



SFUSD

Manager Self Service: Position & Employee Management



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Employee Central Overview

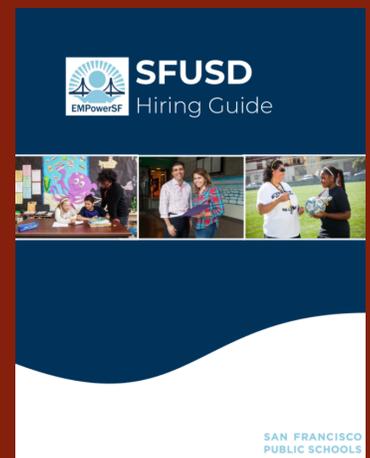
Welcome to EMPowerSF Employee Central, our new employee information and position management system that replaced PeopleSoft in January 2022.

Employee Central provides a variety of features that allow employees to have access to data all in one place. Having a single “source of truth” for this information allows SFUSD to streamline, automate, and connect business processes across Payroll, Budget, DoT, and HR in order to reduce errors and enhance customer service to schools and central offices.

Employee Central is also connected to Recruitment and Onboarding, which means we have sufficient talent data to create comprehensive employee profiles, reports, and resources to support more informed decision-making across the organization. It allows administrators, managers, and HR to gain strategic insight into the entire organization.

In tandem with this guide, please review the [Hiring Guide](#) to learn how to navigate the Recruitment and Onboarding module. It will contain related sections such as:

- [Requisition Creation & Approval Process](#)
- [Employee Referral Process](#)
- [Searching for a Candidate & Forwarding to a Requisition](#)



Access Employee Central in EMPowerSF

Employee Central is accessible through EMPowerSF. You will use your district email to log in.

1. Follow this link to the EMPowerSF [login page](#) (it's a good idea to add this to your bookmarks!), **OR type empowersf.sfusd.edu.**
2. If you are not signed in to your SFUSD Google account, you will be asked to log in to your SFUSD Google account. If you are already logged in, SFUSD uses a Single Sign-On (SSO) system and you should be logged into EMPowerSF immediately.

[Here is a video of the login process](#)

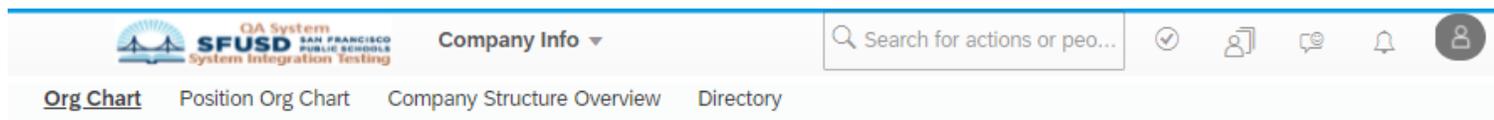
If you are having trouble logging into EMPowerSF, [please submit a ticket for assistance.](#)

The screenshot displays the EMPowerSF dashboard interface. At the top, there is a navigation bar with the SFUSD logo, a 'Home' dropdown, a search bar, and several utility icons. The main content area is divided into several sections:

- News:** Contains two white boxes. The first is titled 'Resources' with the text 'Videos and Step-by-Step Guides' and a question mark icon. The second is titled 'Help' with the text 'Submit an EMPowerSF ticket here' and an information icon.
- My Team:** A large section containing three white boxes:
 - Org Chart:** Shows a tree icon, the number '61', and the text 'Direct Reports (61 total)'.
 - Manage My Team:** Shows a grid of 10 person icons (5 in the first row, 5 in the second row), the number '61', and the text 'Reports (61 Direct)'.
 - Team Summary:** Shows a pie chart icon, the number '2', and the text 'Metrics Available'.
- Bottom Row:** Contains two white boxes:
 - Birthday/Work Anniversary:** Shows three person icons, the number '3', and the text 'Upcoming employee milestones'.
 - Reports:** Shows a document icon, the number '0', and the text 'Favorites'.

Organizational Chart Views

Employee Central gives you different ways to view and search employees and positions! To access the Org Charts, navigate to “Company Info” and select the Org Chart you want to view.



- **Org Chart:** Displays a Supervisor’s current *employees* and their reporting relationships
- **Position Org Chart:** Displays a Supervisor’s *positions* as well as the incumbent employees occupying them. View position details, create positions, change positions, or create job requisitions for hire here. Use the Position Org Chart with your Budget Analyst.
- **Company Structure Overview:** Used to view org charts by Business Unit, Division, Dept, and People
- **Directory:** Search for employees by Name, Person ID, Department, Division, Job Classification, or Location.

Viewing & Searching the Org Chart

To view all of the current employees that a Supervisor oversees, navigate to “**Company Info**” and then select “**Org Chart**.” Click on an employee to make the employee Quick Card pop up. From there, you can click the links to view the employee’s profile or take actions.

You can use the icons in the top right corner to Zoom, Export, or Expand the Org Chart. The Org Chart can only be viewed as of the date you’re viewing it.

If the Supervisor oversees a lot of employees, you might need to click “**View More**” in the bottom right corner to see all of the employees.

Search an employee’s name in the box in the top left corner to view their basic information and where they sit in the District’s Org Chart.

Search Org Chart

100% [Zoom in] [Eye icon] [Download icon] [Fullscreen icon]

Mark Heringer
61/61

	Alanna Lam 00001065-Regular Classroom Teacher		Bayardorj Lkhamsuren 00016793-Sped Para Community Access/T
	Albert Lee 00027083-R Teacher	<div data-bbox="454 892 1144 1354" data-label="Complex-Block"> <p>Alanna Sanu Lam (LamA4) [Close]</p> <p>📞 510-589-7132 ✉ UATNotifyTest@sfusd.edu</p> <p>00001065-Regular Classroom Teacher Thurgood Marshall H.S. (85300)</p> <p>Manager: Mark William Heringer</p> <p>0 Direct Reports 0 Team Size Org Chart</p> <p>Take Action</p> </div>	
	Alexandra 00015910-S		
	Alexis Begl 00032129-R Teacher		
	Alison Bert 00030020-A Sch.		
	Alyson Vigh 00013233-Mild/Moderate RS/SDC		
	Ana Lindo Tannous 00023504-Regular Classroom Teacher		
	Andre Williams 00029714-SOAR Para +1 Employment		
	Damian Nunez 00014119-Secondary Music Teacher		
	Daniela Funes 00032772-R35 Sch Climate/Stu Supp Coord		
	David Valentin 00033177-Regular Classroom Teacher		

[View 45 More](#)

Viewing the Position Org Chart

To view all of the positions (occupied and vacant) that a Supervisor oversees, navigate to **“Company Info”** and select **“Position Org Chart.”**

The Position Org Chart shows each position that a Supervisor oversees. You can see the name of the employee occupying any filled positions, as well as that person’s FTE and the position FTE. For regular positions with a headcount of 1, the FTE of the employee and positions should always match (e.g., 1/1 FTE). If the position is vacant, you will see a little person with a plus sign icon that means that the position has been flagged as “To Be Hired.”

If the Supervisor oversees a lot of employees, you might need to click **“View More”** in the bottom right corner to see all of the positions. Then, drag the screen to the left and right to view all positions. The positions are sorted in order of creation date, so you might need to use “Control F” to find a particular position.

If you click **“Up One Level,”** you can see the supervisor of the position. If you look below, you will see the direct reports of the position.

You can also use the icons in the top right corner to Zoom, Export, or Expand the Position Org Chart.

QA System
SFUSD SAN FRANCISCO PUBLIC SCHOOLS
 System Integration Testing

Company Info

Search for actions or peo...

Org Chart **Position Org Chart** Company Structure Overview Directory

Search By Positions Search No Selection Up One Level Today 100%

00004679
 Principal High School
 Prinpl HS (0461)
 Certificated (CERT)
 Thurgood Marshall H.S....
 Thurgood Marshall H.S....

Mark Heringer

1 / 1 FTE

75 Positions Below

00030895 Regular Classroom... RegClsmTe (0700) 1 / 1 FTE	Eric Brenner	00029943 Regular Classroom... RegClsmTe (0700) 1 / 1 FTE	Brian Finley
00022798 Regular Classroom... RegClsmTe (0700) 1 / 1 FTE	Nicole Hsu	00004986 Senior Clerk Typist Sr Clk Typ (1426) 1 / 1 FTE	Yenney Caine
00022799 Regular Classroom... RegClsmTe (0700) 0.5 / 0.5 FTE	Van Cedric Williams	+ 00029795 Sped Ia Sh -All Im... Sped Ia Sh (S10) 0 / 0.75 FTE	
00022806 Moderate/Severe ... MSRSSDC (0777) 1 / 1 FTE	Edith Arias	00009506 Regular Classroom... RegClsmTe (0700) 1 / 1 FTE	James Stark
00001065 Regular Classroom... RegClsmTe (0700) 1 / 1 FTE	Alanna Lam	+ 00009799 Mild/Moderate RS/... MMRSSDC (0771) 0 / 1 FTE	
00033305 Regular Classroom... RegClsmTe (0700) 1 / 1 FTE	Patrick Hennessey	00000736 Regular Classroom... RegClsmTe (0700) 1 / 1 FTE	Michael Vannelli
00033307 Head Counselor Head Couns (0796) 1 / 1 FTE	Diana Alvarez Santos	00027593 Counselor Counselor (0923) 1 / 1 FTE	Guillermo Garcia
+ 00029890 Sped Ia Sh -All Im... Sped Ia Sh (S10) 0 / 0.125 FTE		+ 00017090 Sped Para Commu... S10W (S10W) 0 / 0.75 FTE	

View 59 More

To view Positions with an effective Start Date in the future:

Back to [Table of Contents](#)

By default, you'll see the Position Org Chart as of today. This includes all active positions as of today. Click the **Calendar** icon in the top right corner to enter a different effective date, either in the past or the future, that you want to use to view the Position Org Chart.

To view **future new positions** created with an effective Start Date in the future, you must use the Calendar icon and specify an effective date in the future. This also applies to view position actions that have been approved for the upcoming fiscal year (we recommend August).

To view Inactive Positions:

By default, Inactive positions will be hidden from the Position Org Chart and search results. To view them, click the **Eyeball** icon in the top right corner for Display Options. **Check the “Show inactive positions” box.**

The Position Org Chart results will refresh and inactive positions will appear with a **diamond or dotted square icon**. When searching, inactive positions will then show up in search results. Once you no longer want to view Inactive positions, uncheck the “Show inactive positions” box.

Position Org Chart Company Structure Overview Directory

People Search Search Org Chart Up One Level Today 100% + 

00019703
Principal High School
Principal, High School (...
Certificated (CERT)
June Jordan School for ...
June Jordan Schools fo...

 Amanda Chui

1 / 1 FTE

43 Positions Below

Display Options X

Show

Child Positions

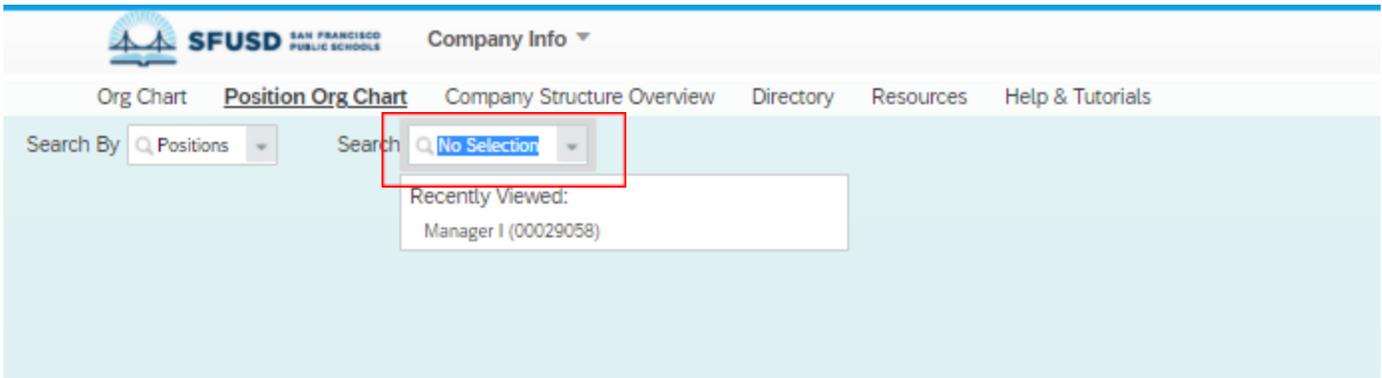
Matrix Positions

Show inactive positions

<p> 10000761 Sped Ia Sh -All Im... Sped Ia Sh -All Im... 0 / 0.75 FTE</p>	<p>00021232  Armon Saleh-Kasmai Regular Classroom... Regular Classroom... 1 / 1 FTE</p>
<p> 10002528 Regular Classroom... Regular Classroom... 0 / 0.8 FTE</p>	<p> 00021234 Regular Classroom... Regular Classroom... 0 / 0.8 FTE</p>
<p> 10003330 Regular Classroom... Regular Classroom... 0 / 1 FTE</p>	<p>00021235  Terrance Amsler Regular Classroom... Regular Classroom... 1 / 1 FTE</p>
<p> 10003374 Regular Classroom... Regular Classroom... 0 / 0.3 FTE</p>	<p>00021237  Crystal Proctor Regular Classroom... Regular Classroom... 1 / 1 FTE</p>
<p>10003417  Carlos Herrera Mahoney Literacy Coach - TSA Literacy Coach - T... 1 / 1 FTE</p>	<p> 00021370 Sp/Ed. IA Non-Sev ... Sp/Ed. IA Non-Sev ... 0 / 0.75 FTE</p>

Searching for a Position or Employee on the Position Org Chart

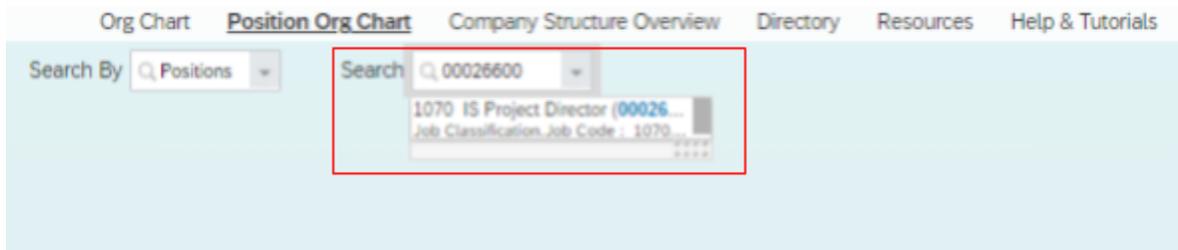
To search the Position Org Chart, select either **“Search By: Positions”** or **“Search By: People.”** Then, you can search by either the Position Number or Position Title (which often matches the Job Code description) or Employee Name.



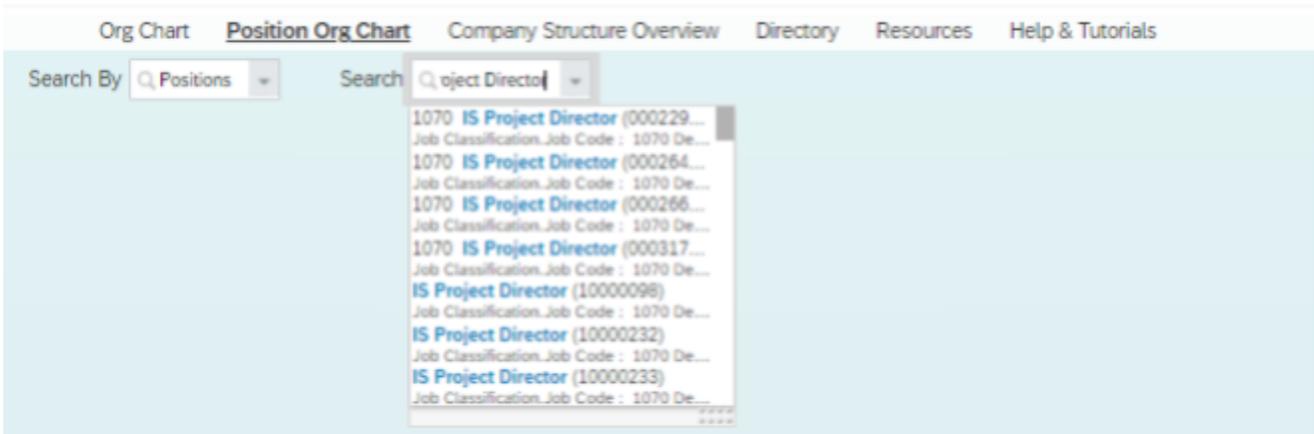
The system will save your place if you leave and come back. If you log out and go back to Position Org Chart, you'll see the last position you searched.

To search by a Position, you have two options:

- 1.) You can search by either the **Position Number** which is a unique 8 digit number assigned to the position. A drop-down of search results will appear if you type in only a portion of the Position Number. Click on the position you want to view in more details.

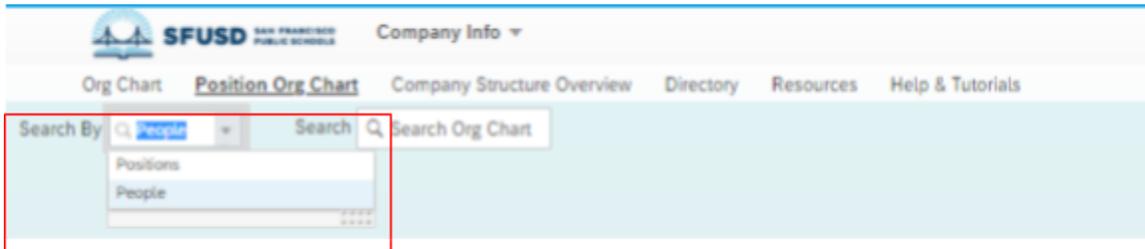


- 2.) You can search by **Position Title** (which often matches the Job Code description). A drop-down of search results will appear. Scroll down and click on the position you want to view in more detail.

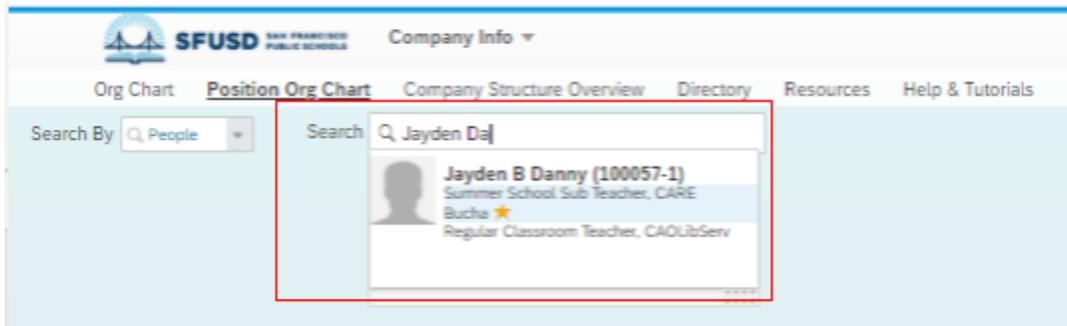


To search by Employee Name:

Select **People** from the Position Org Chart Search By drop-down menu.



In the Search box, type in the employee's name. The more you type in, the more it will narrow the results. A drop-down of search results will appear. Scroll down and click on the employee you want to view in more details.



Position Management Overview

Employee Central makes it easy to:

- View and search employees and positions in Org Chart form
- View Position Org Chart retroactively and in the future
- View Position Details, Position History, and Position Hierarchy Details
- View Incumbent Details and Incumbent History of the employee occupying the position
- Create, Change, and Inactivate positions
- Open requisitions for hire
- View the workflow status of pending requests
- Sync position changes to the incumbent employee

Position Structure/Field Definitions

There are a number of position data fields that have been added or changed in the design of Employee Central and the position management process.

In this section, you'll be able to answer the following questions:

What is the structure of a position? What fields make up a position?

Some position data fields are editable by the Supervisor. Other fields are defaulted based on another field (e.g., Employee Class is defaulted based on the Job Classification). Once an employee is assigned a position, they will inherit most of the position data fields.

Overview	Position Number	A unique number 8-digit assigned to each position
	Status	Active vs Inactive
	Start Date	The Effective Date of the last position action <ul style="list-style-type: none"> • Can be retroactively-dated or future-dated • When creating positions, the Start Date is typically the beginning of the first pay period of the fiscal year.
	Position Action Reason	The reason the last position action was taken (like RPF Reason Code in PeopleSoft)

	To Be Hired	Vacant positions will always be set as “Yes” to indicate that they should be hired
	Position Details	For you to make helpful notes or comments about the position
Job Classification	Job Classification	The code that indicated what job the position will perform (e.g., 0700) <ul style="list-style-type: none"> • New name for Job Code in PeopleSoft
	Job Title	The default description of the Job Classification code (e.g., Regular Classroom Teacher). Auto-populated based on the Job Classification
	Position Title	A more descriptive title you can enter to name the position more specifically (e.g., Ethnic Studies Teacher)
	Employee Class	Certificated, Para, or Classified. Auto-populated based on Job Classification
	Position Type	Regular positions have one employee assigned to one position. Shared positions can have multiple employees assigned to one position <ul style="list-style-type: none"> • Shared position is the new name for Pooled Position in PeopleSoft
	FTE (Max. Headcount)	The FTE can be up to 1.0 for Regular positions. For Shared Positions, this field becomes the Maximum Headcount. Standard Weekly Hours are auto-populated based on the Job Classification and FTE
	FTE Per Employee <i>(Shared Positions Only)</i>	For Shared Positions, this field indicates the maximum FTE that any one employee in the position can work (e.g., a Shared Position can be FTE (Max Headcount) 100 but the maximum FTE Per Employee may only be 0.5
	Standard Weekly Hours	Standard Weekly Hours are auto-populated based on the Job Classification and FTE. You can also edit this field and the FTE will automatically adjust.
	Pay Grade	Auto-populated based on Job Classification

	Calendar Code	Auto-populated based on Job Classification. Can be edited, particularly for Job Classifications that can work School Term or Year Round
	Union Code	Auto-populated based on Job Classification
	Sub Eligible Flag	Auto-populated based on Job Classification except when value is set to 'May be' on job. Indicates whether the position is eligible for a substitute in the SFE Sub System if the employee is absent
	SFE Classification	Indicates what type of substitute job should be advertised in the SmartFind Express (SFE) Substitute System when the employee is absent. This ensures the substitute is brought in for the correct course subject.
Organization Information	Company	This is always "SFUSD"
	Business Unit	"School" or "Central" <ul style="list-style-type: none"> No longer means Certificated, Paraprofessional, and Classified like it did in PeopleSoft
	Division	Central Office Divisions as well as Early Education, Elementary, Middle, K-8 and High.
	Department	The Dept or School where the position is managed. <ul style="list-style-type: none"> If a position is supervised at a school but managed centrally, the Dept ID must be the Central Office. (e.g., Music Teacher supervised by a Principal should have VAPA Dept 104 to allow the VAPA Dept to manage the position)
	Location	Physical address where the position works. <ul style="list-style-type: none"> There is a generic option called 99900-Multiple Work Locations that can be used when one employee is assigned to multiple sites OR multiple employees in a pooled position are assigned to different sites. There is no more TImeroll Location field like in PeopleSoft
	Supervisor Position	Responsible for approving timesheets and time off requests. They will also be responsible for initiating position-related actions and/or approving some of the employee event changes (e.g., termination process).

Additional Information	Consolidation Tag	Supervisors can use this to flag positions during HR's consolidation process.
	Funding for Position	Indicates what type of funding or time period the position is funded by. Ongoing funding is for positions that are funded by stable Resources, Temporary funding is for grant-funded or time-limited Resources, and Summer funding is for Summer School
	Expected End Date <i>(of the founding source)</i>	Required only for Temporary or Summer funding. Indicates the expected end date of the funding source here. Nothing happens automatically once the Expected End Date is reached.
Funding Source	Org, SACS Code, and FTE	Each position may be split-funded with up to four different SACS Codes. The FTE of each SACS Code indicates what percentage of the position should be funded by that SACS Code.

View Position & Incumbent Employee Information

View High-Level Position Data

Click on the position to see high-level **Position Details**, **Position History**, **Position Hierarchy Details**, **Incumbent Details**, and **Incumbent History**. By default, you'll view the position "as of today." Click to change the date to see the position retroactively or in the future (e.g., July 1).

High-level **Position Details** will be displayed at the top. This includes Position Number, Position Title, Job Classification, Employee Class, Department, and Location.

The **Position History** is especially helpful for seeing all the effective changes when a position was changed in the past as well as when the position is scheduled to be changed next in the future.

TIP: When we went live with the new system in January 2022, all positions migrated to the new system had an effective start date of December 21, 2021 (i.e., this date is the "beginning of time" for positions in EMPowerSF). For future fiscal years, new positions are most typically created effective July 1 to align with the fiscal year.

The **Position Hierarchy Details** shows up for Supervisor positions only. This shows many positions report to the Supervisor directly below. It also sums up the total FTE of the employees as well as the total FTE of all

positions (including vacant positions). All vacant positions will have a status of "To Be Hired." Filled positions are occupied with Incumbent employees.

The **Incumbent Details** shows the name of the employee who is occupying the position as of the date of the Position Org Chart. Click to change the date to see who will occupy the position in the future or who occupied it in the past.

Principal High School (00004679)



as of Today

Position Details

Position Number 00004679
Position Title Principal High School
Job Classification Prinpl HS (0461)
Employee Class Certificated (CERT)
Department Thurgood Marshall H.S. (853)
Location Thurgood Marshall H.S. (85300)

Position is fully staffed (1 of 1 FTE).
Position does not allow multiple incumbents.

Position History

Position effective from

Jul 21, 2021 4 months 17 days

Position Hierarchy Details

75 Positions directly below
75 Positions with 55.6/65.975 FTE.
12 Positions have status To Be Hired.
61 Incumbents.

Incumbent Details



Mark William Heringer

Principal High School
1 FTE

Assigned to Position

Jul 21, 2021 4 months 17 days

View All Position Details

To drill down further and see all position details, click the **“Show Position Details”** icon. It looks like an index card. Below is an example of all the position data details. It includes Position Number, Job Classification data, Organization Info data, Additional Info, and Funding Source all in one page

The screenshot displays a user interface for viewing position details. On the left is a summary card for position 00029058, and on the right is a detailed view of the same position.

Summary Card (Left):

- Up One Level
- 00029058
Manager I
Mgr I (4991)
Classified (CLSF)
Stud Nutri (173)
Multi Work Location (99...)
- ⊕
- 0 / 1 FTE
- 1 Position Below

Position Details Panel (Right):

- Manager I (00029058)
- as of Today 
- Position Details Show Position Details
- Position Number: 00029058
- Position Title: Manager I
- Job Classification: Mgr I (4991)
- Employee Class: Classified (CLSF)
- Department: Stud Nutri (173)
- Location: Multi Work Location (99900)
- Position is understaffed (0 of 1 FTE).
- Position does not allow multiple incumbents.
- Position has status To Be Hired
- Jul 1, 2020
- 8 months 2 days

Position:

Manage 

* Position Number 00004679
* Status Active
* Start Date 07/21/2021
* Position Action Reason Data Conversion (CONV)
To be Hired No
Position Details

▼ Job Classification

* Job Classification Prinpl HS (0461) 
Job Title Principal High School
Position Title Principal High School 
Employee Class Certificated (CERT)
Job Family Administrator (ADMN) 
* Position Type 1:1 Position (Regular Position) 
* FTE (Max. Headcount) 1
Standard Weekly Hours 40
Pay Grade ES Prin 200 Step 4 w/increment (AU)
* Calendar Code High School Principal (9) 
Union Code United Administrators of SF (02)
Sub Eligible Flag Yes (Yes)
SFE Classification Principal High School (NO TSAP PAY UNLESS SPECIFIED) (0461) 

▼ **Organization Information**

- * Company SFUSD (SFU) [REDACTED]
- * Business Unit School Site (SCHOOL) [REDACTED]
- * Division High (018) [REDACTED]
- * Department Thurgood Marshall H.S. (853) [REDACTED]
- * Location Thurgood Marshall H.S. (85300)
- * Supervisor Position Assistant Superintendent (00006068) [REDACTED]

▼ **Additional Information**

- Consolidation Tag No
- * Funding for Position Ongoing (Regular)
- Expected End Date

▼ **Funding Source**

* Org 1	* SACS Code 1	* FTE 1	FTE % 1
853	01-74200-0000-2700-1301-853 [REDACTED]	1	100
Org 2	SACS Code 2	FTE 2	FTE % 2
Org 3	SACS Code 3	FTE 3	FTE % 3
Org 4	SACS Code 4	FTE 4	FTE % 4

Change Date 11/05/2021 11:27:29 UTC-8:00

Changed By Billy W. Sanderson [REDACTED]

View Incumbent Employee History

To drill down further and see all employees who occupied a position over a period of time, click **“Show Menu”** – it looks like three horizontal lines in the top right corner. Click **“Show Incumbent History.”**

The screenshot displays a user interface for a position. On the left, a card shows the position number **00004679** and its details: Principal High School, Prinpl HS (0461), Certificated (CERT), and Thurgood Marshall H.S.... Below this, the incumbent's name **Mark Heringer** and the full-time equivalent (FTE) **1 / 1 FTE** are shown. A button labeled **Up One Level** is at the top, and **75 Positions Below** is at the bottom.

The main panel shows the position details for **Principal High School**. A dropdown menu is open, with **Show Incumbent History** highlighted. Other menu items include **Add Lower-Level Position**, **Add Peer Position**, and **Create Job Requisition**. The position details are as follows:

Position Number	00004679
Position Title	Principal High School
Job Classification	Prinpl HS (0461)
Employee Class	Certificated (CERT)
Department	Thurgood Marshall H.S. (853)
Location	Thurgood Marshall H.S. (85300)

Additional information includes: "Position is fully staffed (1 of 1 FTE).", "Position does not allow multiple incumbents.", and expandable sections for **Position History**, **Position Hierarchy Details**, and **Incumbent Details**.

Enter dates in the **“From”** and **“To”** date range boxes to see all employees occupying the position in both the past, present, or future.

Once you have selected one position, you can take several actions right there, including:

- View the history of the employee occupying the position “Show Incumbent History”
- Add Lower Level Position begins the process to submit a request to create a new position who would be Supervised by the position selected.
- Add Peer Position begins the process to submit a request to create a new position who is supervised by the same Supervisor as the position selected
- To begin the process to hire for a vacant position, click Create Job Requisition

Create a New Position (Including Job Classification Changes)

Steps to Creating a New Position

The best time to request position additions, changes, or inactivations is during Spring Budget Development. The Budget Office will review and upload all position actions for you over the Spring and Summer. Any ad-hoc position actions must be submitted manually from the Position Org Chart by the Supervisor (or Central Office Budget Manager).

In this section, you'll learn how to submit a request to create a new position (either as an addition to your roster of positions or as a net-neutral job classification change). Creating a new position will generate a new

8-digit Position Number that will be used to track the position. If you already have an existing vacant position number and just want to hire for it, you can Create a Job Requisition for Hire directly.

Click on **Company Info** and select **Position Org Chart**.

The screenshot displays the HR system interface for SFUSD. At the top, there is a 'Home' dropdown menu with a search bar for 'actions or people'. The dropdown menu is open, showing options: Home, Careers, Succession, Recruiting, **Company Info** (highlighted with a red box), Employee Files, Reporting, Admin Center, Time and Attendance, and Position Org Chart. Below the menu is a 'Help' section with a link to 'Submit an EMPowerSF ticket here'. The main dashboard features two cards: 'Org Chart' showing '61 Direct Reports (61 total)' and 'Manage My Team' showing a grid of 10 team member icons and '61 Reports (61 Direct)'. The bottom navigation bar includes the SFUSD logo, 'Company Info' dropdown, another search bar, and icons for checkmark, folder, chat, and user profile. The 'Company Info' dropdown is open, showing 'Org Chart', **Position Org Chart** (highlighted with a red box), 'Company Structure Overview', and 'Directory'.

To create a new Position, you have two options:

The Supervisor should select an existing position in their Position Org Chart – either a peer of the new position or their own Supervisor position. Click on **“Show Menu”** in the top right corner (looks like three horizontal lines) and select either:

1. **“Add Peer Position”** allows you to select an existing position that reports to the same Supervisor to use as a template for the new position.

2. **“Add Lower Level Position”** allows you to select your own Supervisor position to use as a template for a new position that will report to you. Please note that you will need to select a new Job Classification, because the one that defaults will match the Supervisor’s.

The screenshot shows the 'Position Org Chart' interface. At the top, there are navigation tabs: 'Position Org Chart', 'Company Structure Overview', and 'Directory'. Below these is a search bar with 'No Selection' and a date filter set to 'Today'. A dropdown menu is open, showing a supervisor position: 'Certificated (CERT) Thurgood Marshall H.S....' with a user icon for 'Mark Heringer' and '1 / 1 FTE'. Below this, a list of positions is displayed in a grid. The selected position, '00029795 Regular Classroom Teacher (00001065)', is highlighted. A context menu is open over this position, with options: 'Show Incumbent History', 'Add Lower-Level Position', 'Add Peer Position', and 'Create Job Requisition'. The 'Add Lower-Level Position' and 'Add Peer Position' options are highlighted with a red box. The detailed view for the selected position shows the following information:

Position Number	00001065
Position Title	Regular Classroom Teacher
Job Classification	RegClsrcmTe (0700)
Employee Class	Certificated (CERT)
Department	Thurgood Marshall H.S. (853)
Location	Thurgood Marshall H.S. (85300)

Additional details for the position: 'Position is fully staffed (1 of 1 FTE). Position does not allow multiple incumbents.' Below the details are sections for 'Position History' and 'Incumbent Details'.

A window will pop up that allows you to view, edit, and enter any missing position data details. The following pages will explain each field in the Position section.

TIP: Once you're on this screen, you cannot save your work and come back.

- Please collect all of the information you need in advance, including the SACS Code of the funding source, so that you're ready to enter the position details and submit your request when you come to this screen. The SACS Code will not copy over from the previous position you selected as a template.

- To look up the position details or SACS Code of another position without losing your place, you can right click on the EMPowerSF tab you're on, select "Duplicate," and then start a simultaneous session in EMPowerSF.

Position:

* Position Number

* Status

* Start Date

* Position Action Reason

To be Hired

Position Details

▼ Job Classification

* Job Classification

Job Title

Position Title

Employee Class

Job Family

* Position Type

* FTE (Max. Headcount)

Standard Weekly Hours

Pay Grade

* Calendar Code

Union Code

Sub Eligible Flag

SFE Classification

▼ Organization Information

* Company

* Business Unit

* Division

* Department

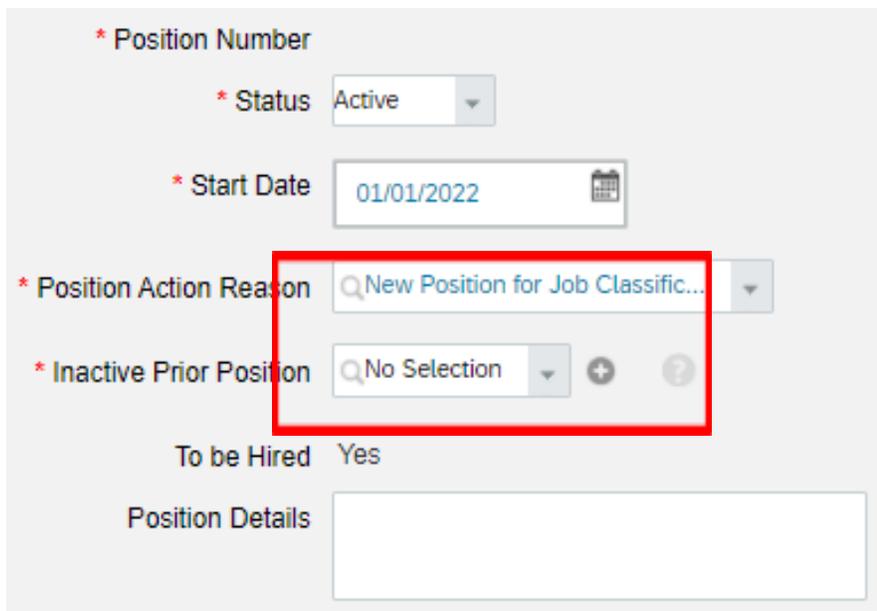
Cancel

Save

To view the position data field definitions, please refer to the [Position Fields Definitions](#) in the previous section.

- **Status:** “Active” for new positions
- **Start Date:** The effective date that the position is budgeted to begin. Typically aligns with the start of a pay period. Can be retroactively-dated or future-dated. The start date *must* be entered in the following format: MM/DD/YEAR.
- **Position Action Reason:** Select from two options:
 - a. **New Position Addition (NPR):** Adding a net additional position and are budgeting additional funds for it
 - b. **New Position for Job Classification Change:** New position is net neutral from a number of FTEs standpoint. You will be creating a new position with a different Job Classification, transferring an employee from an existing position into it, and then inactivating their prior position once vacated
 - **Inactive Prior Position:** This field will popup below the Position Action Reason field. Please enter the existing employee’s current position number that will be inactivated after they are transferred to the new position.

Here is an example of selecting “**Position Action Reason: New Position for Job Classification Change:**”



The screenshot shows a form with several fields. The 'Position Action Reason' dropdown menu is open, showing the selected option 'New Position for Job Classification Change'. Below it, the 'Inactive Prior Position' dropdown menu is also open, showing 'No Selection'. A red box highlights these two dropdown menus. Other fields include 'Status' (Active), 'Start Date' (01/01/2022), and 'To be Hired' (Yes).

- **Position Details:** Optional field where you can make helpful notes or comments about the position
- **Job Classification:** If you choose to create a peer-level position, the Job Classification will be pre-populated for you. If you create a lower-level position, make sure to change the Job Classification listed (or else it will match the Supervisor’s!).
 - a. Selecting a Job Classification will **auto-populate some non-editable fields:**
 - **Employee Class, Job Family, Pay Grade, Union Code, and Sub Eligible Flag.** Here is an example:

Job Classification

* Job Classification: 1091 (1091)

Job Title: IT Oper Supp Admin I

Position Title: IT Oper Supp Admin I

Employee Class: Classified (CLSF)

* Position Type: 1:1 Position (Regular Position...)

* FTE (Max. Headcount): 1

Standard Weekly Hours: 40

Pay Grade: 379 (379)

* Calendar Code: Year Round Employees Biweekly

Union Code: Pro Tech Team (19)

Sub Eligible Flag: No (No)

Job Classification

* Job Classification: Principal (P1)

Job Title: Principal 1

Position Title: Principal 1

Employee Class: Certificated (CERT)

* Position Type: 1:1 Position (Regular Position...)

* FTE (Max. Headcount): 1

Standard Weekly Hours: 40

Pay Grade: 043 (043)

* Calendar Code: Homebound Teachers

Union Code: United Educators-USP (04)

Sub Eligible Flag: Yes (Yes)

SFE Classification: No Selection

b. Selecting a Job Classification will auto-populate some editable fields as well. The following fields will *default* to the most common option, but they *can* be edited:

- **Position Title:** Defaults to match the Job Title (e.g., Regular Classroom Teacher). However, you can edit this to be a more descriptive title (e.g., Ethnic Studies Teacher)
- **Calendar Code:** Defaults to the most common for the Job Classification. Can be edited, particularly for Job Classifications that can work School Term or Year Round
- **SFE Classification:** Indicates what type of substitute job should be advertised in the SmartFind Express (SFE) Substitute System when the employee is absent. This ensures the substitute is brought in for the correct course subject.

- **Position Type:** Select from dropdown as 1:1 Position (Regular Position) or “Shared Position.” Regular positions have one employee assigned to one position. Shared positions can have multiple employees assigned to one position
 - a. Shared position is the new name for Pooled Position in PeopleSoft
 - b. Almost all positions will be Regular Positions where there is 1 employee, in 1 position, and the max headcount is 1. Shared Positions are not common or standard practice for most schools and Central Office Depts.
- **FTE (Max. Headcount):** Usually no more than 1.0 FTE. If you change the FTE, the Standard Weekly Hours will automatically update.
 - a. For all Regular positions, enter the FTE (1.0 FTE max).
 - b. For Shared positions, enter the max headcount – the number of employees who can occupy the position.
 - **FTE per Employee:** For Shared Positions, this field will popup below the FTE (Max Headcount) field. Please enter the maximum FTE of any one employee in the Shared Position (1.0 FTE max)
- **Standard Weekly Hours:** Calculated based on Job Classification and FTE. If you change this, the FTE will automatically update.

Here is an example of selecting 1:1 Position (Regular Position) versus “Shared Position” with the FTE per Employee field popped up below:

▼ Job Classification

* Job Classification

Job Title IT Oper Supp Admin I

Position Title

Employee Class Classified (CLSF)

* Position Type

* FTE (Max. Headcount)

Standard Weekly Hours

Pay Grade 379 (379)

* Calendar Code

Union Code Pro Tech Team (19)

Sub Eligible Flag No (No)

▼ Job Classification

* Job Classification

Job Title Plumber Supervisor I

Position Title

Employee Class Classified (CLSF)

* Position Type

* FTE (Max. Headcount)

FTE per Employee

Standard Weekly Hours

Pay Grade 647 (647)

* Calendar Code

Union Code Local 38 - Plumbers (11)

Sub Eligible Flag No (No)

The following Organization Information fields should carry over from the position you used as a template. Only select a different value if you need to.

- **Company:** This is always “SFUSD”
- **Business Unit:** “School” or “Central.” No longer means Certificated, Paraprofessional, and Classified like it did in PeopleSoft
- **Division:** Central Office Divisions as well as Early Education, Elementary, Middle, K-8, and High.
- **Department:** The Dept or School where the position is managed.
 - a. If a position is supervised at a school but managed centrally, the Dept ID must be the Central Office. (e.g., Music Teacher supervised by a Principal should have VAPA Dept 104 to allow the VAPA Dept to manage the position)
- **Location:** Physical address where the position works.
 - a. There is a generic option called 99900-Multiple Work Locations that can be used when one employee is assigned to multiple sites OR multiple employees in a pooled position are assigned to different sites.
 - b. There is no more TImeroll Location field like in PeopleSoft
- **Supervisor:** Non-editable. Responsible for approving timesheets and time off requests. They will also be responsible for initiating position-related actions and/or approving some of the employee event changes (e.g., termination process).

Organization Information

* Company SFUSD (SFU)

* Business Unit School Site (SCHOOL)

* Division High (018)

* Department Thurgood Marshall H.S. (853)

* Location Thurgood Marshall H.S. (85300)

* Supervisor Position Principal High School (00004679)

There are three new fields on the position in the Additional Information section. Use the drop-downs and date field to make your selections.

- **Consolidation Tag:** “No” for new positions
- **Funding for Position:** Ongoing, Temporary, or Summer. Indicates what type of funding or time period the position is funded by.
 - Ongoing is for positions that are funded by stable Resources
 - Temporary is for grant-funded or time-limited Resources
 - Summer is for Summer School
- **Expected End Date:** Required only for Temporary or Summer funding. Indicates the expected end date of the funding source/position here.

Here is an example of selecting Temporary funding (e.g., for a grant that will expire at the end of the fiscal year) and adding an expected end date of the funding source:

Additional Information

Consolidation Tag No

* Funding for Position Temporary (Temporary)

* Expected End Date 06/30/2022

Each position may be split-funded with up to four different SACS Codes. The FTE of each SACS Code indicates what percentage of the position should be funded by that SACS Code.

- **Org 1:** Enter the Org of the SACS Code to limit the number of SACS codes that appear in the SACS Code drop-down.
- **SACS Code 1:** Select a SACS Code from the drop-down.
 - Make sure to check your budget in PERCii so that you select the right SACS code.

- b. Make sure that you select an Object Code that corresponds to the Job Classification (e.g., 0700 Regular Classroom Teacher positions are budgeted in Object Code 1101 Certificated Salaries) Only valid SACS Codes in PERCii will appear in the list.
- c. If you try to copy/paste the SACS Code, please be sure to retain the dashes but omit the 4-digit fiscal year (e.g., 2022)
- **FTE 1:** Enter the portion of the FTE that will be funded by this SACS Code (up to 1.0 FTE). The FTE % field next will check that all SACS Codes add up to 100% so that the position is fully funded.
- Repeat steps above to split-fund a position with up to four different SACS Codes

Each Job Classification now has a recommended Object Code for the SACS. For example, 0700 Regular Classroom Teacher positions should be budgeted in the Object Code 1101 Certificated Salaries. If you enter a SACS Code that includes a different Object Code, you'll receive a warning. Please double-check that the Object Code is accurate in these cases.

▼ Funding Source

* Org 1	* SACS Code 1	* FTE 1	FTE % 1
<input type="text" value="853"/>	<input type="text" value="01-00000-1110-1000-1101-853"/>	<input type="text" value=".5"/>	50
Org 2	SACS Code 2	FTE 2	FTE % 2
<input type="text" value="853"/>	<input type="text" value="01-74250-1110-1000-1101-853"/>	<input type="text" value=".5"/>	50
Org 3	SACS Code 3	FTE 3	FTE % 3
<input type="text" value="Click to Edit"/>	<input type="text" value="No Selection"/>	<input type="text" value="Click to Edit"/>	
Org 4	SACS Code 4	FTE 4	FTE % 4
<input type="text" value="Click to Edit"/>	<input type="text" value="No Selection"/>	<input type="text" value="Click to Edit"/>	

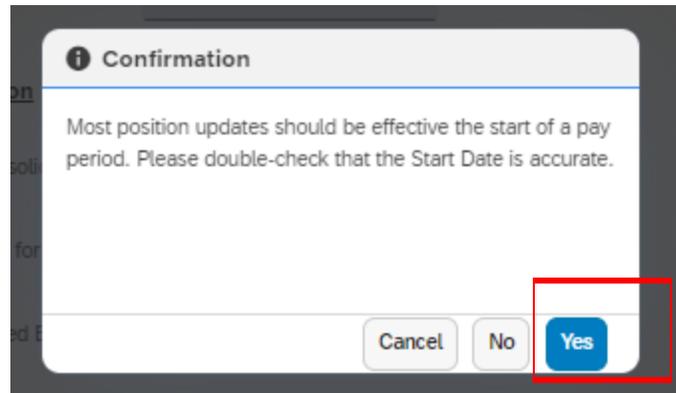
Change Date
Changed By

Submitting Your Request

When you're finished funding the position, click **"Save."** If the start date of the newly created position is not dated July 1, a warning message is displayed suggesting that the start date be verified before proceeding. Click **"Yes"** to acknowledge that you double-checked that the Start Date is accurate. Click **"Cancel"** to go back and edit the Start Date.

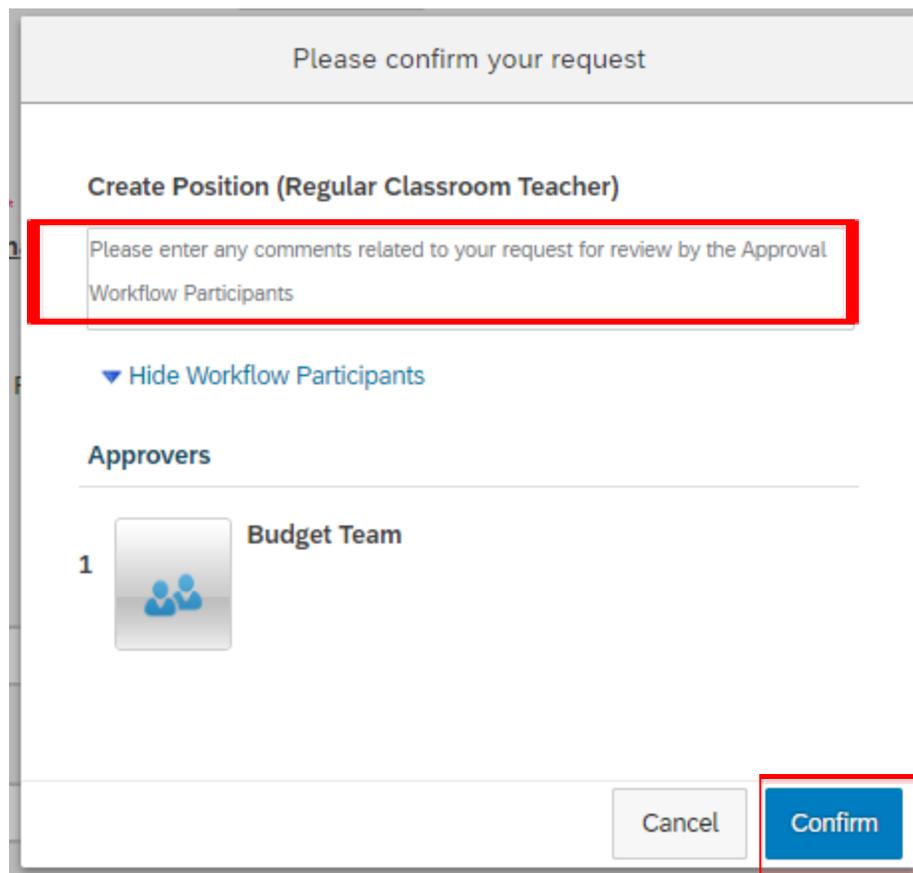
TIP: A warning message appears to double-check the effective start date entered to ensure it is correct. Typically the effective start date should align with the start of a pay period.

Positions that begin at the start of the new school year should be created to align with the start of a pay period (7/21/23 for monthly certificated educators; 7/5/2023 for biweekly paras and classified staff).



If you like, you can write a comment for the Budget and/or HR Approvers to provide more information about the new position you want to create. This field is optional but recommended.

You can also click on **"View Workflow Participants"** to see who exactly in Budget and HR will be responsible for approving the request.



When you click **"Confirm,"** you'll see the following message: *"Changes cannot be made to the newly created position until the request has been approved or rejected."* This means that you cannot submit another position

action for this position until the current one has been processed. The new position will be assigned a preliminary 8-digit Position Number.

Position:

You cannot make any more changes to the record until your pending workflow requests have been approved or rejected. Reach out to the workflow approver to take appropriate action.

* Position Number 10001327

* Status Active

* Start Date 01/01/2022

* Position Action Reason New Position Addition (NPR)

To be Hired Yes

[Position Details](#)

Pending Request Approval Process & Visibility

Approval Process for Create Position Action Requests:

- The position request is sent to the **Budget Team (Approver1)**.
 - The request will then be routed to your assigned Budget Analyst for review and approval. If you have questions, please contact your assigned Budget Analyst.
- The Budget Approvers have the option to “Approve” the request as-is or “Send Back” the request for edits.
- After the position is approved by the Budget Team...
 - **Certificated** and **Para** Positions: The position is created!
 - **Classified** Positions: The request is sent to the **HR Classified Team (Approver2)** for approval.
- As the request is routed to the various Workflow Approvers and approved or sent back, the Supervisor of the new position will receive email notifications keeping them up-to-date on the request’s progress.

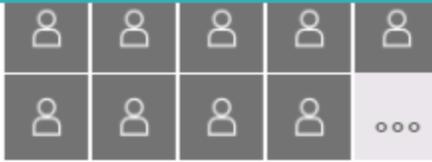
View the status of your Position Action Requests:

- Click on the **Pending Request** tile at the bottom of the homepage.
- **Requests Waiting for My Approval** (on the left): Shows requests that have been “sent back” by Budget or HR and need edits and re-submission
- **My Requests Waiting for Approval** (on the right): Shows requests pending approval. Will display “Currently with ___ Team” so that you know who is currently reviewing the request.



61

Direct Reports
(61 total)



61

Reports (61 Direct)

My Specialty

Admin Favorites

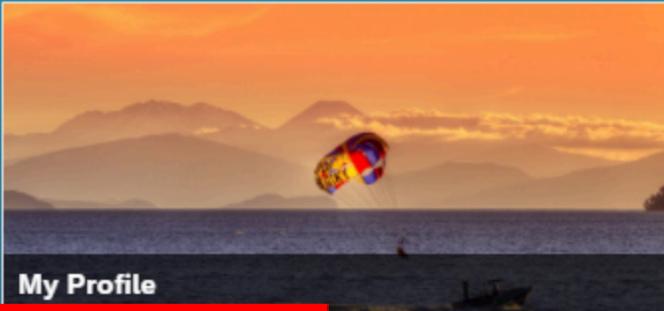


Time and Attendance

Manage Pending Hire



My Info



My Profile

Quick Links



Pending Requests



Back to: Home Page
Pending Requests

Requests Waiting for My Approval

There are no workflow requests

My Requests Waiting for Approval



Create Position (Regular Classroom Teacher) - effective 01/01/2022
Initiated on 12/14/2021 (Currently with Budget Team)

Requests Still In Progress that I Approved

There are no workflow requests

My Notifications

Last Month ▾

There are no workflow requests

To view the newly approved position on the Position Org Chart:

- Select **Company Info** from the drop down menu
- Click on **Position Org Chart**
 - If the position Start Date is in the future, use the Calendar Icon in the top right corner to change the effective date of the Position Org Chart from **Today** to a future date
- The newly created position is displayed.

Change a Position

Steps to Changing an Existing Position

The best time to request position additions, changes, or inactivations is during Spring Budget Development. The Budget Office will review and upload all position actions for you over the Spring and Summer. Any ad-hoc position actions must be submitted manually from the Position Org Chart by the Supervisor (or Central Office Budget Manager).

In this section, you'll learn how to submit a request to change an existing position. For Job Classification changes, see the "Create New Position" instructions above. The example below is to change the Supervisor of a Position.

If the position itself is accurate but you want to change the employee in the position, you will need to work with the appropriate HR Analyst to complete an employee transfer instead.

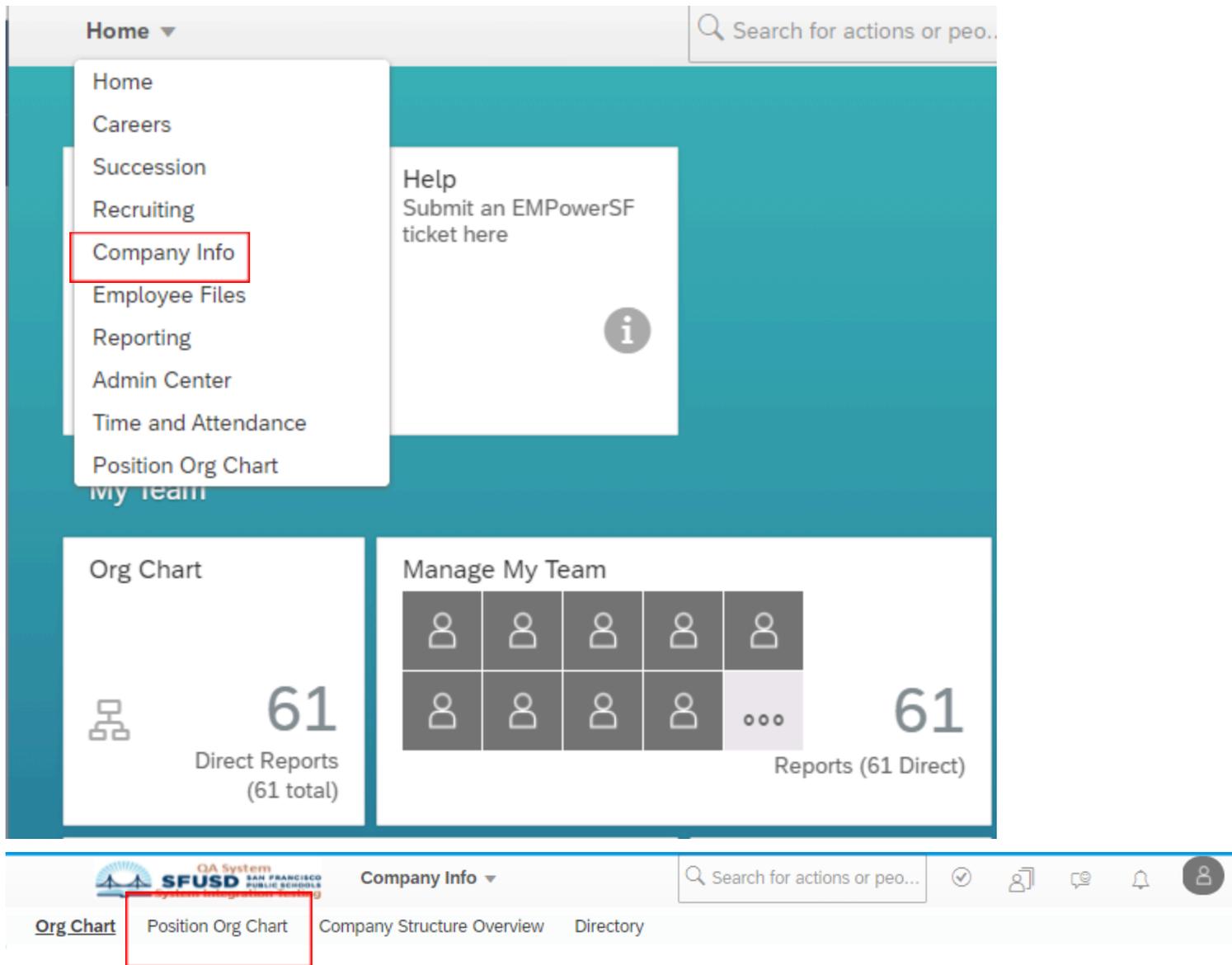
If you'd like to change the FTE of a filled position, please have the employee fill out and submit an FTE Increase/Decrease Form to the appropriate HR Analyst.

TIP: Collect any information you'll need in advance. You won't be able to save your work and come back after starting the process of submitting a position action request.

- Please collect all of the information you need in advance.
- To look up the position details or SACS Code of another position without losing your place, you can right click on the EMPowerSF tab you're on, select "Duplicate," and then start a simultaneous session in EMPowerSF.

- For School Sites: Positions funded by school sites are “owned” by that school site. Please do not change the Supervisor or Location of any school site-funded positions to a different school.
- For Central Offices: If you are changing the Supervisor of a position, collect the new Supervisor’s Position Number in advance (not their name).

Click on **Company Info** and select **Position Org Chart**.



The Supervisor should select an existing position in their Position Org Chart that they want to change. Click on the left side or top half of an existing position in your Position Org Chart that you want to change (don't click on the employee's name or picture). Click on the “Show Position Details” button at the top left. It looks like an index card.

75 Positions Below

00030895 Regular Classroom... RegClsrcmTe (0700) Eric Brenner 1 / 1 FTE	Regular Classroom Teacher (00022798) as of Today  ✓ Position Details Position Number 00022798 Position Title Regular Classroom Teacher Job Classification RegClsrcmTe (0700) Employee Class Certificated (CERT) Department Thurgood Marshall H.S. (853) Location Thurgood Marshall H.S. (85300) Position is fully staffed (1 of 1 FTE). Position does not allow multiple incumbents. > Position History > Incumbent Details
00022798 Regular Classroom... RegClsrcmTe (0700) Nicole Hsu 1 / 1 FTE	
00022799 Regular Classroom... RegClsrcmTe (0700) Van Cedric Williams 0.5 / 0.5 FTE	
00022806 Moderate/Severe ... MSRSSDC (0777) Edith Arias 1 / 1 FTE	

The Position Details will appear in a pop up. From there, click on the **"Edit"** link in the top right corner.

Position:

Edit Manage x

* Position Number 00022798
* Status Active
* Start Date 07/21/2021
* Position Action Reason Data Conversion (CONV)
To be Hired No
Position Details

▼ Job Classification

* Job Classification RegClsmTe (0700) [RE]
Job Title Regular Classroom Teacher
Position Title Regular Classroom Teacher ⓘ
Employee Class Certificated (CERT)
Job Family Certificated (CERT) [RE]
* Position Type 1:1 Position (Regular Position) [RE]
* FTE (Max. Headcount) 1
Standard Weekly Hours 40
Pay Grade CERTS Proposition A Adjustment (B6)
* Calendar Code TK - 12 Teachers (4) [RE]
Union Code United Educators of SF (03)
Sub Eligible Flag Yes (Yes)
SFE Classification _ENGLISH/LANGUAGE ARTS (_ENG) [RE]

▼ Organization Information

* Company SFUSD (SFU) [RE]
* Business Unit School Site (SCHOOL) [RE]
* Division High (018) [RE]
* Department Thurgood Marshall H.S. (853) [RE]
* Location Thurgood Marshall H.S. (85300)
* Supervisor Position Principal High School (00004679) [RE]

▼ Additional Information

Consolidation Tag No
* Funding for Position Ongoing (Regular)
Expected End Date

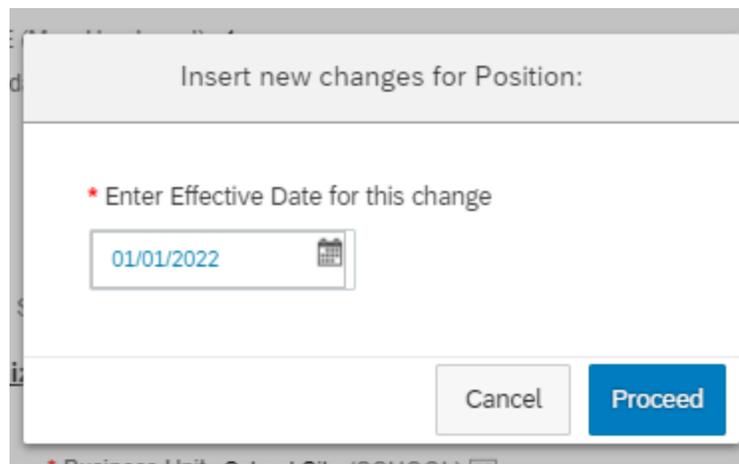
▼ Funding Source

* Org 1	* SACS Code 1	* FTE 1	FTE % 1
853	01-07091-4760-1000-1101-853 [RE]	1	100
Org 2	SACS Code 2	FTE 2	FTE % 2

Then, you will be prompted to enter an **Effective Date** for the change and click **“Proceed”**. The date can be retroactively-dated or future-dated. The effective date *must* be entered in the following format: MM/DD/YEAR.

TIP: Consider the most appropriate effective date that the changes should take effect. Changes should typically take effect the start of a pay period.

- For most changes that began at the start of the school year, use an effective date that aligns with the start of a pay period in July (7/21/23 for monthly certificated educators; 7/5/2023 for biweekly paras and classified staff).
- For FTE or Calendar Code changes, the effective date must align with the start of a pay period. For Certificated or Certificated Admin employees, reach out to your HR Staffing Analyst to confirm the best effective date to use.
- For past fiscal years, changes can no longer be made. To change funding prior to 07/01/2023 if the books are not yet closed, please reach out to the Accounting Department to discuss a manual expenditure journal.



The screenshot shows a dialog box with the title "Insert new changes for Position:". Inside the dialog, there is a red asterisk followed by the text "Enter Effective Date for this change". Below this text is a text input field containing the date "01/01/2022" and a small calendar icon to its right. At the bottom of the dialog, there are two buttons: a white "Cancel" button and a blue "Proceed" button.

Depending on the Effective Date you enter and whether or not there is already a record with the same Effective Date, the changes will be categorized as either:

- **Insert Position:** Add a record with new Effective Date that doesn't yet exist
- **Correct Position:** Change an existing record for an Effective Date that already exists

The position edit screen will appear with editable position details fields. The following pages will explain each field you can change in the Position section.

Position:

* Position Number 00022798

* Status Active

* Start Date 01/01/2022

* Position Action Reason Change FTE (FTE)

To be Hired No

Position Details

▼ Job Classification

* Job Classification RegClstrmTe (0700)

Job Title Regular Classroom Teacher

Position Title Regular Classroom Teach

Employee Class Certificated (CERT)

Job Family Certificated (CERT)

* Position Type 1:1 Position (Regular Position...)

* FTE (Max. Headcount) 1

Standard Weekly Hours 40

Pay Grade CERTS Proposition A Adjustment (B6)

* Calendar Code TK - 12 Teachers (4)

Union Code United Educators of SF (03)

Sub Eligible Flag Yes (Yes)

SFE Classification _ENGLISH/LANGUAGE ARTS (_ENG)

▼ Organization Information

* Company SFUSD (SFU)

* Business Unit School Site (SCHOOL)

* Division High (018)

* Department Thurgood Marshall H.S. (853)

Cancel

Save

Position Data Fields You Can Change

To view the position data field definitions, please refer to the [Position Fields Definitions](#) in the previous section.

You can Change only the following fields for an active position:

- **Position Action Reason:** Select the “Change” option that best represents the change. Your selection will be used for HR Reporting, so please try to be as accurate as possible.
 - a. When changing multiple fields, please select the key driver that is triggering this change. For example, a change in department could trigger a change in funding source or location change, however, the Position Action Reason would be Change in Department.
 - b. “Fall Budget Revision” and “Spring Budget Development” are for Budget Office Use Only.

TIP: This field will be pre-populated with the most recent Position Action Reason. So make sure to review this field and select the correct Position Action Reason for this current change!

- **Position Details:** Optional field where you can make helpful notes or comments about the position
- **Job Classification:** NON-EDITABLE. It looks editable, but it is not. See the “Create New Position” instructions above for Job Classification changes.
- **Position Title:** Can be edited to be a more descriptive title (e.g., Ethnic Studies Teacher)
- **Position Type:** Select from dropdown as 1:1 Position (Regular Position) or “Shared Position.” Regular positions have one employee assigned to one position. Shared positions can have multiple employees assigned to one position
 - a. Shared position is the new name for Pooled Position in PeopleSoft
 - b. Almost all positions will be Regular Positions where there is 1 employee, in 1 position, and the max headcount is 1. Shared Positions are not common or standard practice for most schools and Central Office Depts.
- **FTE (Max. Headcount):** Usually no more than 1.0 FTE. If you change the FTE, the Standard Weekly Hours will automatically update.
 - a. For all Regular positions, enter the FTE (1.0 FTE max).
 - b. For Shared positions, enter the max headcount – the number of employees who can occupy the position.
 - **FTE per Employee:** For Shared Positions, this field will popup below the FTE (Max Headcount) field. Please enter the maximum FTE of any one employee in the Shared Position (1.0 FTE max)
- **Standard Weekly Hours:** Calculated based on Job Classification and FTE. If you change this, the FTE will automatically update.
- **Calendar Code:** Can be edited, particularly for Job Classifications that can work School Term or Year Round
- **SFE Classification:** Indicates what type of substitute job should be advertised in the SmartFind Express (SFE) Substitute System when the employee is absent. This ensures the substitute is brought in for the correct course subject.
- **Business Unit:** “School” or “Central.” No longer means Certificated, Paraprofessional, and Classified like it did in PeopleSoft
- **Division:** Central Office Divisions as well as Early Education, Elementary, Middle, K-8, and High.
- **Department:** The Dept or School where the position is managed.

- a. If a position is supervised at a school but managed centrally, the Dept ID must be the Central Office. (e.g., Music Teacher supervised by a Principal should have VAPA Dept 104 to allow the VAPA Dept to manage the position)
- **Location:** Physical address where the position works.
 - a. There is a generic option called 99900-Multiple Work Locations that can be used when one employee is assigned to multiple sites OR multiple employees in a pooled position are assigned to different sites.
 - b. There is no more Tlmeroll Location field like in PeopleSoft
- **Supervisor:** To designate a different Supervisor, you must enter the Supervisor's Position Number or Position Title. You cannot search by name in this field.
 - a. Responsible for approving timesheets and time off requests. They will also be responsible for initiating position-related actions and/or approving some of the employee event changes (e.g., termination process).
- **Consolidation Tag:** Change to "Yes" to flag positions for consolidation to HR
- **Funding for Position:** Ongoing, Temporary, or Summer. Indicates what type of funding or time period the position is funded by.
 - a. Ongoing is for positions that are funded by stable Resources
 - b. Temporary is for grant-funded or time-limited Resources
 - c. Summer is for Summer School
- **Expected End Date:** Required only for Temporary or Summer funding. Indicates the expected end date of the funding source/position here.

Each position may be split-funded with up to four different SACS Codes. The FTE of each SACS Code indicates what percentage of the position should be funded by that SACS Code.

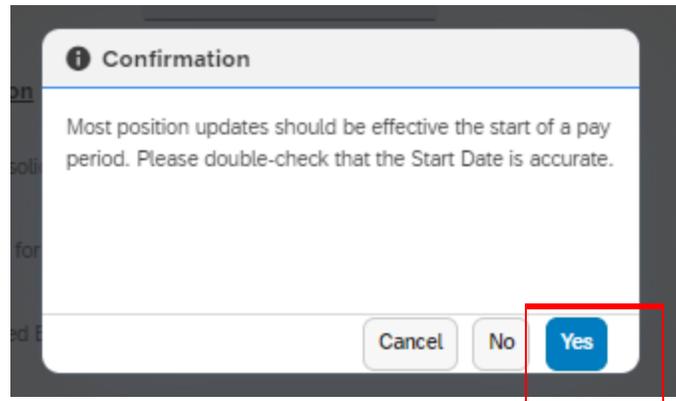
- **Org 1:** Enter the Org of the SACS Code to limit the number of SACS codes that appear in the SACS Code drop-down.
- **SACS Code 1:** Select a SACS Code from the drop-down.
 - a. Make sure to check your budget in PERCii so that you select the right SACS code.
 - b. Make sure that you select an Object Code that corresponds to the Job Classification (e.g., 0700 Regular Classroom Teacher positions are budgeted in Object Code 1101 Certificated Salaries) Only valid SACS Codes in PERCii will appear in the list.
- **FTE 1:** Enter the portion of the FTE that will be funded by this SACS Code. The FTE % of each SACS Code entered should add up to 100% so that the position is fully funded.
- Repeat steps above to split-fund a position with up to four different SACS Codes

Submitting Your Request

After you have finished editing the position, click "**Save**" in the bottom right corner. If the start date of the changes is not dated July 1, a warning message is displayed suggesting that the start date be verified before proceeding. Click "**Yes**" to acknowledge that you double-checked that the Start Date is accurate. Click "**Cancel**" to go back and edit the Start Date.

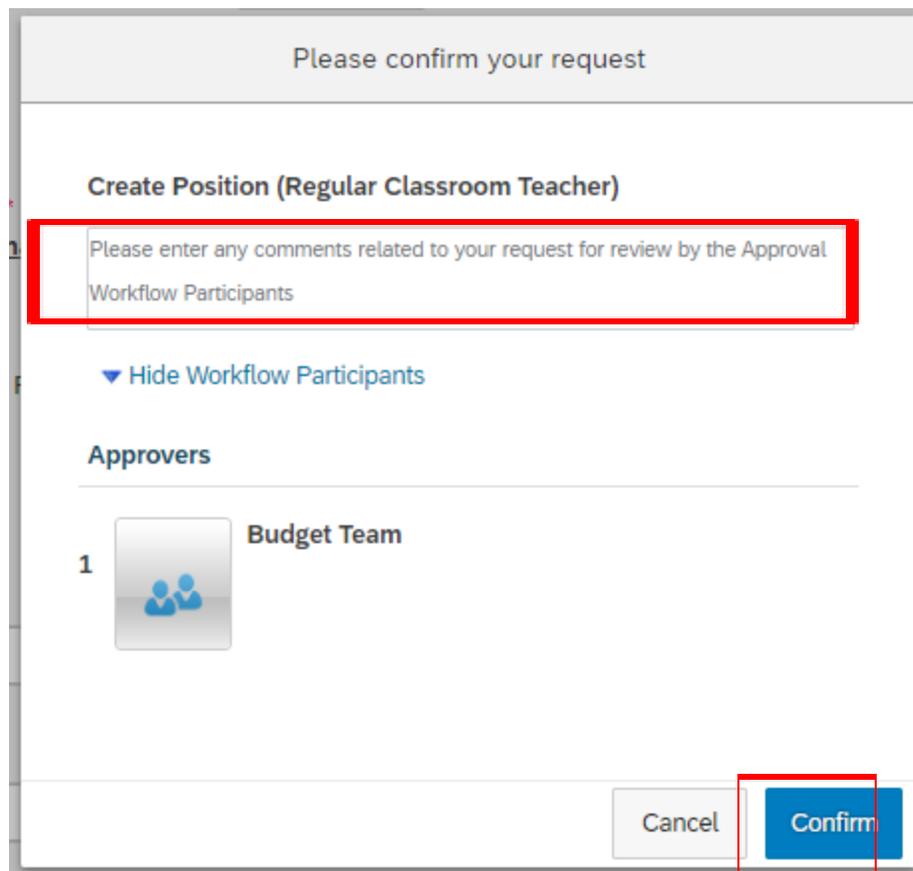
TIP: A warning message appears to double-check the effective start date entered to ensure it is correct. Typically the effective start date should align with the start of a pay period.

Positions that begin at the start of the new school year should be created to align with the start of a pay period (7/21/23 for monthly certificated educators; 7/5/2023 for biweekly paras and classified staff).



If you like, you can write a comment for the Budget and/or HR Approvers to provide more information about the position changes. This field is optional but recommended.

You can also click on **“View Workflow Participants”** to see who exactly in Budget and HR will be responsible for approving the request.



When you click “**Confirm**,” you’ll see the following message: “Changes cannot be made to the newly created position until the request has been approved or rejected.” This means that you cannot submit another position action for this position until the current one has been processed.

Pending Request Approval Process & Visibility

Position Fields You Can Change that REQUIRE Budget And/Or HR Approval:

If you change any of the Budget-Approved fields listed below, Budget Office approval is required. If you change any of the HR-Approved fields below, HR Approval is required.

If you change multiple fields but at least one requires approval, the entire request will go to Budget and/or HR for approval.

In addition, the presence of a requisition for hire will impact the HR approval and notification processes.

Budget-Approved fields (for both vacant and occupied positions):

- Effective Date/Start Date
- FTE (Max Headcount)
- Funding for Position Type
- Expected End Date of Funding
- Calendar Code
- SACS Codes

HR-Approved fields (for occupied positions only):

- Effective Date/Start Date
- FTE (Max Headcount)
- Calendar Code
- SFE Classification
- Consolidation Tag
- Expected End Date

Position Fields You Can Change WITHOUT Needing Any Approval:

There are several fields that do not require Budget or HR approval! We’re hoping that this will lead to faster updates and more accurate data.

Be very careful about entering the correct Effective Start Date, Position Action Reason, and selecting the correct data in the drop-down when making changes to fields that do not require approval. There is no “undo” button.

- Position Details
- Position Title
- Business Unit
- Division
- Dept
- Location
- Supervisor

Approval Process for Change Position Action Requests:

- The Budget and/or HR Approvers have the option to “Approve” the request as-is or “Send Back” the request for edits.
- As the request is routed to the various Workflow Approvers and approved or sent back, the Supervisor of the new position will receive email notifications keeping them up-to-date on the request’s progress.

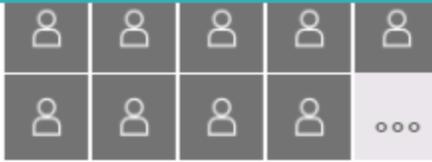
View the status of your Position Action Requests:

- Click on the **Pending Request** tile at the bottom of the homepage.
- **Requests Waiting for My Approval** (on the left): Shows requests that have been “sent back” by Budget or HR and need edits and re-submission
- **My Requests Waiting for Approval** (on the right): Shows requests pending approval. Will display “Currently with ___ Team” so that you know who is currently reviewing the request.



61

Direct Reports
(61 total)



61

Reports (61 Direct)

My Specialty

Admin Favorites

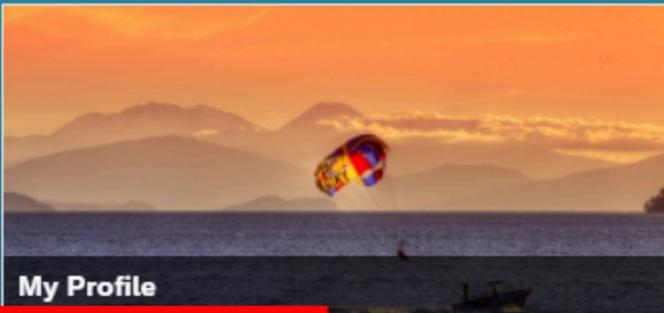


Time and Attendance

Manage Pending Hire



My Info



My Profile

Quick Links



Pending Requests



Back to: Home Page

Pending Requests

Requests Waiting for My Approval

There are no workflow requests

My Requests Waiting for Approval



Create Position (Regular Classroom Teacher) - effective 01/01/2022
Initiated on 12/14/2021 (Currently with Budget Team)

Requests Still In Progress that I Approved

There are no workflow requests

My Notifications

Last Month ▾

There are no workflow requests

To view the newly approved position changes on the Position Org Chart:

- Select **Company Info** from the drop down menu
- Click on **Position Org Chart**
 - If the position Start Date is in the future, change the date of the Position Org Chart from **Today** to a future date
- The newly created position is displayed.

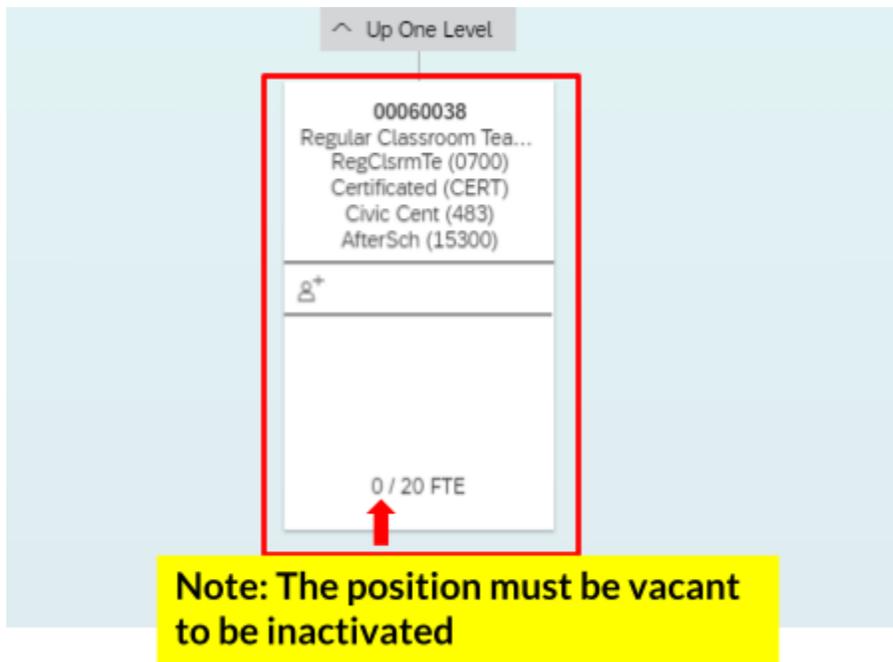
Inactivate a Position

Requirements for Inactivating a Vacant Position

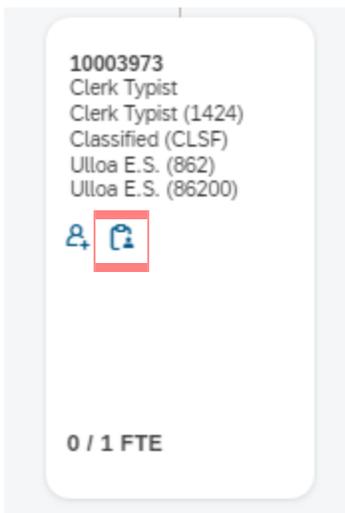
The best time to request position additions, changes, or inactivations is during Spring Budget Development. The Budget Office will review and upload all position actions for you over the Spring and Summer. Any ad-hoc position actions must be submitted manually from the Position Org Chart by the Supervisor (or Central Office Budget Manager).

In this section, you'll learn how to submit a request to inactivate a vacant position. However, a few requirements must be met before a position can be inactivated:

- ***The position to be inactivated must be vacant.*** You can check that a position is vacant by looking at the position record on the position org chart and looking at the **FTE**. ***An FTE of zero means that the position is currently vacant.*** If the position is not vacant as of the date of the request, please work with HR to transfer the incumbent employee out of the position.



- **Any Active Job Requisitions for Hire must be deleted/closed.** If a position shows a clipboard icon, it means that there's an Active Job Requisition for Hire. Please reach out to the appropriate HR Analyst ensure that the Job Requisition for Hire is deleted or closed.



- **The position must not be a Supervisor of any direct reports:** When you are terminating the Supervisor employee, there is an option that appears to transfer direct reports to another position. If selected, the position becomes vacant and the position can be inactivated. If the employees are not transferred, then all direct report positions will need to be manually changed to report to a different Supervisor.

Transfer Direct Reports

Who should the 154 direct report(s) of Tami Mari Benau report to after the termination?

Everyone according to position hierarchy

Terminate

Transfer Event Reason *

No Selection

Transfer Job Relationships

Who should the job relationship reports of Tami Mari Benau report to after his/her termination?

Everyone to upper manager Billy W. Sanderson

Steps to Inactivating a Vacant Position

Click on **Company Info** and select **Position Org Chart**.

The screenshot shows a software interface with a teal background. At the top left, there is a 'Home' dropdown menu. A search bar at the top right contains the text 'Search for actions or peo...'. A 'Help' box is visible, containing the text 'Submit an EMPowerSF ticket here' and an information icon. The 'Company Info' menu item is highlighted with a red box. Below the menu, there are two main sections: 'Org Chart' and 'Manage My Team'. The 'Org Chart' section shows a tree icon and the text '61 Direct Reports (61 total)'. The 'Manage My Team' section shows a grid of 10 person icons (5 in the first row, 5 in the second row) and the text '61 Reports (61 Direct)'. The second row of icons has a greyed-out icon with three dots.

The Supervisor should select an existing position in their Position Org Chart that they want to deactivate. Click on the **“Show Position Details”** button at the top left. It looks like an index card. Make a note of the position number here if you’d like to double check later on that the position is deactivated.

75 POSITIONS Below	
<div style="border-bottom: 1px solid #ccc; padding: 5px;"> <p>00030895 Regular Classroom... RegClsrcmTe (0700)</p> <p style="text-align: right;"> Eric Brenner</p> <p style="text-align: right;">1 / 1 FTE</p> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px;"> <p>00022798 Regular Classroom... RegClsrcmTe (0700)</p> <p style="text-align: right;"> Nicole Hsu</p> <p style="text-align: right;">1 / 1 FTE</p> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px;"> <p>00022799 Regular Classroom... RegClsrcmTe (0700)</p> <p style="text-align: right;"> Van Cedric Williams</p> <p style="text-align: right;">0.5 / 0.5 FTE</p> </div> <div style="padding: 5px;"> <p>00022806 Moderate/Severe ... MSRSSDC (0777)</p> <p style="text-align: right;"> Edith Arias</p> <p style="text-align: right;">1 / 1 FTE</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Regular Classroom Teacher (00022798) ☰ ×</p> <p>as of Today 📅</p> <p>✓ Position Details</p> <p>Position Number 00022798</p> <p>Position Title Regular Classroom Teacher</p> <p>Job Classification RegClsrcmTe (0700)</p> <p>Employee Class Certificated (CERT)</p> <p>Department Thurgood Marshall H.S. (853)</p> <p>Location Thurgood Marshall H.S. (85300)</p> <p>Position is fully staffed (1 of 1 FTE).</p> <p>Position does not allow multiple incumbents.</p> <p>> Position History</p> <p>> Incumbent Details</p> </div>

The Position Details will appear in a pop up. From there, click on the **“Edit”** link in the top right corner.

Position:

Edit Manage x

* Position Number 00022798
* Status Active
* Start Date 07/21/2021
* Position Action Reason Data Conversion (CONV)
To be Hired No
Position Details

▼ Job Classification

* Job Classification RegClsmTe (0700) [RE]
Job Title Regular Classroom Teacher
Position Title Regular Classroom Teacher ⓘ
Employee Class Certificated (CERT)
Job Family Certificated (CERT) [RE]
* Position Type 1:1 Position (Regular Position) [RE]
* FTE (Max. Headcount) 1
Standard Weekly Hours 40
Pay Grade CERTS Proposition A Adjustment (B6)
* Calendar Code TK - 12 Teachers (4) [RE]
Union Code United Educators of SF (03)
Sub Eligible Flag Yes (Yes)
SFE Classification _ENGLISH/LANGUAGE ARTS (_ENG) [RE]

▼ Organization Information

* Company SFUSD (SFU) [RE]
* Business Unit School Site (SCHOOL) [RE]
* Division High (018) [RE]
* Department Thurgood Marshall H.S. (853) [RE]
* Location Thurgood Marshall H.S. (85300)
* Supervisor Position Principal High School (00004679) [RE]

▼ Additional Information

Consolidation Tag No
* Funding for Position Ongoing (Regular)
Expected End Date

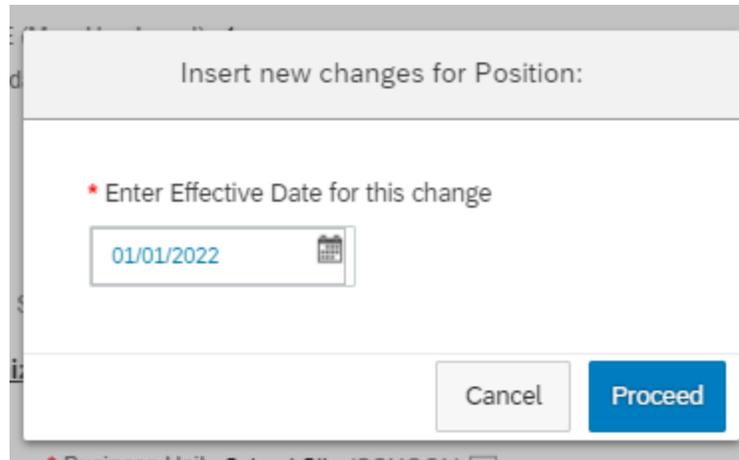
▼ Funding Source

* Org 1	* SACS Code 1	* FTE 1	FTE % 1
853	01-07091-4760-1000-1101-853 [RE]	1	100
Org 2	SACS Code 2	FTE 2	FTE % 2

Then, you will be prompted to enter an **Effective Date** for the position inactivation and click **“Proceed”**. The date can be retroactively-dated or future-dated. Remember that you cannot inactivate a position during a time period when it was filled with an employee. The effective date *must* be entered in the following format: MM/DD/YEAR.

TIP: Consider the best effective date to inactivate the position

- If a position has been vacant since the start of the school year, enter retroactive effective date 07/01/2023 to align with the fiscal year.
- If a position has been filled and recently became vacant, check the Incumbent History of the position to see when the position was vacated. Then, enter the day after the position became vacant as the effective date.



TIP: Once you're on this screen, you cannot save your work and come back.

Once an effective date has been selected, you will be taken to a page allowing you to make changes to the position:

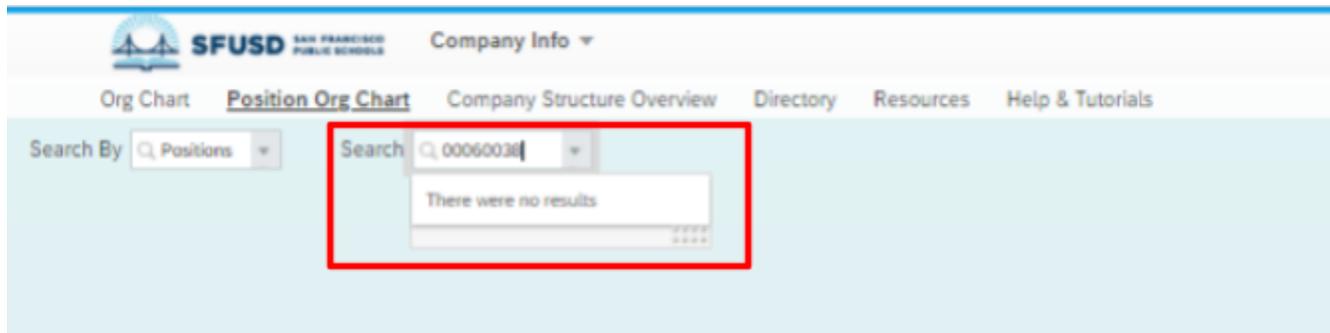
- **Start Date:** The effective date that the position should be inactivated. Can be retroactively-dated or future-dated. Remember that you cannot inactivate a position during a time period when it was filled with an employee. The start date *must* be entered in the following format: MM/DD/YEAR.
- **Status:** Select **“Inactive”** in the drop-down
- **Position Action Reason:** Select **“Inactivate Position (INA)”** in the drop-down

Once finished, click **Save** in the bottom right corner.

Request Process & Visibility

Because the position is already vacant, **no approval from Budget or HR is needed**. The Budget Office will receive a notification that you have inactivated the position. We recommend reaching out to your Budget Analyst to notify them if a Budget Transfer Request will accompany the position inactivation as well.

By default, Inactive positions will be hidden from the Position Org Chart and search results. If you made a note of the position number earlier, you can confirm a position is inactivated by searching for it again. On the **Position Org Chart**, click on the “**Search By**” dropdown box and select “**Positions**”. Then click on the Search box to the right and type in the position number that you’d like to find. The inactive position will not be found in the search results..

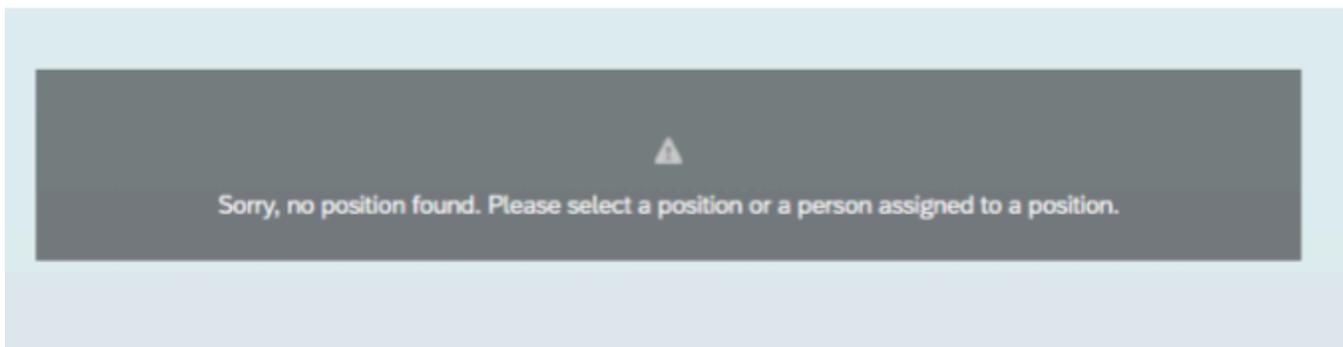


Position:

- * Position Number 00060038
- * Status Inactive
- * Start Date 02/09/2021

- * Position Action Reason Inactivate Position (INA)
- To be Hired Yes

Position Details



To view inactive positions, click the Eyeball icon in the top right corner of the Position Org Chart for Display Options. Check the “Show inactive positions” box. The Position Org Chart results will refresh and inactive positions will appear with a **diamond icon**. When searching, inactive positions will then show up in search results. Once you no longer want to view Inactive positions, uncheck the “Show inactive positions” box.

Position Org Chart Company Structure Overview Directory

People Search Search Org Chart Up One Level Today 100% + 

00019703
Principal High School
Principal, High School (...
Certificated (CERT)
June Jordan School for ...
June Jordan Schools fo...

 Amanda Chui

1 / 1 FTE

43 Positions Below

Display Options ×

Show

Child Positions

Matrix Positions

Show inactive positions

<p> 10000761 Sped Ia Sh -All Im... Sped Ia Sh -All Im... 0 / 0.75 FTE</p>	<p>00021232  Armon Saleh-Kasmai Regular Classroom... Regular Classroom... 1 / 1 FTE</p>
<p> 10002528 Regular Classroom... Regular Classroom... 0 / 0.8 FTE</p>	<p> 00021234 Regular Classroom... Regular Classroom... 0 / 0.8 FTE</p>
<p> 10003330 Regular Classroom... Regular Classroom... 0 / 1 FTE</p>	<p>00021235  Terrance Amsler Regular Classroom... Regular Classroom... 1 / 1 FTE</p>
<p> 10003374 Regular Classroom... Regular Classroom... 0 / 0.3 FTE</p>	<p>00021237  Crystal Proctor Regular Classroom... Regular Classroom... 1 / 1 FTE</p>
<p>10003417  Carlos Herrera Mahoney Literacy Coach - TSA Literacy Coach - T... 1 / 1 FTE</p>	<p> 00021370 Sp/Ed. IA Non-Sev ... Sp/Ed. IA Non-Sev ... 0 / 0.75 FTE</p>

View or Withdraw Pending Requests

Pending Requests Tile

In this section, you'll learn how to view your pending position action requests waiting for approval. You can also withdraw pending requests you'd like to cancel.

View the status of your Position Action Requests:

- Click on the **Pending Request** tile at the bottom of the homepage.
- **Requests Waiting for My Approval** (on the left):
 - Shows requests that are waiting for your approval as a Supervisor
 - May shows requests that have been “sent back” by Budget or HR. These requests need to be:
 - Edited and re-submitted
 - Withdrawn (aka cancel)
- **My Requests Waiting for Approval** (on the right):
 - Shows requests pending approval. Will display “*Currently with ___ Team*” so that you know who is currently reviewing the request.
 - May shows requests that have been “sent back” by Budget or HR. These requests need to be:
 - Edited and re-submitted
 - Withdrawn (aka cancel)



61

Direct Reports
(61 total)



61

Reports (61 Direct)

My Specialty

Admin Favorites

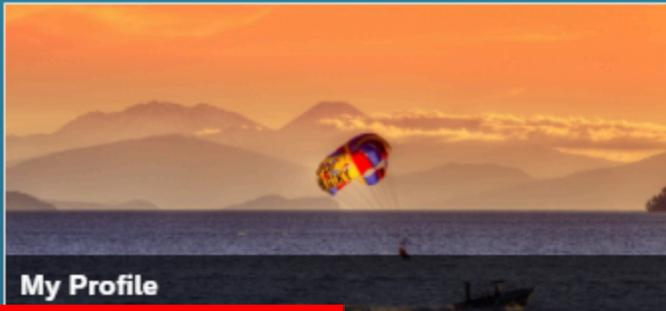


Time and Attendance

Manage Pending Hire



My Info



My Profile

Quick Links



Pending Requests



Back to: Home Page

Pending Requests

Requests Waiting for My Approval

There are no workflow requests

My Requests Waiting for Approval

 [Create Position \(Regular Classroom Teacher\) - effective 01/01/2022](#)
Initiated on 12/14/2021 (Currently with Budget Team)

Requests Still In Progress that I Approved

There are no workflow requests

My Notifications Last Month

There are no workflow requests

Withdraw Requests

Learn how to “withdraw” position action requests that have been sent back by the Budget or HR Approver and are no longer needed To cancel them, please click on each request and “withdraw it.”

Withdraw “Sent back” Position Action Requests:

- Look for any requests that have been “sent back” on either the left or right side.
- Click on the blue hyperlink of each request
- Scroll down to the bottom and click “Withdraw”

Pending Requests

Requests Waiting for My Approval

 [Change Position \(Inst. Aide Elem Basic: Spanish\) - effective 08/17/2023](#)
Initiated by Ellen Tieu on 04/26/2023

 [Create Position \(Eld Classroom Teacher\) - effective 08/10/2023](#)
Initiated by Salwa A. Zaki on 05/15/2023

 [Change Position \(Sped Ia Sh -All Impair\) - effective 08/07/2023](#)
Initiated by Ellen Tieu on 05/18/2023

My Requests Waiting for Approval

 [Change Position \(Com Rel Sp Elem Advr: Spanish\) - effective 10/12/2022](#)
Initiated on 11/04/2022 (Currently with Budget Team)

 [Change Position \(Regular Classroom Teacher\) - effective 08/17/2022](#)
Sent back by Jennifer Schuster on 11/22/2022

 [Change Position \(Regular Classroom Teacher\) - effective 08/12/2022](#)
Sent back by Jennifer Schuster on 11/22/2022

▼ Funding Source

Org 1 *	SACS Code 1 *	FTE 1 *	FTE % 1
507 236	01-00000-1110-1000-1101-507  01-00000-1110-1000-1150-236	1	100
Org 2	SACS Code 2	FTE 2	FTE % 2
Org 3	SACS Code 3	FTE 3	FTE % 3
Org 4	SACS Code 4	FTE 4	FTE % 4

Resubmit

Update

Withdraw

Spring Budget Development Early Position Creation Process

Process for Creating New Positions

Spring Budget Development begins in February-March, where school sites and Central Offices begin planning their positions for the following fiscal year. In this section, you'll learn how and when to expect those new positions to be created. **Please do not submit any position actions in EC for the following fiscal year unless instructed to do so by your Budget Analyst.** This could potentially result in duplicate position actions.

If a new position is needed by late Spring, then no further action is necessary. Positions will be automatically mass uploaded by the Budget Office and will appear on the Position Org Chart in late Spring.

New Positions Needed BEFORE the Mass Upload Process:

- New positions must be budgeted on the Spring Budget Template.
- Budget Analysts will check that no similar positions are being inactivated that could be funded instead. You can change the SFE Classification of an existing position if needed
- Budget Template must be balanced, submitted, and reviewed for accuracy by the Budget Team
- If new position is needed early, please email a justification and demonstration of urgency to your Budget Analyst (who will get approval from Budget Management Leadership)
- Budget Analyst to confirm that future SACS Code exists in current year budget. If not, Budget Analyst will need to fill in Goal - Function and load penny line in current year budget
- Budget Analyst will provide instructions to the Supervisor / Budget Manager on how to submit a position action to create positions from the EC Position Org Chart
- Budget Analyst will confirm with the Supervisor:

- Enter the position details from the Budget Template
- Effective start date that aligns with a pay period (It will NOT be 7/1)
- Position Action Reason: Spring Budget Development (ANN)
- SACS Code: Full SACS Code
- Supervisor / Budget Manager will submit a position action to create positions from the EC Position Org Chart
- Budget Analyst (and HR if needed) will approve the position action request
- Budget Analyst will add the actual position number to Budget Template in the Position Number column
- Then, Supervisor can submit a Job Requisition for Hire

Initiate Employee Transfer

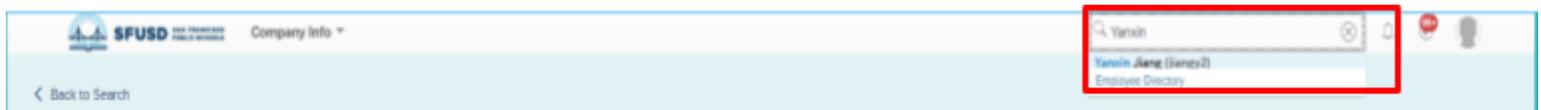
Overview

In this section, you'll be able to answer the following question:

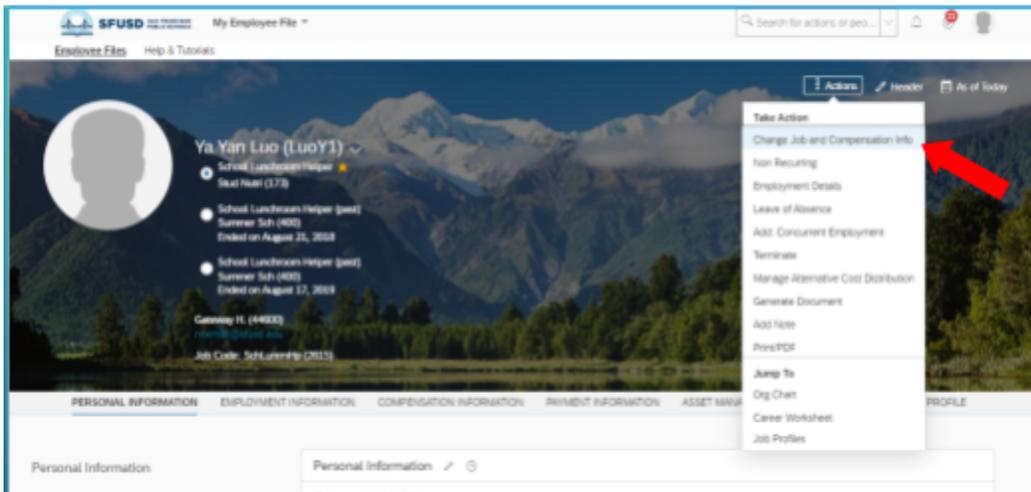
- How do I initiate an Employee Transfer from one position to another?

To start the process of an employee transfer

- Navigate to the search tool on the home page. Enter the name of the employee.
- Click on the name whose transfer has to be done



- Once the employee's record is displayed, click on **Actions** icon in right hand corner
- Click on **Change job and compensation info** from the **Actions** dropdown menu



On the screen you will need to:

- Select the checkbox next to **Job Information**
- Enter a date in the **Changes to take effect** date box
- Select **Transfer** from the **Event** dropdown box
 - Select the appropriate reason from the **Event Reason** dropdown

Change Job and Compensation Info

Choose what you want to change

Job Information
Change employer's job data, time information, and other information.

Job Relationships
Specify the employer's HR business partner, legal advisors, and others besides the primary manager.

Compensation Information
Change the salary, bonus, eligibility for benefits, and other information.

When would you like your changes to take effect?

Jan 29, 2021

Event*

Transfer

Event Reason*

No Selection

Department Code (DPT)

Internal Hire (INTHIRE)

LayOff - Involuntary Layoff due (TRDEG)

LayOff - Involuntary Layoff due (TRDHO)

LayOff - Involuntary Layoff due (TRLOF)

LayOff - Involuntary Layoff due (TRLWQ)

Loc Transfer - Involuntary (TRI)

Position*

School Lunchroom H...

Position Entry Date

Supervisor

Edgar Jose Garcia, Sch Lunchroom Area Supervisor, Mu...

Business Unit

Central Office (CENTRAL)

Division

Policy & Operations (003)

Department

Stud Nutri (173)

Primary Location

Gateway H. (44600)

Secondary Location 2

Secondary Location 3

Secondary Location 4

Secondary Location 5

Cancel Save

- Enter the new position the employee is to be assigned to

Position Information

Incumbent of Parent Position

No Selection

Position*

School Lunchroom H...

Position Entry Date

Supervisor

Edgar Jose Garcia, Sch Lunchroom Area Supervisor, Mu...

- After selecting the position, data will be auto populated into the necessary fields
- Click on the **Show More** button to see more fields

Show 17 more fields

Job Information

Job Classification	Job Title	Pay Scale Level Entry Date	Employee Class	FLSA Status
SchLunrMhp (2615)	School Lunchroom Helper	MMM/dtd, yyyy	Classified	No FLSA Required
Standard Weekly Hours	FTE*	Regular/Temporary*	Is Fulltime Employee*	Employee Type*
27.5	0.6875	Regular	No	Classified
Employment Type*	Appointment Type	Tenure/ Permanent Status	Calendar Code	Union Code
CSC-Civil Service	PCS (Permanent Civil Service)	No Selection	SchoolTerm - Student Nutrition (5)	SEIU 1021
Sub Eligible Flag	SFE Classification	Is Consolidated	Probation Period Start	Probationary Period End Date
No	No Selection	No	Nov 02, 2016	MMM/dtd, yyyy
Pay Scale Type	Pay Scale Area	Pay Scale Group		
SEIU - CLASSIFIED 7.5% Employee RETIREMENT Pickup (USA/SEIU-CLA)	2615 SNS Worker (USA/2615)	280-CLA (USA/2615/SEIU-CLA/280-CLA)		

- Click save to confirm the request
- The transfer information will be sent to the Supervisor (Approver 1) for approval

Please confirm your request

Submitting Loc Transfer- Voluntary request for Oriia O'Keeffe.

Enter your comment here

[Hide workflow participants](#)

Approvers

1 Cadi A. Poite
Director

CC

Shyama Krishnan Testing Admin

[Cancel](#) [Confirm](#)

After the position is sent to the Approver, they will see the request in their Approve Requests tile.

The screenshot shows the SFUSD dashboard with a 'To-Do' section. The 'Approve Requests' tile is highlighted with a red box and shows '1 Request'. To its right is a 'Take Courses' tile showing '11 Courses Due Anytime'. An 'Approve Requests' modal is open, displaying a request for 'Loc Transfer- Voluntary for Oriia O'Keeffe' initiated by Yanxin Jiang on March 3, 2021, effective on March 2, 2021. The modal includes an 'Approve' button and a 'Go to Workflow Requests' button.

The approver will then click on the **Go to Workflow Requests** button to see workflow details

The Change Job action for Orla O'Keeffe has been approved Inbox x

 **Cadi A. Poile** <system@successfactors.com>
to me ▾



 Reply  Forward

There is also a record of the change history that you can check to see when other changes have been made.

Change History	Job Information Changes
Mar 02, 2021	Last updated by CPI API Admin (admincpi) on Wednesday, March 3, 2021 3:10:42 PM PST
Other	Effective as of: Mar 02, 2021
Division Facilities (016) Policy & Operations (002)	Employee Status Employee Status Active
Department Custodial (341) Rel & Plan (012)	Event Event Data Change
Primary Location 135 Van Ne (10104) 555 Frankl (01200)	Event Reason Other (OTHDTA)
SACS Code 1 01-00000-0000-8200-2301-341 01-00000-0000-7200-2301-012	Position Information Incumbent of Parent - Position Manager I (00001341) Deputy Director (00025087)
FTE % 1 100 88.7	Position Entry Date Mar 02, 2021
SACS Code 2 01-07940-0000-7200-2301-012	Supervisor Cadi A. Poile, Director, 135 Van Ne Myonghoon Leigh, Deputy Superintendent, 555 Frankl
FTE % 2 14.3	Organization Information Company SFUSD (SF1)
<input type="button" value="Insert New Record"/>	<input type="button" value="View Approval History"/> <input type="button" value="Delete"/> <input type="button" value="Edit"/>

Reference List

Manage Employee Data

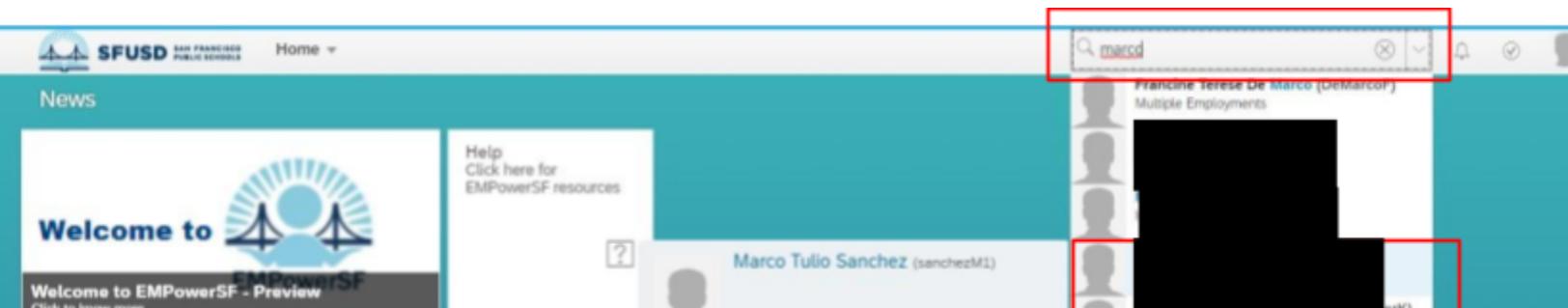
Overview

In this section, you'll be able to answer the following questions:

- How do I execute a voluntary or involuntary termination?

Steps to Termination

To begin the process of executing a voluntary or involuntary termination you'll first want to search for the employee. This is done by searching for the employee in the search section. Once you begin to type the employee who will be terminated, you'll see their name display below the search field.



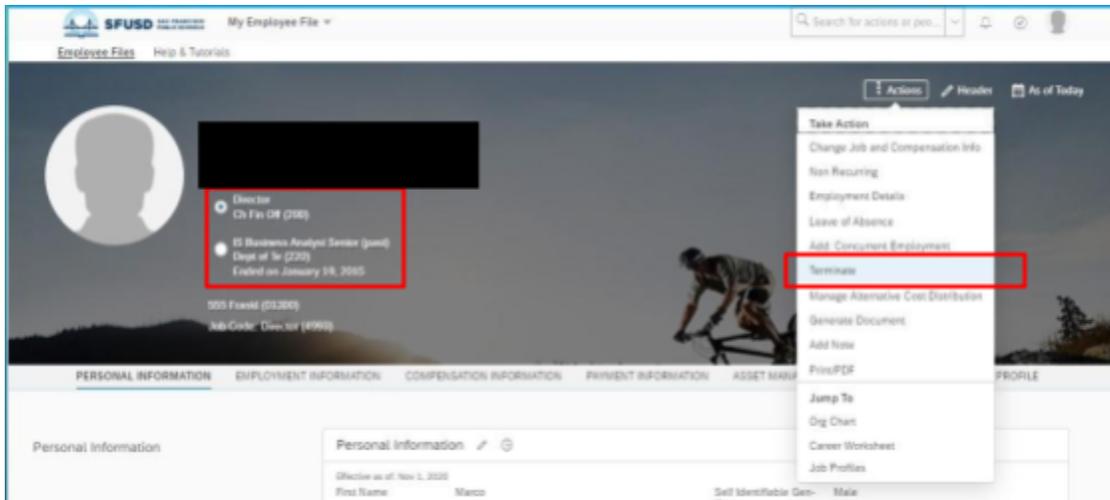
There are 2 scenarios for Termination:

- **Scenario 1:** Terminating one assignment for an employee with multiple assignments (more than 2), also known as **Concurrent Assignments**
- **Scenario 2:** Employee with direct reports the question around what to do with supervisors

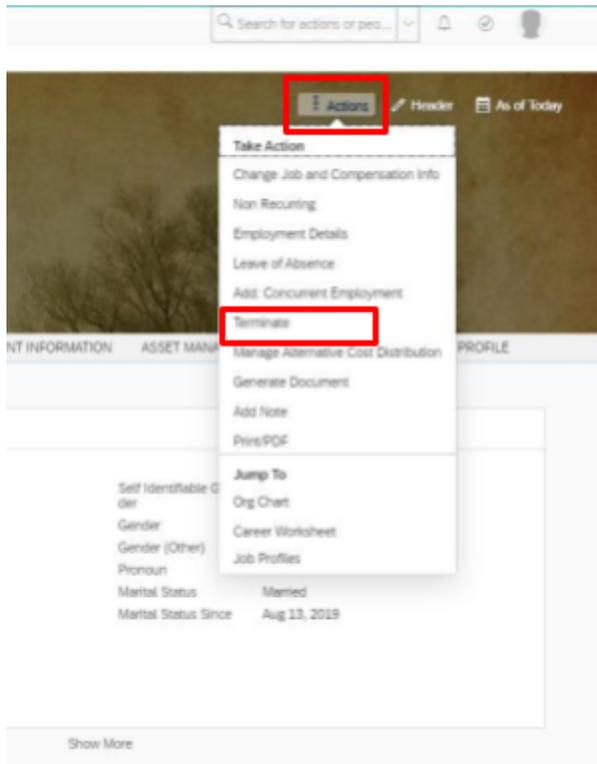
Scenario 1:

For employees who are in concurrent assignments, on the left hand of the page, there are two white dots. Here you will have the option to switch between assignments and select the assignment that needs to be terminated.

Once you have identified the assignment that you would like to terminate, select **terminate** under the action button, which is located on the right side of the screen.



To execute a termination, you'll need to go to the employee profile page. By clicking the Actions text, you'll see a variety of actions you can take via the dropdown menu. You'll want to select Terminate to begin the termination process. This will allow you to open the termination requisition, and to also modify an approved termination requisition.



The next step is to include termination details. On this page you'll be able to share the termination date, termination reason, as well as indicate if they are 'ok' to be rehired. For employees who are supervisors with direct reports, there will be an additional field visible.

Terminate

Terminate	Termination Date*	Termination Reason*	OK to Rehire*	Last Date Worked*
	<input type="text" value="MM dd, yyyy"/>	<input type="text" value="No Selection"/>	<input type="text" value="No"/>	<input type="text" value="MM dd, yyyy"/>

Notes

Attachment



No attachments uploaded

Drop files to upload, or use the "Upload" button.

Upload

Certificate Provided?

If the employee is a supervisor with direct reports:

- There is an option that appears to move direct reports to another position.

- If selected, the position becomes vacant and the position can be inactivated.
- **If missed, the position cannot be inactivated even when vacant.** The direct reports would then need to be reassigned to a new supervisor manually

TRANSFERRING DIRECT REPORTS IS VERY IMPORTANT!

Transfer Direct Reports
Who should the 154 direct report(s) of Tami Mari Benau report to after the termination?
Everyone according to position hierarchy

Terminate
Transfer Event Reason*
No Selection

Transfer Job Relationships
Who should the job relationship reports of Tami Mari Benau report to after his/her termination?
Everyone to upper manager Billy W. Sanderson

Cancel Save

Once you have completed all of the necessary termination fields, select **Save** at the bottom right hand corner for the screen. Once you have done that, an email notification will be sent to the employee.

Terminate

Termination Date* [MMM dd, yyyy] Termination Reason* No Selection OK to Rehire* No Last Date Worked* [MMM dd, yyyy]

Notes

Attachment Upload

No attachments uploaded
Drop files to upload, or use the "Upload" button.

Certificate Required?

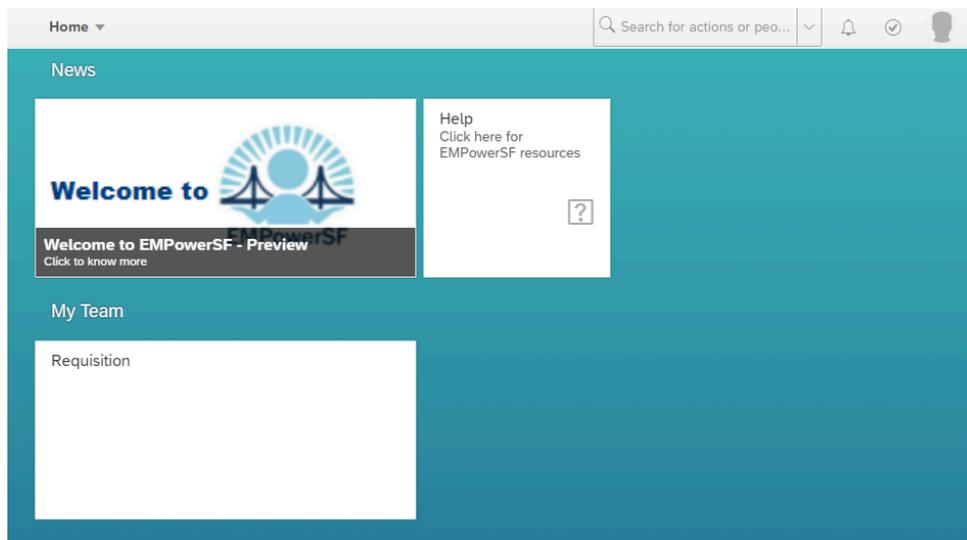
Cancel Save

Leave of Absence/AWOL

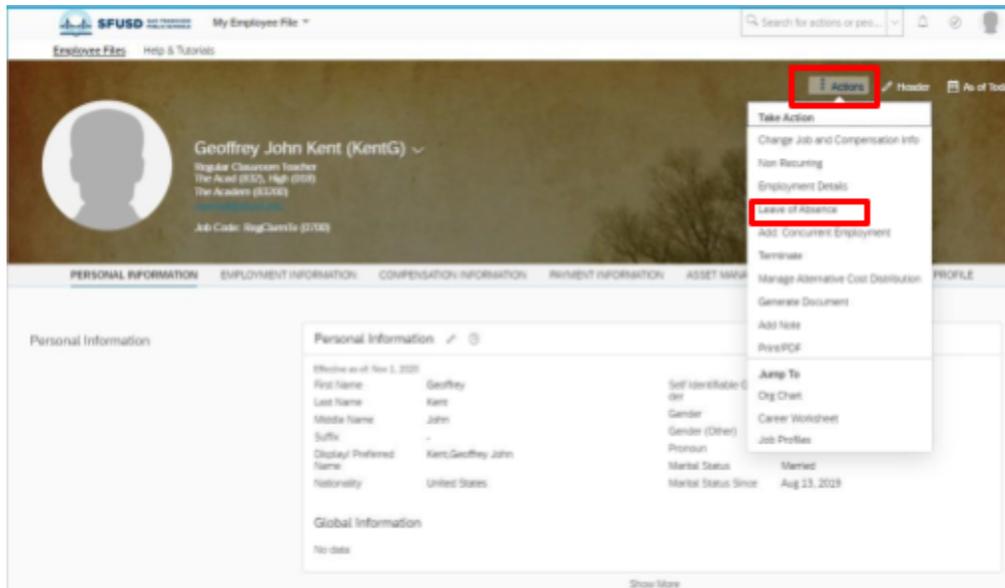
Entering a Leave on Behalf of another Employee in Employee Central

Once the leave is approved in WFS. The leave must be entered in EC (this drives the payment and employee status)

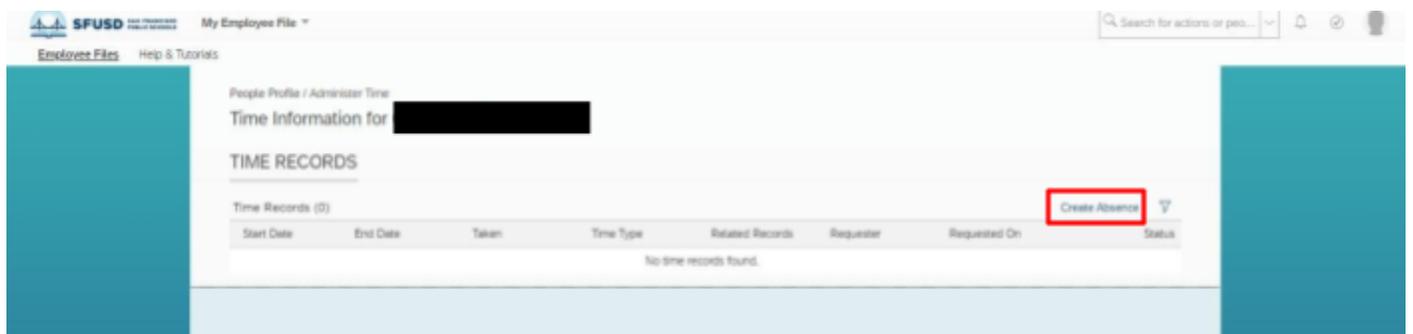
Access the EMPowerSF system using your SFUSD login credentials. Once you are authenticated, the home screen landing page will populate. Select **Employee Files** from the Home page dropdown menu. **Search for the employee** who is going on leave.



Click on the **Actions** button located in the upper right hand corner. Select **Leave of Absence** from the dropdown menu.



Click on the **Create Absence** link



Enter the details:

- Time type
- Start date
- Expected return date
- Comments

Click Submit.

(* The **expected return date** is mandatory. Any extension to the date will need to be updated

Time Type

Start Date* Expected Return Date* Actual Return Date

Requesting

Comment

Position Management & Backfills for *Sabbatical* Leaves

Employee Going on Sabbatical Leave

If an employee goes on **sabbatical leave**, the **HR Staffing Team** will move them out of their original **position** and into a **designated shared position** that is funded and supervised by HR. The HR Staffing Team will work with the Supervisor of the employee on leave to submit a job requisition to hire a backfill into the now vacant original position if needed.

Hiring a Temporary Backfill for a Sabbatical Leave

The **Supervisor of the employee on sabbatical leave** should work with their **HR Staffing Team** to **backfill** the original vacant position by submitting a job requisition to hire another employee.

Position Management & Backfills for *Non-Sabbatical* Leaves

Employee Going on Non-Sabbatical Leave

When an employee goes on **non-sabbatical leave**, the **HR Staffing Team** will work with the employee's Supervisor to discuss options for coverage. If hiring a temporary backfill employee is needed, the **HR Staffing Team** will connect with the assigned **Budget Analyst**.

If hiring a temporary backfill employee is needed, the assigned **Budget Analyst** will oversee the creation of a new **“Temporary Leaves Position”** that is identical to the position of the employee on leave, except that it will be funded by Leaves Org 236. The new position will retain the original Supervisor, Location, etc.

The **HR Staffing Team** will **transfer the employee on leave into the new “Temporary Leaves Position.”** This position will remain visible on the Supervisor’s Position Org Chart and the Supervisor will continue reviewing and approving the timesheets of the employee on leave.

Hiring a Temporary Backfill for a Non-Sabbatical Leave

The **Supervisor of the employee on non-sabbatical leave** should work with their **HR Staffing Team** to **backfill the now vacant original position** by submitting a job requisition to hire a temporary backfill employee.

Validating an Employee’s Leave

The Expected Return date will validate when the employee is supposed to return from Leave of absence.

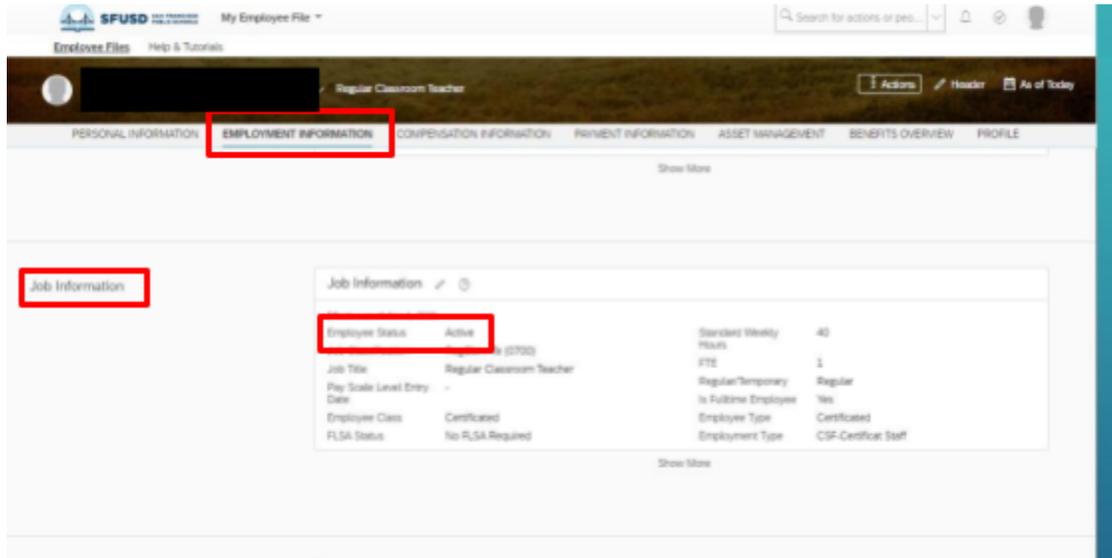
- You can use the expected return date entered in EMpower System or WFS to validate if the employee has returned and if any position is active after the expected date or a report by using:
 - EMpower System: Job Information Without Position, Job Information With Position, Employment Information reports
 - WFS: Current Cases, Employees Due to Return to Work, Employees Overdue to Return to Work reports



Navigate to Employment Information

- Select **Employment Information**
- Find the Job Information section

- The employee will be assigned to Active employee status, since they return back to work.
- If the employee is still on a leave of absence, the status will be either inactive or active based on the type of leave



- Report to validate if the employee has not returned to work to the budget team

Returning an Employee from Leave

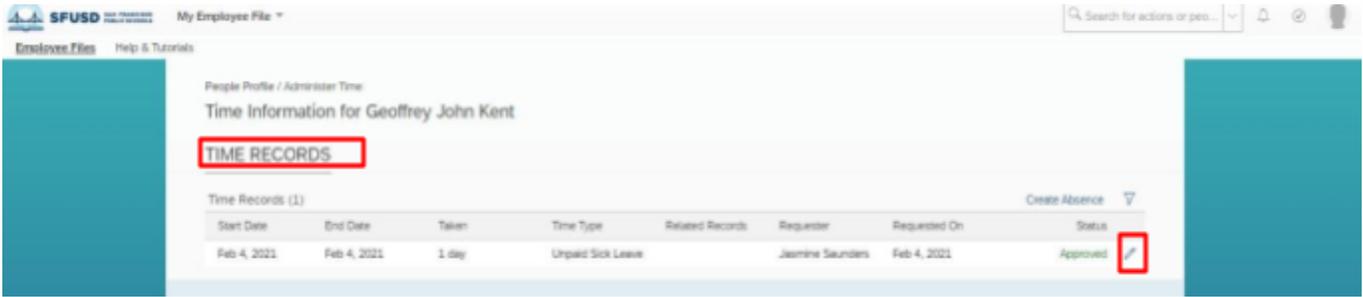
Updating a leave of absence

Click on the **Actions** button located in the right hand corner of the employee profile page

Click on **Leave of Absence**

Click on the existing time record for the current leave of absence

Select the **pencil** icon to edit the time record



Update the following fields:

- **Actual Return Date** (enter the date when the employee is returning back to work)
- Comments

Click on the Submit button

The 'Edit Absence' form contains the following fields:

- Time Type: Unpaid Sick Leave
- Start Date: Feb 04, 2021
- Expected Return Date: Feb 05, 2021
- Actual Return Date: MM/DD/YY (highlighted with a red box)
- Requesting: 1 day
- Comment: (empty text area)

At the bottom right, there are three buttons: 'Submit' (highlighted with a red box), 'Cancel Absence', and 'Cancel'.

Returning from Leave: Position Management & Backfills for *Sabbatical* Leaves

End the Temporary Backfill's Assignment to the Original Position

When an employee returns from **sabbatical leave**, their **original position must be vacant**. If a temporary backfill employee was hired into that position, then the **HR Staffing Team** must take one of the following steps:

1. Transfer the temporary backfill out of the position
2. Terminate the temporary backfill's assignment in the position

3. Determine if the **Supervisor** wants to fund an additional position to transfer the temporary backfill into. If this is the case, the assigned **Budget Analyst** can help ensure that an additional position is budgeted

Employee Returning from Sabbatical Leave

The **HR Staffing Team** will then move the employee returning from leave back into their vacant **original position** and out of the designated shared position that is funded and supervised by HR.

Returning From Leave: Position Management & Backfills for *Non-Sabbatical* Leaves

End the Temporary Backfill's Assignment to the Original Position

When an employee returns from **non-sabbatical leave**, their **original position must be vacant**. If a temporary backfill employee was hired into that position, then the **HR Staffing Team** must take one of the following steps:

1. Terminate the temporary backfill's assignment in the position
2. Transfer the temporary backfill out of the position to cover another vacant, budgeted position
3. Determine if the **Supervisor** wants to fund an additional position at their site to transfer the temporary backfill into. If this is the case, the assigned **Budget Analyst** can help determine if there is available budget to create a new position

Employee Returning from Non-Sabbatical Leave is Transferred Back into Original Position

The **HR Staffing Team** will then move the employee returning from leave back into their vacant **original position** and out of the "Temporary Leaves Position" that is funded by Leaves Org 236.

Inactivate the "Temporary Leave Position"

The **HR Staffing Team** will contact the assigned **Budget Analyst** to inform them that the temporary leave position funded by Org 236 is now vacant and ready to be inactivated. **Budget Analyst** will inactivate the position.

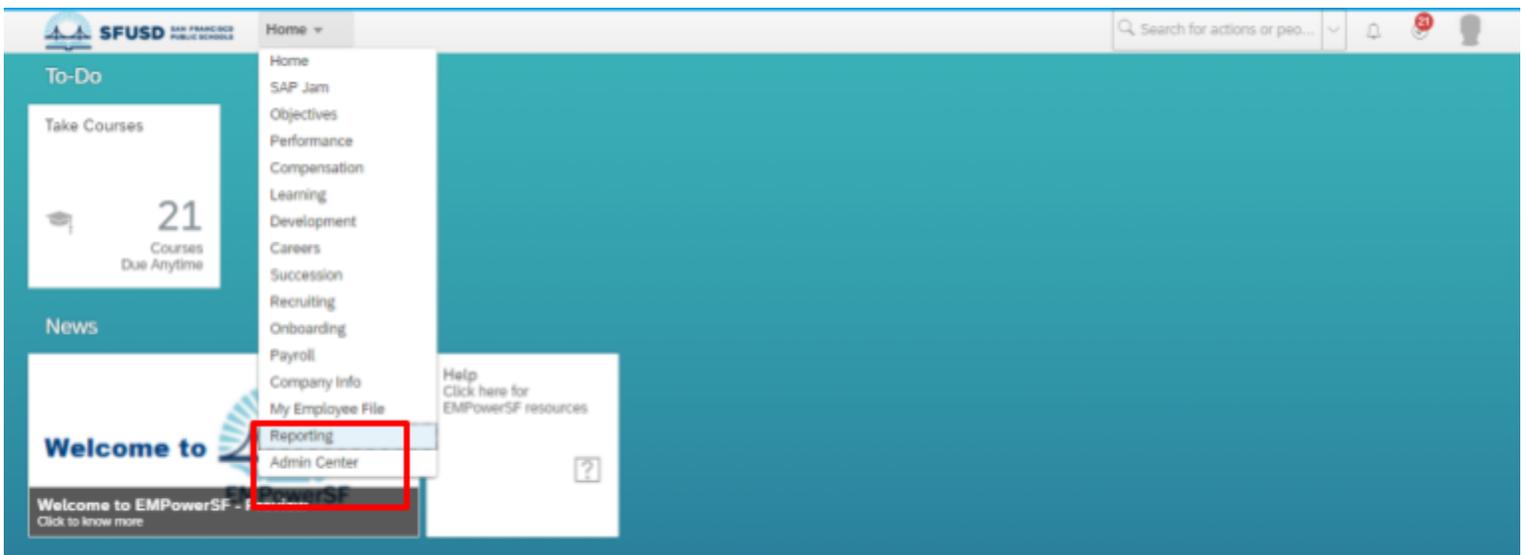
Employee Data Reports

Overview

Reports remain accessible to managers using PERCii.

Accessing Standard Reports

Start by selecting **Reporting** from the Home Page dropdown menu.



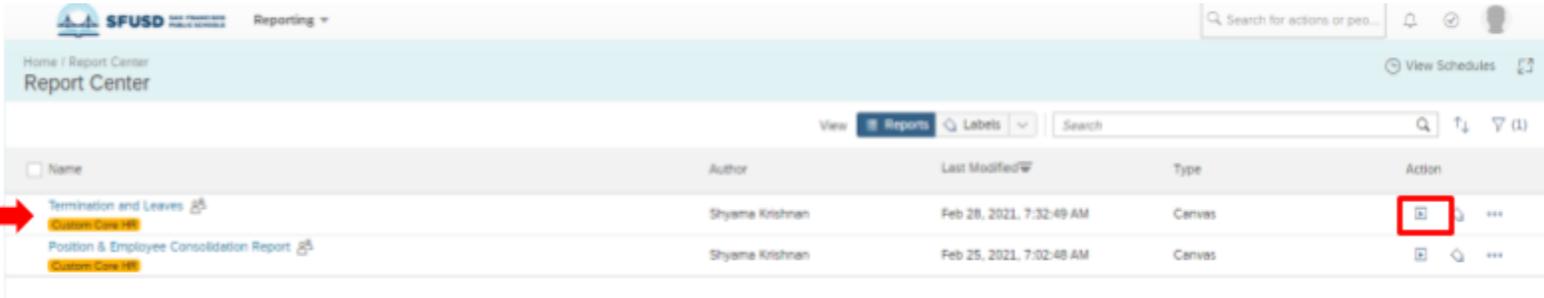
Standard reports can be accessed via the Report Center. Reports help you quickly find information on common HCM statistics. Table reports are available if users want to view a portion of a report or combine reports. Users can export reports in CSV, Excel, PDF, or PowerPoint format.

A screenshot of the SFUSD Report Center interface. The page title is 'Report Center' and it includes a search bar and navigation links. Below the navigation, there is a table listing various reports. The table has columns for Name, Author, Last Modified, Type, and Action. The reports listed are: Employment Changes, Termination, Applicant Report_Raj_22Jan2021, and Candidate Profile - Common Legal Questions. The 'Applicant Report_Raj_22Jan2021' report is highlighted with a yellow background.

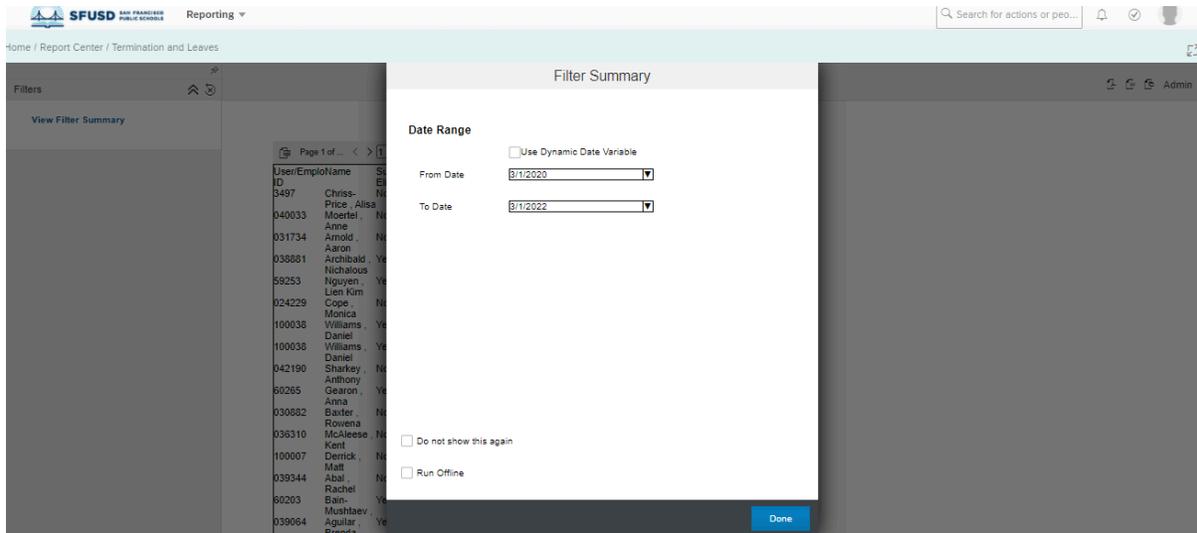
Name	Author	Last Modified	Type	Action
Employment Changes	Yanxin Jiang	Feb 2, 2021, 10:27:09 AM	Table	View Download More
Termination	Shyama Krishnan	Jan 25, 2021, 2:41:03 AM	Table	View Download More
Applicant Report_Raj_22Jan2021	Rajasekar Thangaraj	Jan 22, 2021, 6:24:35 PM	Table	View Download More
Candidate Profile - Common Legal Questions	Shabareesh K	Jan 22, 2021, 1:50:43 AM	Table	View Download More

To show you an example of how to pull a report, we will pull a Termination and Leaves Report. This process can be repeated for any report that you'd like to pull.

In the Report Center, select the **Termination and Leaves Report**



You can run the report online immediately or run offline. Enter the dates for the report.



The report is generated immediately. You can download it into CSV, Excel, PDF, or PowerPoint. Click **Save** then **Done** and the Termination / Leaves report will appear.

Reporting

Search for actions or peo...

Home / Report Center / Termination and Leaves

Termination and Leaves - Page #1

admin

View Filter Summary

ID	EmpName	Sub Eligible	Job Title	Event Date	Location	FTE	Standard Weekly	AppointmType	Event
0497	Chris Price	No	Senior Clerk Typist	1/5/2021	50701	1	40.00	PCS	Leave of (Permanent)Absence
040033	Moorel Anne	No	Public Information	2/22/2021	99900-ADJ1 Work Loc		40.00	PEX	Leave of (Permanent)Absence
031734	Aaron Arnold	No	Senior Clerk Typist	2/09/2021	09003- VSPJ and	1	40.00	PCS	Leave of (Permanent)Absence
030881	Archibald Nicholas	Yes	Principal High	3/1/2021	75700- June Jorda	1	40		Leave of Absence
09253	Nguyen Lien Kim	Yes	Child Develop-	3/13/2021	91000- Leola M. H	0.375	15.00	PARAPER	Termination
024229	Cope Monica	No	Teacher Special	1/5/2021	17400-CA1 and SA	1	40		Leave of Absence
100038	Williams Daniel	Yes	Bilingual Classroom	2/14/2021	43100- Aptos M.S	0.7	28		Leave of Absence
100038	Williams Daniel	Yes	Bilingual Classroom	2/25/2021	43100- Aptos M.S	0.7	28		Leave of Absence
042190	Shakley Anthony	No	Electrician	2/8/2021	24100- Bldg & Gr	1	40.00	PCS	Leave of (Permanent)Absence
00265	Geason Anna	Yes	Specialized Phys	3/2/2021	81000- Sanchez EI	0.6875	27.50	PARAPER	Termination
030882	Baxter Rowena	No	Lead SNS Worker	3/1/2021	76400- Philp &	1	40.00	PCS	Leave of (Permanent)Absence
036310	McAleese Kent	No	S10B Bus ParaEducat	2/15/2021	35000- Special Ed	0.875	35.00	PARAPER	Leave of Absence
100007	Demick Matt	No	S10B Bus ParaEducat	2/3/2021	35000- Special Ed	0.875	35.00	PARAPER	Termination
030344	Abal Rachel	No	Speech Therapist	2/09/2021	35000- Special Ed	1	40		Leave of Absence
00203	Bain-Mushbaty Agular	Yes	Sped Ia Sh -All Impair	3/6/2021	77000- Presidio M	0.75	30.00	PARAPER	Termination
039064	Brenda	Yes	Mid/Moderat RS-SOC	1/19/2021	57500- Glen1 Park		40.00		Leave of Absence

You can schedule the report by selecting Run Offline. Click the Export to Excel button in the upper left corner to run the report.

Click **CSV** from drop down box

Filter Summary

Date Range

Use Dynamic Date Variable

From Date: 2/1/2022

To Date: 2/1/2022

Run Offline CSV XLSX XLS

Done

The report is scheduled.

Report Center

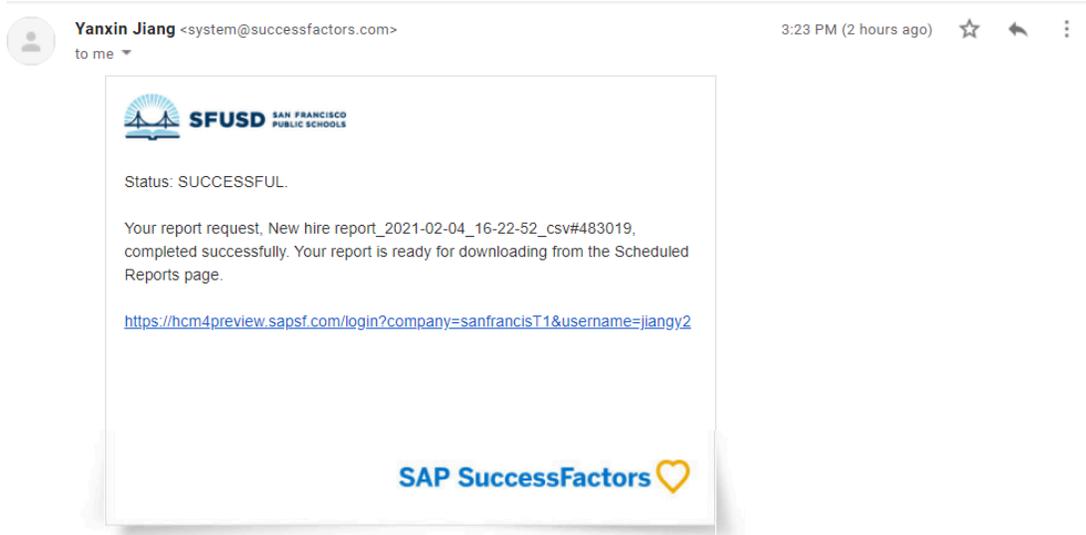
Termination and Leaves - Page #1 is successfully scheduled. You can find it in [View Schedules](#).

Close

You are now able to view all of your scheduled reports

Name	User	Frequency	Status	Last Run	Date
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline		Waiting
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 6:02:17 PM	Completed
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:57:09 PM	Completed
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:52:46 PM	Completed
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:51:43 PM	Completed
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:50:48 PM	Completed
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 3:45:25 PM	Completed
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 3:44:37 PM	Completed
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 3:31:27 PM	Completed
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Feb 25, 2021, 8:02:20 PM	Completed

You will get an email notification once the scheduled report is ready to download.



You can download the report from your schedule reports view, once it is available.

The screenshot shows the SFUSD Reporting interface. The page title is "View Schedules". Below the title, there are tabs for "My Schedules" and "My Jobs". A search bar is present with the text "Search by Job Name". The main content is a table with the following columns: Title, Author, Occurrence, Destination, Start Date/T, Cells, Impact of Guardrail, and Status. The first row is highlighted with a red box. A red arrow points to the "Download" icon in the actions column of the second row.

Title	Author	Occurrence	Destination	Start Date/T	Cells	Impact of Guardrail	Status	Actions
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline				Waiting	
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 9:36:56 PM			Completed	Download
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 6:02:17 PM			Completed	Job Detail
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:57:09 PM			Completed	Cancel
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:52:46 PM			Completed	Edit
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:51:43 PM			Completed	
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 5:50:48 PM			Completed	
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 3:45:25 PM			Completed	
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 3:44:37 PM			Completed	
* Position & Employee Consolidation Report - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Mar 1, 2021, 3:31:27 PM			Completed	
* Termination and Leaves - Page #1 - Component 1	Yanxin Jiang	Once	Offline	Feb 25, 2021, 6:02:20 PM			Completed	

Proxy Settings: Delegating Manager Responsibilities

The Proxy Rights feature allows hiring managers to assign an employee to act as a proxy to perform various position management and managerial tasks on their behalf. The manager must first assign a designee as a proxy. The system allows two (2) proxies per site for the employee central module. The Proxy Rights feature is included in all of the modules of EMPowerSF except the Onboarding module.

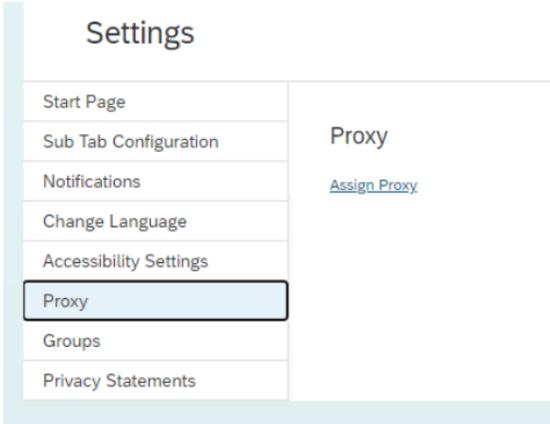
For someone to have Proxy Rights, the hiring manager must first assign the designee as a proxy. It is absolutely **CRITICAL** that managers monitor this closely. Proxies can make updates to position data fields without Budget or HR approval. Some of these fields are highly consequential.

The following are the steps to assign a proxy:

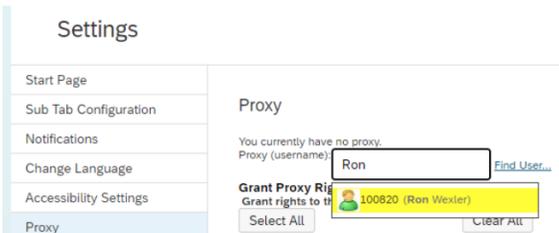
1. Click on the **User Account Navigation** icon located on the top right side of the screen.



2. Select **Settings** from the dropdown menu.
3. Select **Proxy** from the Setting menu. The Proxy menu will be displayed.



4. Click the **Assign Proxy** link. The Add Proxy screen will display.
5. Enter the name of the designee in the **"Find User"** search box.



6. Click the module that applies: **"Employee Central + Employee Profile"**.

Grant Proxy Rights:

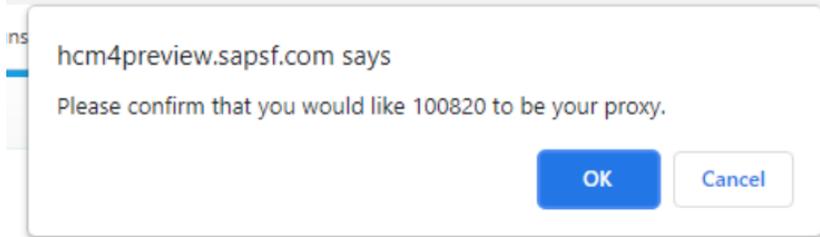
Grant rights to the following modules/tabs:

Total Goal Management Employee Central V2 + Employee Profile

Private Objectives Private Data For Proxy Account Holder

Career Development Planning

7. Click **Save**. The system will display a confirmation message.



8. Click **OK**. The system will display the name of the designee in the “Granted Proxy Rights” grid.
9. To end the proxy rights, click the red **X** (delete) next to the user’s name on the right side of the screen.

How-To Index: Process Guides
