Creating a Position

E-Guide

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University of Minnesota
CREATING A POSITION

E-Guide

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Step By Step: Creating a Position

This document contains step-by-step information on how to create a position. Positions are created by unit position managers. All new positions will require approval from central Compensation with the exception of faculty, temporary/casual, student, and cloned positions.

Follow these steps when creating a position.

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**STEP 1: GETTING STARTED**

Before creating a position, make certain the following questions have been answered prior to performing work in HRMS.

- Did the department consult with the HR representative about their organizational needs?
- Does the department have vacant positions to use instead of creating a new position?
- Is the correct job code classification being used?
- Has the department captured the details of their new position on a Position Management Request (PMR) form?
- When reviewing the PMR, is the Reports To appropriate?
- Does the PMR contain appropriate signatures of approval from the department or unit?
- Has a position description been provided? Does it follow the standards of the “Writing a Position Description” job aid recommended by the Office of Human Resources?
- Can I clone an existing position? (See Appendix A for more information on cloning.)

**STEP 2: CREATE POSITION**

Log in to myu.umn.edu. Navigate to: Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

1. Click the Add a New Value tab.
2. Click <Add>.
3. Enter the Effective Date of the new position. Note: Future dates are NOT allowed for positions.
4. Enter the Job Code. Note: Once Job Code is entered, the following fields will auto-populate: Full/Part Time, Union Code, Title, Short Title, Salary Admin Plan, Grade, Step, Standard Hours, Work Period, FLSA Status, and Bargaining Unit.

5. Select “Regular” or “Temporary” from the Reg/Temp field. Temporary is used for an appointment lasting less than 3 months.

6. Select “Full-Time” or “Part-Time” from the Full/Part Time field. Part-time is used for an appointment less than 40 hours per week.

7. Update the title in the Title field if using a working title different from the Job Code title. (Note: this title feeds into the Departmental Directory – Is this still true?)

8. Click <Detailed Position Description>.

9. Paste the Position Description text into the open text field.

10. Click <OK>.

11. Enter the Department ID number in the Department field. Note: Once the Department ID is entered, the following fields will auto-populate: Company and Location.

12. Review the Company field for accuracy. (Default is “UMN,” Select “UMP” or “UNS” when appropriate.)

13. Review the Location field for accuracy. (Location defaults based on the Department ID but if the work is being done in a different location than the department, it will need to be updated.)

14. Enter the position number of the supervisor for the new position in the Reports To field.

15. Enter Comments in the text field as needed. Note: Items that should be entered into this field include: 1) EOAA Goals if recruiting for Faculty or P&A Position, 2) Intended ChartField string paying for the funding of the position, 3) Reasons or rationale behind the new organizational need for the position.

16. Click the Specific Information tab.
17. Increase the Max Head Count to more than “1” if needed. (Note: Multiple headcounts for a position means the position is identical for ANY hire. Same Reports To, same number of hours per week, etc.)

18. Review Update Incumbents checkbox. (Leave unchecked when creating a new position.)

19. Review Include Salary Plan/Grade checkbox. (Select the box for all positions with the exception of the following: Positions Associated with bargaining units 01-17 should be unchecked.)

20. Review Notice Rights checkbox. (Select the box when an employee is not eligible for Notice Rights by either holding a Duluth non-regular or fixed term appointment or for an employee being appointment by the President for a limited time.)


22. Review the Position Pool ID field. If the payroll accounting funding strategy is position pool, enter the specific Pool ID for funding in the field.

23. Select the appropriate primary reason of service for the position from the Classified Indicator field. Defaults to “Not Applicable.” Change to “Clinical Scholar”, “Research”, or “Teaching” if needed. A value of “Direct Hire” indicates that a position was not posted and was filled through the No Search Process (do we still refer to this a no search? Thought there was a newer term)

24. Enter the value of the full time equivalent in the FTE field. See the “Full Time Equivalent (FTE) Calculations” job aid for additional information.
Step By Step: Creating a Position (cont.)

25. Review the *Adds to FTE Actual Count* checkbox. Select this box when the FTE value is 0.01 or above. Do not check if the field value is 0.0.

26. Click <Save>. The new position will be saved as “Active” and “Proposed.” Central Compensation will review and change the status to “Approved” if appropriate.

27. Write the system assigned Position Management number on the PMR form for your records.

STEP 3: MONITOR STATUS

All new positions will require approval from central Compensation with the exception of faculty, temporary/casual, student, and cloned positions.

Navigate to: Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Positions Info

1. Click the Find an Existing Value tab.

2. Enter the new position ID in the Position Number field.

3. Click <Search>.

4. Review the Position Status:
   a. If “Proposed,” the position is still under review by Compensation.
   b. If “Denied,” the position can no longer be used and a new position request must be made.
   c. If “Approved,” the position can be used for recruiting or hiring.

STEP 4: VALIDATE DATA

Confirm the data posted accurately and completed. Use the “Queries and Reports for Position Management” job aid for additional assistance.
This document contains step-by-step information on how to create a position by cloning. Positions are created by unit position managers. Cloning a position is a feature that allows for the creation of a new position by copying the data from an existing active and approved position. When a position is cloned, it will be considered new and have a unique position number. Compensation previously reviewed the classification of the existing position, therefore, the cloned position will not require review. The cloned position will automatically be “Active” and “Approved.”

Follow these steps when creating a position by cloning.

### Appendix A: Cloning a Position

STEP 1: GETTING STARTED

Before creating a position, make certain the following questions have been answered prior to performing work in HRMS.

- Is the position you wish to clone active and approved?
- Is the Detailed Position Description of the position you wish to clone accurate for the new position? Does it follow the standards of the “Writing a Position Description” job aid recommended by the Office of Human Resources? (Some fields can be updated when cloning a position but Detailed Position Description is not one of them.)
- Did the department consult with the HR representative about their organizational needs?
- Does the department have vacant positions to use instead of creating a new position?
- Has the department captured the details of their new position on a Position Management Request (PMR) form?
- Does the PMR contain appropriate signatures of approval from the department or unit?

STEP 2: CREATE POSITION

Navigate to: Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

1. Click the Add a New Value tab.
2. Click <Add>.
3. Click <Initialize> on the Description tab.
4. In the new “Default Position Data” pop-up window, enter the date the position will become effective in the Effective Date field. Note: Future dates are NOT allowed for positions. Cloned positions are considered ‘new’.

5. Enter the number of the existing position that will be cloned in the Position Number field. Note: Only select “Approved” and “Active” positions to clone.

6. Click <OK>.

7. Update open fields on the Description tab if applicable. Note: Changes can be made only to those fields that are open and allow changes.

8. Enter comments (include the following as best practice).
   a. Capture the original position number that was cloned.
   b. Indicate what modifications were made on the cloned position.

9. Click the Specific Information tab.

   Note: Changes can be made only to those fields that are open and allow changes. See the “Position Pages Field Names and Definitions” job aid for additional information on these fields.
   a. Update Max Head Count if applicable.
   b. Update Classified Indicator if applicable.
   c. Update FTE value if applicable.
   d. Check or uncheck Adds to FTE Actual Count if applicable.
Appendix A: Cloning a Position (cont.)

10. Click <Save>.

The cloned position will automatically be saved as “Active” and “Approved.” Note: The position will be labeled as “Cloned Position.”
Appendix A: Cloning a Position (cont.)

STEP 3: MONITOR STATUS

All new positions will require approval from central Compensation with the exception of faculty, temporary/casual, student, and cloned positions. Upon save, the cloned position should be saved as “Active” and “Approved.” Follow these steps to confirm the status of the cloned position.

Navigate to: Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Positions Info

1. Click the Find an Existing Value tab.
2. Enter the new position ID in the Position Number field.
3. Click <Search>.
4. Review the Position Status. The cloned position should reflect “Approved.”

STEP 4: VALIDATE DATA

Confirm the data posted accurately and completed. Use the “Queries and Reports for Position Management” job aid for additional assistance.