CU | University of Colorado
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EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

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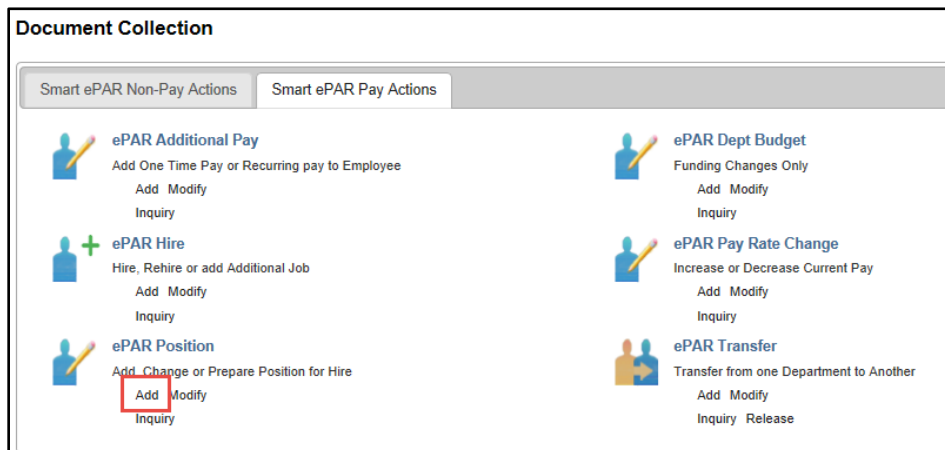
As you start your transaction, the page displays the number of steps as you progress. In this procedure, you see 1 of 16 (shown below). As you progress through the transaction, the number of steps may change depending on whether you decide to update certain items.

Step 1: Position Search

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

Select Employee Type			
⦿ Vacant Position	○ Reactivate Position	○ Update/Recruit Filled Position	○ New Position

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 Step5-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, enter it in the appropriate field instead.

Search Criteria
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, enter that instead.)

Search Criteria		
Business Unit:	USYS 🔍	System Administration
*Department:	51000 🔍	Employee Services

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

4. Enter 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 inlcude them.

    Position Number: 00 🔍 Professor with Tenure

    [Search] [Clear]

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. Select 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.

Position Data		
	Current Value	New Value
Position Title	Student Asst IV	Front Desk Support

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

Job Information				
	Current Value		New Value	
Business Unit:	USYS	System Administration	USYS	System Administration
Job Code:	4104	Student Asst IV	4104	Student Asst IV
Regular/Temporary:	Temporary		Temporary	
Full/Part Time:	Part-Time		Part-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. In this example, there is no one in the Reports To position because a name is not next to the position number.

Work Information				
	Current Value		New Value	
Department:	51000	Employee Services	51000	Employee Services
Company:	CU	University of Colorado	CU	University of Colorado
Location:	5UCA	Office of the President	5UCA	Office of the President
Reports To:	00508109		00508109	
Appointing Authority:				

5. Edit **Standard Hours**.

Salary Plan Information				
	Current Value		New Value	
Salary Admin Plan:	410	Student Worker	410	Student Worker
Salary Grade:	S14	Student Assistant IV	S14	Student Assistant IV
Standard Hours:	1.00		1.00	
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:	✓	☐

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:		🔍

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 in 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:	Front Desk Support	Short Description:	SA IV

2. Type a **Short Description**, which can be an identifier of your choice.

3. Select **Yes** for the areas of the non-person profile 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 field that is required for **Students/Temporary** positions is the HR Consultant. If Position Summary, 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 these track the position specific training as well as university-wide training.

To send to CU Careers, you must enter the position summary section and select the send to CU Careers checkbox.

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

Position Summary	○ Yes ● No
HR Consultant	● Yes ○ No
Required Training	○ Yes ● No
Background Check Types	○ Yes ● No
Additional Job Requirement	○ Yes ● No
HR Only	○ Yes ● No
	○ Select All Yes
	○ Select All No

4. Click **Next**.

Note: The following steps show the process if you **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 <u>new</u> 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. Select one of the following options (some of these may not apply to Student positions.):

   - **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.

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

5. Select the appropriate exemption statute.

6. If you are recruiting for the position, select the **Feed to CU Careers?** checkbox. This sends the position to CU Careers once approved. Leave this 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 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. Do not update them. The system runs a Profile Create Process and updates these fields.
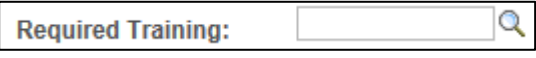
New Profile Identities

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	🗑

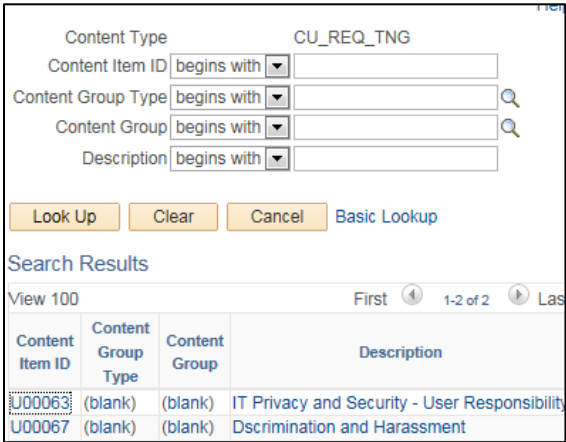Add New Profile Associations

12. Click **Next**.

Step 6: NPP-Required Training

For existing positions the Discrimination and Harassment and IT Privacy and Security training 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 a training option from the list. This is where you can add the Required Training specific to the position.

Content Type	CU_REQ_TNG	
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 ◀ 1-2 of 2 ▶ Las

Content Item ID	Content Group Type	Content Group	Description
U00063	(blank)	(blank)	IT Privacy and Security - User Responsibility
U00067	(blank)	(blank)	Dscrimination 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 7: NPP-Background Checks and Additional Information

These sections describe how to add background checks and additional job 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:

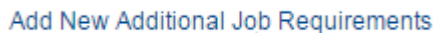| View 100			First ◀ 1-6 of 6 ▶ Last
Content Item ID	Content Group Type	Content Group	Description
CREDIT	(blank)	(blank)	Financial/Credit Check
CRIMINAL	(blank)	(blank)	Criminal Background Check
DRIVING	(blank)	(blank)	Driving Record Check
EPL	(blank)	(blank)	EPLS - Excluded Parties List
OTHER	(blank)	(blank)	Other Background Check
SEX_OFFEND	(blank)	(blank)	Sex Offender Registry Check

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

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. If any of these values were in Position Data (from version 8.9), 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

8. To add another Additional Job Requirement, click **Apply and Add Another***.*

   Apply and Add Another

   Or,

   Click **OK**.   OK

9. Click **Next**.   Next

Step 8: NPP-HR Only

This section is used by HR or Student Employment position reviewers only. They will be able to add notes about the position.

1. Click **Next**.   Next

Step 9: New Department Budget Table-Position

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

1. Choose **Pct** or **Amt**.   ○ Amt ● Pct

2. Enter **Department** number then press **Tab** twice.
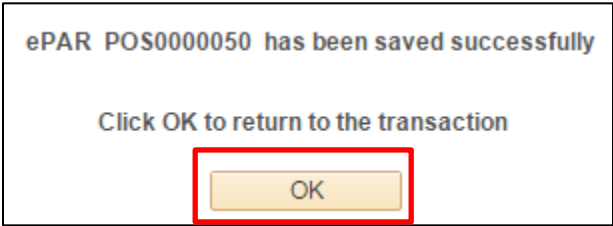
3. Enter **SpeedType** and then press **Tab** twice.

4. Enter **Distribution %** or **Amount**.

5. To add another row, click the plus.   ➕

6. To remove a row, click the minus.   ➖

Step 10: Saving and Submitting a Position

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

    ePAR POS0000050 has been saved successfully

    Click OK to return to the transaction

    OK

2. Click **OK**.

3. Click **Submit**. Submit