

Session 13 - Human Resources: Position Management

Date: Thursday, April 14, 2022

Time: 2:30pm – 4:30pm

Anthology

	Functionality	Comments
1.	Provide a ten-minute overview of the position management system.	
2.	Demonstrate the ability to create new positions for various employee groups (i.e., student workers, federal work-study, temp and permanent staff, full and part time faculty, administrators, contract staff, fixed schedules etc.).	
3.	Demonstrate the ability to copy an existing position to create a new one with similar characteristics.	
4.	Demonstrate position history tracking. We need to be able to see position history when position fte changes, supervisor changes, budget code changes, and title change of position itself. Also when we have ended/abolished position and possible comment areas to give reason for change(s). Also need to demonstrate to show all employees that held that specific position.	
5.	Demonstrate the ability to create salary schedules for various employee groups, classifications, years of service, special compensation types such as longevity tied to salary schedules, etc.	
6.	Demonstrate the ability to encumber funds for a position, including salary and benefits.	
7.	Demonstrate how the encumbrance is updated with each payroll processed. Show how payments are tied to – and reported on – by position.	
8.	Demonstrate the ability to allocate funding for a position across multiple accounts -- by either percentages or absolute dollar amounts—including option to allocate premium/shift pay to different budget codes.	
9.	Demonstrate the ability to assign a unique identifier, e.g., job code, to a position.	

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10.	Demonstrate the ability to create a job title, job description, classification, etc., for a position.	
11.	Demonstrate the ability to specify the duties for a position.	
12.	Demonstrate the ability for HR to edit the job description and route for approval.	
13.	Demonstrate the ability to specify the minimum and desirable qualifications for a position.	
14.	Demonstrate the ability to designate a position as full-time or part-time, exempt or non-exempt, qualifying or non-qualifying on the 50% Law etc.	
15.	Demonstrate the ability to characterize a position in multiple ways, e.g., administrative, staff, faculty, internship.	
16.	Show how non-resident employees can be identified and tracked – including visa status. Show how different tax rules and tax treaties can be applied based on visa status	
17.	Demonstrate the ability to characterize the work hours, e.g., regular, night shift, split shift; ability to set maximum hours and/or days for particular positions.	
18.	Demonstrate the ability to assign a position to a particular role within an organizational structure, e.g., reporting to a particular supervisor and/or multiple supervisors.	
19.	Demonstrate organization chart functionality with positions. How employees fit into the overall structure of the organization. Create an org chart for Management team, Academic Affairs, Student Services, Petaluma.	
20.	Demonstrate the ability to assign a single employee to multiple positions with varying pay rates, including different retirement withholdings and reporting.	
21.	Demonstrate the ability to integrate with HR and Finance and external agencies.	

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22.	Demonstrate the ability to specify whether position is benefit-eligible	
23.	Demonstrate the ability to specify retirement system, including ability to override for exceptions. Include both STRS and PERS examples as well as other retirement systems. Show how a single employee can be assigned to more than one retirement system.	

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Evaluator's Name: _____

Evaluation Form

Perceived Strengths of Vendor Solution:

Perceived Weaknesses of Vendor Solution:

Additional Comments:

Acceptability of Vendor Solution: Yes No

Evaluation URL: