

8.9 HRMS Step by Step Guide

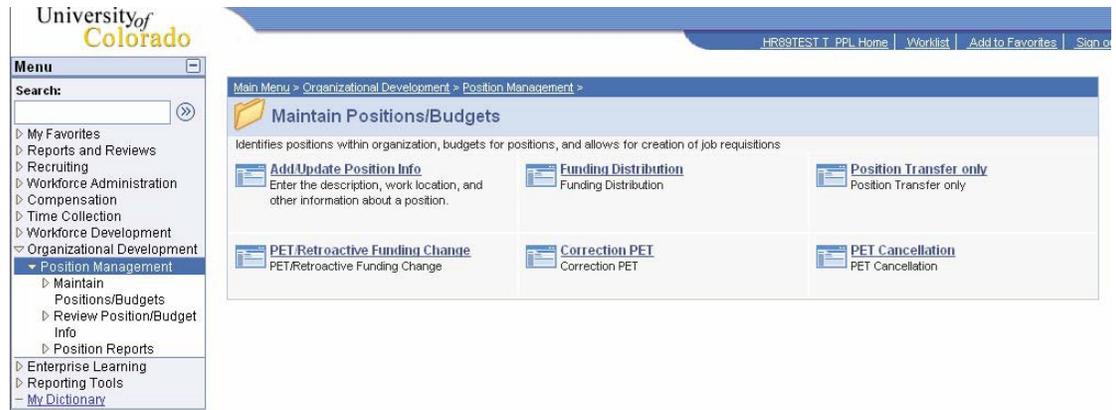
Create a New Position w/ Funding - Organizational Development Module

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.

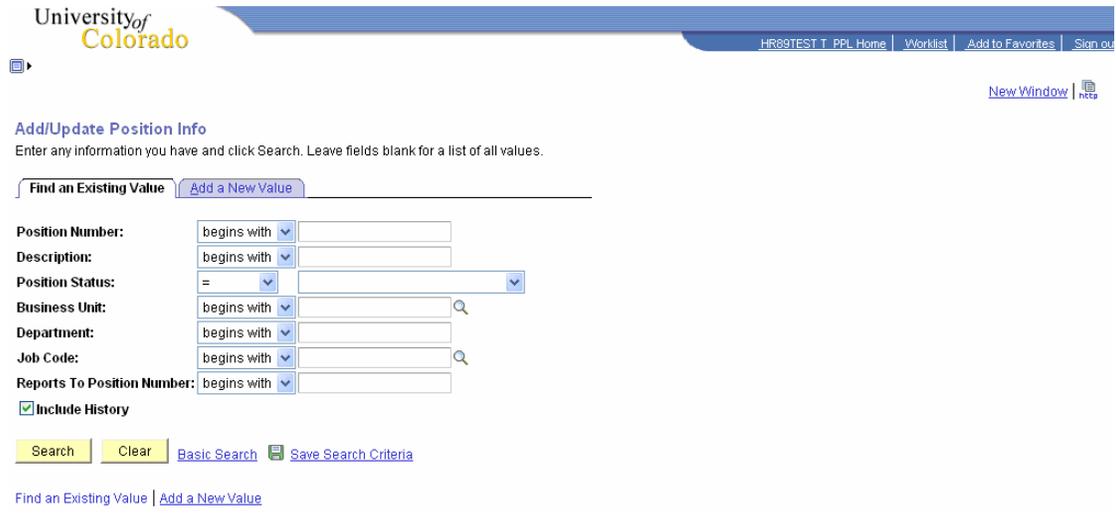
1. Navigate to Add/Update Position Info

- Organizational Development
- Position Management
- Maintain Positions/Budgets
- Add/Update Position Info



2. Add/Update Position Info page displays

- Click [Add a New Value](#)



3. Description page displays

- Position Information section:
 - 1) Effective date defaults to current date. Change if necessary
 - 2) Status defaults to Active
 - 3) 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
 - 2) Enter Job Code
 - 3) 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 [Detailed Position Description](#) link to add extra details about position

University of Colorado

HR99TEST.T.ALL_CU Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Customize Page | help

Description | Specific Information | Position and Incumbent Data

Save Refresh Update/Display Include History

Position Information Find | View All First 1 of 1 Last

Position Number: 00000000 Go To Position Funding

Headcount Status: Current Head Count: 0 out of 0

'Effective Date: 01/22/2007 Position Notes 'Status: Active Initialize

'Reason: NEW New Position 'Action Date: 01/22/2007

Position Status: Approved Status Date: 01/22/2007

Job Information

'Business Unit: UCOLO University of Colorado

Job Code: Manager Level:

'Reg/Temp: 'Full/Part Time: >= 50%

Regular Shift: N/A

Title: Short Title: Detailed Position Description

Work Location

'Reg Region: USA United States

Department: 'Company: CU University of Colorado

Location: Appointing Authority:

Essential Services Class Staff Seasonal or Academic Year Appointment? Supervises Classified Staff

Special Opportunity Posn Preplacement Physical Required Class Staff Spec Quals Officer Position

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Description | Specific Information | Position and Incumbent Data

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Position Status: Approved Status Date: 01/22/2007

Job Information

'Business Unit: UCOLO University of Colorado

Job Code: Manager Level:

'Reg/Temp: 'Full/Part Time: >= 50%

Regular Shift: N/A

Title: Short Title: Detailed Position Description

Work Location

'Reg Region: USA United States

Department: 'Company: CU University of Colorado

Location: Appointing Authority:

Essential Services Class Staff Seasonal or Academic Year Appointment? Supervises Classified Staff

Special Opportunity Posn Preplacement Physical Required Class Staff Spec Quals Officer Position

5. Description page continued

- Work Location section:
 - 1) Enter Department (5 digit org #)
 - 2) Company and Location default from Department. Location code may be changed
 - 3) 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

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

The screenshot shows the 'Specific Information' tab of a position record. Key fields include:

- Position Number:** 00000000
- Headcount Status:** Open
- Current Head Count:** 0 out of 0
- Effective Date:** 01/22/2007
- Status:** Active
- Max Head Count:** 1
- Background Checks:** Includes checkboxes for Criminal, Financial, Motor Vehicle, and Other Background Checks.
- Education and Government:** Includes FTE (0.000000), Classified Indicator (Surv Spous), and Add to FTE Actual Count (checked).
- Required HIPAA Access:** Includes checkboxes for PHI, Treatment, Research, Payment, and Operations.
- Requirements for Hazardous Materials Handling or Exposure:** Includes radio buttons for Yes/No for Hazardous Chemicals, Radioactive Materials, and Infectious Mats/Human Blood or Bodily fluids.

8. Save your work

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

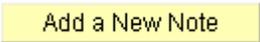
The screenshot shows the 'Job Information' tab of a position record. Key fields include:

- Position Number:** 00679011 (Student Asst IV)
- Headcount Status:** Open
- Current Head Count:** 0 out of 1
- Effective Date:** 12/03/2006
- Status:** Active
- Reason:** NEW (New Position)
- Action Date:** 02/06/2007
- Position Status:** Proposed
- Status Date:** 12/03/2006
- Business Unit:** UCOLO (University of Colorado)
- Job Code:** 4104 (Student Asst IV)
- Manager Level:** Non-Manager
- Reg/Temp:** Temporary
- Full/Part Time:** < 50%
- Regular Shift:** N/A
- Title:** Student Asst IV
- Short Title:** SA IV
- Work Location:** Reg Region: USA (United States)

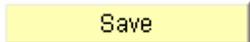
9. After New Position has been saved, Position Notes may be added on either Description or Specific Information pages

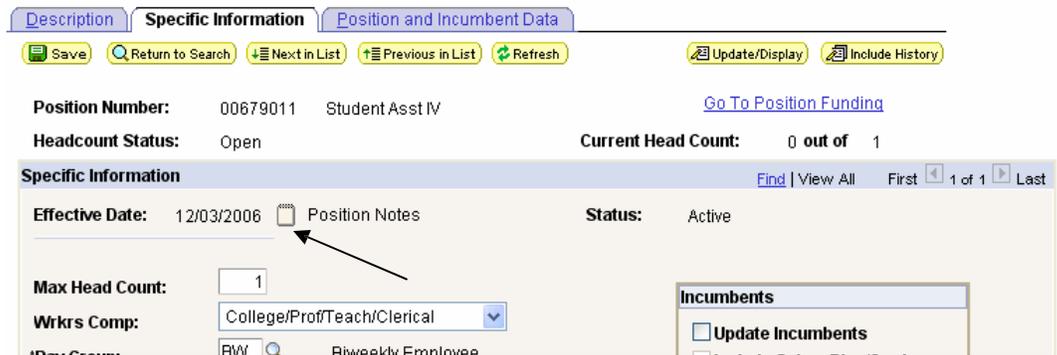
- Click  to enter comments (optional)

10. Notepad page displays

- Click 

11. Enter/Save Note

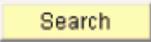
- Enter note/comments
- Click 
- Click on [Position Data Page](#) link to return to page



 **Notepad**

Instructions

Selection Criteria

*Position: 00679011 

*Eff Date: 2006-12-03

Earliest Note Date  End 

 Return To: [Position Data Page](#)

There are no existing notes for the specified search criteria.

Return To: [Position Data Page](#)

 **Note Detail - Selected Note**

Instructions

Selected Note

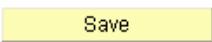
Position: 00679011 **Created:** 02/06/2007 12:32PM

Eff Date: 2006-12-03 **Creator:** Smith, Jane C

Last Update:
by:

Subject: New Position

Note Text: New position authorized by Mark Stanker to support PBS general administrative duties and payroll production assistance.

Return To: [Note Selection Page](#)
[Position Data Page](#) 

12. Add Funding

- From the Position Data page, click [Go To Position Funding](#) link

13. Funding

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

	*Percent	*Speed Type	Funding End Date	SpeedType Description	Fund	Org	Program	Project	Su
1									

14. Save Funding Distribution

REMEMBER:
**FUNDING MUST BE
 CREATED AND
 SAVED BEFORE
 POSITION CAN BE
 APPROVED.**

**BOTH FUNDING AND
 POSITION REQUIRE
 APPROVAL**

Funding Distribution
Position and Incumbent Data

Save
Return to Search
Next in List
Previous in List
Refresh

[Go To Position Data](#)
[Go To Funding History](#)

Funding
Find | View All
First
1 of 1
Last

Position Number: 00679011
Sequence: 0
Entered Date: 02/06/2007

Funding Status: Proposed
Funding Notes
Status Date: 02/06/2007

*Funding Begin Date: 12/03/2006
 Amt Pct
Appr/Reject:

Distribution | Find
First
1-2 of 2
Last

		*Percent	*Speed Type	Funding End Date	SpeedType Description	Fund	Org	Program	Project	Su
1	+ -	25.000	51038639		PBS Admin Support	10	51010	10007		
2	+ -	75.000	51045303		Payroll Production	10	51007	10007		

Create a New Position with Funding complete

See page 8 for additional funding tips

HRMS Tips for using Funding Distribution

The screenshot shows the HRMS interface for Funding Distribution. At the top, there are tabs for 'Funding Distribution' and 'Position and Incumbent Data'. Below the tabs are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', and 'Refresh'. The main area displays 'Funding' information for Position Number 00508108, Sequence 1, and Entered Date 07/22/2004. It shows 'Funding Status: Approved' and 'Status Date: 07/18/2002'. A 'Distribution' table is visible with one row: 1, 100.000, 51039635, PBS Finance/Op, Fund 10, Org 51008, Program 10007. Red callout boxes highlight: 'Add new funding row' pointing to the '+' button; 'Add/Remove distribution row' pointing to the '+' and '-' buttons in the distribution table; and 'Remove funding with current or future funding begin date' pointing to the 'Funding Notes' icon.

- 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**. The distribution will then display in Proposed status. 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. This is the only situation 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. Once in No Action Taken status, the funding row can not be approved by anyone, including ES staff.