



Job Aid for Managers for Submitting a Position Management Review Request via Redcap

The purpose of this job aid is to provide COM/OHS managers with a detailed instructional guide for when and how to submit a Position Management Review Request via Redcap. Information on when to submit a Position Management Review Request and what to do prior to such is a summary of existing best practices. The “how” describes the logistics of submitting the request in the new Redcap process.

I. When to Submit a Position Management Review Request via Redcap

- For the creation and posting of a new position*
- Backfilling of a vacated position*
- Hire (or reappointment) of a returning retiree**

*Includes all staff and student positions (except Graduate Associates and Graduate Fellows)

**Includes faculty and staff.

- For returning faculty physician retirees, please contact Rachel Strittmatter for clinical productivity approval and attach it to the Position Management Review Request.
- For all faculty returning retirees (physicians and PhDs), after Position Management Review approval is obtained, please submit the returning retiree packet to the College Office of Faculty Affairs (Kendra Kay) to obtain College and University approval before generating the letter of offer and entering/updating the position in Workday. The list of required items for the packet can be found under Returning Retirees on the [APT Required Documents and Processes](#) site.

II. Prior to Submitting a Position Management Review Request via Redcap

New Positions:

Working in consultation with HR, new positions that are being proposed should have a business need for the position. An assessment should occur to determine the following (not an exhaustive list):

- What is the strategic priority that is driving the need for the position?
- Are the functions of the position being performed today? If yes, by what position(s)/incumbents?
- Are there other functions that will cease as a result of the new position? If yes, what position(s) are performing them?
- Was this position planned as part of a strategic plan and/or budget planning?
- What is the estimated base salary for the position? What is the source of funding? Is it secured?

Existing Positions:

Working in consultation with HR, existing positions that have been vacated should have a review of the position description (for possible updates) and the need for the position. An assessment should be done to revisit business needs and determine the following (not an exhaustive list):

- Is this a critical function that must be re-filled for business continuity?
- Have the needs of the business shifted at all?
- Should the position be repurposed or put on hold?
- What changes are necessary to the position description, and does that shift the title/role?
- What is the downside if the position is not filled asap?
- Is the posting budget neutral?

Note: Based on the extensive Career Roadmap Job Catalog, it is highly likely that the proposed position will come under an existing job profile /salary range. A consultation with the HR Consultant will assist in identifying a title and salary range prior to submission of the Position Management Review request. Please note that some requests may require additional review by Compensation and result in a different title and salary range than submitted.

III. How to Submit a Position Management Review Request via Redcap

Access the Position Management Intake form at this link [Position Management Intake \(osumc.edu\)](https://osumc.edu/position-management-intake)

Please note the Position Management Intake forms need to be submitted even if a position has been approved in the fiscal year budget.

Complete the form as follows:

1. **Department:** Select department from the drop-down menu. If not listed, there is an “other option”.
2. **Dept Workday Cost Center:** This is the organization where the position is housed, which may be different from the costing allocation.
3. **HR Action Type:** Select Create and Post, Fill Existing or Returning Retiree
4. **Person Making the Request:** This is the person completing the intake form. Add name and email address.
5. **Hiring Manager Name:** Identify the name of the hiring manager.
6. **Department/Division Leadership Review:** Select Yes or No as to whether the position has been discussed with appropriate leadership in the department or division.
7. **Budget:** Select Yes or No as to whether the position is in this year’s budget. If new and in the budget, identify the applicable strata or adaptive number.
8. **Requisition:** If a requisition has been initiated in Workday, identify requisition number. Please note that the best / preferred practice is to enter a job requisition at the same time as entering the Position Management Intake form. However, it is not mandatory.
9. **Official University Title and Working Title:** This is the Career Road Map Job Profile and Career Roadmap Working Title. To access this information, enter *OSU Job Catalog Report* in the search bar in Workday.
10. **FTE:** Enter percentage of effort. This report is available 11/1/22.
11. **Employee Type:** Identify whether the position is regular, term, or temporary.

Definitions:

Regular: A position which may be classified or unclassified and may be full- or part-time at any percentage of FTE (up to 100%). Regular classified positions are an employment relationship between the university and the employee that is intended to be ongoing, subject to the needs of the unit and to the employee meeting job performance standards. Regular unclassified positions are typically at will.

Term: An unclassified position for which the employment relationship between the university and the employee is intended for a designated period of time normally greater than one year but less than three years. Postdoctoral scholars are designated as term but may hold positions for a period of up to five years.

Temporary: A classified or unclassified position for which the employment relationship between the university and the employee is intended for a specific, designated period of time not to exceed 12 continuous months. Student positions are temporary.

12. **Targeted Salary:** This should be the default compensation that will be entered on the requisition, which is the midpoint of the Career Roadmap range. Range information can be found in the OSU Job Catalog report.
13. **Workday Worktags:** Identify the applicable Workday worktags, **to include the percentage**. If there are multiple worktags select “yes”, to add information if subsequent columns. Minimally, the cost center and the fund must be identified. Please note that Emeritus Faculty cannot be charged to FD100.

14. **Intended Candidate:** Identify if there is an intended candidate and add name and whether they are internal or external to OSU

15. **Justification:** Provide justification for the request

The form may be “Submitted” or “Saved for Later”.

The workflow is as follows:



*Circumstances under which a request will be work flowed to the Position Management Committee (subject to change based on COM/OHS priorities):

- Positions that Finance identifies as not being in the budget and/or disapprove for other reasons.
- Requests for positions with a Graduate Medical Education role at the department level, whether a creation or backfill, so that the role can be further vetted in relation to the shared service GME office and discussions/reviews taking place regarding organizational structure goals and processes.
- New position that has a component that is under a centralized/shared service function.
- Requests from departments undergoing significant restructuring.

The Position Management Review Committee is comprised of leadership from the Dean’s Office, Education, Faculty Affairs, Finance, Human Resources, and Research