8.9 HRMS Step by Step Guide Create a New Position w/ Funding - Organizational Development Module

Overview: This guide provides instruction on creating a new position with funding and approving the position and funding.

Note: The screen shots used in this guide may not be representative of your access.

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	Colorado			HR89TEST T PPL Home Worklist Add to Favorites Sign o
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Position Info	Search:	Main Menu > Organizational Development > Position M	<u>Management</u> >	
	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Maintain Positions/Budgets		
□ Organizational	My Favorites Reports and Reviews	Identifies positions within organization, budgets for	positions, and allows for creation of job requi	sitions
	▶ Recruiting	Add/Update Position Info	Funding Distribution	Position Transfer only
Development	Compensation	other information about a position.	Funding Distribution	Position Transfer only
Position Management	Time Collection			
	♥ Organizational Development	PET/Retroactive Funding Change	Correction PET	PET Cancellation
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	Review Position/Budget Info			
	▷ Position Reports	-		
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	- My Dictionary			
 2. Add/Update Position Info page displays Click Add a New Value 	University of Colorado	and click Search. Leave fields blank for a list of all va dd a New Value begins with begins wi	alues.	HR89TEST T PPL Home Worklist Add to Favorites Sign o New Window 🛺
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	Find an Existing Value <u>Add a N</u>	New Value		

3. Description page displays

- Position Information section:
- Effective date defaults to current date. Change if necessary
- 2) Status defaults to Active
- Reason defaults to New
- 4) *Initialize* button provides opportunity to copy data from an existing position

4. Description page continued

- Job Information section:
- 1) Business Unit defaults to UCOLO
- Enter Job Code
 Reg/Temp & Full/Part Time default from Job Code. Either value may be changed if needed, for most job codes
- 4) Manager Level field optional (defaults to Non-Manager)
- 5) Use optional <u>Detailed</u> <u>Position Description</u> link to add extra details about position

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5. Description page continued

- Work Location section:
- Enter Department
 (5 digit org #)
- Company and Location default from Department. Location code may be changed
- Enter Reports To position number (required for all HRMS positions, with the exception of student hourly, student faculty or retirees)
- 4) Appointing Authority optional
- 5) Essential Services & Proposed Costs optional

6. Description page continued

- Salary Plan Information section:
- 1) Enter FTE (optional)
- 2) Percent of Time & Standard Hours default when Job Code is entered. A change to either one updates the other
- 3) FLSA defaults based on job code

Reg/Temp:	۸ ۴	Manager Level: Sull/Part Time: ≥= 50% ♥	v	
itle:	s	Short Title:	Detailed Position Description	
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Region: USA 🔍 Uni	ed States			
Department:		'Company: CU 🔍	University of Colorado	
Location:				
Reports To:		Appointing	Q	
Essential Services	Class Staff Seasonal or Acade	Authority: mic Year Appointment?	Supervises Classified Staff	
Special Opportunity Posn	Preplacement Physical Require	ed Class Staff Spec Quals	Officer Position	
Faculty/Exempt Professional -	Minimum	Maximum		
Proposed Costs	Salary Range:			
	Start Up Cost:			
	Moving Expense:			
	Total:			

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▶ Faculty/Exempt Profes Proposed Costs	sional - Salary Range: Start Up Cost: Moving Expense: Total:	Minimum	Maximum					
Salary Plan Informatio FTE: Salary Admin Plan: Standard Hours:	n Percent of Time: Grade: 0.00 Work Period:							
USA FLSA Status:	Nonexempt	~						
Save Notify	Previous tab Next tab mation Position and Incumbent Da	13	E. Add	题Update/Display	Include History	Correct Hi	istory	

- 7. Specific Information page
- Max Head Count defaults to '1'
- □ Pay Group defaults based on job code (MON or BW), change if needed
- □ Employee Type defaults based on job code (Salaried or Hourly), change if needed
- □ Hazardous Materials Requirements required. Provide Yes/No answer
- □ Optional entries: Background Checks; Education & Government; Required HIPAA Access

8. Save your work

"Saved" displays upper right page corner and Position # displays

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2ay Group: Employee Type:		*			Include Salary Plan/Grade			
Background Check:	5			1	Budgeted Position			
Criminal Histo	ry Records	E Financial H	listory Records		Confidential Position			
Motor Vehicle	Records	Other Back	kground Check		Job Sharing Permitted			
Education and Gove	rnment							
Classified Indicat	or: Surv Si	nous						
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Manager Level: Non-Manager *Full/Part Time: < 50%

Short Title:

SAIV

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Position Status: Proposed Status Date: 12/03/2006

Douroll & Dopofit Cr

*Business Unit: UCOLO Q University of Colorado Job Code: 4104 Q Student Asst IV

Temporary 🔽

Student Asst IV

*Reg Region: USA Q United States out: 51000

Job Information

*Reg/Temp:

Work Location

Title:

Regular Shift: N/A

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Detailed Position Description



12. Add Funding

From the Position
 Data page, click <u>Go</u>
 <u>To Position Funding</u>
 link

Max Head Count: 1 Wrkrs Comp: 1 Pay Group: 2 'Employee Type: 1 13. Funding Distribution page

Distribution page displays

- Funding Begin Date defaults to 1st day of current unprocessed pay period; change if necessary
- PCT method of distributing funding is default. Choose AMT if needed
- Enter percent of salary (or estimated salary amount) to be paid from the desired SpeedType/FOPPS
- Enter SpeedType, FOPPS will display after tabbing
- Enter Funding End Date, if applicable.
 Each row in
 Distribution may have a different funding end date
- Click to insert additional rows as needed (one row for each ST)
- If using PCT method, sum of % in all rows must = 100%
- Funding Notes may be added, if needed

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'Pay Group:	Include Salary Plan/Grade

Funding Distribution Position and Incumbent Data

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14. Save Funding Distribution	Funding Distribution Position and Incumbent Data Image: Save Q Return to Search Image: Save Image:	
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SAVED BEFORE POSITION CAN BE	Position Number: 00679011 Sequence: 0	Entered Date: 02/06/2007
<u>APPROVED</u> .	Eind View All F	First 🗹 1 of 1 🕨 Last
	Funding Status: Proposed Notes Status Date: 02/06/2	:007
POSITION REQUIRE	Funding Begin Date: 12/03/2006 O Amt ● Pct Appr/Reject:	
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Create a New Position with Funding complete

See page 8 for additional funding tips



HRMS Tips for using Funding Distribution

- □ For a **NEW position** (or for updates to positions with expired funding), funding must be entered in order for the position to be approved. Regardless of the new position's effective date, when the new funding row is added, the funding begin date defaults to the first day of the current (unprocessed) payroll period. Users may modify that date if needed.
- Add a new Funding Row for **each Funding Begin Date**.
- Entered Date is the date the funding was added. The first row added on this day will always be Sequence 0. Any additional rows added on the same day will increase the sequence number by 1 for each row entered. Rows entered on following days will have an updated Entered Date, and the Sequence will start at 0 again.
- Correct or Update Current/Future Funding
 - If funding for a current or future payroll period is in Proposed status, type over the existing data without adding an additional Funding row, and resave. If desired, the entire funding row for a current/future funding begin date may be removed entirely by clicking the Delete button by the Funding Notes icon.
 - For an Approved current or future funding distribution, add a new Funding row. <u>The distribution will then display</u> <u>in Proposed status</u>. Type over the existing data, add/remove rows as needed, and resave. (Note: this process will insert an additional funding row. If the row is not needed, delete it.)
- Payroll Expense Transfers with Retroactive Funding Changes (PETR and PETP) the PET process will add a new funding row to the most current Entered Date, and the Sequence will be increased. <u>This is the only situation</u> where the Entered Date will not be updated to reflect the date the row was added to the funding page.
- Funding strings each new Funding Row adds to the top of the previous funding components, to create a new funding string. When funding is added, any funding distribution with a begin date in current or future payroll periods will be saved in Proposed status. However the underlying components of the Funding String will retain their original approval status. The system no longer assigns a proposed status to the entire funding string when a row is added, nor is the whole string approved when one component is approved.
- No Action Taken this status is assigned to any current funding components that are not approved before the current payroll is processed. <u>Once in No Action Taken status, the funding row can not be approved by anyone, including ES staff.</u>