ePRB Workflow Process: Instructions for HR Liaisons

Revised July 2023

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What is the PRB?

The Position Review Board (PRB) is a body that consists of the Chief Administrative Officer (CAO) and the Directors of the Office of Management and Budget (OMB) and the Office of Human Resources Management (OHRM). Collectively, they manage the County's human resources position complement in accordance with its legal, fiscal, and budgetary requirements and parameters. County positions in the Executive Branch (i.e., classified and exempt service positions) are subject to review and approval by the PRB. All positions, including creations, change/reallocations, and change/fast-track must be fully approved through the electronic PRB (ePRB) workflow process prior to advertisement and/or the hiring of candidates.

It is highly recommended that prior to beginning the recruitment process, the Agency Human Resources (HR) Liaison speaks with the assigned Talent Acquisition Analyst to discuss the job classification and position description development process.

How do I gain access to the SAP ePRB Workflow?

Anyone needing access to the SAP ePRB workflow must first take the online training that is in the LMS.

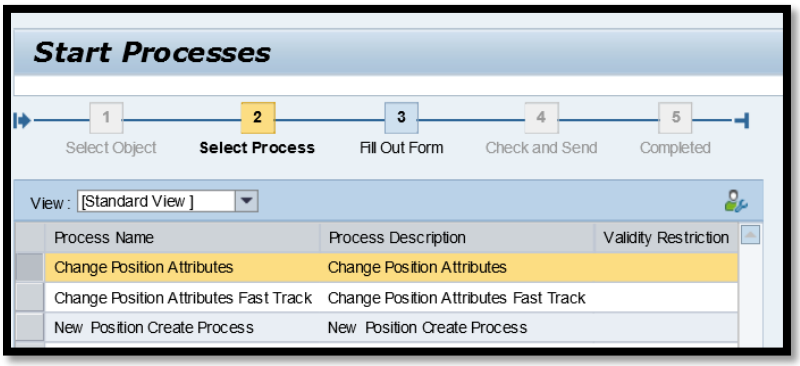
Learner Catalog - Standardized - ePRB Workflow Process Training - Session details (neogov.com)

Once the requester clicks "Enroll", a member of OHRM Talent Acquisition will grant you access. Once the training has been completed, the requestor must then follow the instructions at the end of the training to gain access. All access ePRB access requests must be submitted to OIT by way of a ticket from your agency IT Coordinator.

The ePRB Process Options

The ePRB process has three (3) options:

1. **Change Position Attributes** – Request for Upward and Downward reallocations;
2. **Change Position Attributes Fast Track** – Request to fill an existing vacancy at the same class of work/grade and same salary (or less) as the previous incumbent;



3. **New Position Create Process** – Request to create a new position that does not currently exist in SAP, including increases to position complement, vacancies that do not currently exist in SAP and new Temporary/Seasonal (1000 hour) and Limited Term Grant Funded (LTGF) positions.

From an end user perspective, both Change Position Attributes processes are the same. Follow the steps as outlined in the Change Position Attributes process taught during PRB training and included in this guide. The Fast Track process has a shorter workflow to assist with filling existing vacant positions with no classification changes more quickly. All three (3) options can be used to move a position to another organization unit during the request.

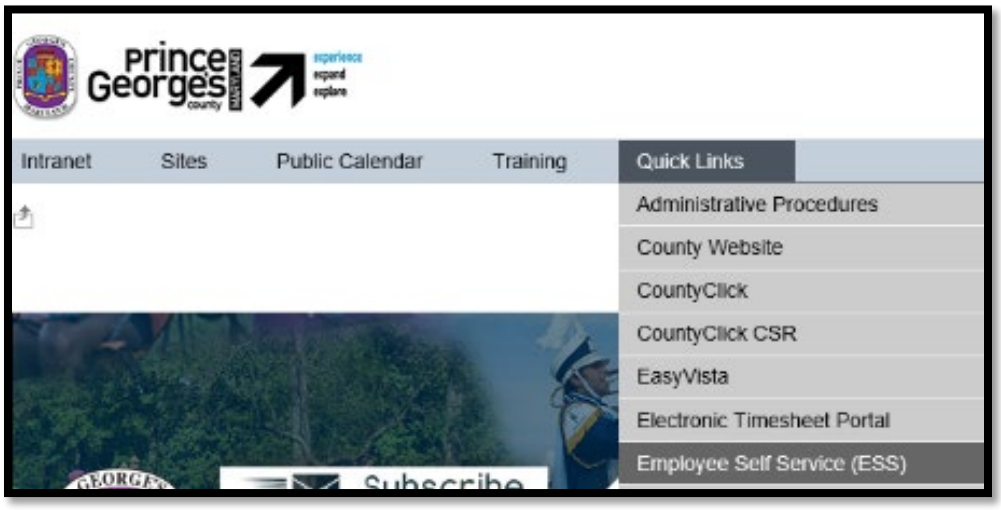
Required Documents

Transaction Type	Process	Route To	Documents to Attach to the ePRB Workflow	Additional Steps
A. CREATE POSITION **Add a new position to an agency or department, including new authorized positions at the beginning of each fiscal year)** **Includes creations of new 1000hrs, LTGFs and other temporary positions**	ePRB - Create	➢ OMB Analyst ➢ OMB Director ➢ OHRM REC Analyst ➢ OHRM REC Manager ➢ OHRM Director	▪ Position Description (544) ▪ Organizational Chart ▪ Position Action Form or Position Request Form ▪ Position Creation Justification Memo signed by Agency Director	▪ Check ePRB form data, including: • Organizational Unit and Cost Center are correct • Employee Group and Subgroup • Include notes on funding source (e.g. – "partially funded through lapse of position 12345")
B. REALLOCATION (upward / downward) **A reallocation is a reassignment of a position from one occupational class to another of a higher or lower grade.**	ePRB - Change	➢ OMB Analyst ➢ OMB Director ➢ OHRM REC Analyst ➢ OHRM REC Manager ➢ OHRM Director	▪ Updated Position Description (544) ▪ Organizational Chart ▪ Position Action Form or Position Request Form ▪ Position Reallocation Justification Memo signed by Agency Director ▪ If this request is the result of a Desk Audit, include report from OHRM	▪ Check ePRB form data, including: • Organizational Unit and Cost Center are correct • Employee Group and Subgroup ▪ Include notes on funding source (e.g. – "partially funded through lapse of position 12345")
C. REFILL EXISTING VACANCY **No changes to the class of work; Requesting to fill at the same salary as the currently budgeted amount or less.**	ePRB – Change Fast Track	➢ OMB Analyst ➢ OMB Director ➢ OHRM REC Analyst	▪ Updated Position Description (544) ▪ Organizational Chart	▪ Check ePRB form data, including: • Organizational Unit and Cost Center are correct • Employee Group and Subgroup ▪ Include any notes on changes to position attributes

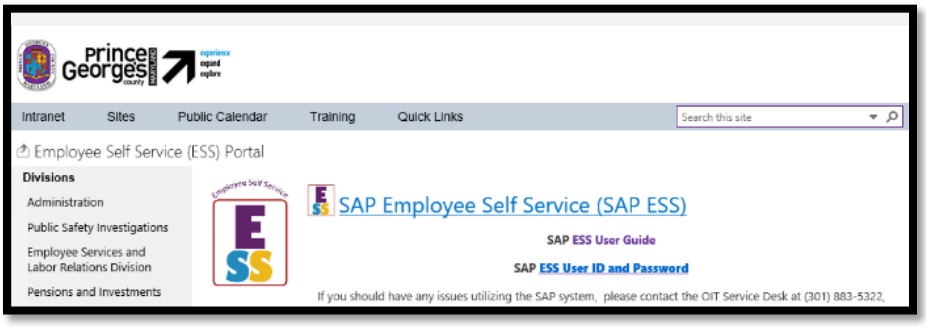
Let's Get Started! Accessing ePRB

To begin with any ePRB item, open the Employee Self Service Portal.

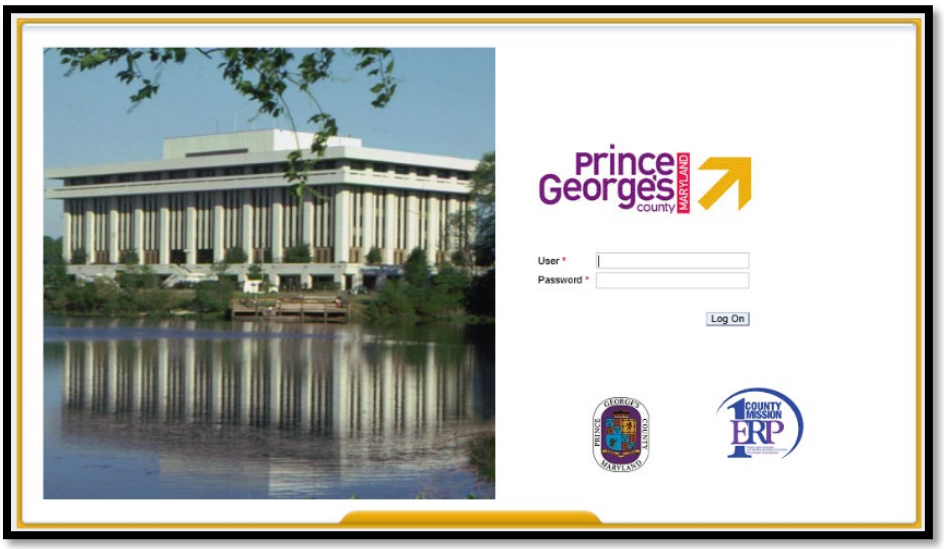
1. Go to the County's main intranet page, http://intranet/Pages/default.aspx
2. Use "Quick Links" and click on the "Employee Self Service (ESS)" option.



3. Click on the “SAP Employee Self Service (SAP ESS)” link.

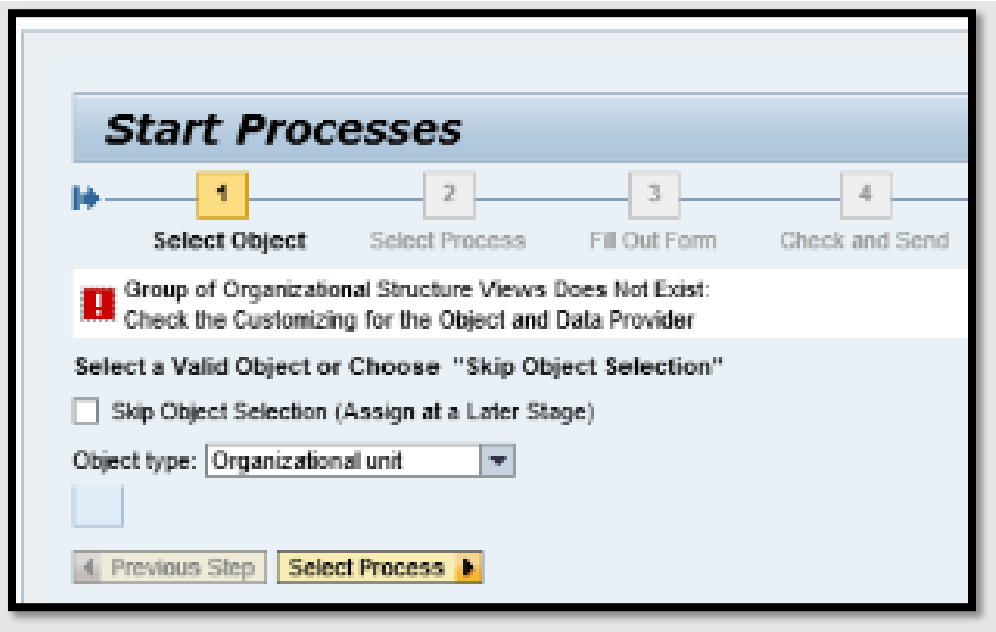


4. Log into the SAP Portal with your SAP user ID and password.

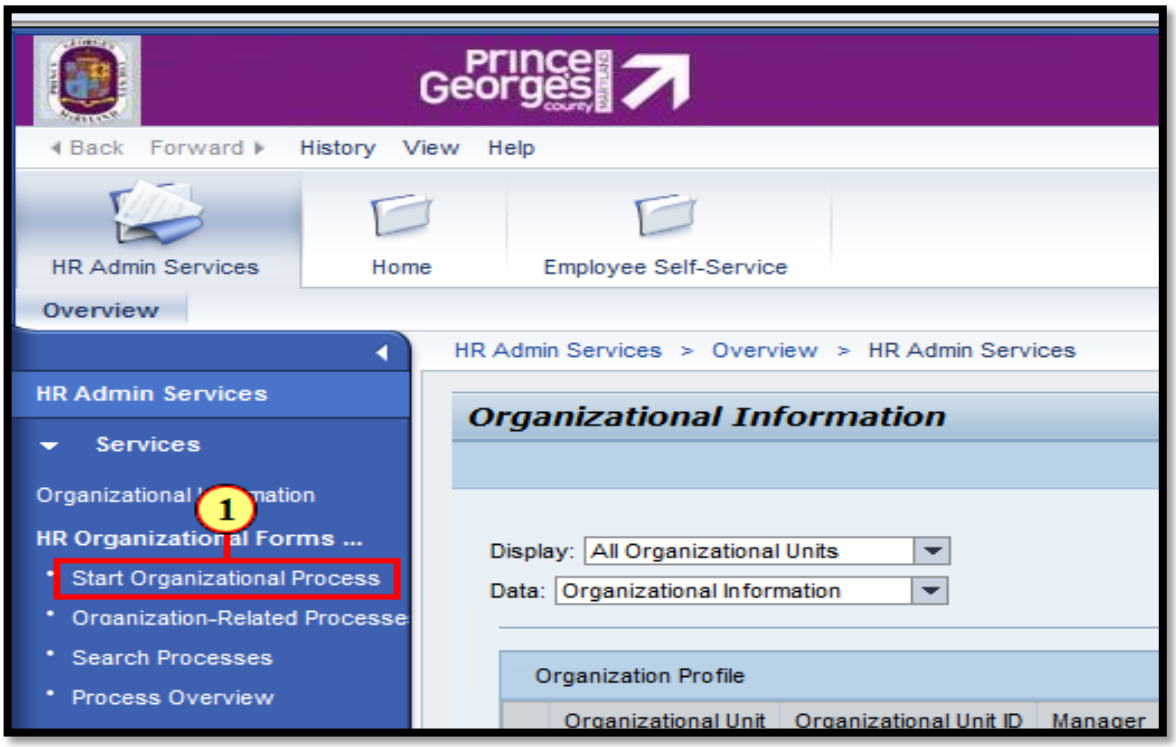


5. Click on “HR Administrative Services” tab.

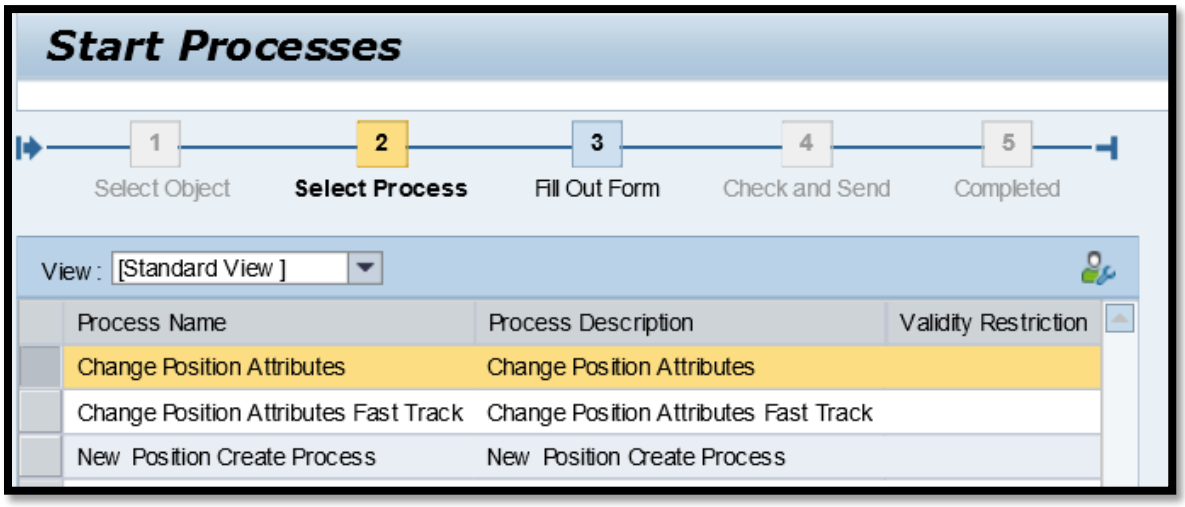
6. Click “Start Organizational Process” in the blue navigation bar on the left-hand side of the screen



7. Check “Skip Object Selection” and Click “Select Process.”



8. Select the desired process and follow the specific steps to Create or Change a Position.

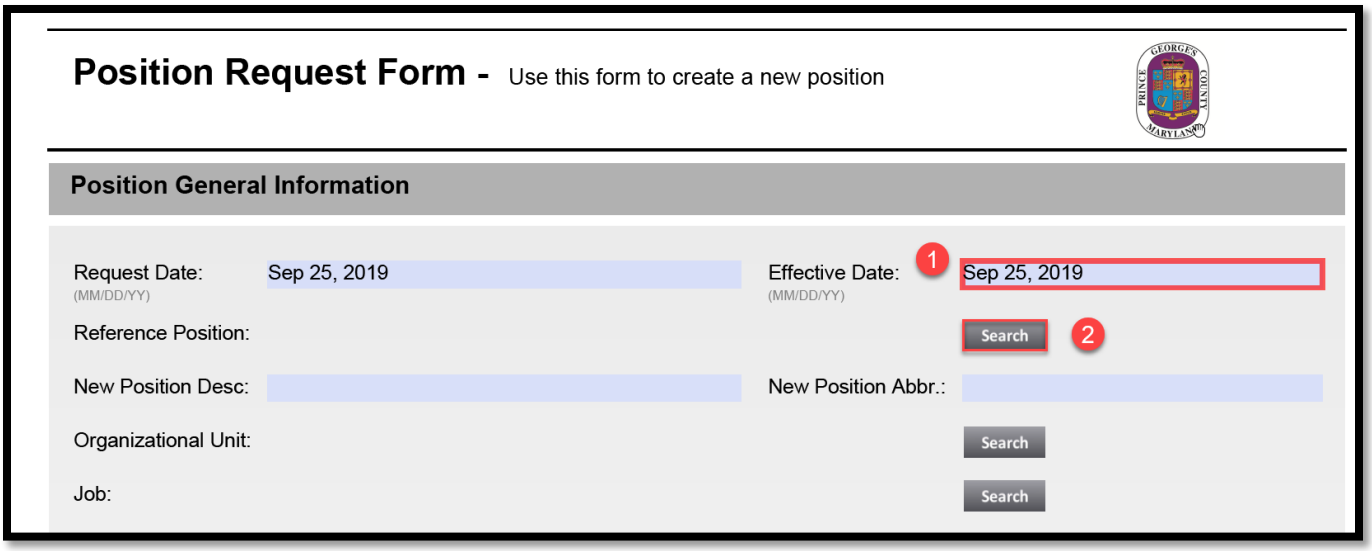


Creating a New Position

1) Enter both the Request Date and Effective Date. The Request Date is the day you are completing the form. The Effective Date is the day the position will be **created** in SAP, if approved. Remember, SAP is date driven.

2) Identify an existing position **IN YOUR AGENCY** that is most like the position that you wish to create. For example, if you want to create an General Clerk 4G in organizational unit 12345, selecting another General Clerk 4G in the same organizational unit would be ideal. However, selecting a General Clerk 4G in another organizational unit in your agency (e.g., Personnel Area) will also work.

   A. Click "Search" next to the position field.



B. Select a search option “Positions via Org Structure” or “ASR Position Search”.

For the ePRB process, do not use the “Directly Managed Positions” search option.

a. Positions via Org Structure search option:

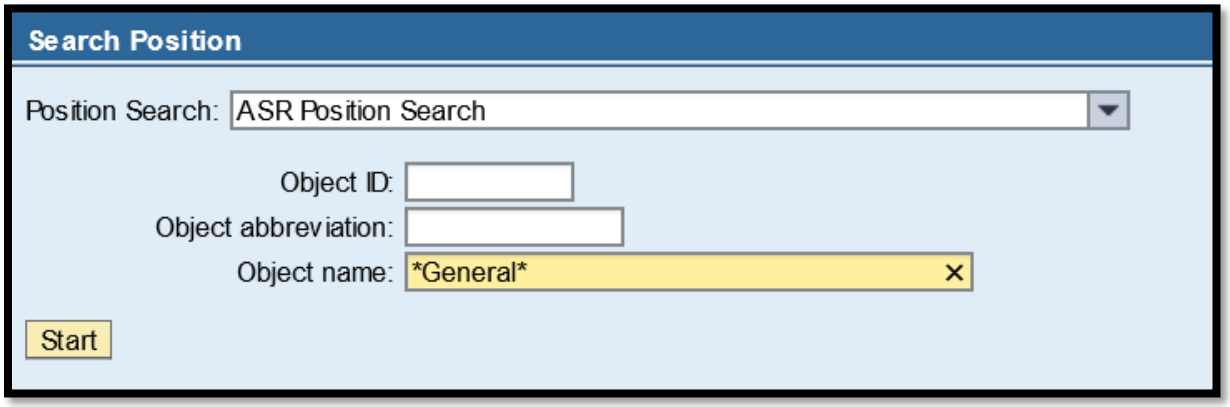
a) Click on the organizational units to display positions under each.

b) Select the grey box next to the specific position that you want to change and click “Ok.”

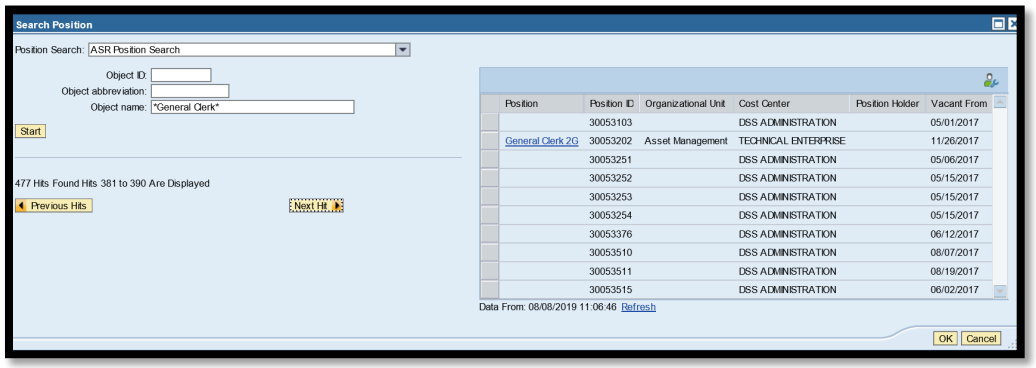
b. ASR Position Search

a) Type in a keyword from the position you want to find. In the example below *General* is used as a keyword for General Clerk. Note that you must use a capital letter at the beginning of the keyword.

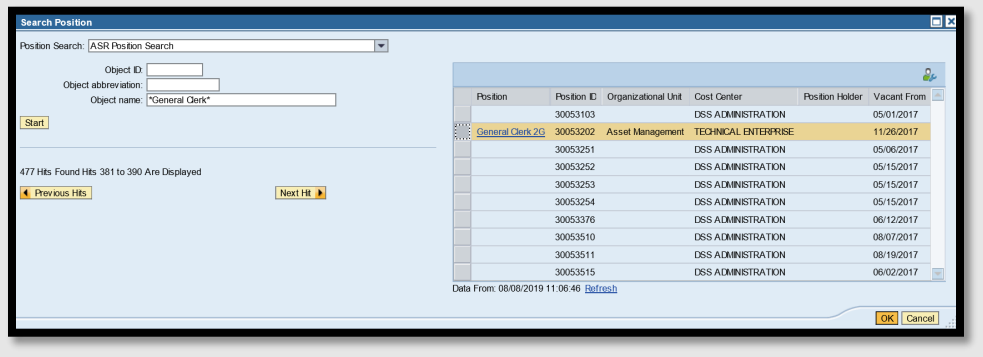
b) Click “Start.”



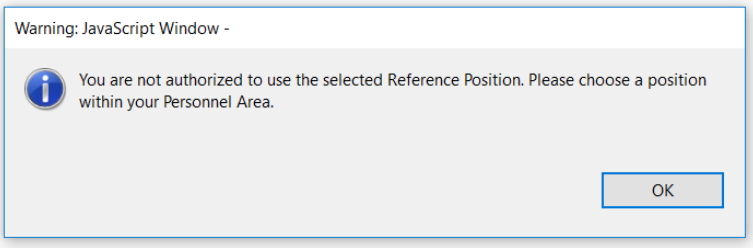
c) A list of positions throughout the County will show in the box on the right-hand side. Look for a position with the "Position" title populated. If it is blank, this is a position outside of your Personnel Area (agency) and should not be selected. If the position you need is not listed, click "Next Hit" to bring up the next set of search results. Otherwise, select the Position title that is displayed and is available in your agency.



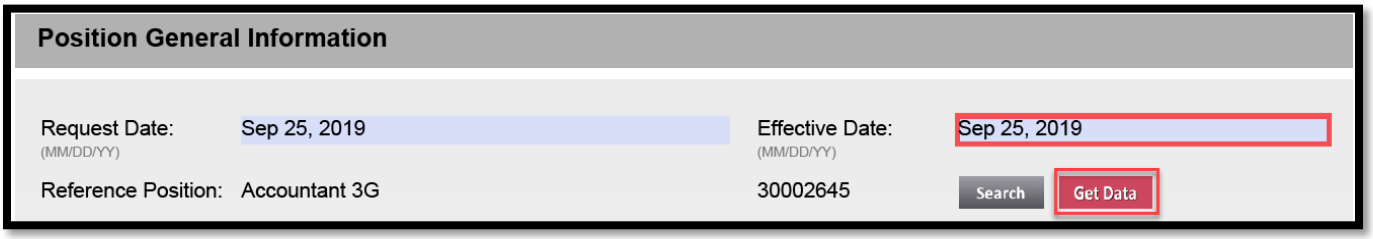
d) Find the desired position and click the grey box to the left of the position title. Click "OK".



Please note that if you select a position outside of your agency (Personnel Area), you will receive the error displayed below. Start the search again and select another position.



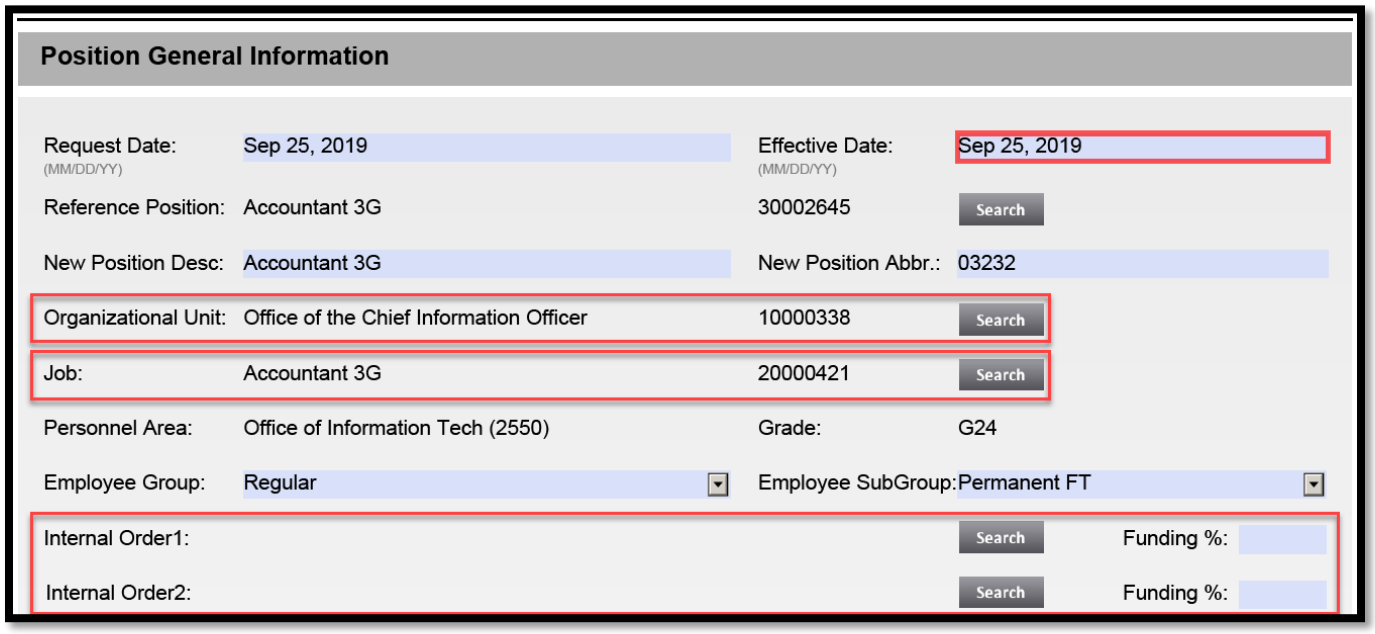
e) Click the red "**Get Data**" button to pull in all the current attributes of this position. **PLEASE VERIFY the Position and Org Unit Numbers to ensure that you are selecting the correct position. If the Position and/or Org Unit is not correct, search again.**



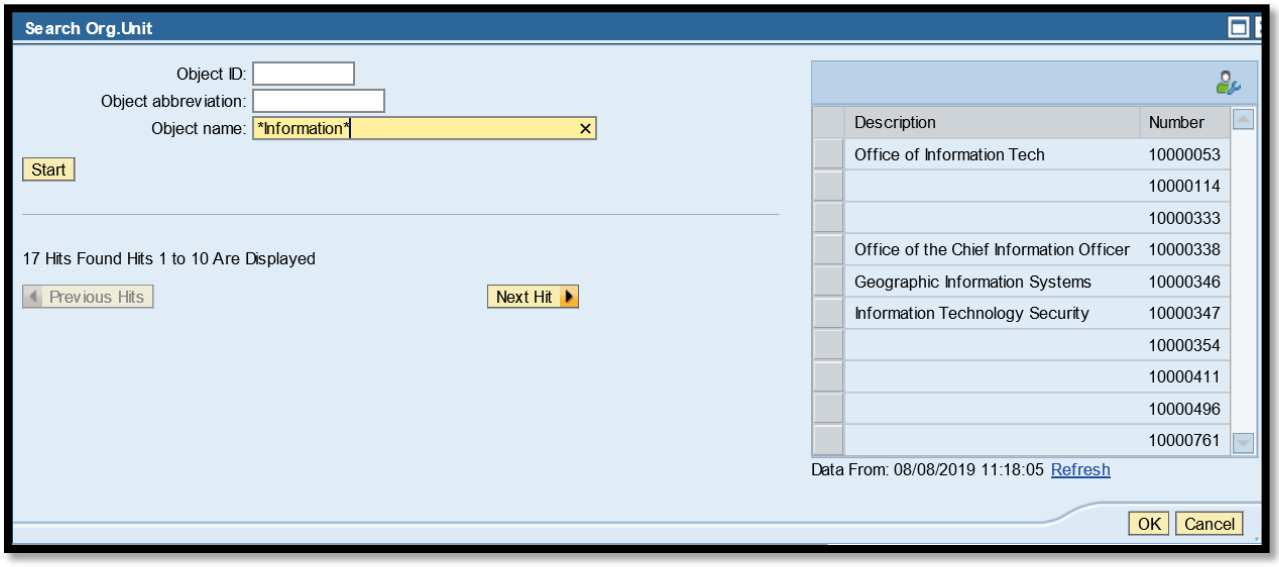
3) The form pulls in the values for the referenced position, including Position Title, Position Number, Position Abbreviation (Legacy Pin), and attributes including Organizational Unit, Cost Center and Grade. **If you have selected a position that is identical to the position you would like to create, there is no need to "search" for changes and you may skip this step**.

4) If you need to change one of the attributes identified below, click "Search" to the right of the field as in the example below. Change the position attributes necessary to create the position as desired. You can change any of the following attributes:

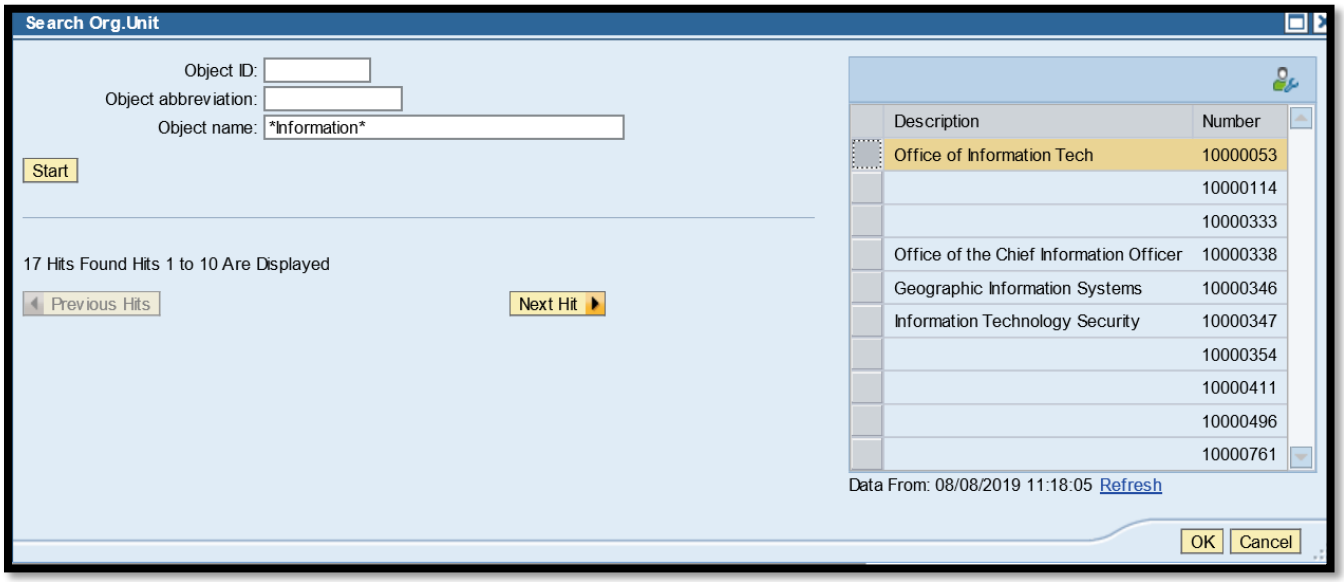
- Organizational Unit/Cost Center
- Job (Class of Work)
- Internal Order



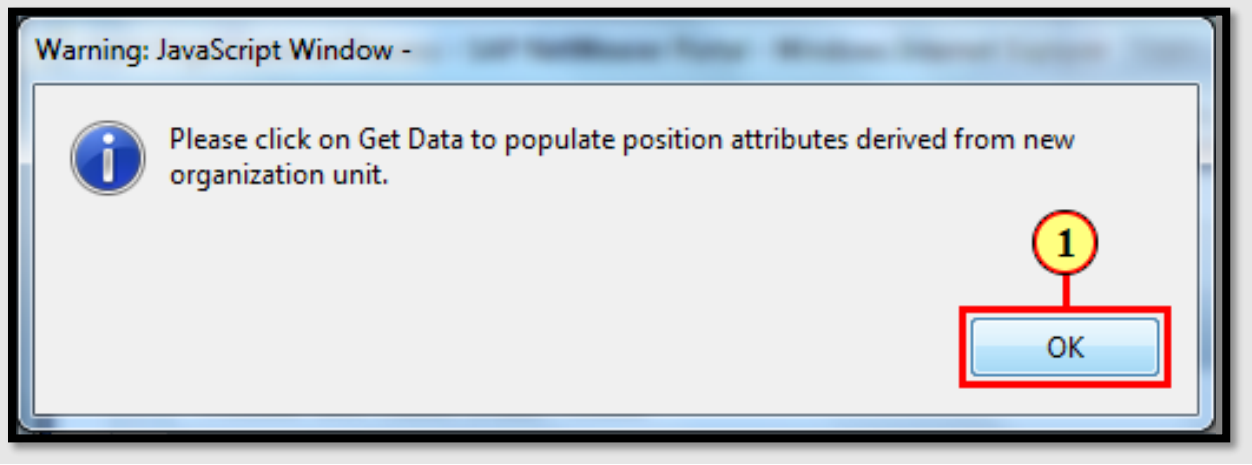
A) Enter the required search criteria to find the appropriate Organizational Unit. Enter the *Org unit name* in the Object name field. Click to begin the search.



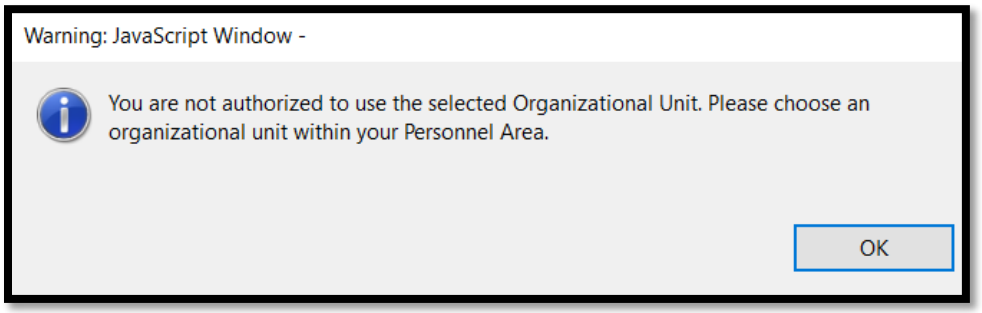
B) Review the search results. Click the grey box to the left of the Organizational Unit to select it. If the Description text is blank, this organizational unit is outside of your Personnel Area (agency) and should not be used. Click “OK” to return to the Position Request Form.



C) Review the informational message and click “OK.” Then Click the red “**Get Data**” button to populate the form with information from the selected Organization Unit.



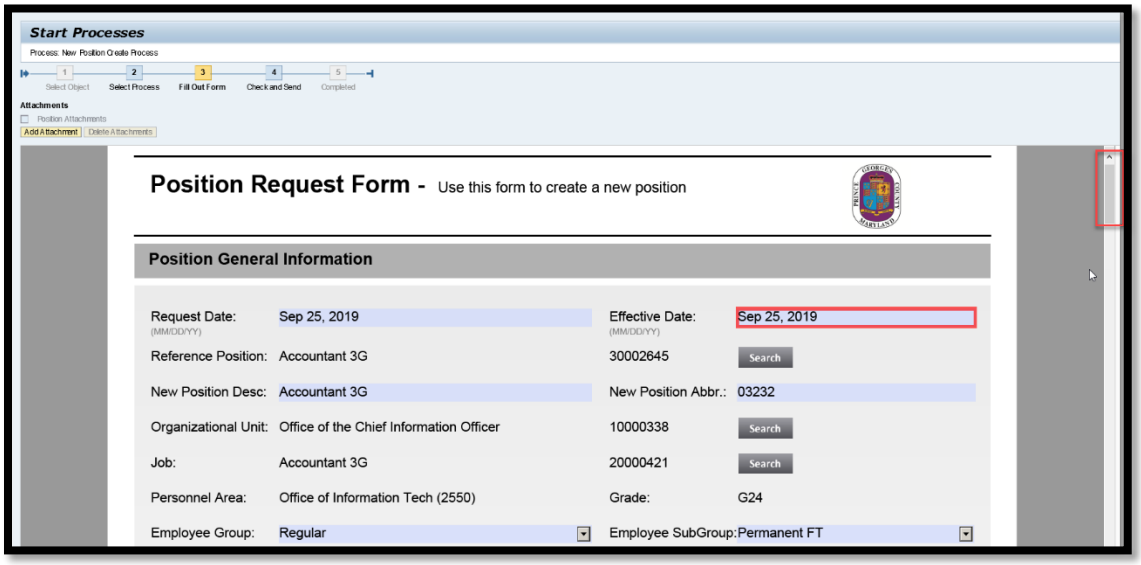
Please note that if you select an Organizational Unit outside of your Personnel Area (agency), you will see the message below displayed. Start the search again and select a valid Organizational Unit.



5) Verify your entries, checking that all of the information displayed is correct.

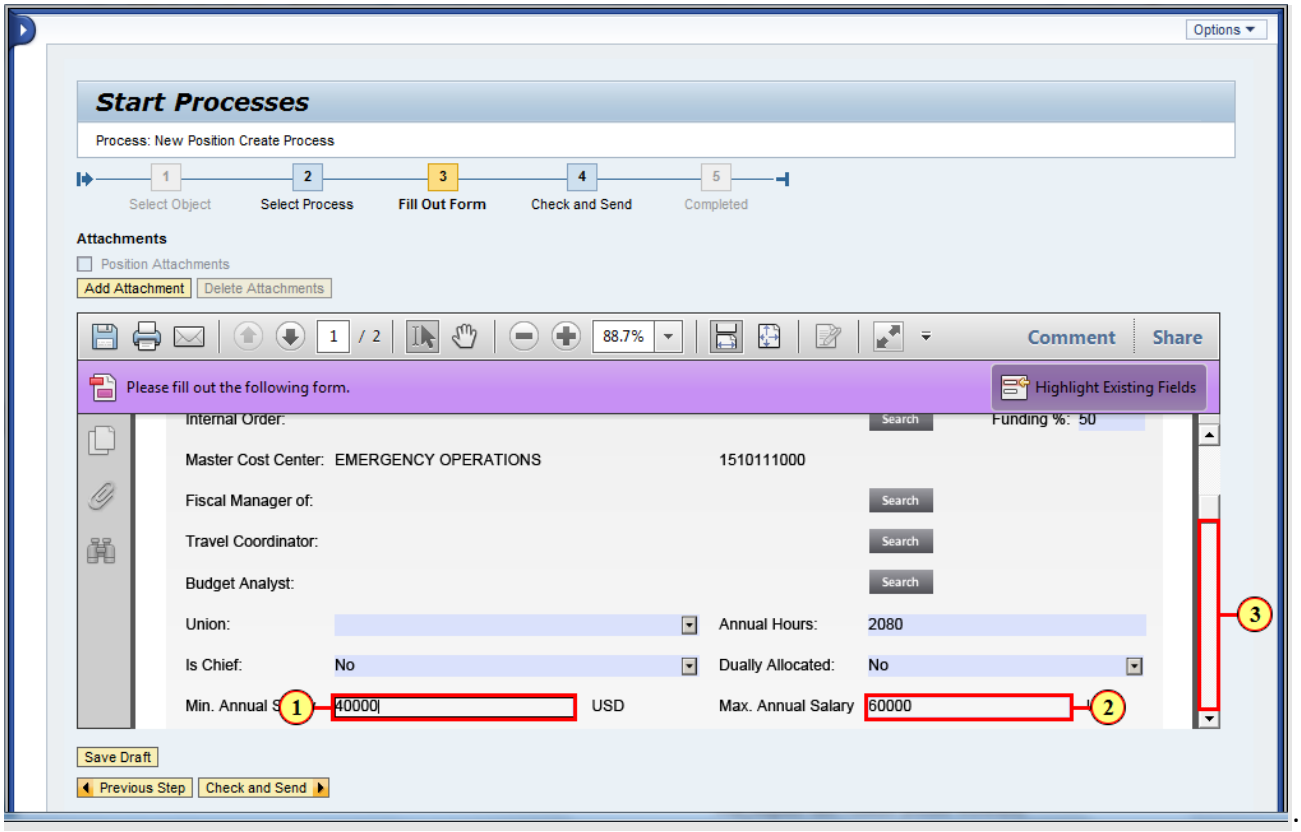
   a. **Employee Group and Employee Subgroup:** Please note that new full-time/part-time classified positions should be in Employee SubGroup “Probationary” not “Permanent.”

6) Click the scroll bar to display additional information.

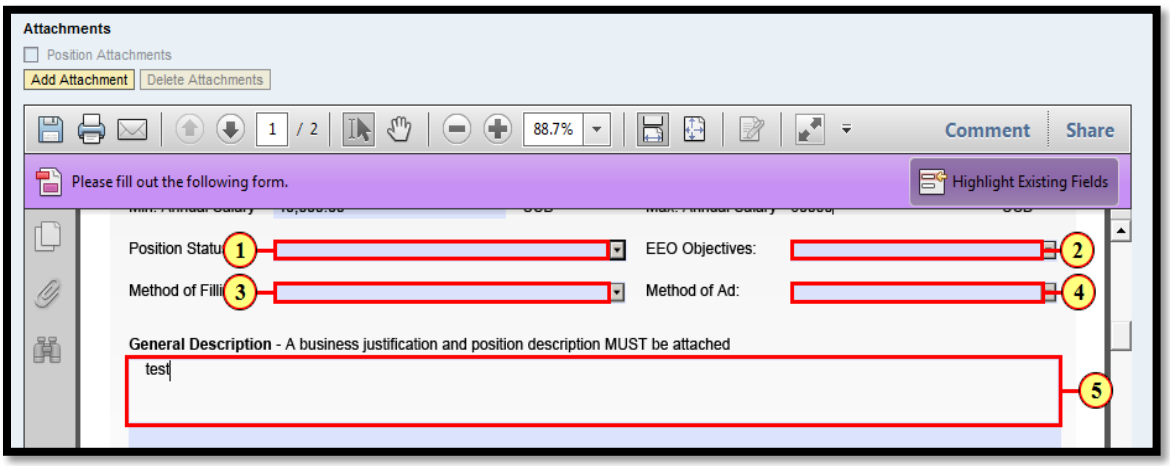


Some fields will automatically populate based on information from the Job.

7) Enter the minimum and maximum salary. This should not be the salary range for the Job, but the budgetary amount available to fill the position



8) Use the drop-down boxes to fill in the remaining fields:
   - Dually Allocated (required)
   - Chief (required)
   - Position Status (required)
   - EEO Objectives (required)
   - Method of Filling (recommended)
   - Method of Advertisement (recommended)



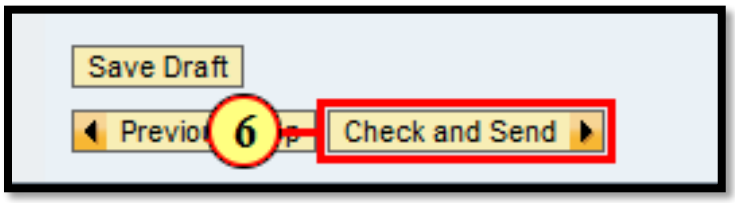
9) Enter a summary description for the action, including any key points that you need to highlight. (e.g., this position is funded with lapse salaries from positions "12345" and "67890.")
   a) **Note:** for all position creates a justification memo, signed by the Agency Appointing Authority, must be submitted in the "attachments"

10) Adding Attachments. The following attachments are required when submitting a New Position Create request.
   i) **Justification Memo**: A memo signed by the Agency Appointing Authority stating the reason why this position is being created.
      - Prior to beginning the ePRB workflow, prepare your justification memo with signature lines for the Appointing Authority and the Deputy Chief Administrative Officer (DCAO). Prepare the memo and supporting documents and submit to the DCAO for signature. The DCAO's Office will return the signed package to the requesting agency. If this is not already electronic, scan the signed memo for attachment during the ePRB process.
   ii) **Organization Chart:** A chart showing the Agency org structure that shows where this vacancy will be located within the organization.
   iii) **Position Description (544):** A current/up-to-date position description that lists out the job duties the incumbent will be performing.
   iv) **Position Request Form:** This form must be submitted so that OMB can review and verify the accurate cost centers.

v) **Personal Services Agreement (PSA):** This is for Limited Term Grant Funded (LTGF) positions. If the request is not for an LTGF request, this document is not needed.

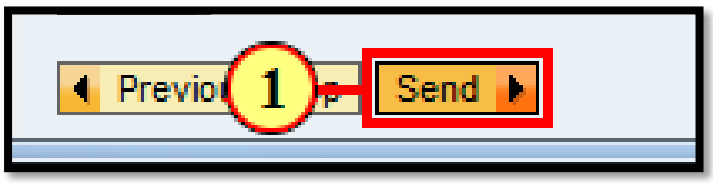
11) Review the displayed information and confirm the form is complete and accurate. Click "Check and Send" if you are ready to submit.

If you save the draft, it will be available in your Universal Worklist for further editing. (Universal Worklist is under the "Home" tab.)



12) The form allows you to review the information once again prior to final submission. **The tentative position number will now show at the top of the form. Write this down for your reference.**

13) Click "Send" to submit the form.



14) A confirmation message will display. Copy the reference number. Your submission is now being processed through the workflow.

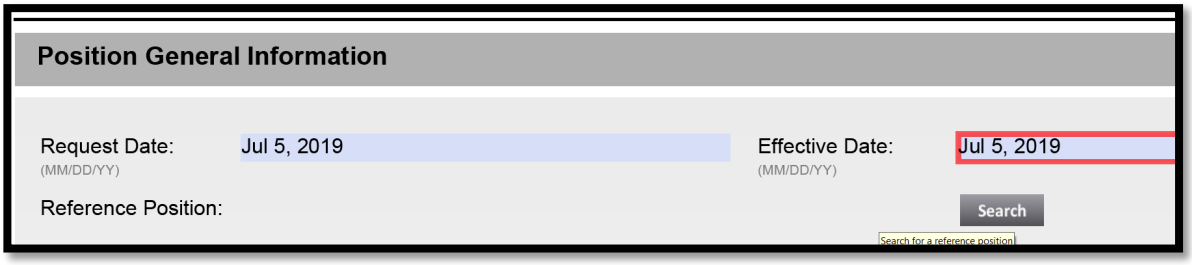
15) If an error occurs, report the incident to include the reference number and the tentative position to your departmental IT Coordinator, so an SAP-HCM EasyVista Incident Ticket can be generated through the Office of Information Technology (OIT).

Changing Position Attributes

Use Change Position Attributes for Upward or Downward Reallocations in the same classification or different.

1. **Search for the <u>specific position</u> that you wish to reallocate or fill** through the ePRB "Positions via Org Structure" Search or ASR Position Search.

   A. Click "Search" next to the position field.



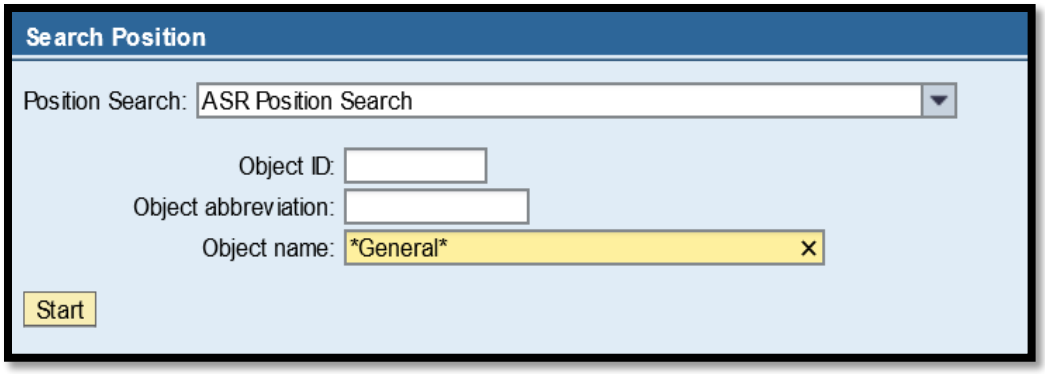
   B. Select a search option "Positions via Org Structure" or "ASR Position Search".

   For the ePRB process, do not use the "Directly Managed Positions" search option.

   a. **Positions via Org Structure Search**
   a) Click on the organizational units to display positions under each unit.
   b) Select the grey box next to the specific position that you want to change and click "Ok."

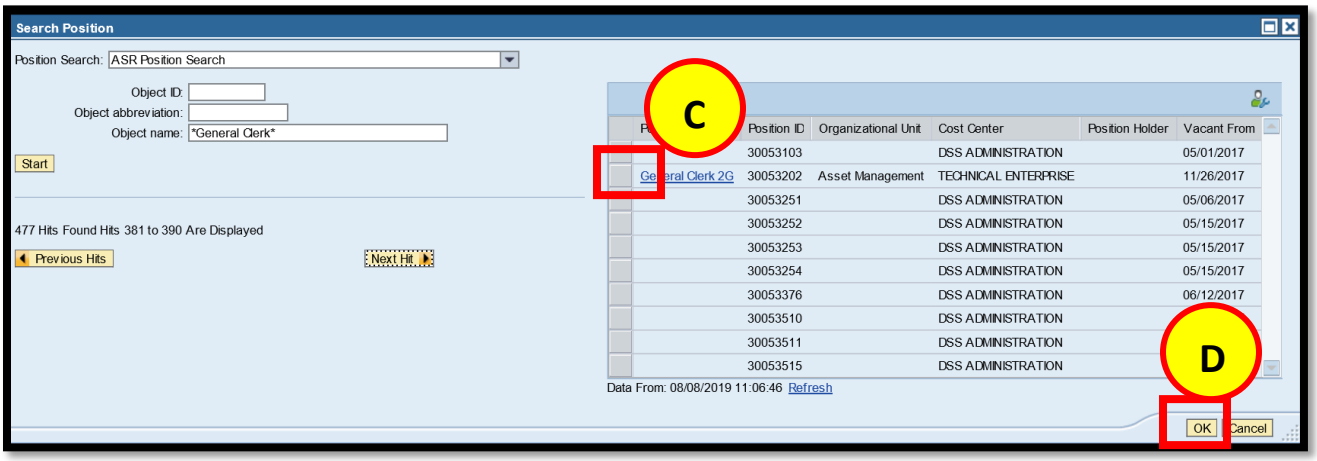
   b. **ASR Position Search**
   a) Type in a keyword from the position you want to find. In the example below *General* is used as a keyword for General Clerk. Note that you must use a <u>capital</u> letter at the beginning of the keyword and asterisk symbol before and after the keyword.

   b) Click "Start."

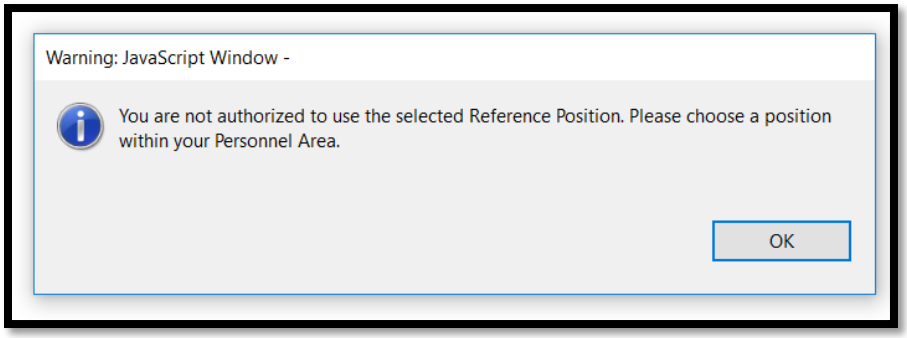


c) A list of positions throughout the County will show in the box on right hand side. Look for a position with the "General" title populated. If it is blank, this is a position outside of your Personnel Area (agency) and should not be selected. If the position you need is not listed, click "Next Hit" to bring up the next set of search results. Otherwise, select the Position title that is displayed and is available in your agency.

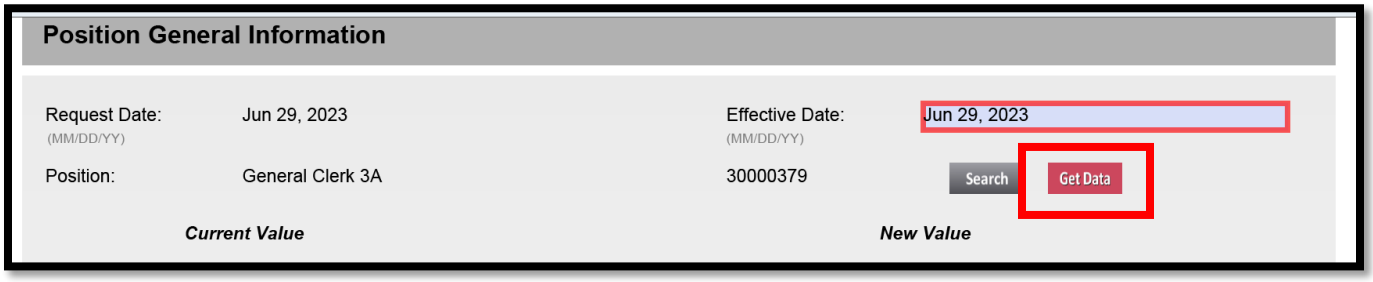
d) Find the desired position and click the grey box to the left of the position title. Click "OK."



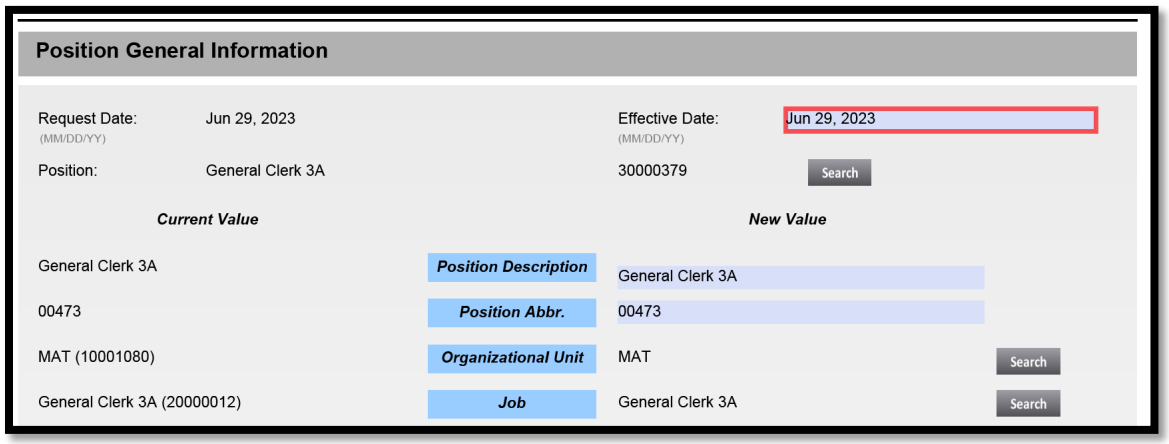
****Please note that if you select a position outside of your agency (Personnel Area), you will receive the error displayed below. Start the search again and select another position.**



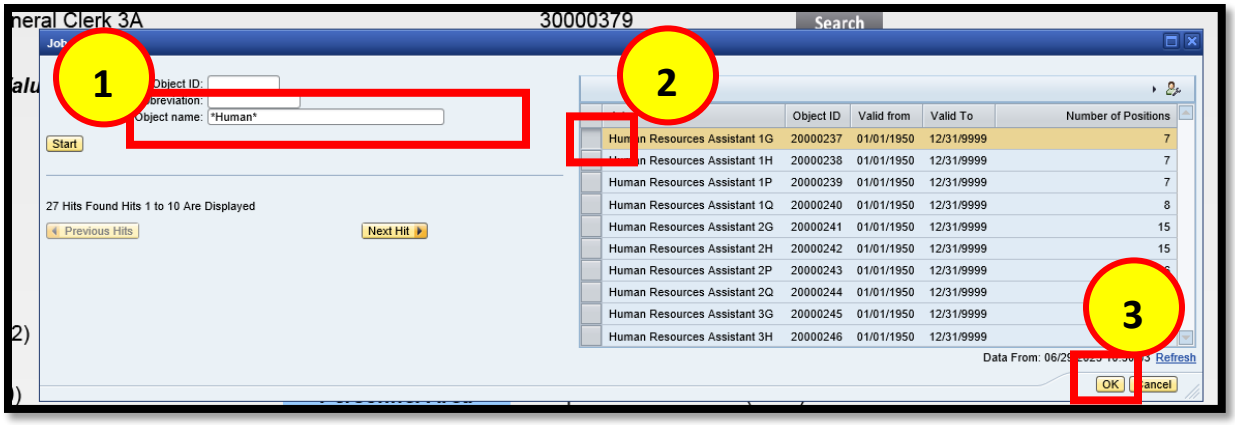
e) Click the red "**Get Data**" button to pull in all the current attributes of this position. **PLEASE VERIFY the Position and Org Unit Numbers to ensure that you are selecting the correct position. If the Position and/or Org Unit is not correct, search again.**



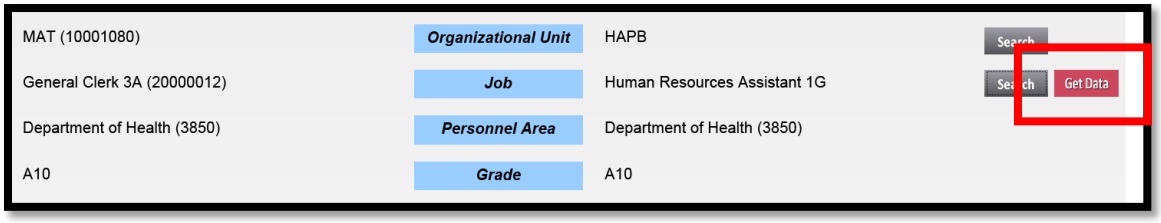
2. On the left side of the form, the values of the selected position appears. . **If you have selected a position that is identical to the position you would like to create, you may skip this step.**



3. Changing *the Job* field. You can make changes on the right hand side to the *Job* (which is changing the class of work) by clicking the "Search" button and locating the job in the *Object Name* field to which you want to reallocate the class of work to.
    a. Once you've located the new Job classification that you want to reallocate the position to, click the gray box next to the Job title and select OK.

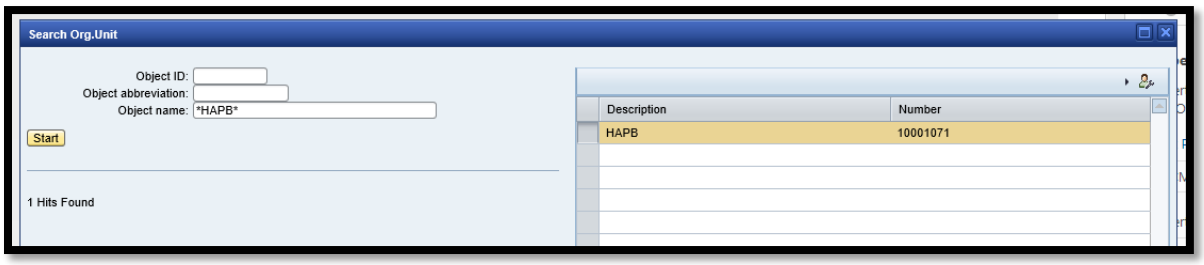


b. Next you'll select the red "Get Data" button to update the position attributes, such as the Grade.



4. Changing ***Organization Unit***. You can make changes on the right hand side to the **Organizational Unit** by clicking the "Search" button and locating the desired organizational unit or job in the *Object Name* field. **<u>If you do not want to change the Organizational Unit, skip this step</u>**.

   <u>Note:</u> that you must use a <u>capital</u> letter at the beginning of the keyword and asterisk symbol before and after the keyword.

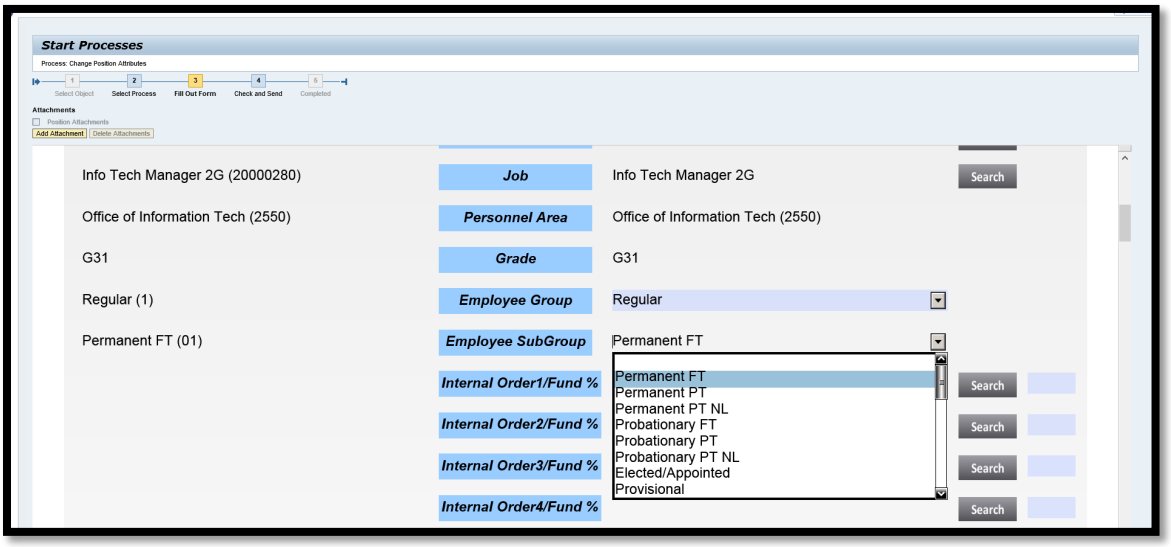


5. Additional Changes. Change the position attributes necessary to modify the position as desired. You may change any of the following attributes using the same Search feature as noted in step 3 & 4 :

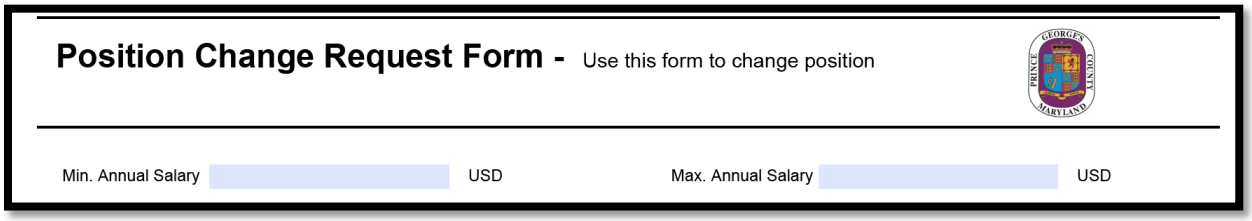
   a) Master Cost Center
   b) Internal Order

6. Verify that the information displayed is correct, including Employee Group and Employee Subgroup. **Please note that new full-time/part-time classified positions should be in Employee SubGroup "Probationary" not "Permanent."**

   Some fields will automatically populate based on information from the Job.

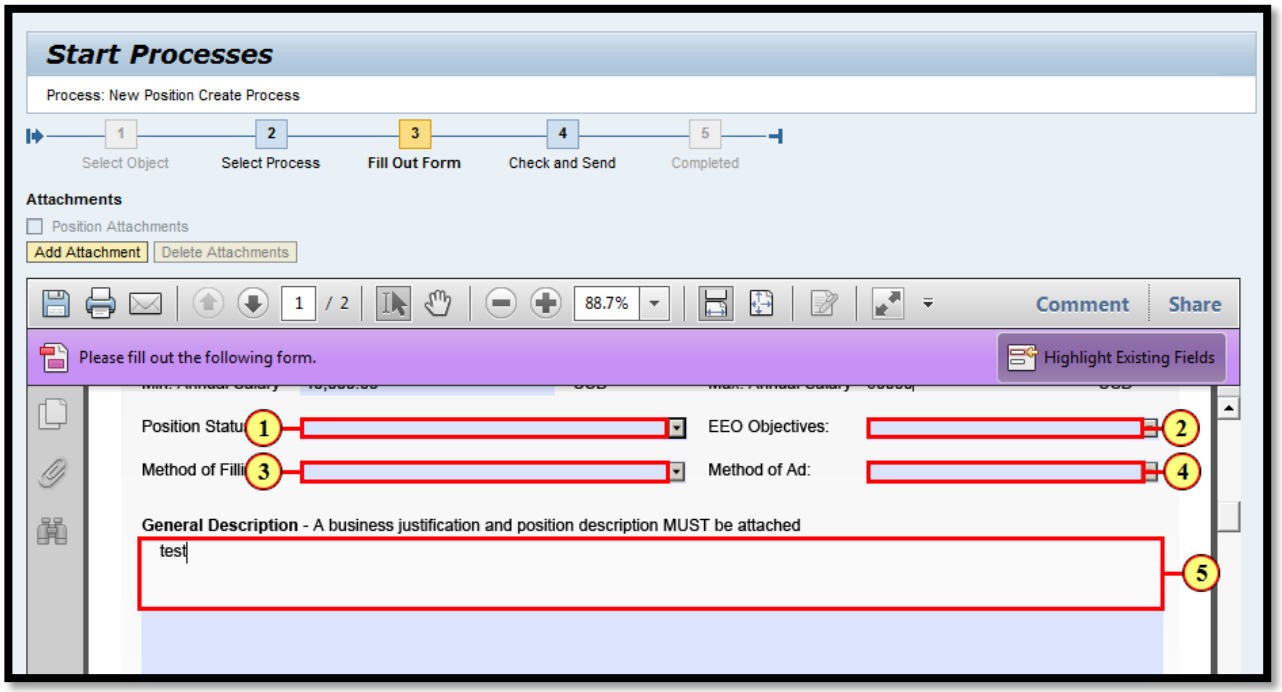


E) Enter the minimum and maximum salary. This should not be the salary range for the Job, but the budgetary amount available to fill the position.



7. Use the drop-down boxes to fill in the remaining fields:
   - Dually Allocated (required)
   - Chief (required)
   - Position Status (required)
   - EEO Objectives (required)
   - Method of Filling (recommended)
   - Method of Advertisement (recommended)

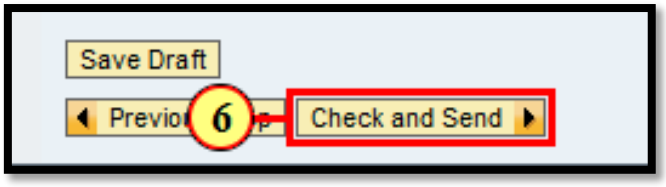
8. Enter a summary description for the position, including any key points that you need to highlight (e.g., this position is funded with lapse salaries from positions “ABC” and “123”).



9. Adding Attachments. The following attachments are required when submitting a Change Position Attributes.
   i) **Justification Memo**: A memo signed by the Agency Appointing Authority stating the reason why this position is being created.
      - Prior to beginning the ePRB workflow, prepare your justification memo with signature lines for the Appointing Authority and the Deputy Chief Administrative Officer (DCAO). Prepare the memo and supporting documents and submit to the DCAO for signature. The DCAO’s Office will return the signed package to the requesting agency. If this is not already electronic, scan the signed memo for attachment during the ePRB process.
   ii) **Organization Chart:** A chart showing the Agency org structure that shows where this vacancy will be located within the organization.
   iii) **Position Description (544):** A current/up-to-date position description that lists out the job duties the incumbent will be performing.
   iv) Position Request Form: This form must be submitted so that OMB can review and verify the accurate cost centers.
   v) **Personal Services Agreement (PSA):** This is for Limited Term Grant Funded (LTGF) positions. If the request is not for an LTGF request, this document is not needed.

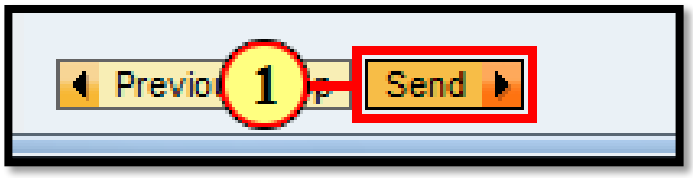
10. Review the displayed information and confirm the form is complete and accurate. Click “Check and Send” if you are ready to submit.

    If you save the draft, it will be available in your Universal Worklist for further editing. (Universal Worklist is under the “Home” tab.)



11. The form allows you to review the information once again prior to final submission.

12. Click “Send” to submit the form.

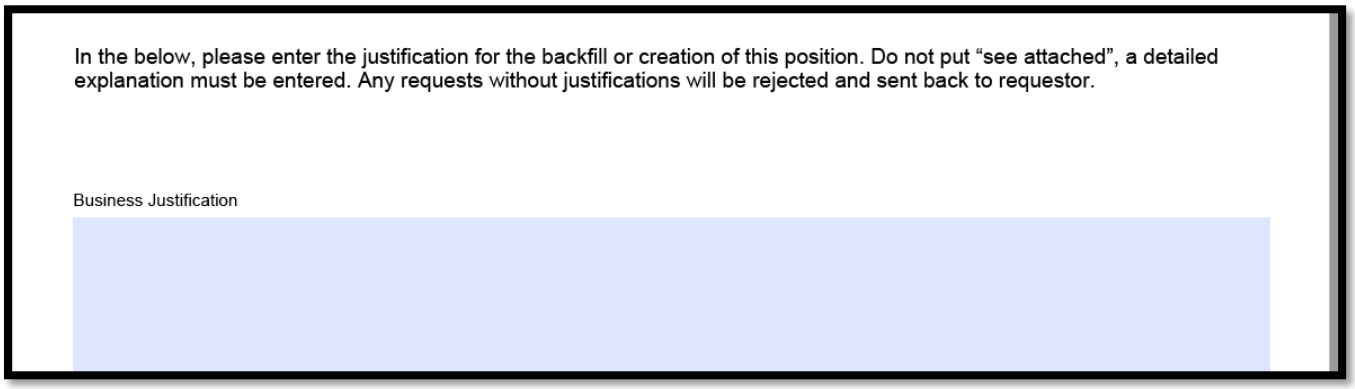


13. A confirmation message will display. Copy the reference number. Your submission is now being processed through the workflow!

14. If an error occurs, report the incident to include the reference number and the tentative position number to your departmental IT Coordinator, so an SAP-HCM EasyVista Incident Ticket can be generated through the Office of Information Technology.

Changing Position Attributes Fast Track

Use Change Position Attributes Fast Track to fill an existing vacancy as it is currently approved in your agency's budget (same class of work and same salary – or lower salary.) To complete this request you will follow the same steps as in Change Position Attributes, with the **EXCEPTION** that you **MUST** enter the justification in the Business Justification box. A Justification Memo is not a required document for Change Position Attributes Fast Track.



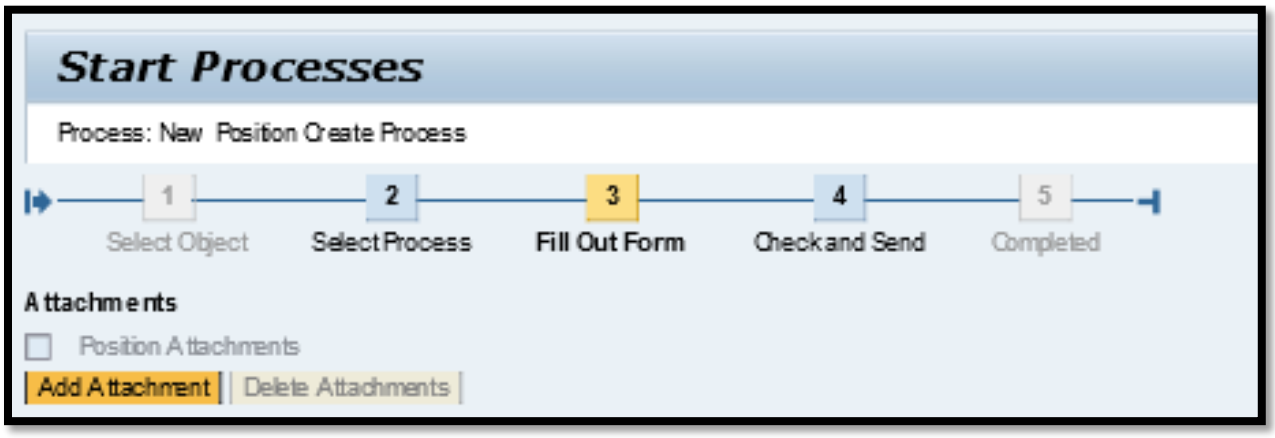
Required Documentation:

The following attachments are required when submitting a Change Position Attributes Fast Track.

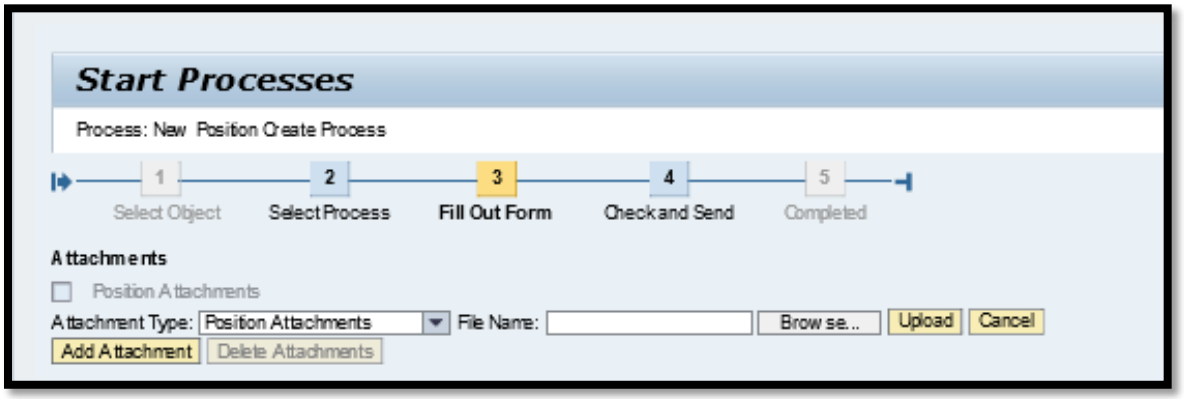
i) **Organization Chart:** A chart showing the Agency org structure that shows where this vacancy will be located within the organization.
ii) **Position Description (544):** A current/up-to-date position description that lists out the job duties the incumbent will be performing.

Adding Attachments to ePRB Items

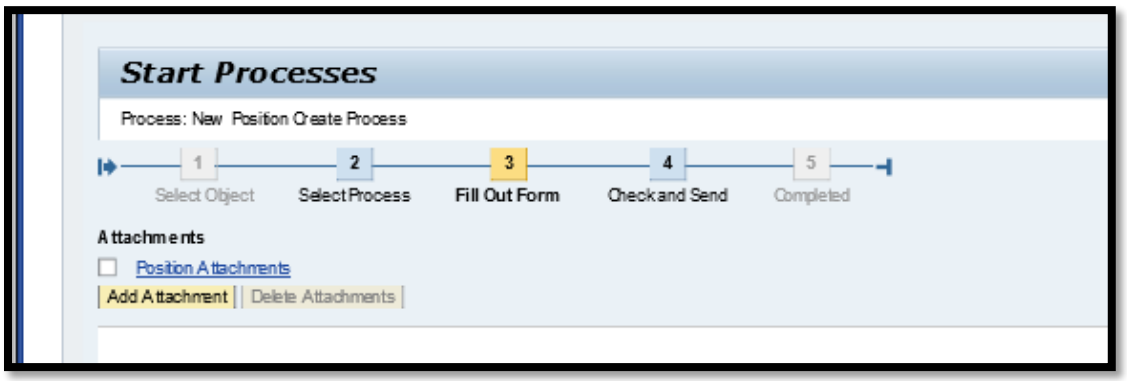
1. Click “Add Attachments.”



2. Click “Browse” to find the file on your computer. Select the desired file(s) and click “Upload.”



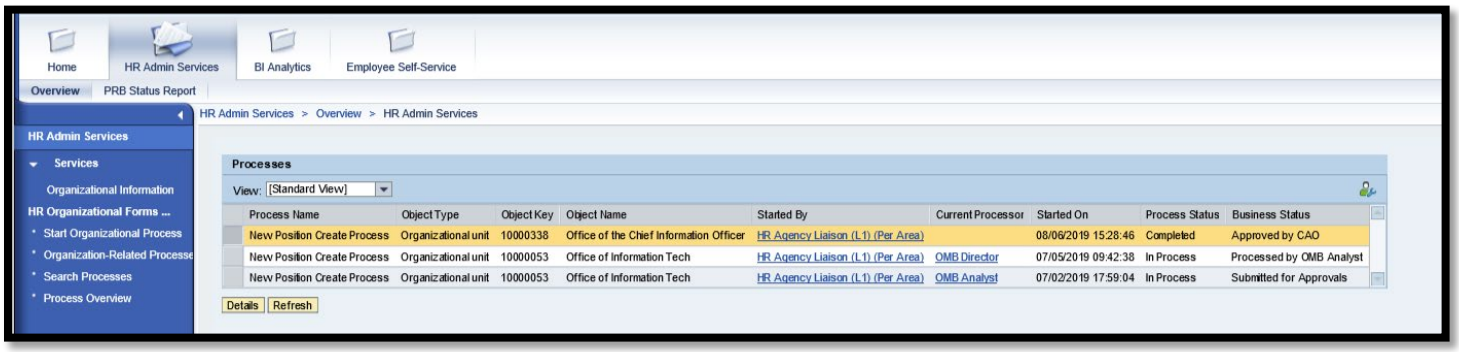
3. The “Position Attachments” text is now a hyperlink to the attached documents. Repeat the process to add additional attachments.

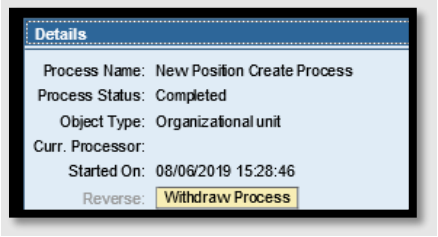


Withdrawing a Position

The HR Liaison that initiated the ePRB action may withdraw it from the workflow. The withdraw function will work until a position has reached final approval. Once it is withdrawn, it is removed from the workflow queue and no further action can be taken.

1. Log into the SAP Portal and click on the HR Admin Services tab.
2. Click “Process Overview”
3. Highlight the position to be withdrawn and click “Details.”
4. Click “Withdraw Process.”





What is the Status of the Position?

Now that you have successfully submitted an ePRB request through the workflow, you can view the status of where it is located at any time.

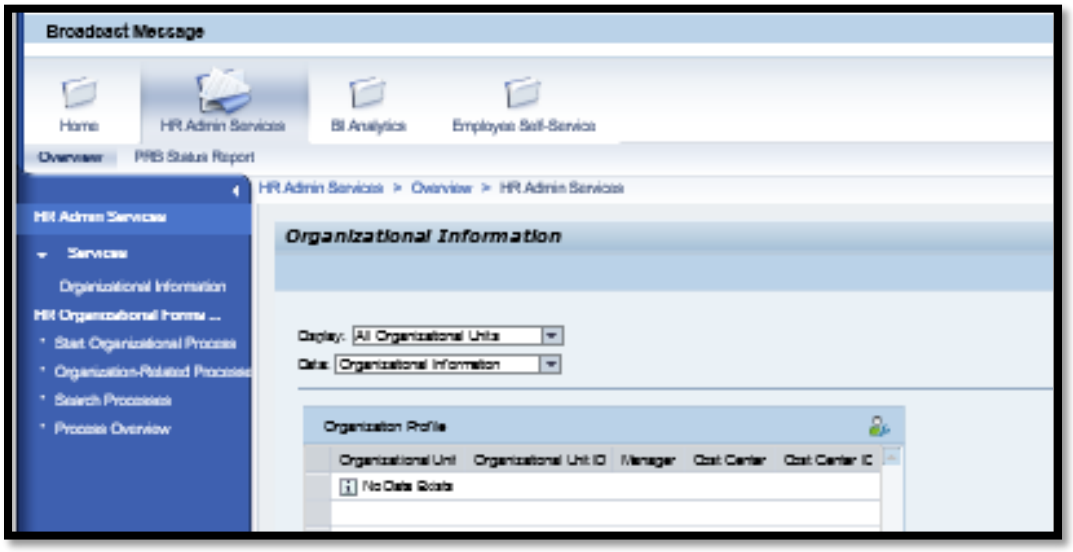
There are several ways to check the status of your position:

- Process Overview screen
- PRB Status Report

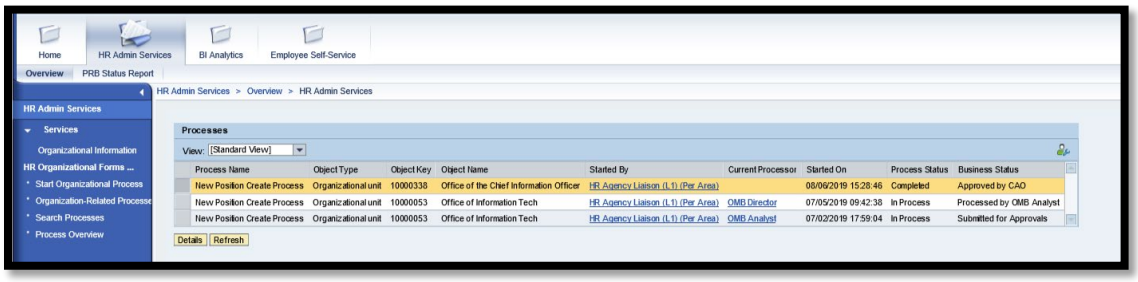
Process Overview Screen

The HR Liaison that entered the ePRB item can use the Process Overview screen to view the status.

1. Log into the SAP Portal and open the HR Admin Services tab.
2. Click on “Process Overview”.

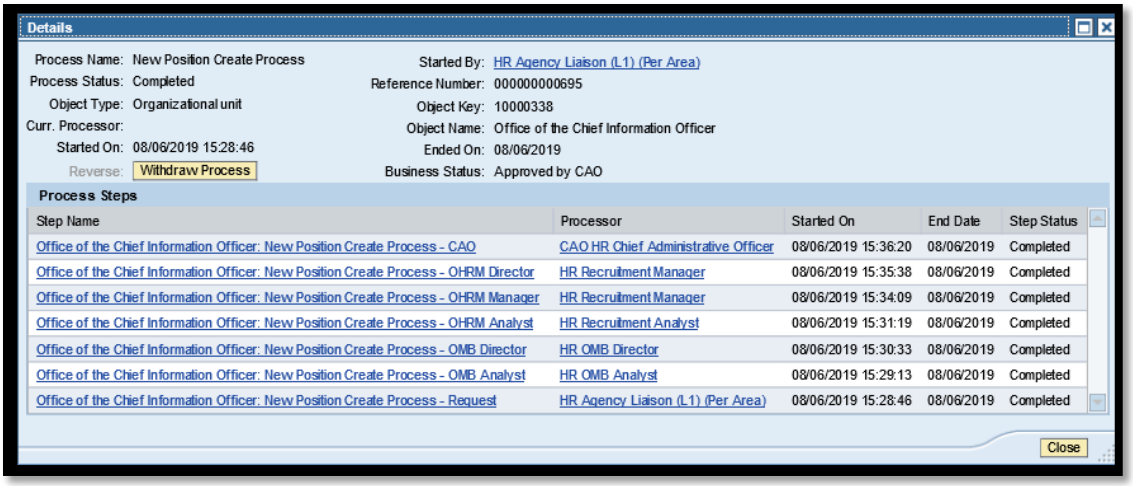


3. A list of submitted positions will display, including information on the current processor of each ePRB item. In the example below, the first item is complete (approved by the CAO). The second item is with the OMB Director and the third item is with the OMB Analyst.



Click “Details” for further information on the history of the highlighted position.

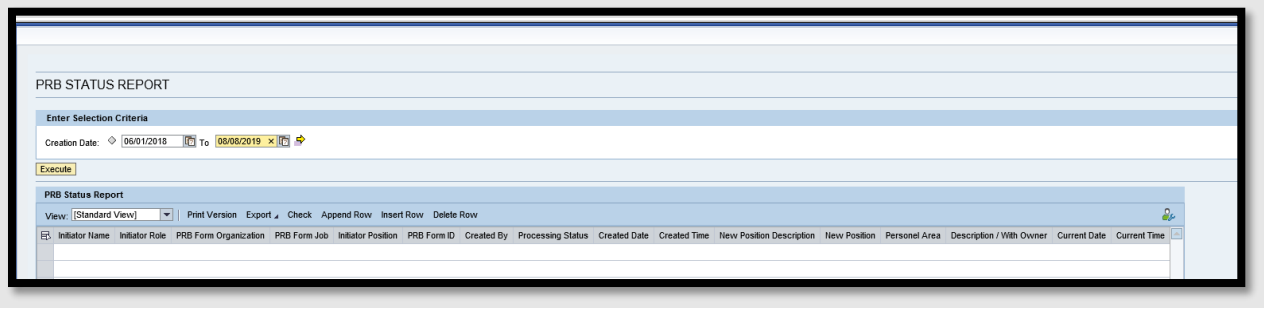
4. A pop-up window will display the approval history on the selected item, with the date and time each approver completed their review.



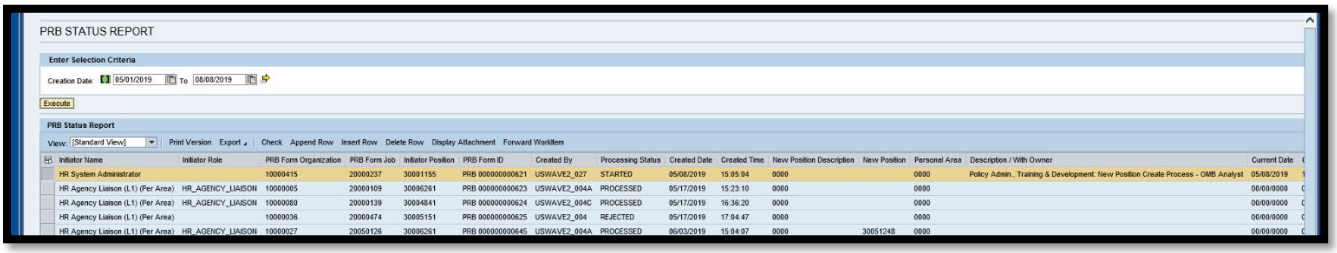
PRB Status Report

Authorized users, including Agency HR Liaisons with PRB access and any designated agency staff with a PRB Reporter SAP role, can run the PRB Status Report. The PRB Status Report provides details on the status of each submitted PRB item within a given date range. Agency staff can only see ePRB items submitted by staff in their own agency.

1. Open the SAP Portal and click on the HR Admin Services tab.
2. Click on "PRB Status Report"
3. Enter a date range and click "Execute."



4. A list of ePRB items entered during the data range will display. Information on the status is shown. The current processor is listed in the column titled "Description/With Owner"



5. To display the attachments for a specific item, highlight the row and click "Display Attachments."

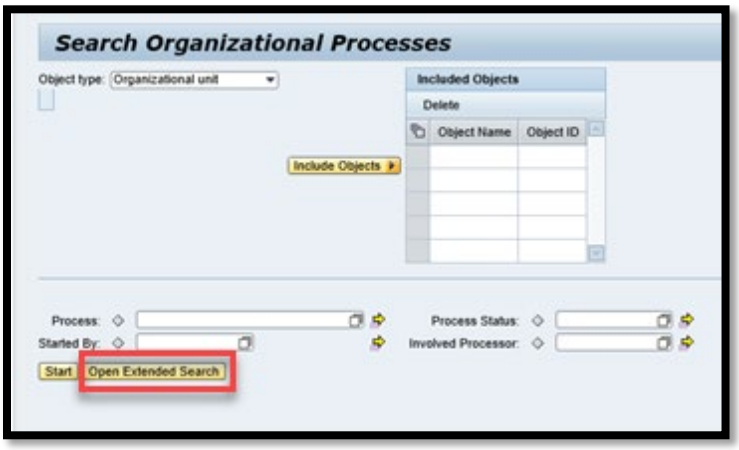
The PRB Status report can also be viewed from the SAP GUI by using transaction code ZHCM_PRB_STATUS and following the instructions above. Please note that attachments cannot be viewed from the GUI.

Viewing the Approved ePRB Form (also called a PRF)

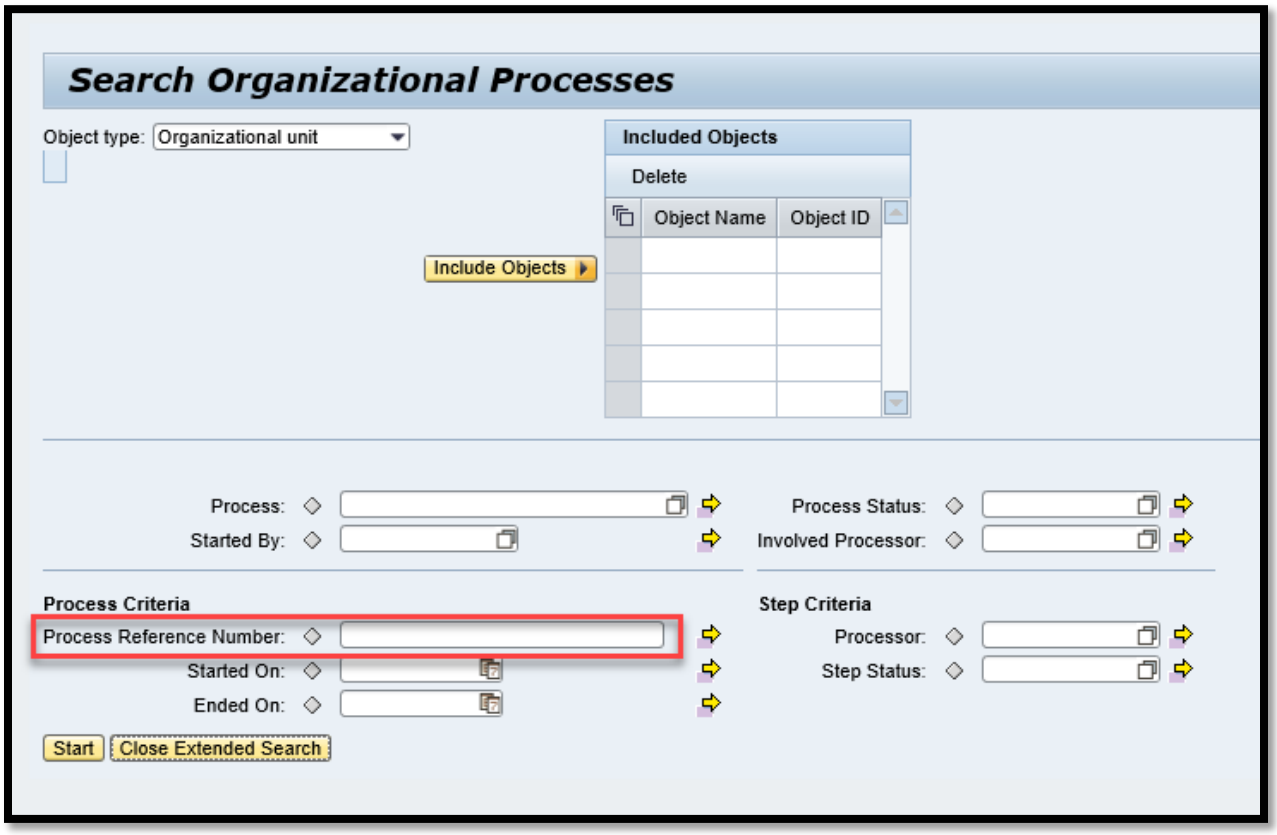
Use these instructions to display approved ePRB forms.

1. Open the SAP Portal.
2. Click on the **HR Admin Services** tab.
3. Click on "**Search Processes**" in the blue bar on the left-hand side of the screen.

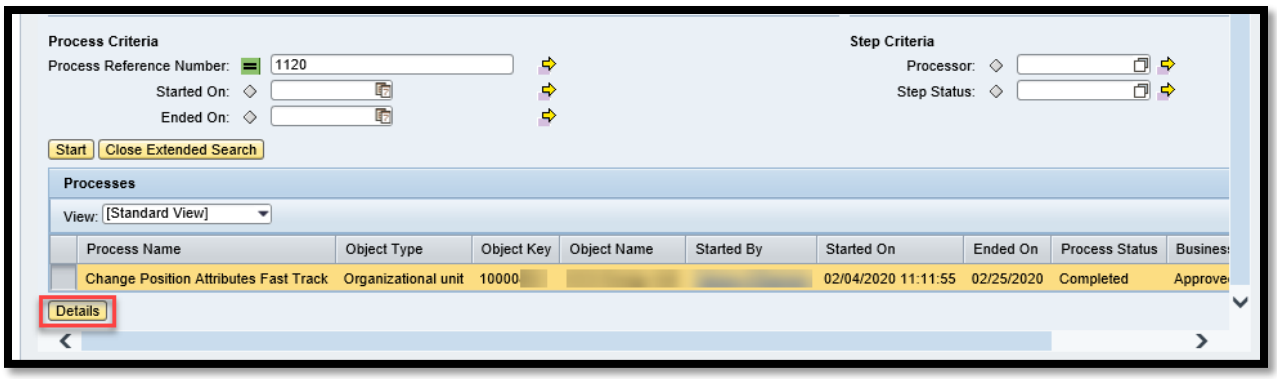
4. The Search Process window will open. Click "**Open Extended Search**."



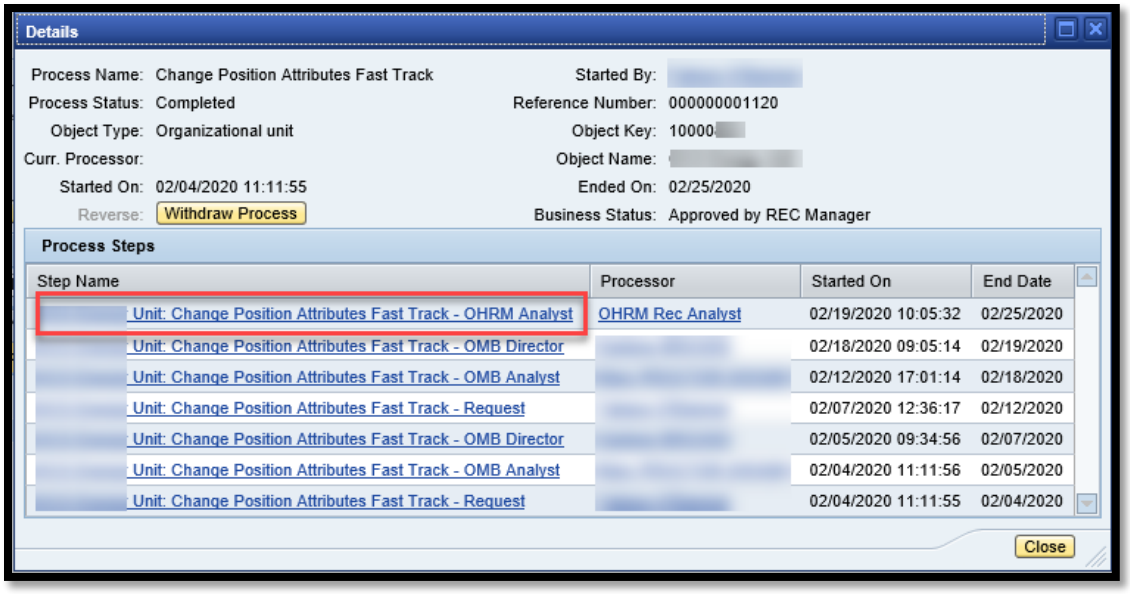
5. Enter the last four digits of the ePRB form number in the "**Process Reference Number**" field.



6. General information about the position will display. Click "**Details**."

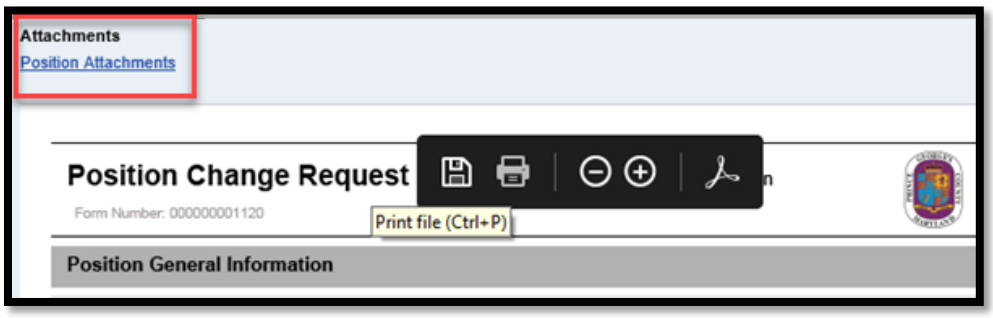


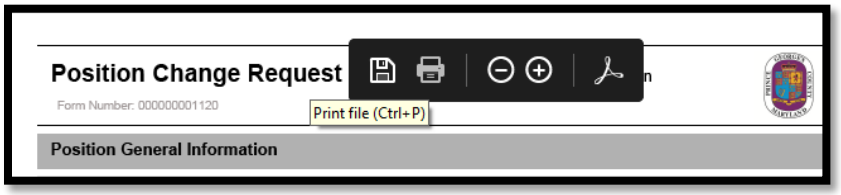
7. A detailed list of the position's history will display. Click on the top link under "**Step Name**" to open the approved form.



8. The approved form will display, including comments from all approvers shown at the end of the form.

9. Position Attachments can also be displayed by clicking on the "**Position Attachments**" link at the top of the form.



Print or Save Approved ePRB Forms/PRFs

1. Follow the instructions to open the approved ePRB form. It will display in a PDF format.
2. Use the print function in the Adobe program to print the form or click on the save icon to save a copy of the PDF form.