






Human Capital Management: Step-by-Step Guide

Creating a Classified Staff Position

This guide describes how to create and update position data and the non-person profile (job description) and, if necessary, prepare to feed data to CU Careers for recruitment. The types of changes you can make include working with vacant positions, reactivating positions, updating positions, new positions, and moving position and non-person profile data to CU Careers.

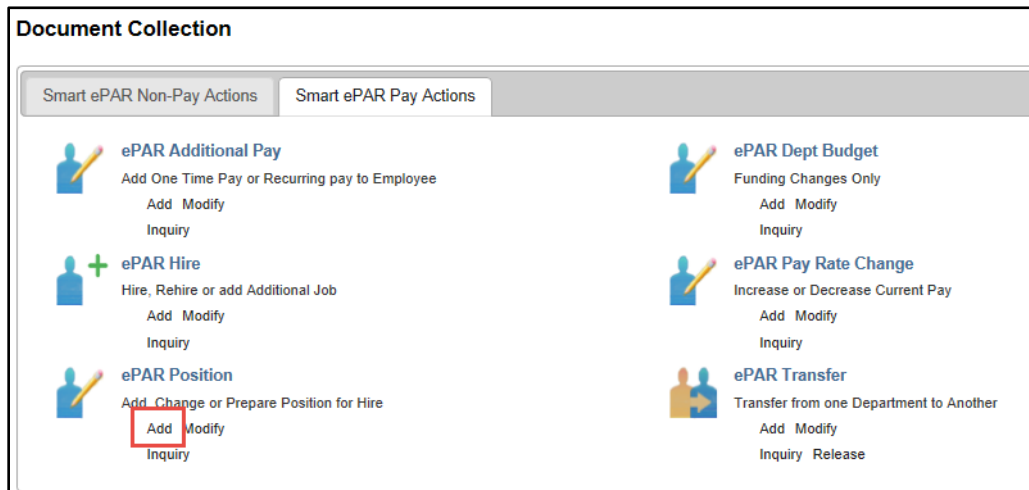
Before you begin, here are a few tips:

- The non-person profile is referred to as NPP throughout this document.
-  The magnifying glass activates a lookup and displays search results for you to select valid field values.
-  The book and checkmark icon lets you spell check text boxes.
-  The trashcan icon lets you remove an item.
-  The down arrow lets you hide, or collapse, sections you do not want to view.

Click the  arrow to expand the section.

Beginning the Transaction

1. Navigation: **Main Menu > Smart Solutions > Document Framework > Document Collection.**
2. Click the **Smart ePAR Pay Actions** tab.
3. Under ePAR Position, click **Add**.



As you start your transaction, the page displays the number of steps as you progress. In this procedure, you see 1 of 16 (shown below). As you progress through the transaction, the number of steps may change depending on whether you decide to update certain items.

Create ePAR Position Request

Step 1 of 16: ePAR - Position Search

Step 1: Position Search

To begin searching for a position or to begin creating a new one:

- Under **Select Employee Type**, select the type of action you want to take:
 - Vacant Position:** Choose to update a currently vacant position.
 - Reactivate Position:** Choose to update and reactivate an inactive position.
 - Update/Recruit Filled Position:** Choose to update a filled position or send to CU Careers to begin a search.
 - New Position:** Choose to create a brand new position.

Note: When creating a new position, do not update the **New Profile Identities** or **New Profile Association** (shown later in Step 5-Position Summary). A Profile Create Process will run and update these fields. See screenshot in Step 5.

- Select a **Business Unit** (campus) and press **Tab**. This step is optional; if you know the position number, skip Business Unit.

Note: Pressing the Tab key allows HCM to register your data entry before moving to another field. If you click with your mouse and enter data without allowing HCM to register your entry, you may lose what you entered and may have to enter it again.

- Under Search Criteria type the department number and press **Tab**. This step is optional; if you know the position number, skip this step.

Note: If the Department field does not populate, click the lookup next to the field to search for and select the department.

- Type the position number then press **Tab**.

Note: If the position number includes leading zeros (00 or 0000), you must include them.

Search Results		
Select	Position Number	Description
1 <input checked="" type="checkbox"/>	00217776	Admin Assistant III

5. Make sure the Select checkbox is selected for your position.

Search Results		Personalize Find First 1 of 1 Last					
Select	Position Number	Description	Short Description	Business Unit	Department	Job Code	Reports To
<input checked="" type="checkbox"/>	00217776	Admin Assistant III		UAMC	20189	G3A4XX	00605895

6. Click **Next**.

Step 2: Position Action/Reason

Go to Action/Reason Selection to select your action reason and enter comments about the position update:

1. From the **Reason** dropdown, select **Vacant Position**.

***Reason:** ▼

Vacant Position

Vacant Position: This selection is used regardless of whether the position is vacant and ready for recruitment or if you are just updating the NPP. If using CU Careers to recruit and hire a candidate and collect candidate information, there is a separate checkbox (described later in this document and process) that directs HCM to feed the data to CU Careers.

2. Select an Effective Date.

Old Effective Date: 08/11/2015

***Effective Date:**

- When feeding positions to CU Careers, the Effective Date must equal today's date or earlier (i.e. it cannot be future-dated).
- When you are doing a direct hire you will need to have the Effective Date prior to the hire date of a new employee.
- When you are just updating the position and there is an incumbent in this position, make sure the Update Incumbents box is selected so it will also update Job data with this information.

Specific Information		
	Current Value	New Value
Update Incumbents:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Salary Plan/Grade:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Budgeted Position:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Notes:

- The Position table does not use Effective Date sequencing. You **can only** use one Effective Date for each action/reason combination on the Position table
- Profile type is identified by employment group.

Profile Type: Univ Staff Pos Profile Templ

3. Add comments for the purpose of the transaction.

4. Click **Next**.

Step 3: Position-Change

Not all sections in Position-Change will need to be updated. However, it is recommended that all information is verified before sending the position to CU Careers for recruitment. Only edit the fields below if changes need to be made to update and verify position information:

1. Verify all fields.
2. Edit **Position Title**. This will be your working title on the posting.

▼ Position Data		
	Current Value	New Value
Position Title	Admin Assistant III	Chair Assistant

3. Edit the Job Information.

▼ Job Information		
	Current Value	New Value
Business Unit:	UAMC Anschutz Medical Center	UAMC Anschutz Medical Center
Job Code:	G3A4XX Admin Assistant III	G3A4XX Admin Assistant III
Regular/Temporary:	Regular	Regular
Full/Part Time:	Full-Time	Full-Time
Regular Shift:	N	N

4. Edit **Department, Company, Location, Reports To** (required) and **Appointing Authority**.

Note: The Reports To field must have an incumbent in it.

▼ Work Information		
	Current Value	New Value
Department:	20189 SOM-MED-Gastroenterology	20189 SOM-MED-Gastroenterology
Company:	CU University of Colorado	CU University of Colorado
Location:	2RB Research Bridge	2RB Research Bridge
Reports To:	00605895 Visiting Professor	00605895 Visiting Professor
Appointing Authority:	00605895 Visiting Professor-Vacant	00605895 Visiting Professor-Vacant

5. Edit **Standard Hours**.

▼ Salary Plan Information		
	Current Value	New Value
Salary Admin Plan:	950 Admin Support and Related	950 Admin Support and Related
Salary Grade:	S11 S11	S11 S11
Standard Hours:	40.00	40.00
FLSA Status:	Nonexempt	Nonexempt

6. Deselect, or clear, the **Update Incumbents** box if you don't want these updates to apply to the person currently holding the position.

Update Incumbents:	<input checked="" type="checkbox"/>	
--------------------	-------------------------------------	--

7. Update **Budgeted FTE**, if necessary.

	Current Value	New Value
Budgeted FTE:	1.000000	1.000000

8. Update **Campus Box**.

CU Position Info	
Current Value	New Value
Campus Box:	<input type="text"/> 

9. Click **Next**. 

Step 4: Non-Person Profile Questionnaire

This page of the transaction lets you choose which parts of the non-person profile (NPP) to update. To choose the areas of the non-person profile to update:

1. In the **Description** field, update the description to match your Position Title (working title).

Non-person Profile Descriptions	
Description: <input type="text" value="Chair Assistant"/>	Short Description: <input type="text" value="AdmAsstII"/>

2. Type a **Short Description**, which can be an identifier of your choice.
3. Select **Yes** for each area of the NPP you want to update.

Note: Radio buttons that are greyed out and marked Yes have mandatory fields that must be filled out to save and submit to CU Careers for recruitment. Fields that HCM feeds to CU Careers for **Classified Staff** include: the fields in Position Summary (Job Summary), HR Consultant, Duty Statements (Samples of work), Job Competencies, Minimum Qualifications, Background Check Types, Additional Job Requirements, and Core Competencies. While some of these are not mandatory, if you are recruiting, you should review the values, e.g., Job Competencies, Background Checks, and Additional Information. It is also important to check the Required Training as this tracks the position specific training as well as university-wide training.

Please choose Yes/No for the below Non-Person profile options that you wish to change/add/delete

Position Summary	<input type="radio"/> Yes <input type="radio"/> No
HR Consultant	<input type="radio"/> Yes <input type="radio"/> No
Duty Statements	<input type="radio"/> Yes <input type="radio"/> No
Essential Functions	<input type="radio"/> Yes <input checked="" type="radio"/> No
Staff Core Competencies	<input type="radio"/> Yes <input checked="" type="radio"/> No
Job Competencies	<input type="radio"/> Yes <input checked="" type="radio"/> No
Minimum Qualifications	<input type="radio"/> Yes <input type="radio"/> No
Preferred Qualification	<input type="radio"/> Yes <input checked="" type="radio"/> No
Required Training	<input type="radio"/> Yes <input checked="" type="radio"/> No
Background Check Types	<input type="radio"/> Yes <input checked="" type="radio"/> No
Additional Job Requirement	<input type="radio"/> Yes <input checked="" type="radio"/> No
Driver's License Type	<input type="radio"/> Yes <input checked="" type="radio"/> No
Driver's License Endorsements	<input type="radio"/> Yes <input checked="" type="radio"/> No
HR Only	<input type="radio"/> Yes <input checked="" type="radio"/> No
Salary Survey Matches	<input type="radio"/> Yes <input checked="" type="radio"/> No

Select All Yes
 Select All No

4. Click **Next**.

Note: The following steps show the process as if you chose **Select All Yes** in the previous step. If you chose **Yes** for only some pages, skip to the step that correlates to the name you see on the screen.

Step 5: Position Summary

Update the position summary page (required for CU Careers):


- To add a new position summary, click **Add New Position Summary** or select the row currently populated to edit existing information. New rows will need to be added when first creating/updating these positions.

Current Position Summary	
ID	Type of Review
NEW	New Position

New Position Summary	
ID	Type of review
NEW	New Position

Add New Position Summary

- Click the lookup next to **Type of Review**.


Type of Review: 

- Select from one of the following options:

- New:** Use when creating a new position or adding the job summary for the first time.
- Vacant:** Use when filling a vacant position or soon to be vacant position.
- Update Pos:** Choose only if updating a position.
- Reallocation:** Use for a position change that is **not** a Promotion or Demotion (no change in pay).
- Promotion:** Use if position change is with more pay/responsibilities.
- Demotion:** Use if position change is with less pay/responsibilities.

DEMOTION	(blank)	(blank)	Position Change with less pay/responsibilities
NEW	(blank)	(blank)	New Position
PROMOTION	(blank)	(blank)	Positon change with more pay/responsibilities
REALLOCATION	(blank)	(blank)	Position change that is not a Promotion or a Demotion (no chg in pay)
UPDATE POS	(blank)	(blank)	Update an existing position/NPP
VACANT	(blank)	(blank)	Vacant Position

- Click the lookup next to **Exemption Statute**.

Exemption Statute: 

- Select the appropriate exemption statute.

- If you are recruiting for the position, click the **Feed to CU Careers?** checkbox. This sends the position to CU Careers once approved. Leave the box unchecked if you are only updating the position/NPP and not sending to CU Careers for recruitment.

Feed to CU Careers?

- Enter a **Job Summary**. (This will feed to CU Careers as part of your job description.)

Job Summary:

Note: The Job Summary text box is limited to 1,325 characters.

- Click **OK**. OK

- Click **Add New HR Consultants** (required for CU Careers). Add New HR Consultants

- Click the lookup next to HR Consultant and select the correct HR Consultant for your campus (refer to your campus HR for more information).

- Click **OK**. OK

Note: When creating a new position, the New Profile Identities and New Profile Association (shown below) will be blank. Do not update them. The system runs a Profile Create Process updates these fields.

New Profile Identities			
Profile Identity Option	Key 1 Value	Description	Status
			🗑️
Add New Profile Identities			
Current Profile Associations			
Profile Association	Key 1 Value	Description	Status
New Profile Associations			
Profile Association	Key 1 Value	Description	Status
			Active 🗑️
Add New Profile Associations			

- Click **Next**. Next

Step 6: NPP-Duties

To identify and add duties of the position (required when you want to feed to CU Careers):

1. Choose **Add New Duty Statement**. Add New Duty Statements for Classified

2. Click the lookup next to **Duties**. Duties:

3. Use the search boxes on the top of the screen to find the duty you want to use. Use the Job Code list to search by Content Item ID.

Or,

Click the name of the duty from the list at the bottom.

Content Type CU_DUTIES

Content Item ID begins with

Content Group Type begins with

Content Group begins with

Description begins with

Look Up
Clear
Cancel
Basic Lookup

Search Results

View 100 First 1-4 of 4 Last

Content Item ID	Content Group Type	Content Group	Description
G3A4	(blank)	(blank)	Design and implement the general office and administrative operations
G3A4 2	(blank)	(blank)	Deciding what operations will be performed, how processes are implemented; creating forms

4. Verify that the **Rating Model** is **CUCS**.

Rating Model: CUCS Classified Perf Plan - 3

5. Enter **Percent of Time**. Percent of Time:

6. Enter **Examples of Decisions**, **Examples of Problems/Challenges**, and **Description of Work**. These allow you to add more detail about how a person might accomplish the duty statement.

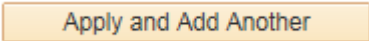
Examples of Decisions:

Examples of Problems/Challenge:

Description of Work:

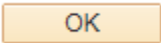
OK
Cancel
Apply and Add Another

7. To add another duty, click **Apply and Add Another**.



Or,

Click **OK**.



8. If the position has some form of Line or Staff Authority, add this information to the section shown below.

New Classified Line/Staff Authority	
ID	Supervision/Line Staff Auth

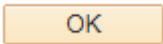
Add New Classified Line/Staff Authority

Classified Line/Staff Authorit

Supervision/Line Staff Auth: Staff Authority (Influences campus-wide management decisions)

List Pos #s and Job Titles:

9. Click **OK**.



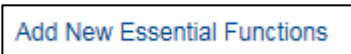
10. Click **Next**.



Step 7: NPP-Essential Functions

Essential functions describe the requirements of the position. (This field will not feed to CU Careers.) To add essential functions:

1. Click **Add New Essential Functions**.



2. Click the lookup for **Essential Functions**.

Essential Functions:

- Use the search boxes on the top of the screen to find the essential function you want to use; then click the name of the duty from the list at the bottom.

Content Type CU_ESS_FNCTS

Content Item ID begins with

Content Group Type begins with

Content Group begins with

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100

Content Item ID	Content Group Type	Content Group	Description
ENV_ATMOSPH	(blank)	(blank)	Atmospheric Conditions - Expos
ENV_CONFREST	(blank)	(blank)	Confined/Restricted Env - Work
ENV_EXTCOLD	(blank)	(blank)	Extreme Cold - Exposure to non-
ENV_EXTHEAT	(blank)	(blank)	Extreme Heat - Exposure to non-

- To add another Essential Function, click **Apply and Add Another**.

Apply and Add Another

Or,

OK

- Click **Next**.

Next

Step 8: NPP-Core Competencies

Core competencies will populate from the classified staff profile template for existing, filled positions. For new positions you will have to add them. If populated, core competencies will feed to CU Careers.

Add New Class Staff Core Competencies

- Click **Add New Class Staff Core Competencies**.

- Click the lookup for **Core Competency**.

Core Competency:

- Select a competency. Be sure to add all five core competencies listed below.

New Class Staff Core Competencies					
ID	Core Competencies	Status	Rating Model	Description	Proficiency
ACCTABILITY	Accountability	Active	CUCS	Classified Perf Plan - 3	
COMMUNICAT	Communication	Active	CUCS	Classified Perf Plan - 3	
CUST SERVICE	Customer Service	Active	CUCS	Classified Perf Plan - 3	
INTERPERSON	Interpersonal Skills	Active	CUCS	Classified Perf Plan - 3	
JB KNOWLEDGE	Job Knowledge	Active	CUCS	Classified Perf Plan - 3	

[Add New Class Staff Core Competencies](#)

- To add another Core Competency, click **Apply and Add Another**.

Apply and Add Another

Or,

OK

- Click **Next**.

Next

Step 9: NPP-Job Competencies

Job competencies will feed to CU Careers. To add job competencies to a position:

1. Click **Add New Job Competency**.

[Add New Job Competency](#)

2. Click the lookup for **Job Competency**.


Job Competency: 


3. Use the search boxes on the top of the screen to find the job competency you want to use, then click the name of the job competency from the list at the bottom.

Look Up Job Competency Help

Content Type CU_JOB_COMP

Content Item ID begins with



Content Group Type begins with 

Content Group begins with 

Description begins with

[Basic Lookup](#)

Search Results

View 100 First  1 of 100  Last

Content Item ID	Content Group Type	Content Group	Description
GENERAL001	(blank)	(blank)	Accuracy and Attention to Detail
GENERAL002	(blank)	(blank)	Active Learning
GENERAL003	(blank)	(blank)	Active Listening
GENERAL004	(blank)	(blank)	Analytical Thinking
GENERAL005	(blank)	(blank)	Attention to Detail

4. To add another job competency, click **Apply and Add Another**.

Or,

Click **OK**.

5. Make sure the **Rating Model** is **CUCS**.

Rating Model:  [Classified Perf Plan - 3](#)

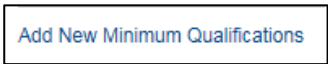
Click **OK**.

6. Click **Next**.

Step 10: Qualifications

Minimum qualifications must be entered to feed to CU Careers. To enter qualifications:

1. Click **Add New Minimum Qualifications**.



2. Click the lookup for **Content Item ID**.

Content Item ID:

3. Search the Content Item ID by typing the first four values of the job code.

Content Type: CU_MIN_QUAL

Content Item ID: begins with

Content Group Type: begins with

Content Group: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1 of 1 Last

Content Item ID	Content Group Type	Content Group	Description
G3A4	(blank)	(blank)	Three years of general clerical experience.

4. In the **Minimum Qualifications** text box, type the specifics of the qualifications, which will feed to CU Careers.

Minimum Qualifications

Content Item ID: Three years of general clerical experience.

Minimum Qualifications:

5. Enter all minimum qualifications in the text box.
6. Click **OK**. (Do not click Apply and Add Another.)

7. Click **Add New Preferred Qualifications**.



8. Click the lookup for **Content Item ID**.


Content Item ID:


9. Enter all preferred qualifications in the text box.

Preferred Qualifications

Content Item ID: Preferred Qualifications

Preferred Qualifications:


10. Click **OK**.  (Do not click Apply and Add Another.)

11. Click **Next**. 

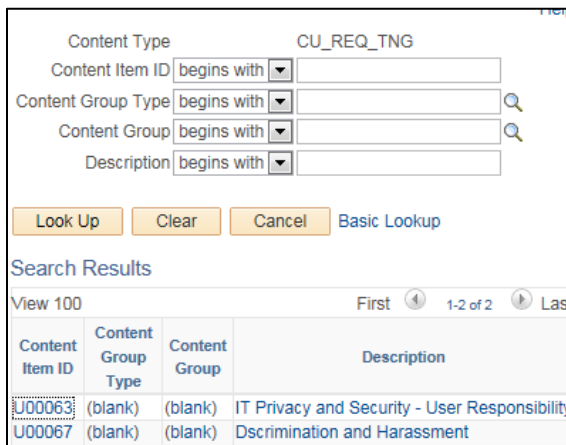
Step 11: NPP-Required Training

For existing positions the Discrimination and Harassment and IT Privacy and Security training, which are required for all employees will be listed. For new positions you will need to add Discrimination and Harassment and IT Privacy and Security and trainings and any additional required training for that position:

1. Click **Add New Required Training**. 


2. Click the lookup for **Required Training**. 


3. Select training items from list. This is where you can add any required training specific to the position.



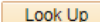



Content Type CU_REQ_TNG

Content Item ID begins with [input field]

Content Group Type begins with [input field] 

Content Group begins with [input field] 

Description begins with [input field]

Search Results

View 100 First 1-2 of 2 Last

Content Item ID	Content Group Type	Content Group	Description
U00063	(blank)	(blank)	IT Privacy and Security - User Responsibility
U00067	(blank)	(blank)	Discrimination and Harassment

4. To add another Required Training click **Apply and Add Another**.

Content Item ID	Content Group Type	Content Group	Description
A00001	(blank)	(blank)	General Fin Overview Lecture
A00002	(blank)	(blank)	General GL and PO
A00003	(blank)	(blank)	Core CSC-AP
A00004	(blank)	(blank)	Core CSC-PA
A00005	(blank)	(blank)	Core Financial
A00006	(blank)	(blank)	Core Department
A00007	(blank)	(blank)	General PS HRMS Training
A00008	(blank)	(blank)	Gen PS HR Trng for New Users
A00009	(blank)	(blank)	Campus Employer Time Entry
A00010	(blank)	(blank)	HR/PeopleSoft Refresher Course
A00011	(blank)	(blank)	PS HR Executive Session
A00012	(blank)	(blank)	PS Recruit Workforce Training
A00013	(blank)	(blank)	PS HR Admin Train Session
A00014	(blank)	(blank)	PS HR Admin Train Course

Apply and Add Another

Or,


Click **OK**. **OK**

5. Click **Next**. **Next**

Step 11: NPP-Background Checks and Additional Information

The following sections describe how add background checks, job requirements, and driver's license requirements. Background checks and job requirements will feed into CU Careers. The Criminal Background check will be listed for filled positions, it will need to be added for new positions. To add additional information including the background checks:

1. Click **Add New Background Check Types**. **Add New Background Check Types**

2. Click the lookup for **Background Check Type**. **Background Check Type:** 

View 100 First 1-8 of 8 Last

Content Item ID	Content Group Type	Content Group	Description
CREDIT	(blank)	(blank)	Financial/Credit Check
CRIMINAL	(blank)	(blank)	Criminal Background Check
DRIVING	(blank)	(blank)	Driving Record Check
EPL	(blank)	(blank)	EPLS - Excluded Parties List
OTHER	(blank)	(blank)	Other Background Check
SEX_OFFEND	(blank)	(blank)	Sex Offender Registry Check

3. Select the background check.

4. To add another background check type, click **Apply and Add Another**. **Apply and Add Another**

Or,

Click **OK**. **OK**

[Add New Additional Job Requirements](#)

5. Click **Add New Additional Job Requirements** (optional).

6. Click the lookup for **Additional Job Requirements**. 

7. Select **HIPAA, Hazardous materials, Environmental**, and any other additional job requirements. If any of these values were in HRMS 8.9 Position Data, they will be migrated into the NPP for active positions.

Content Item ID	Content Group Type	Content Group	Description
CALL BACK	(blank)	(blank)	Call Back
CAMP_SEC_ATH	(blank)	(blank)	Campus Security Authority
DRUG FREE WK	(blank)	(blank)	Drug Free Workplace
DR_LIC_REQ	(blank)	(blank)	Driver's License Requirement
ESSNTAL SVCS	(blank)	(blank)	Essential Services Designation


[Apply and Add Another](#)

8. To add another Required Training click **Apply and Add Another**.

Or,

Click **OK**. [OK](#)

9. Click **Add New Driver's License Type** (optional). [Add New Driver's License Type](#)

10. Click the lookup for **Driver's License Type**. 


Content Item ID	Content Group Type	Content Group	Description
CDL	(blank)	(blank)	Commercial Driver's License
REG	(blank)	(blank)	Regular Driver's License

11. Choose Driver's License Type.

12. Click **OK**. [OK](#)

13. Click **Add New Driver's License Endorsements** (optional). [Add New Driver's License Endorsements](#)

14. Click the lookup for **Driver's License Endorsement**.



Content Item ID	Content Group Type	Content Group	Description
HAZ_MATERIAL	(blank)	(blank)	Hazardous Materials Endorsement
MOTORCYCLE	(blank)	(blank)	Motorcycle
PASSENGER	(blank)	(blank)	Passenger Endorsement
SCHOOL BUS	(blank)	(blank)	School Bus Endorsement

15. Choose an endorsement.

16. Click **OK**. [OK](#)

17. Click **Next**. [Next](#)




Step 12: NPP-HR Only

The HR Only section lets HR users add notes about the position.


1. Click **Next**. 

Step 13: New Department Budget Table-Position

This section will populate based on current funding for the position if it exists. Verify that information is correct, or change funding.

1. Choose **Pct** or **Amt**. 
2. Enter **Department** number then press **Tab** twice.
3. Enter **SpeedType** and then press **Tab** twice.
4. Enter **Distribution %** or **Amount**.
5. To add another row, click the plus. 
6. To remove a row, click the minus. 

Step 14: Saving and Submitting a Position

1. Click **Save** from the top left corner. 

ePAR POS0000050 has been saved successfully

Click OK to return to the transaction

OK

2. Click **OK**.

3. Click **Submit**. 