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
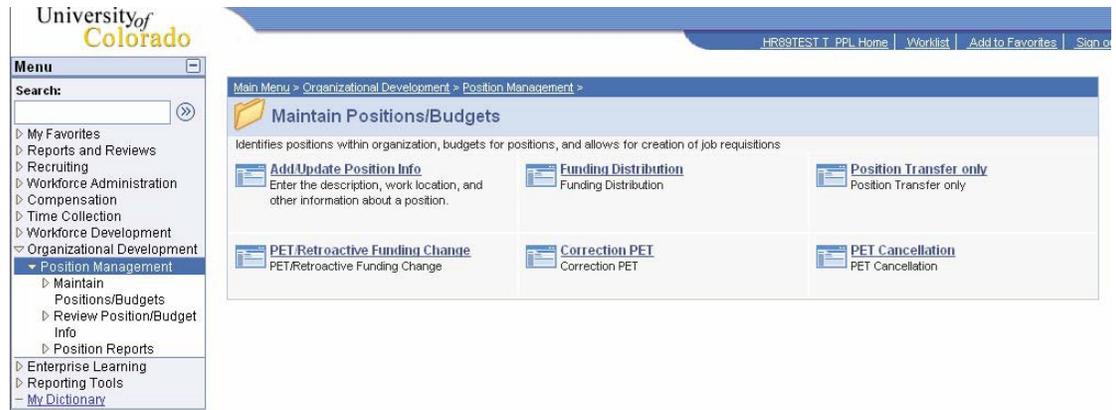
2. Add/Update Position Info page displays

☐ Click [Add a New Value]
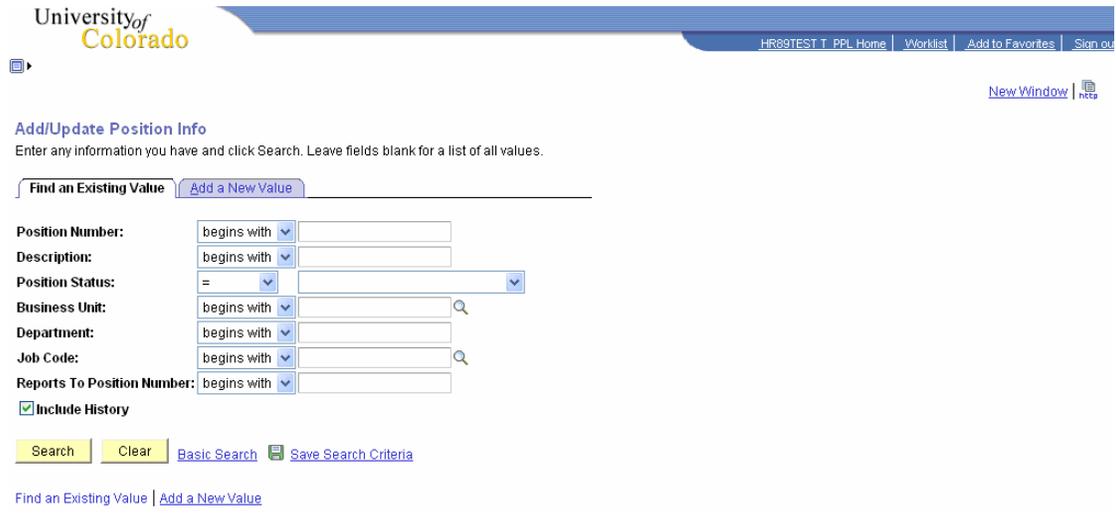
3. Description page displays

☐ 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

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

8. Save your work

- Click [Save]
- "*Saved*" displays upper right page corner and Position # displays

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

☐ Click Position Notes to enter comments (optional)

Description	Specific Information	Position and Incumbent Data

Save | Return to Search | Next in List | Previous in List | Refresh | Update/Display | Include History

Position Number:	00679011 Student Asst IV		Go To Position Funding
Headcount Status:	Open	**Current Head Count:**	0 out of 1

Specific Information   Find | View All   First 1 of 1 Last

Effective Date:	12/03/2006 ☐ Position Notes	**Status:**	Active

Max Head Count: 1

Wrkrs Comp: College/Prof/Teach/Clerical

Pay Group: BW 🔍 Biweekly Employee

Incumbents
☐ Update Incumbents

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10. Notepad page displays

☐ Click **Add a New Note**

📝 **Notepad**

▷ **Instructions**

▽ **Selection Criteria**
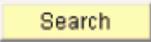
*Position:	00679011	Search
*Eff Date:	2006-12-03	
Earliest Note Date	End	

Add a New Note   **Return To:** Position Data Page

There are no existing notes for the specified search criteria.

Return To: Position Data Page

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11. Enter/Save Note

☐ Enter note/comments

☐ Click **Save**

☐ Click on **Position Data Page** link to return to 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.

Save   **Undo Changes**
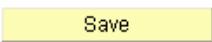
Return To: Note Selection Page

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

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

                                        Find | View All   First ◄ 1 of 1 ► Last

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

- 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._