Creating New Positions

This is a step-by-step guide for position managers 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.
  - Note: The accuracy of Position Management data is critical since it is the source data which flows to other HRMS modules and ultimately impacts the employee.

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, investigate possible reasons prior to saving record. If unresolved, cancel request in HRMS and re-enter once data is confirmed.
Creating New Positions (cont.)

Step 7 – Save Position

• Click <Save>.

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

• New positions require review by Compensation (with the exception of faculty, temporary/casual, student, and cloned positions).

• Monitor the status of the approvals within the position record by referring to the Position Status field and the Summary of Changes section.

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.