fully approved, or before entering a hire, the data from the request must be pushed over to Position Data. Position Data changes, including changes to Budget Data, should be effective the beginning of a pay period. It is recommended that HR staff push the RTS data to Position/Budget Data the pay period before the new hire starting. All position and budget data should be updated before a new hire is entered. If additional changes or corrections are needed after the hire entry, a ticket must be submitted to the SSO.

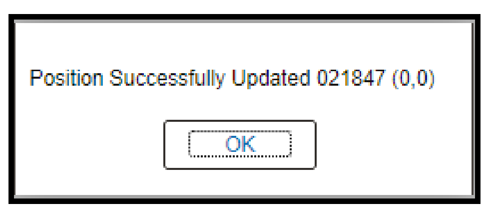
1. Navigate to the desired RTS request and select the Post Approval tab.
2. Enter or update values for the following fields:
    a. Position Update Date: Enter or select the effective date of the position updates – this should be the beginning of a pay period
    b. Job Code: Defaults from the job code in the Position Data section
        i. If multiple job codes were included in the RTS Request, enter or select the appropriate job code for the position
    c. Location Code: Defaults from the location code in the Position Data section
        i. If multiple job codes were included in the RTS Request, enter or select the appropriate job code for the position



3. Select **Push to Position/Budget**. This will update all applicable fields in preparation for the hire to be entered into HCM.
4. Select **OK** to confirm position data processing.



5. After position data has been processed, select **OK** to confirm completion. You may receive notification of any issues the system experienced while the applying the updates.



RTS Request Audit

Depending on your agency's policies and practices, different users may make changes to an RTS request along the way. You can use the Audit tab to review which users made changes, what fields were changed, and when the change was made.

To view the audit data for an RTS request use the following steps.

1. Navigate to the desired RTS request and select the Audit tab.

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User ID	Name	Date/TimeStamp	Request Sequence	Change Description	Field Name	Old Value	New Value
[illegible]	[illegible]	08/16/24 2:27:11.000000PM	1	Field Changed	Multiple JobCodes?	N	Y
[illegible]	[illegible]	08/16/24 2:26:25.000000PM	1	Field Changed	Reports To	002833	019837
[illegible]	[illegible]	08/16/24 2:26:25.000000PM	1	Field Changed	HR Comments		Updated reports to TEST
[illegible]	[illegible]	08/07/24 4:10:40.000000PM	1	Created RTS Request			

Queries

There are several delivered queries available for those with the Agency HR and Budget roles:

1. **WI_HR_RTS_REQUESTS:** RTS request report, with several parameters, such as
   a. Business Unit
   b. Department
   c. Date Range
   d. Status
2. **WI_HR_RTS_ATTACHMENTS:** Similar to the RTS request report, but also includes a direct link to the attachments uploaded in each request.