Creating New Positions

The purpose of this job aid is to give position managers a step-by-step guide on creating new positions in HRMS based on the unit initiated Position Management Request (PMR) Form.

**Step 1 – Units Consult with Position Managers**

- Pro-actively discussing the needs and requirements of a new position between the unit and the position manager will lessen the amount of questions and follow up prior to data entry.

**Step 2 – Review Form for Completion**

- Position managers should review data on PMR Form.
  - Is all data complete on the PMR Form?
  - Is funding identified and justified?
  - Does the PMR Form have the appropriate signatures?
  - Is there a new position description?

**Step 3 – Review Unit Position Management Data**

- Review HRMS position data for department
  - Does department have vacant position to use versus creating a new position?
  - Is the Reports To appropriate for this new position?

**Step 4 – Follow Up with Unit to Resolve Questions**

- Communicate with unit on questions pertaining to the request.
  - Since the source of data originates from Position Management and flows into other HRMS modules – it is critical that all data in Position Management is accurate.

**Step 5 – Enter Request for New Position in HRMS**

- Enter data from PMR Form into HRMS.

**Step 6 – Review Data in HRMS vs. PMR Form Prior to Saving**

- Is data the same?
  - Are there any discrepancies? If data is not the same then investigate possible reasons prior to saving record. If unresolved then cancel request in HRMS and re-enter once data is confirmed.

**Step 7 – Save Position**

- Click <Save>. 
Creating New Positions (cont.)

Step 8 – Resolve Errors/Messages if Needed

- Review and resolve errors for position record.

<table>
<thead>
<tr>
<th>Error Message</th>
<th>How to Resolve</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highlighted Fields are Required</td>
<td>Enter data into the highlighted fields.</td>
</tr>
<tr>
<td>Please enter a Department it is a required field.</td>
<td>Enter a Department ID.</td>
</tr>
<tr>
<td>Please enter a Job Code it is a required field.</td>
<td>Enter a job code.</td>
</tr>
<tr>
<td>Invalid value - press the prompt button or hyperlink for a list of valid values. The value entered in the field does not match one of the allowable values.</td>
<td>Select a valid value from the drop-down list.</td>
</tr>
<tr>
<td>Warning - The Reports To position has not been entered. Reports To is blank.</td>
<td>Enter a Reports To. This field is used to generate organizational reports in Position Management.</td>
</tr>
<tr>
<td>Warning - Action Reason should be NEW when a position is added. When a position is created, the Action Reason should be NEW.</td>
<td>Change action reason to “NEW” or leave as is if this position pre-dates the first record entered into the system.</td>
</tr>
</tbody>
</table>

Step 9 – Monitor Approvals

- Some new positions will require approval from central position management as well as compensation.
- Monitor the status of the position request in HRMS and look for communication from central position management regarding approval or denial of request.

Step 10 – Review for Completion in HRMS and Notify Unit

- Position manager sends communication to those involved with position (hiring managers, appointment entry personnel, initiators of the request) on the status of the position record.
The purpose of this job aid is to identify when it is appropriate to pool positions in Position Management. Ideally, positions should have a 1:1 relationship (one position = one headcount). If certain criteria are met it is possible to create a multi-headcount position.

**Note:** Position fields must be identical.

The following fourteen (14) fields must be exactly the same in order to create a pooled position.

<table>
<thead>
<tr>
<th>Company</th>
<th>Department ID</th>
<th>Union Code</th>
<th>Location</th>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bargaining Unit</td>
<td>Reports To</td>
<td>Regular/Temporary</td>
<td>Business Title</td>
<td>Salary/Admin Plan</td>
</tr>
<tr>
<td>Standard Hrs</td>
<td>Full/Part Time</td>
<td>Grade</td>
<td>FTE</td>
<td></td>
</tr>
</tbody>
</table>

**Types of Positions Pooled**

- Hourly employees such as students or temporary casual appointments
- Graduate employees

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Two temporary/casual appointments = Pooled “217675” and “217677”

Hourly student positions = Pooled “217680”
Creating/Updating Headcount for Position Record

Set headcount in the *Max Head Count* field when creating or updating position record.

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Do’s & Don’ts of Position Pooling

- Pooling allows a position manager to associate multiple jobs in one position.
- Supervisors are never pooled.
- Positions should mirror the job data of the incumbents.
Position Pages Field Names and Definitions

This job aid identifies and defines the tabs and fields in Position Management for position managers and/or position inquiry viewers. See the Position Management: Creating New Positions course for detailed definitions of each field.

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

DESCRIPTION TAB. POSITION INFORMATION SECTION

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>A unique system assigned number that identifies the position. Number is assigned when record is saved.</td>
</tr>
<tr>
<td>Headcount Status</td>
<td>This will be blank initially and cannot be updated on this page.</td>
</tr>
<tr>
<td>Current Headcount</td>
<td>Indicates the number of positions available within this record. Defaults to “1 out of 1.”</td>
</tr>
<tr>
<td>Effective Date</td>
<td>First date action is effective. Defaults to the current date. Future dated effective dates are not encouraged.</td>
</tr>
<tr>
<td>Reason</td>
<td>Reason for the new or changed position row.</td>
</tr>
<tr>
<td>Position Status</td>
<td>The status of the position request. Defaults to “Proposed” for a new position record.</td>
</tr>
<tr>
<td>Current Head Count</td>
<td>Indicates the number of positions available within this record. Defaults to “1 out of 1.”</td>
</tr>
<tr>
<td>Status</td>
<td>Positions can be active or inactive. Inactive positions cannot be used or reactivated. New positions default to “Active.”</td>
</tr>
<tr>
<td>Action Date</td>
<td>Defaults to the current date.</td>
</tr>
<tr>
<td>Status Date</td>
<td>Defaults to the current date.</td>
</tr>
<tr>
<td>Key Position</td>
<td>Do not use.</td>
</tr>
</tbody>
</table>

DESCRIPTION TAB. JOB INFORMATION SECTION

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Defaults to “UMNHR.” Do not change.</td>
</tr>
<tr>
<td>Job Code</td>
<td>Job classification as listed by the Office of Human Resources. Selection of job code updates the following fields: Union Code, Title, Short Title, Salary Admin Plan, Grade, Standard Hours, Work Period, Mon-Tue-Wed-Thu-Fri (8.00 each).</td>
</tr>
<tr>
<td>Reg/Temp</td>
<td>Enter “Reg” if position is more or equal to three months. Enter “Temp” if position is less than months. Used for determining benefits eligibility.</td>
</tr>
<tr>
<td>Regular Shift</td>
<td>Defaults to “Not Applicable.” Do not change.</td>
</tr>
<tr>
<td>Title</td>
<td>Associated with the Office of Human Resources job code. Defaults to “Title” when job code is entered. This can be changed to more appropriately reflect someone’s duties if needed, however the “official” job code must be used to recruit for the position. This title will flow to the campus directory.</td>
</tr>
<tr>
<td>Short Title</td>
<td>Defaults to the job code number when Job Code is entered.</td>
</tr>
</tbody>
</table>
**Position Pages Field Names and Definitions (cont.)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full/Part Time</strong></td>
<td>Enter “Full Time” if position is more or equal to 40 hours per work. Enter “Part-Time” if position is less than 40 hours per week. Used for determining benefits eligibility.</td>
</tr>
<tr>
<td><strong>Union Code</strong></td>
<td>Defaults to “Union Code” when <em>Job Code</em> is entered. Should not be changed unless position is for Duluth or Crookston faculty. Position managers must determine the appropriate union code (“I1” or “I2”) for UMD and UMC faculty and override if necessary.</td>
</tr>
<tr>
<td><strong>Detailed Position</strong></td>
<td>Opens a new pop-up window with current job code description. The default job code description should be overridden with a detailed position description describing the work that will be done within the unit specific to the job code. This is used by Compensation to ensure that the correct job code is being used and will be used by recruiting.</td>
</tr>
</tbody>
</table>

**DESCRIPTION TAB. WORK LOCATION SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reg Region</strong></td>
<td>Defaults to USA. Do not change.</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>Identification number linked to a department at the U of M. Enter financial DeptID here. When you enter in the department identification number it will update the following fields: <em>Company, Location</em>.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>Physical campus location of the position work place. Defaults to location when department is entered. If there is no location value which represents where the employee is actually located, select the closest location. If the work place is outside of Minnesota, select “Outside of Minnesota.”</td>
</tr>
<tr>
<td><strong>Reports To</strong></td>
<td>Enter supervisor’s position number. This is the person who will be approving time for timekeepers and absences for the employee. It is important that anytime a supervisor is terminated or on a leave of absence that this field is updated. If it is not updated, time or absences will not get approved.</td>
</tr>
<tr>
<td><strong>Supervisor Lvl</strong></td>
<td>Do not use.</td>
</tr>
<tr>
<td><strong>Company</strong></td>
<td>Defaults based on department. Do not override except for cases where position is affiliated with a unique group such as University of Minnesota Physicians (company UMP) or a fellowship/scholarship (company UNS).</td>
</tr>
<tr>
<td><strong>Dot-Line</strong></td>
<td>Do not use.</td>
</tr>
<tr>
<td><strong>Security Clearance</strong></td>
<td>Do not use.</td>
</tr>
</tbody>
</table>

**DESCRIPTION TAB. SALARY PLAN INFORMATION SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salary Admin Plan</strong></td>
<td>Do not change. Indicates appropriate compensation plan, defaulted by job code. Defaults to salary admin plan when job code is entered.</td>
</tr>
<tr>
<td><strong>Grade</strong></td>
<td>The pay range within the salary administration plan of the job code. Defaults to grade when job code is entered. Do not change except for the <em>Trades Job Codes</em> “BU 02.”</td>
</tr>
<tr>
<td><strong>Step</strong></td>
<td>Entering the step here will default the step to the <em>Job Data</em> pages. If you don’t do it here, you will need to maintain this field manually on the <em>Job Data</em> page.</td>
</tr>
<tr>
<td><strong>Work Period</strong></td>
<td>Do not change. Defaults work period when job code is entered.</td>
</tr>
</tbody>
</table>
Position Pages Field Names and Definitions (cont.)

**Standard Hours**
Defaults to “40” when job code is entered. Update this to reflect the standard hours you need. All hours must be stored in 1/4 increments not just the .25 for hourly. For example, “30.23” needs to be entered as “30.25” because Time and Labor needs time reported in quarter hour increments. The Standard Hours will default to Job Data and can only be changed in Position.

**DESCRIPTION TAB. USA SECTION**

**FLSA Status**
Defaults to FLSA status when job code is entered.

**Bargaining unit**
A recognized bargaining agent for a defined group of employees as defined by the Bureau of medication Services under Minnesota state law. Defaults to bargaining unit when job code is entered. Do not change. The exception will be for Duluth because faculty can be in either Bargaining Unit “08” or “09” based on union contracts.

**Comments**
Insert narration on the purpose of this position request. Used to send a message to central position management.

**Approve/Deny**
Used by central position management to approve or deny the position or deny a position request.

**Save**
Saves, records, and assigns a numeric value to the position request.

**Notify**
Allows the position manager to initiate an email to another University employee with an X.500 account.

**Add**
Allows the position manager to add a new row of data to the position.

**Update/Display**
When searching for data, the default is to search in Update/Display mode. It displays the current record only.

**Include History**
View all action items on the record. All rows of data will display.

**Correct History**
If the position request is denied, the position manager will use correct history to make modifications on the denied request.

**SPECIFIC INFORMATION TAB. SPECIFIC INFORMATION SECTION**

**Max Head Count**
Defaults to “1.” Total number of available headcounts should be entered.

**Mail Drop ID**
Do not use.

**Work Phone**
Do not use.

**Health Certificate**
Do not use.

**Signature Authority**
Do not use.

**Incumbent**
Employee currently holding the position or past employees who have previously held the position.

**Update Incumbents**
When creating a new position, do not check. When updating a position record, this should be checked as it will then send Position data into the Job Record. Data will refresh overnight.
Position Pages Field Names and Definitions (cont.)

Include Salary Plan/Grade
This will be activated for some groups, but not all. If a single occupant is using this position number, it should always be checked.

Budgeted Position
Default will have this box checked. Although delivered position budgeting will not be used, this field will be used to send information to the Finance side. Information will not be sent for certain job codes like “Temp/Casuals,” “Students,” and “Grad Students.”

Confidential Position
Do not change.

Job Sharing Permitted
Do not change.

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

SPECIFIC INFORMATION TAB. EDUCATION AND GOVERNMENT SECTION

Position Pool ID
Units using a distribution strategy of position pool will use this field to assign position records to a Pool ID.

Pre-Encumbrance
Indicator
Defaults to “Encumber Immediately.” Do not change.

Encumber Salary
Option
Defaults to “Salary Step.” Do not change.

Classified Indicator
Defaults to “(Not Applicable).” Change to “Clinical Scholar,” “Research,” or “Teaching” if needed. Created for contract faculty to identify which part of the mission they were hired for.

Calc Group (Flex Service)
Do not use.

Academic Rank
Do not use.

FTE
Defaults to “0.0.” This field is used to tell the University how many people work for us. There will be a modification that prevents people from going over 1.0 FTE. For those individuals who have two jobs, they can only have a combined FTE of “1.0.” Leave “0.0” FTE for all hourly appointments, graduate students, undergraduate students, UMI, UNS, UMP, UMR, and Cobra appointments. Any summer research/summer session appointments will have a “0.0” FTE if they have another appointment. To calculate a FTE less than 1.0, divide the number of work hours per week by 40 hours (15/40) and round to the 6th decimal point (.375000).

Adds to FTE Actual
Count
Select this checkbox when the FTE value is “0.01” and above. Do not check this field if the FTE value is “0.0.” Central position management will be checking the FTE and Adds to FTE Actual Count fields when reviewing.

BUDGET AND INCUMBENTS TAB. CURRENT BUDGET & CURRENT INCUMBENTS SECTION

Current Incumbent
Employee currently holding the position.

Job Data
This link will pull up the job data pages associated with the position record.