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

Human Capital Management: Step-by-Step Guide

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

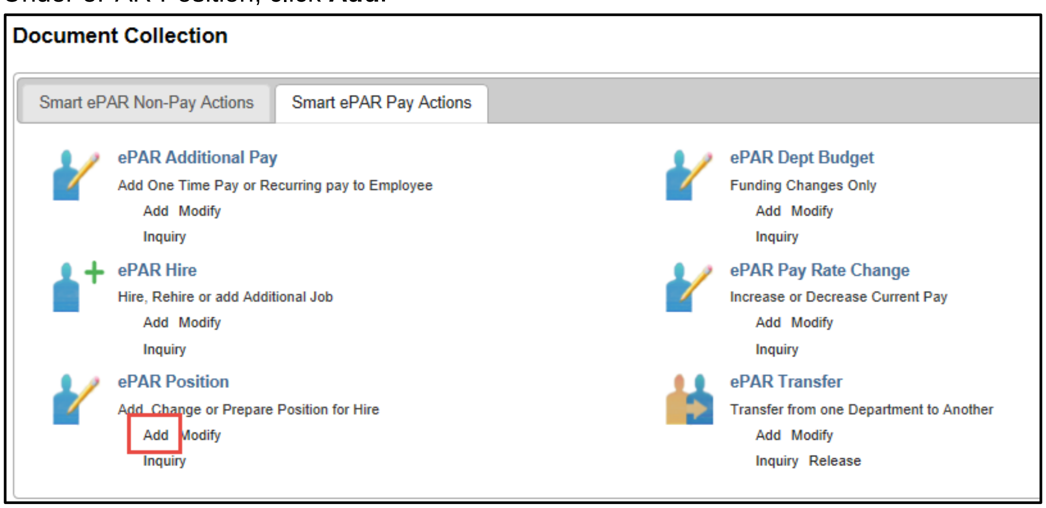
Before you begin, here are a few tips:

- The non-person profile is referred to as NPP throughout this document.
- The magnifying glass is called a look up 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**.



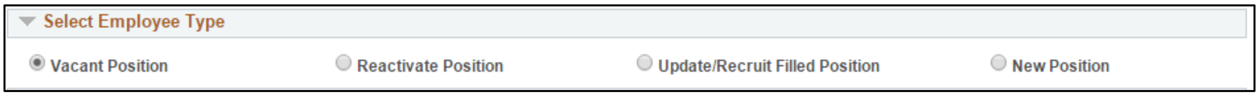
As you start your transaction, the page displays the number of steps as you progress. In this procedure, you see 1 of 16 (shown below). As you progress through the transaction, the number of steps may change depending on whether you decide to update certain items.

Create ePAR Position Request

Step 1 of 16: ePAR - Position Search

Step 1: Position Search

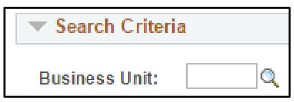
To begin searching for a positon or to begin creating a new one:



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.

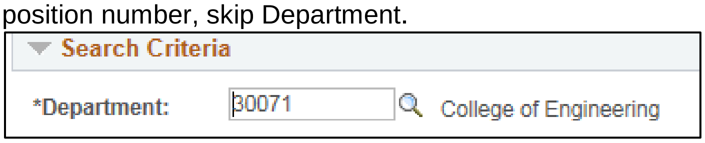
   Note: When creating a new position, do not update the **New Profile Identiftes** or **New Profile Association** (shown later in Step 5-Position Summary). A Profile Create Process will run and update these fields. See screenshot in Step 5.

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.

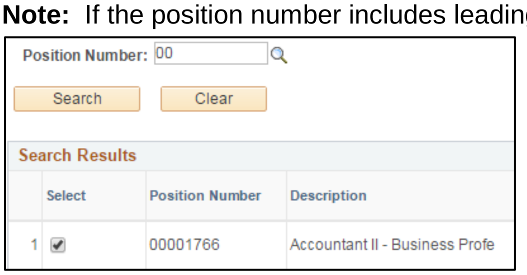
3. Under Search Criteria type or select the department number and press **Tab**. This step is optional; if you know the position number, skip Department.



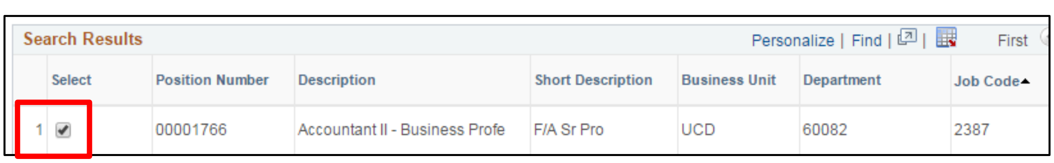
   Note: If the Department field does not populate, click the lookup next to the field to search for and select the department.

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

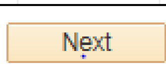
   Note: If the position number includes leading zeros (00 or 0000), you must include them.



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



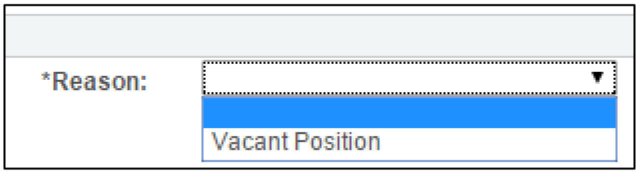
6. Click **Next**.



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**.



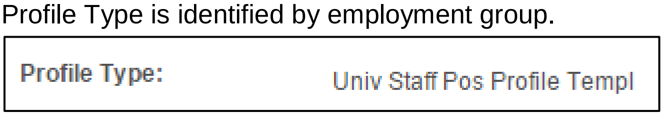
Vacant Position: This selection is used regardless of whether the position is vacant and ready for recruitment or if you are just updating the NPP. If using CU Careers to recruit and hire a candidate, and collect candidate information, there is a separate checkbox (describe later in this document and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



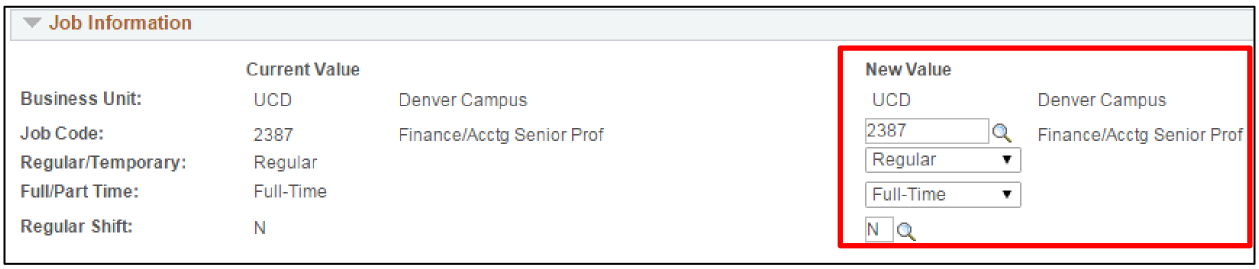
3. Add comments for the purpose of the transaction.
4. Click **Next**.

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 all position information is still valid:

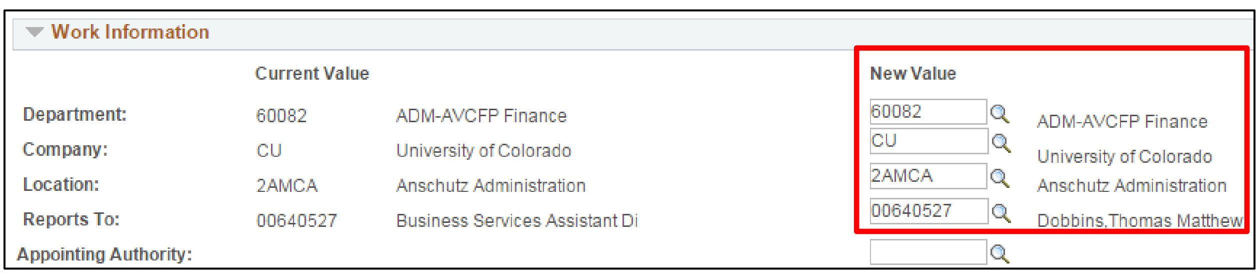
1. Verify all fields.
2. Edit **Position Title**. This will be your working title on the posting.

3. Edit the **Job Information**.

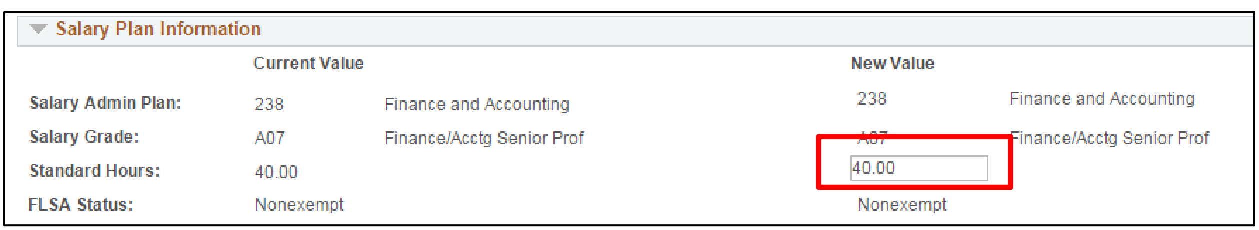


4. Edit **Department**, **Company**, **Location**, **Reports To** (required) and **Appointing Authority**.

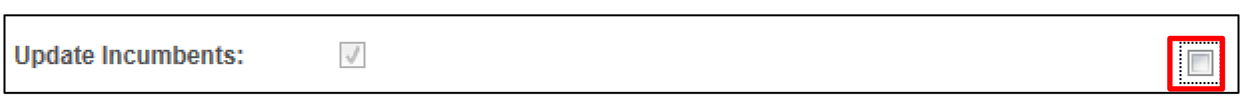
   Note: The **Reports To** field must be populated.



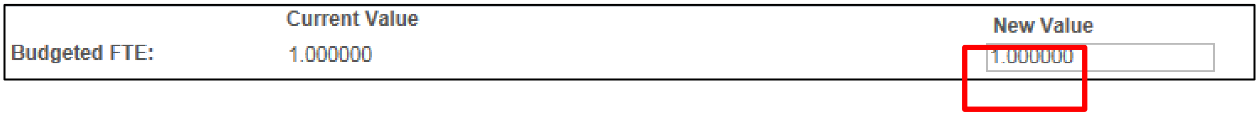
5. Edit **Standard Hours**.



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



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



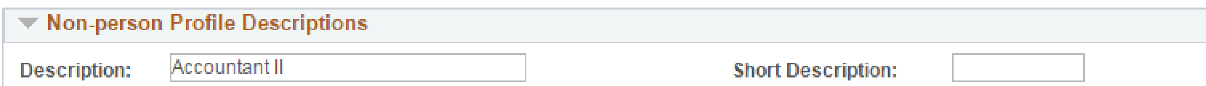
8. Update **Campus Box**.

9. Click **Next**. Next

Step 4: Non-Person Profile Questionnaire

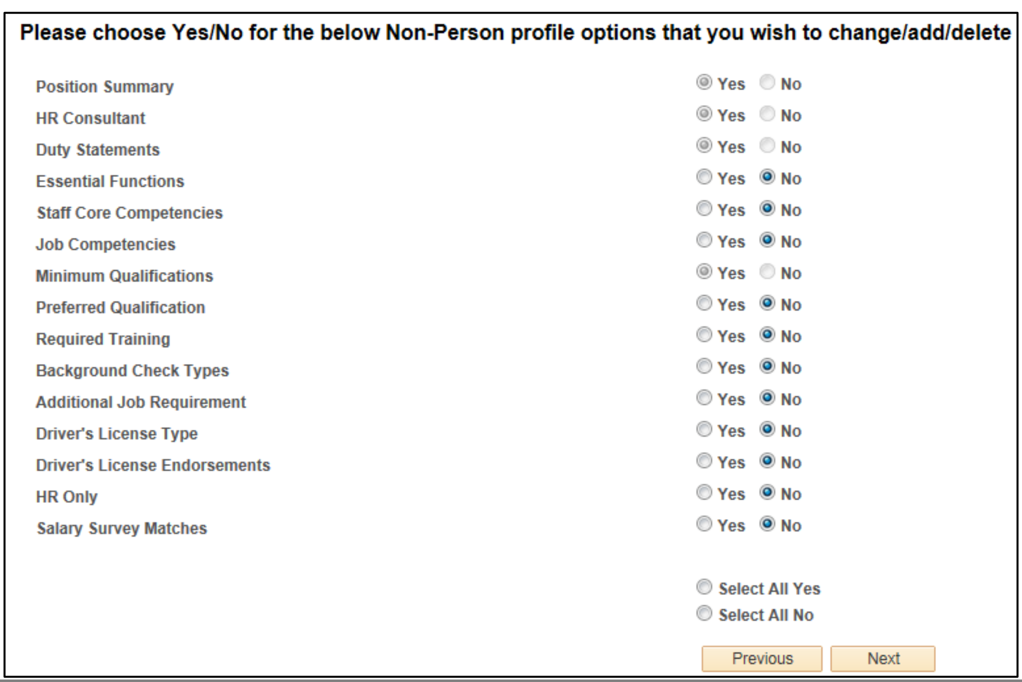
This page of the transaction lets you choose which parts of the non-person profile (NPP) to update. To choose the areas of the non-person profile to update:

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 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 **University Staff** include: Position Summary (Job Summary), HR Consultant, Duty Statements (Samples of work), Job Competencies, Minimum Qualifications, Background Check Types, Additional Job Requirements, and Core Competencies. It is also important to check the Required Training as this tracks the position specific training as well as university-wide training.



4. Click **Next**.

   Note: The following steps show the process as 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

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

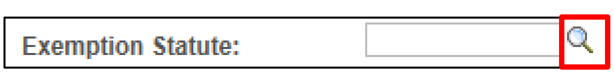
1. To add a new position summary, click **Add New Position Summary** or select the row currently populated to edit existing information. New rows will need to be added when first creating/updating these positions.

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

3. Select 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.

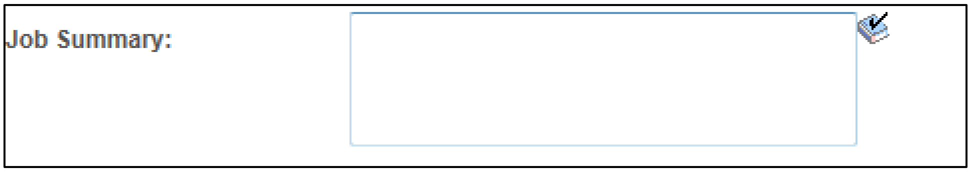
DEMOTION	(blank)	(blank)	Position Change with less pay/responsibilities
NEW	(blank)	(blank)	New Position
PROMOTION	(blank)	(blank)	Positon change with more pay/responsibilities
REALLOCATION	(blank)	(blank)	Position change that is not a Promotion or a Demotion (no chg in pay)
UPDATE POS	(blank)	(blank)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

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



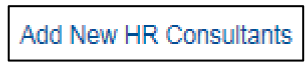
5. Select appropriate exemption statute.
6. If you are recruiting for the position, click the **Feed to CU Careers?** checkbox. This sends the position to CU Careers once approved. Leave unchecked if you are only updating the position/NPP and not sending to CU Careers for recruitment.

7. Enter a **Job Summary**. (This information 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 Consultants** (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).

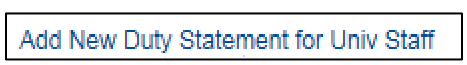
11. Click **OK**. 

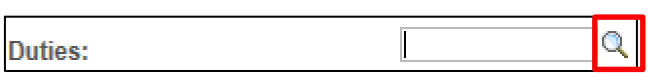
Note: When creating a new position, the New Profile Identities and New Profile Association (shown below) will be blank. Do not update them. The system runs a Profile Create Process and updates these fields.

12. Click **Next**. 

Step 6: NPP-Duties

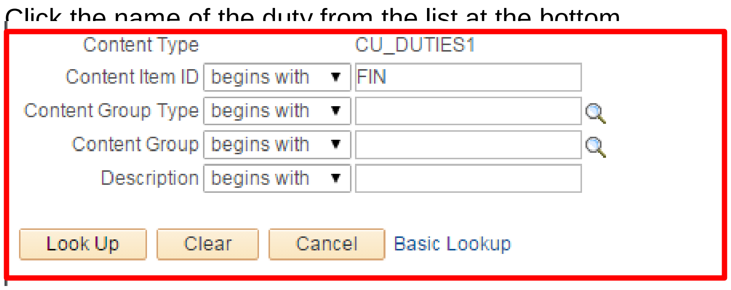
To identify and add duties of the position (Required to feed to CU Careers):

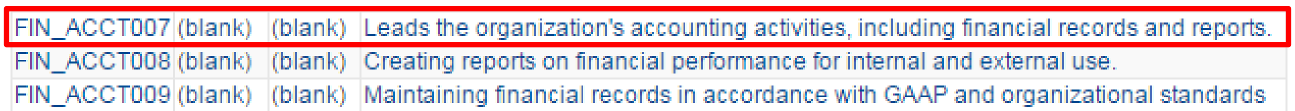
1. Choose **Add New Duty Statement.** 

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

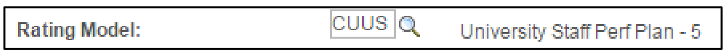
3. Use the search boxes on the top of the screen to find the duty you want to use. Use the Job Code/Job Family list to search by Content Item ID.

   Or,



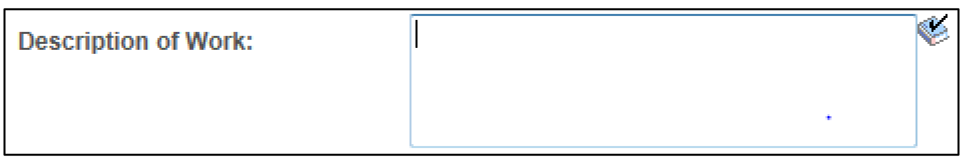


4. Verify that the **Rating Model** is **CUUS**.



5. Enter **Percent of time** (optional). 

6. Enter the **Description of Work**. This lets you add more detail about how a person might accomplish the duty statement.



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

   Or,

   Click **OK**. 

8. Repeat until all duties have been added.

9. Click **Next**. 

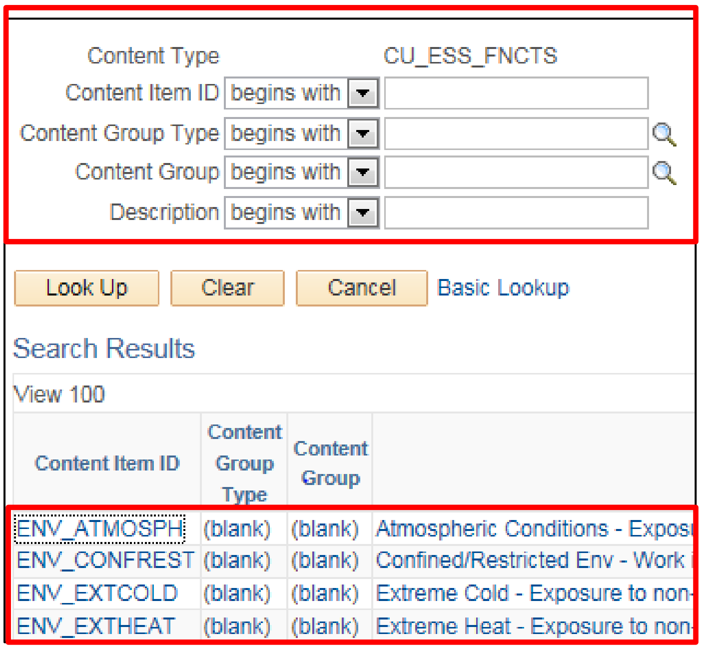
Step 7: NPP-Essential Functions

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**. 

3. 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.



4. To add another essential function, click **Apply and Add Another.** 

   Or,

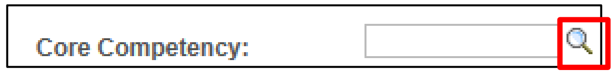
   Click **OK**. 

5. Click **Next**. 

Step 8: NPP-Core Competencies

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

1. Click **Add New Univ Staff Core Competencies**. 

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

3. Select compentencies. Be sure to add all six core competecies listed below:

New Univ Staff Core Competencies	
ID	Core Competencies
ACCTABLITY	Accountability
COLLABORAT	Collaboration
COMMUNICTN	Communication
DIV_INCLUSN	Diversity and Inclusion
ETH_INTEGR	Ethics and Integrity
RELATN BLDG	Relationship Building

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

   Or,

   Click **OK**. 

5. Click **Next**. 

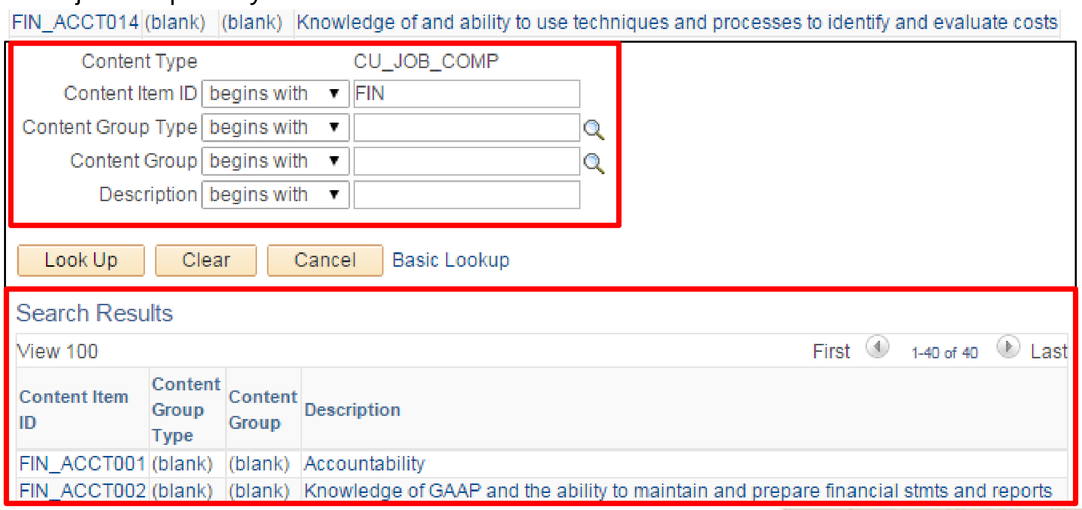
Step 9: NPP-Job Competencies

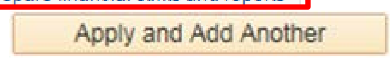
Job competencies will feed to CU Careers. To add Job Competencies to a position:

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

2. Click the lookup for **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.



4. To add another Job Competency, click **Apply and Add Another**. 

   Or,

   Click **OK**. 

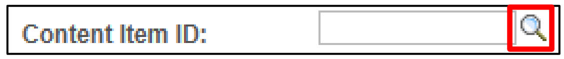
5. Click **Next**. 

Step 10: Qualifications

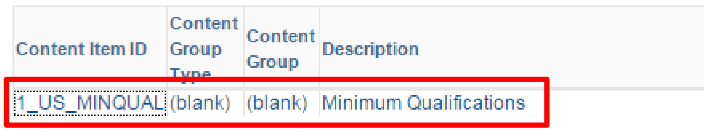
Minimum qualifications must be entered to feed to CU Careers. You can also specify preferred qualifications.
To define qualifications:

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

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



3. Click **Minimum Qualifications**.

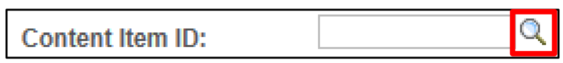


Content Item ID	Content Group Type	Content Group	Description
1_US_MINQUAL	(blank)	(blank)	Minimum Qualifications

4. Enter <u>all</u> minimum qualifications in the text box.
5. Click **OK**. 

(Do not click Apply and Add Another.)
6. Click **Add New Preferred Qualifications**.

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



8. Enter <u>all</u> preferred qualifications in the text box.
9. Click **OK**. 

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

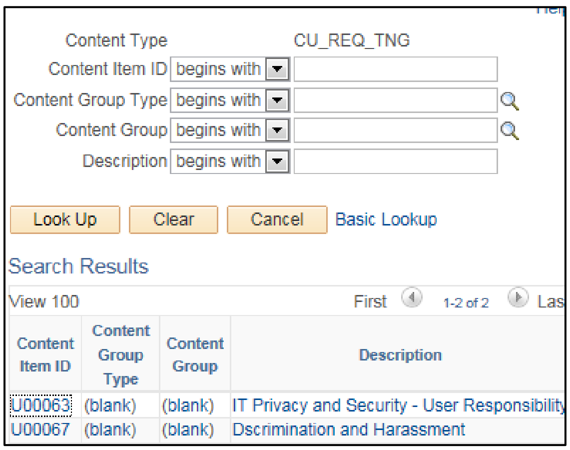
Step 11: NPP- Required Training

For existing positions, the Discrimination and Harassment and IT Privacy and Security Awareness trainings are required for all faculty and staff, and will be listed by default. For new positions you will need to add the Discrimination and Harassment and IT Privacy and Security Awareness 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.



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

Or,

Click **OK**. 

5. Click **Next**. 

Step 12: NPP-Background Checks and Additional Information

The following sections describe how to 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 existing positions, but 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:
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. Select **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 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 the **Driver's License Type**. Driver's License Type:

11. Select the 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 the **Driver's License Endorsement**.

Driver's License Endorsement:

15. Select the 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 13: NPP-HR Only

This HR Only section lets HR users add notes about the position and include salary survey matches.

1. Click **Next**. Next

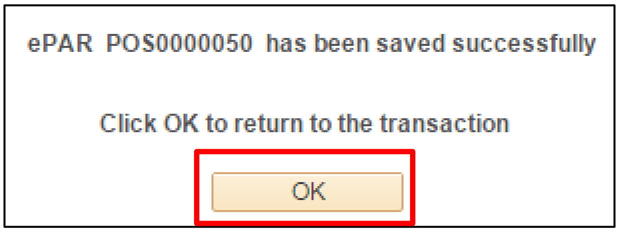
Step 14: New Department Budget Table-Position

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 and 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 15: Saving and Submitting a Position

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

2. Click **OK**. 

3. Click **Submit**.