University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
EMPLOYEE SERVICES

# Human Capital Management: Step-by-Step Guide

## Creating a Faculty 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, creating new positions, and moving position and non-person profile data to CU Careers.

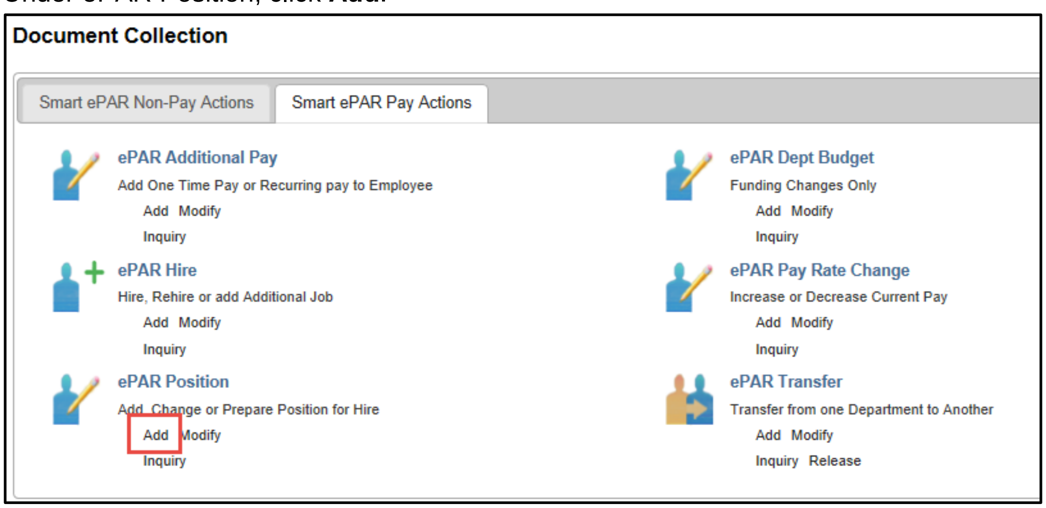
Before you begin, here are a few tips:

- The non-person profile is referred to as NPP throughout this document.
- The magnifying glass is called a lookup and displays search results for you to select valid field values.
- The book and checkmark lets you spell check text boxes.
- The trashcan 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**.



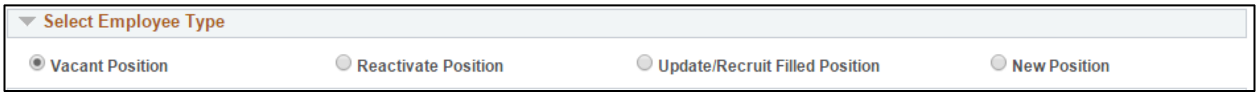

As you start your transaction, the page displays the number of steps as you progress. In this procedure, you see 1 of 16 (shown below). As you progress through the transaction, the number of steps may change depending on whether you decide to update certain items.

Create ePAR Position Request

**Step 1 of 16: ePAR - Position Search**

# Step 1: Position Search

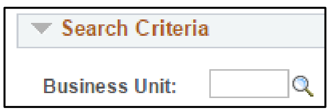
To begin searching for a positon or to begin creating a new one:




1. 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.

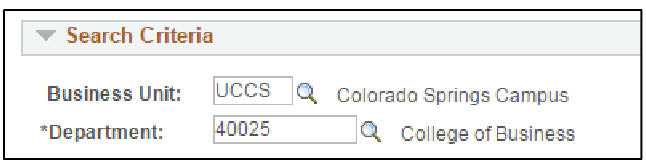
   **Note:** When creating a new position, do not update the **New Profile Identities** or **New Profile Association** (shown later in Step 5-Position Summary and HR Consultant). A Profile Create Process will run and update these fields. See screenshot in Step 5.

2. 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.

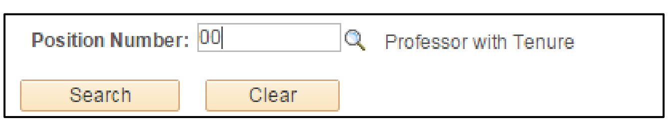
3. Type the department number and press **Tab**. (Optional: If you know the position number, skip this step.)



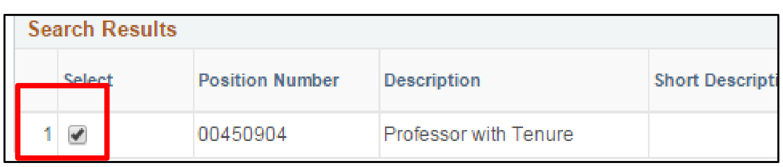

**Note:** If the Department field does not populate, click the lookup next to the field to search for and select the department.

4. Type the position number and choose the appropriate one that populates, then **Tab** out of the field.

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




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

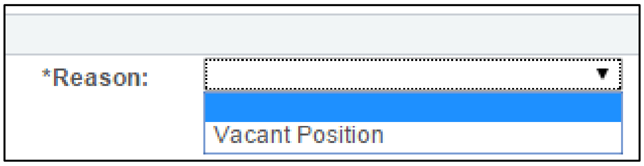



6. Click **Next**.

# 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**.



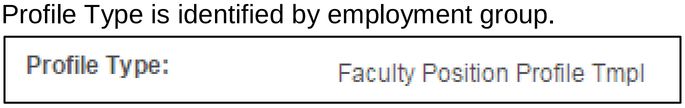

**Vacant Position:** This reason is used regardless of whether the position is vacant and ready for recruitment or if you are just updating the NPP. If you are using CU Careers to recruit and hire a candidate, and collect candidate information, there is a separate checkbox (described later in this document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

2. Choose an 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.


**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.




3. Add comments for the purpose of the transaction.

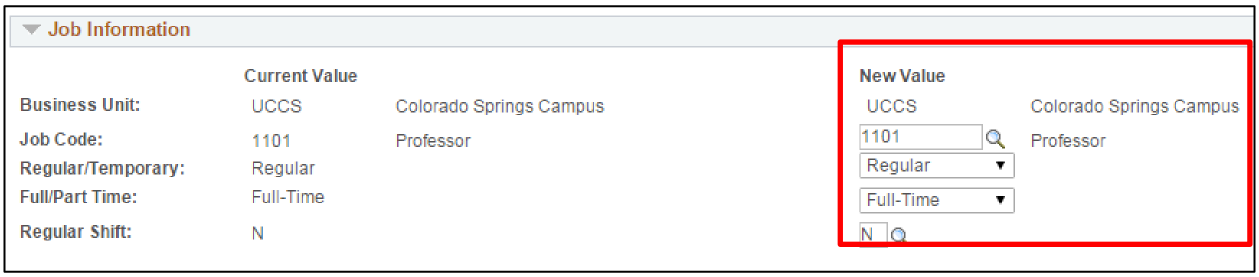
4. Click **Next**. 

# 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:

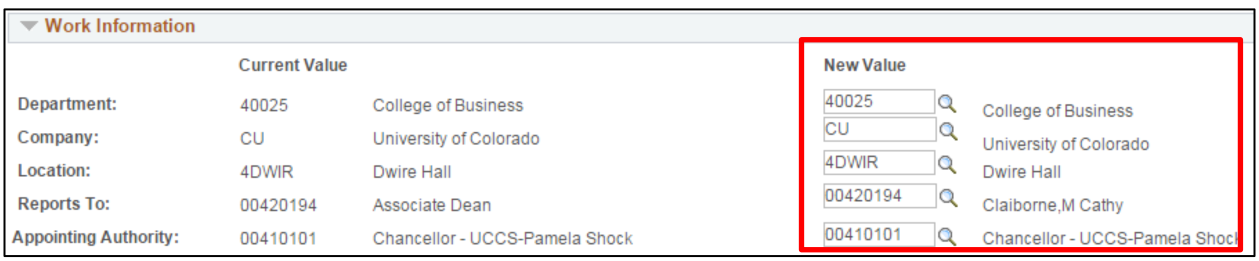
1. Verify all fields.
2. Edit **Position Title**. This will be your working title on the posting.


3. Edit **Job Code**, **Regular/Temporary**, **Full /Part Time**, and **Regular Shift**.

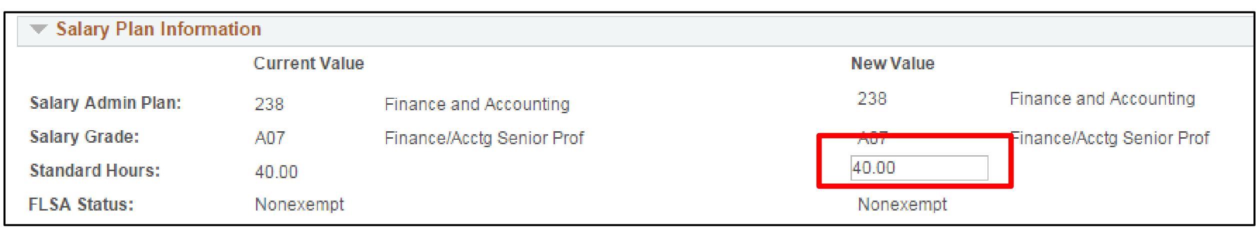



4. Edit **Department**, **Company**, **Location**, **Reports To** (required) and **Appointing Authority**.

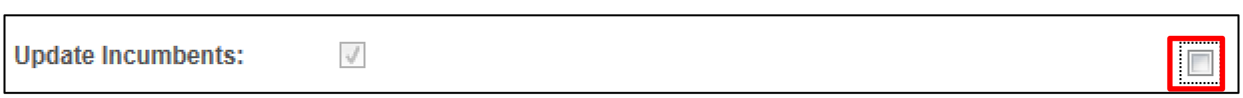
   **Note:** The **ReportsTo** field must have an incumbent in it.



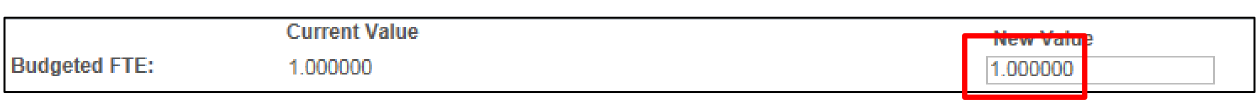

5. Edit **Standard Hours**.




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




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



8. Update **Campus Box**.


9. Click **Next**.

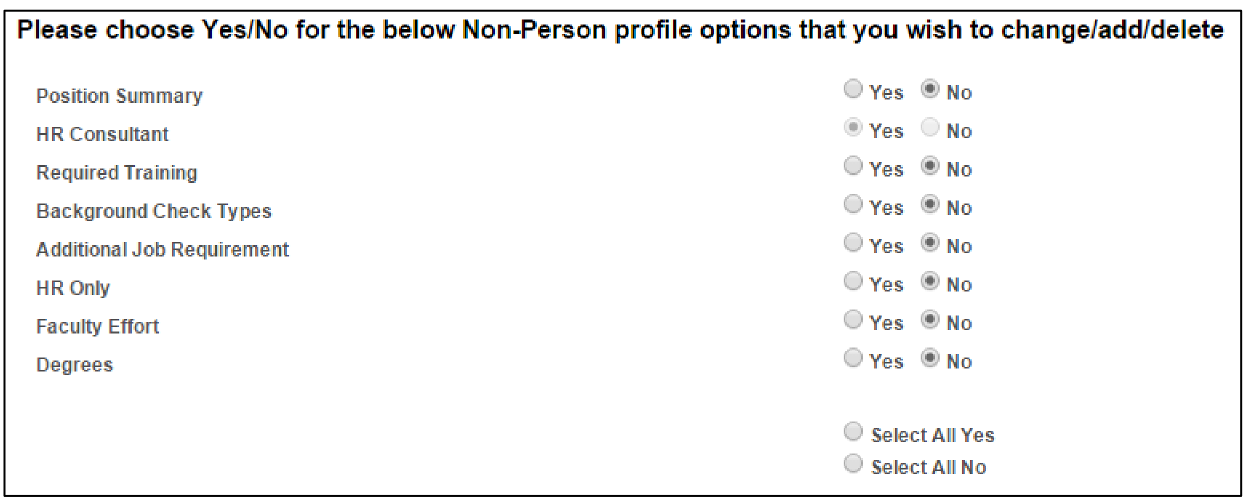

# Step 4: Non-Person Profile Questionnaire

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).


2. Type a **Short Description**, which can be an identifier of your choice.
3. Select **Yes** for the areas 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. The only fields that are required for **Faculty** are Position Summary and HR Consultant. If Background Check Types, Additional Job Requirements, and Degrees are populated, they will feed to CU Careers. It is also important to check the Required Training as this tracks the position-specific training as well as university-wide training. Position Summary must be marked Yes if you plan to send data to CU Careers.




4. Click **Next.**

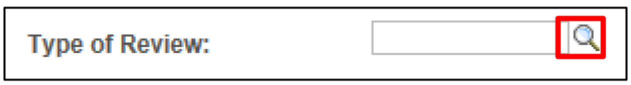

**Note:** The following steps show the process as if you chose **Select All Yes** in the previous step. If you chose **Yes** for only some pages, skip to the step that correlates to the name you see on the screen.

# Step 5: Position Summary and HR Consultant

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

1. 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.


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

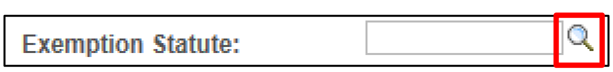



3. Choose from one of the following options:

   - **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.

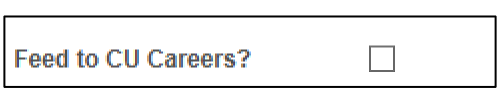
| | | | |
|---|---|---|---|
| DEMOTION | (blank) | (blank) | Position Change with less pay/responsibilities |
| NEW | (blank) | (blank) | New Position |
| PROMOTION | (blank) | (blank) | Positon change with more pay/responsibilities |
| REALLOCATION | (blank) | (blank) | Position change that is not a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

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

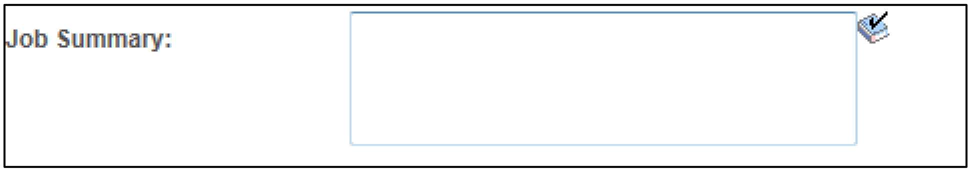



5. Select the appropriate exemption statute.

6. If you are recruiting for the position, click the **Feed to CU Careers?** chekbox. 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.



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




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

8. Click **OK**. 


9. Click **Add New HR Consultant** (required for CU Careers). 


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

11. Click **OK**. 

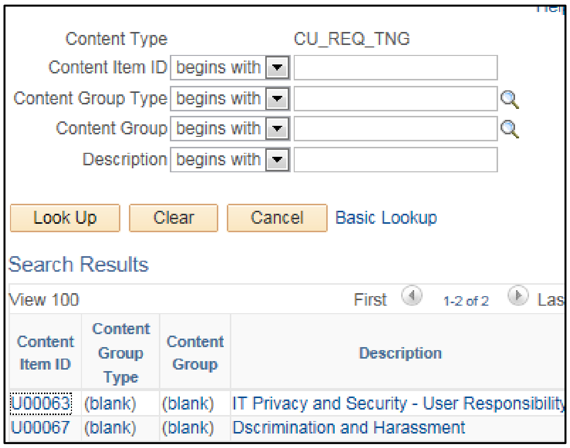

**Note:** When creating a new position, the New Profile Identities and New Profile Association (shown below) will be blank. <u>Do not update them.</u> The system runs a Profile Create Process and updates these fields.


12. Click **Next**. 

# Step 6: NPP-Required Training

For filled positions, the Required Training for all employees will already be listed for University-wide training. Any additional job-specific training, at least initially, will need to be added. For new positions you will need to add those trainings and any additional required training for that position:

1. Click **Add New Required Training**. Add New Required Training
2. Click the lookup for **Required Training**. Required Training:
3. Select a training option from the list. This is where you can add the Required Training specific to the position.




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 7: NPP-Background Checks and Additional Information

This section describes how to add background checks, job requirements, and driver's license requirements. (Background checks and job requirements will feed into CU Careers). Again, the Criminal Background check will be listed for filled positions; it will need to be added for new positions. To add additional 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:
3. Select the background check.

View 100 First 1-6 of 6 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 |

4. To add another Background Check Type click **Apply and Add Another**. Apply and Add Another

   Or,

   Click **OK**. OK

5. Click **Add New Additional Job Requirements** (optional). Add New Additional Job Requirements
6. Click the lookup for **Additional Job Requirements**. Additional Job Requirements:
7. Choose **HIPAA**, **Hazardous materials**, **Environmental**, and any other additional job requirements.

| 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 |

8. To add another Additional Job Requirement, click **Apply and Add Another**. 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**. Driver's License Type:

11. Choose a **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 |

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**.

Driver's License Endorsement:

15. Choose an 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 |

16. Click **OK**. OK

17. Click **Next**. Next

# Step 8: NPP-HR Only

This section is used by HR or Faculty position reviewers only (e.g., Dean's Office Staff). They will be able to add notes about the position.

1. Click **Next**. Next

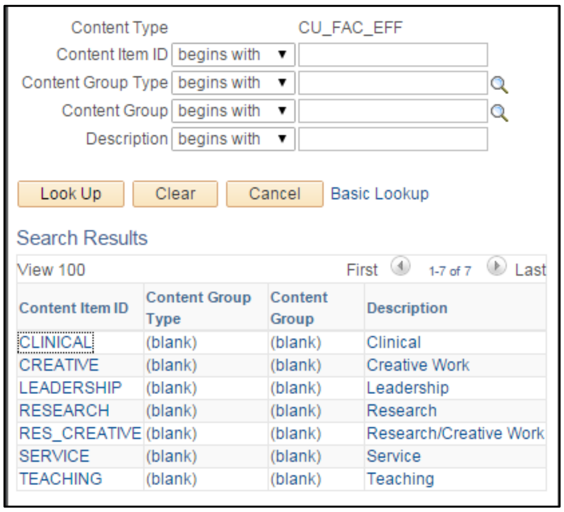
# Step 9: NPP-Faculty Effort

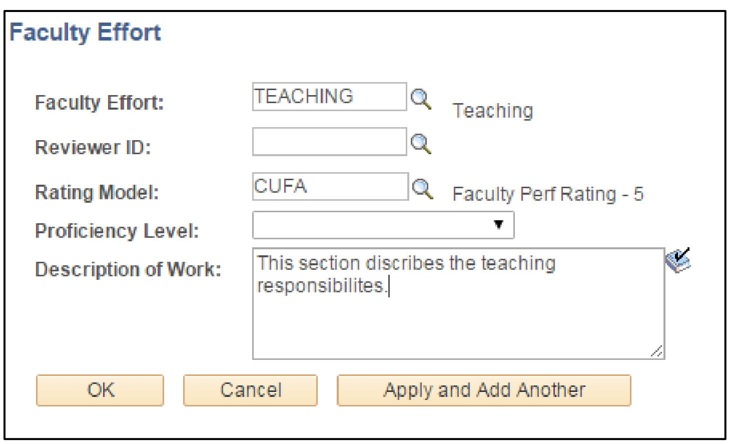
This section describes any Teaching, Research, Service, Clinical, Creative, Leadership activities performed by faculty.

1. Click **Add New Faculty Effort**.


2. Click the lookup for **Faculty Effort**.


3. Select the **Faculty Effort** type:



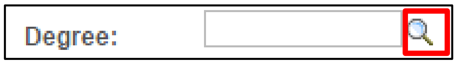

4. Click **OK**.


5. Click **Next**.

# Step 10: NPP-Degree and Field of Study

This section leets you define any degrees and requirements for fields of study.  If populated, the field of study will feed to CU Careers.

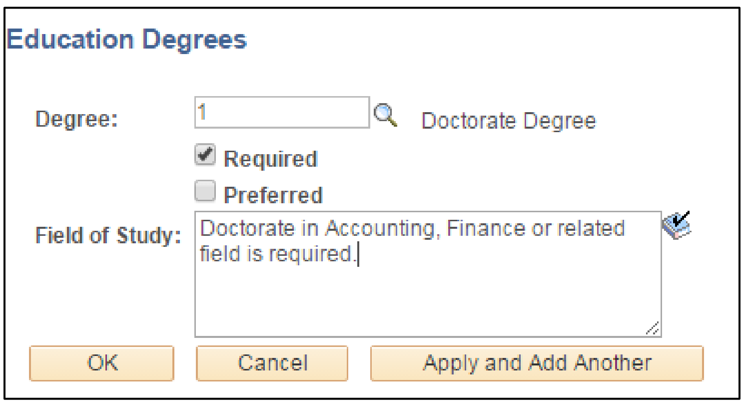
1. Click **Add New Degree**. 

2. Click the lookup for **Degree**. 

3. Click the appropriate Degree type:

| Content Item ID | Content Group Type | Content Group | Description |
|---|---|---|---|
| 1 | (blank) | (blank) | Doctorate Degree |
| 1DA | (blank) | (blank) | Doctor of Arts |
| 1DARCH | (blank) | (blank) | Doctor of Architecture |
| 1DBA | (blank) | (blank) | Doctor of Business Admin |
| 1DE | (blank) | (blank) | Doctor of Engineering |

4. Indicate whether the degree is **Required** or **Preferred**.  You can add select **Apply and Add Another** if one is Required and another is Preferred.
5. Complete the **Field of Study Section**.




# Step 11: New Department Budget Table-Position

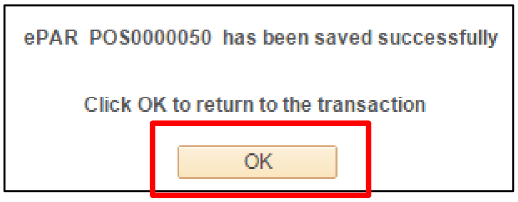
This section populates based upon current funding for the position, if it exists. Verify whether the information is correct, or change the funding.

1. Choose **Pct** or **Amt**. 

2. Enter **Department** number then press **Tab** twice.
3. Enter **SpeedType** and 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 12: Saving and Submitting a Position

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

2. Click **OK**. 

3. Click **Submit**.