

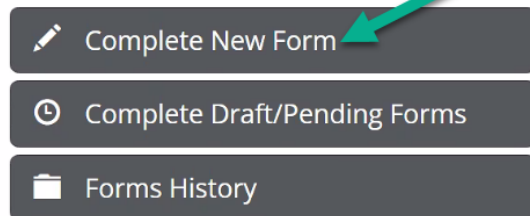
Close Position Form

Purpose: Close a position in the current budget.

Steps to close a position:

1. Create Close Position Form >> [Click here.](#)
2. Click Complete New Form

What would you like to do?



The screenshot shows a user interface with three buttons. The first button, 'Complete New Form', is highlighted with a green arrow. The second button is 'Complete Draft/Pending Forms' and the third is 'Forms History'.

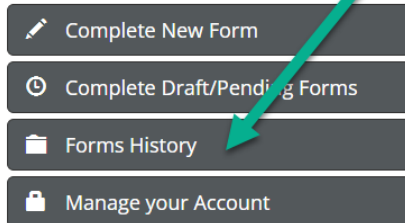
3. Enter Position to Close
 - a. Position content will populate – it can take a few seconds.
 - b. Possible messages received:
 - i. **The position is vacant.**
 1. Received if the position is currently vacant.
 2. Informational
 - ii. **Position not found. Contact the Budget Office.**
 1. Received if the position is already closed or if the originator does not have HR security to the position orgn.
 2. Do not proceed. Contact the Budget Office.
 - iii. **The position is filled.**
 1. Received if the position is currently filled.
 2. Do not proceed unless the position is going to be vacant on/before closure date.
 - iv. **Position has an end date. Contact the Budget Office.**
 1. Received if a Close Position Form has already been processed for the position.
 2. Do not proceed. Contact the Budget Office.
4. Pick Closure Date
5. Answer: Is the position being closed due to reduction in force (RIF)?
6. Enter justification for position closure.
7. Click Next
8. Sign Form - sign first and last name as displayed on screen. Click Sign Electronically.
9. Form will route to Human Resources. HR can return/approve.
 - a. Originator will receive an email when HR takes action. Generic email with subject line of Dynamic Forms: Co-Signature Update.
 - b. If HR returns the form for revision, originator can edit and resubmit this form. Originator will receive daily email that they have a form in Returned status.
10. Form will route to Budget Office. Budget can reject/approve.

- Originator will receive an email when Budget Office takes action. Keep this email. This is the originator's history for the request.
- The position will be closed with Budget Office approval.
- If Budget rejects the form, originator cannot edit or resubmit this form.

Forms History:

- Forms History will show minimal information on previous forms.
- Originator cannot view forms that they have submitted.
- Cognos report RPT_PBUD_013 – Closed Positions located at Human Resources>Departmental Users>Position Reports will show when a position was closed.
- Contact the Budget Office if you need further information on closed position.

What would you like to do?



Complete New Form

Complete Draft/Pending Forms

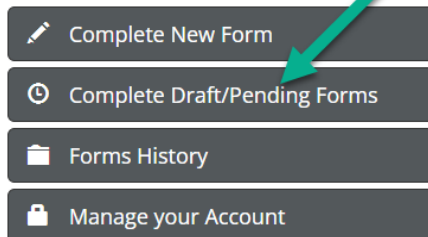
Forms History

Manage your Account

Close Position Form Routing:

- Click on Complete/Draft Pending Forms

What would you like to do?



Complete New Form

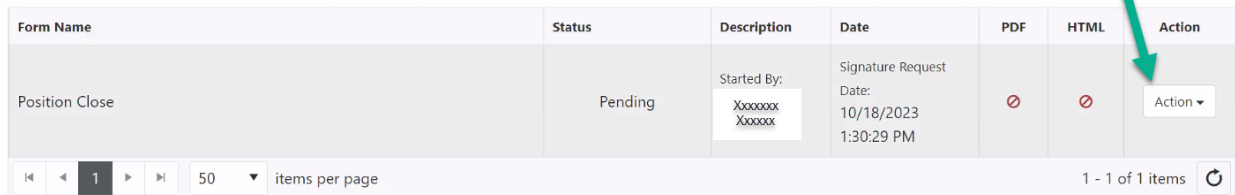
Complete Draft/Pending Forms

Forms History

Manage your Account

- Click on Action

Pending / Draft Forms



Form Name	Status	Description	Date	PDF	HTML	Action
Position Close	Pending	Started By: XXXXXXXXXX XXXXXXXXXX	Signature Request Date: 10/18/2023 1:30:29 PM			Action ▾

1 - 1 of 1 items

- Esigned indicates whether HR or Budget has approved. The Budget level will not appear until HR has approved. When only one line appears and it is HSC BD HR, it means that it is pending HR. Once HR approves, the Budget (HSC Bud) level will appear. Example below is pending Budget approval.

Co-Signer Information

* Click the Edit Cosigner action to edit/change your co-signer(s) information

* Click the Re-send Notification action to re-send a notification to your designated co-signer(s)

First Name	Last Name	Relationship	Email	Esigned	Esigned Date	Last Notified	Action
Xxxxxx	Xxxxxxx	HSC BD HR - Lubbock	Xxxxxx@xxx.xxx	Yes	10/18/2023 1:31:35 PM	10/18/2023 1:30:29 PM	Actions ▼
		HSC Bud		No		10/18/2023 1:31:36 PM	Actions ▼

Contact the Budget Office with any questions.