Quick Reference Guide - Org Management
Completing a Maintain Position Form (page 1 of 7)

BU Employee Learning Solutions

Maintaining a Position

Complete a **Maintain Position** form whenever there is a need to modify/edit/update an existing position within your org structure..

About this Guide

There are a wide range of fields appearing on each tab of a Maintain Position form and a number of different scenarios for completing a Maintain Position form.

As such, <u>this guide is intended to show the reader where to go to access fields they might wish to modify</u>.

The Relationship between OM and PA

- While the Org Management (OM) form of **Create Position** is typically used in hiring scenarios, the on-going "maintenance" of an existing position (accomplished through completion of a **Maintain Position** form) often serves as the prerequisite for nearly all **Personnel Administration** (***PA***) actions taken once an employee is hired into that position, such as: *Position Change, Salary Change, Transfer*, etc.
- A list of PA actions requiring an OM form prerequisite ("*QRG-HCM- Personnel Admin Processes and Org Mgmt Form Prerequisites")* is available on the BUworks Central Portal, via the Employee Learning Solutions site:

https://prw.buw.bu.edu/gm/folder-1.11.7380

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The Relationship between OM and PA (continued)

In order to take an action on the PA side, your OM action (*Maintain Position)* must first be approved via Workflow. Given OM and PA forms each have their own Workflows, keep in mind the approval process and the timing of your request (i.e. avoid waiting until the last minute to complete an OM form if there is to be a subsequent PA action).

Prior to Maintaining a Position

- **<u>Contact HR Compensation any time you plan on Maintaining a Position if it involves a change which might impact the position salary and/or grade</u>**
- Keep in mind that there can only be 1 manager position within a given Org Unit. *Why is this significant?* If you plan to "maintain a position" intending on changing the Position title to make it a "Manager" position, there are things to consider that would be best addressed through a call with HR/Comp first, as such a change to the position would likely involve a change in salary, possibly job grade, benefits, etc. As a result, you might need to request a new org unit be created (via an **Org Unit Request** form), followed by a Create Position form to get the Manager position created and assigned to that new org unit

Scenarios for Maintaining a Position

- When you hear the term "maintain position" it refers to editing/updating/modifying an *existing* position. For example, you might be maintaining an existing position that an employee currently holds - *and will remain in*. An example of "position maintenance" in this case could be because the position's "*Essential Functions*" that the employee is expected to perform are being updated

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Scenarios for Maintaining a Position (continued)

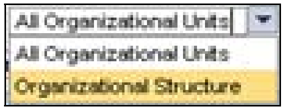
- On the other hand, you might be maintaining the position because the current employee holding it *will be* leaving BU. Changes you make in maintaining it now could be in the context of "prepping it," so that it better matches the employee you'll to hire into the position to replace them. An example of "position maintenance" in this case could be the "*Recruitment/Department Proposed Amount*"- the salary you **propose** to pay the new employee. You'd therefore want that field maintained via the Maintain Position form. The form is routed for approval by Compensation

Looking up the Position to be Maintained

As a best practice, prior to accessing the Maintain Position form, look up the position to confirm you have the correct one you plan to maintain. You can then confirm the **Org Unit ID**, **Position Number** and **Holder** of the position:

To look up a position in your Org Structure:

1. From the **BUworks Central portal**, click the **Manager Self-Service** (or **Payroll Coordinator**) tab.
2. Click the sub-tab of Organization
3. Click the Organizational Overview • Organizational Profile link to obtain the ID of the organizational unit.
4. From the **Org Unit Selection** dropdown, select **Organizational Structure:**



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Looking up the Position to be Maintained

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5. Select the appropriate org structure and sub-unit from the list where the position is assigned.

6. Refer to **Account Assignment Features** to review, confirm and write down the existing/active position for the **Org Unit ID**, **Position Number** and **Holder** of the position of the position you want to maintain.
7. Click the **Close** button to exit.

You're ready to access the Maintain Position form!

Accessing the Maintain Position Form

1. From the BUworks Central portal, based upon your role, click the **Manager Self-Service** (or **Payroll Coordinator**) tab.
2. Click the sub-tab of Organization.
3. From **Organizational Management Actions** - click the link labeled **Maintain Position**.
4. Enter the 8-digit **Position Number**.
5. Click the **Select Position** button Select Position to open the maintain position form.

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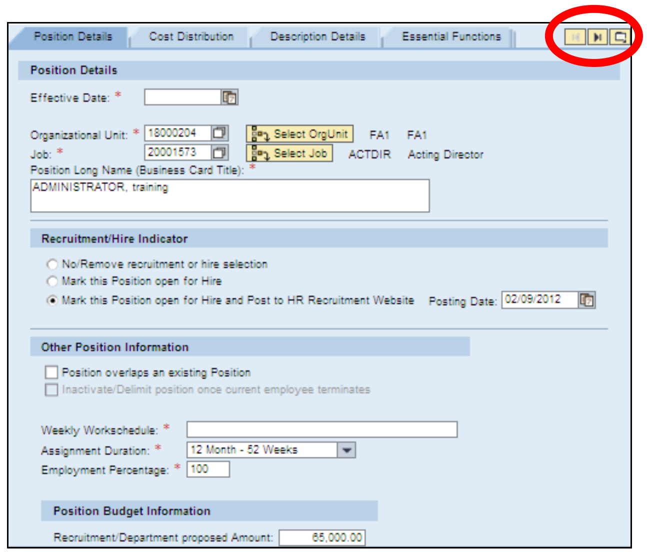
Accessing the Maintain Position Form (continued)

7. The **Maintain Position** screen appears:

In the screenshot below, you'll note there are tabs for *Position Details, Cost Distribution, Description Details,* and *Essential Functions*. As with the *Current Position Data* half of the page, use the arrow keys (circled below) to navigate to additional tabs available to you.



Notes:

- All information on the position is presented via tabs
- On the left side of the screen is a *reference* view (not shown above) called **Current Position Data**, allowing you to see the position's details as they appear today. You can look, but not edit the reference half (left side) of the screen
- On the right of the Maintain Position form, the **New Position Data** section appears (shown in the screenshot above). This is where any edits to the position are made

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Accessing the Maintain Position Form (continued)

- Only those tabs with data for which you are allowed to propose a change on the Maintain Position form are presented in the New Position Data section

Completing the Maintain Position Form

The Position Details Tab

1. **Effective Date –** Enter the date that you want the changes to the position you're making to take effect. They'll be reflected on the position once the Maintain Position form is approved via Workflow.

Organizational Unit – This field will pre-populate, based upon the position to be maintained that you initially entered.

Notes:

- In order to change the Org Unit, it would need to be searched for or entered in the text box
- **Tip**: If you are changing the org unit, make sure to click the Select OrgUnit button after you enter/have selected the new Organizational Unit
- **Remember**- Only one chief position/Manager per Org Unit. A change of org unit for this position may require an Org Unit Request form be completed first. Talk with the OM Admin (Uzma Akhtar) prior to changing an Org Unit assigned to a position

Job – This field pre-populates, based upon the position being maintained that the job code is tied to.

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Completing the Maintain Position Form

The Position Details Tab (continued)

Position Long Name (Business Card Title) – Use this field **only** to change the name of the position as it might appear on a business card:

Position Long Name (Business Card Title): *
Web Designer

Tip: Remember - changing a person's *Position Long Name (Business Card Title)* up to a "senior/mgr" level may involve more than a simple name change, as things such as compensation, grade and benefits might very well be impacted as a result of such a change. Contact Central HR with questions prior to completing a Maintain Position form.

"Recruitment/Hire Indicator"

Recruitment/Hire Indicator
- No/Remove recruitment or hire selection
- Mark this Position open for Hire
- Mark thiis Position open for Hire and Post to HR Recruitment Website

The **Recruitment/Hire Indicator** area of the Maintain Position form is where you indicate if (and when) you want to initiate the recruitment process to get the position filled and furthermore, if you want any (Staff only) position changes you're making to be posted to the BU HR Recruitment Website. This is all indicated through the selection of one of three options:

- ***No/Remove recruitment or hire selection***
- ***Mark this Position open for Hire***
- ***Mark this Position open for Hire and Post to HR Recruitment Website***

"Recruitment/Hire Indicator" (continued)

No/Remove recruitment or hire selection

This option is used for:

- **Positions that you are maintaining, but do not want posted through Human Resources to the BU HR Recruitment website, nor to hire an employee for.**

  Types of positions NOT posted include *Faculty, Temporary, Non-Compensated, Academic Research*, etc.

Notes:

- There may already be an active employee holding the position. You may be simply updating, for example, their position's *Essential Functions* –

  "While I am maintaining/updating info on this position, I have no plans to hire an employee into it.

  Once the Maintain Position form has been approved, the position will continue to appear in my Org Structure and if I view it, it will reflect the changes I've made to it (based upon the "Effective Date" I indicated at the top of this Maintain Position form).

  I do not want the position posted."

"Recruitment/Hire Indicator" (continued)

Mark this Position open for Hire

This option is used when:

You have a position which currently exists within your Org Structure.

The position is a type of position that is NOT posted through Human Resources to the BU HR Recruitment website (e.g.*Faculty,Temporary and Non-Compensated Positions, Academic Research*, etc.)

You now are ready to proceed with hiring an employee into the position –

*"I created this position earlier and it appears in my Org Structure as vacant. I am now ready to hire an employee into it and have therefore selected the "**Mark this Position open for Hire**" option.*

*I do **NOT** want this position posted to the BU HR Recruitment website."*

Notes:

- When "Mark this Position open for Hire" is selected, a date field automatically appears, labeled "**Earliest Hire Action Date**" Earliest Hire Action Date: * . This is the earliest estimated date you expect to hire someone into it
- There is a check in place, ensuring the Earliest Hire Action Date cannot be set to be earlier than the "Effective Date" that was entered at the top of the Maintain Position form

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"Recruitment/Hire Indicator" (continued)

○ Mark this Position open for Hire and Post to HR Recruitment Website

This option is used for:

- **Existing Staff positions that appear within your Org structure that you are maintaining.**

  Selecting this option indicates that you want the position posted through Human Resources to the BU HR Recruitment website with any updates to the position you've made.

  This option also means you want to get an employee hired into it (also through HR, who will enter the new staff hire into SAP for you)

" I am requesting HR Recruitment begin the recruitment process for filling this position. This starts with an HR Recruiter posting it to the BU HR Recruitment website.

I have indicated the ideal date that I'd like the position posted in the Posting Date: * *field...*

In working with HR/Recruitment, I am 'opening the door' to this position so as to allow them to eventually hire a Staff employee into it for me."

Note: Once the Maintain Position form completes Workflow and is approved, an HR Recruiter will contact you to discuss the recruiting and posting process.

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"Other Position Information"


Position Details

Effective Date: * 05/01/2014

Organizational Unit: * 10000297 Verify OrgUnit Data

Job: * 20001559 Verify Selected Job

Position Long Name (Business Card Title): * POSTDOCTORAL ASSOCIATE

Recruitment/Hire Indicator

◉ No/Remove recruitment or hire selection
○ Mark this Position open for Hire
○ Mark this Position open for Hire and Post to HR Recruitment Websit

Other Position Information

☐ Position overlaps an existing Position
☐ Inactivate/Delimit position once current employee terminates

Weekly Workschedule: * 8 HOURS, 5 DAYS
Assignment Duration: * 12 Month - 52 Weeks
Employment Percentage: * 100

Position Budget Information

Recruitment/Department proposed Amount: 44,340.00
Position Budget Amount: 44,340.00
Position Planning No.:

Weekly Work schedule –

Note: This is NOT to be confused with the "*Work schedule rule*" field. This field is simply to aid HR/Recruitment in terms of Staff positions that are to be posted to the BU HR Recruitment website.

If you are changing this field - In the text box, enter the days, schedule and number hours per week (i.e. *Mon-Fri, 8:30am-5pm, 40 hours*). If the employee will be on a "non-standard" schedule (i.e. *not* Monday-Friday), provide a brief explanation. **Note**: Your entry will be reflected on the *Additional Data* tab.

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"Other Position Information" (continued)

Assignment Duration – To change this field, via the dropdown menu, select the appropriate assignment duration. Your entry will be reflected on the *Additional Data* tab.

Employment Percentage – Allows for a range between 100 to 0 (whole numbers). Your entry will be reflected on the *Additional Data* tab.

Recruitment Amount Information

The position budget amount will be displayed directly under the Recruitment/Department proposed amount for informational purposes. Please contact your position analyst if you have any questions.
If you intend to increase an employee's salary, there may be subsequent impacts to the position's grade, the employee's benefits, etc.

After the Maintain Position form has gone through Workflow and been approved, you would complete a *Salary Change* form on the Personnel Administration side to officially change the employee's salary and reflect any salary increase.

To change this field – Enter what you would like to propose to pay the employee (The amount entered may not end up being the actual salary-this is determined by Compensation). For **exempts and non-exempts**, enter the **proposed annual salary** (e.g. 65000.00). For temporary, enter the **proposed hourly pay** (e.g. *15.00*). **Note**: The amount entered will not be higher than the approved grade for this position.

"Attachments"

"Attachments"

Uploading attachments is **optional**. It is intended for adding attachments containing information specific to the position ONLY. For example, for a *Lab Technician* position, the attachment might contain an expanded list of chemicals the employee will be working with.

Notes:

- The Maintain Position form being completed will ultimately pass through Workflow for official approval (Comp, Budget, OM Admin, Dept. Level 1, 2) Therefore, you need NOT attach any "offline approval" documents as a means of getting a position past Workflow approval
- NEVER attach documents containing sensitive, employee-specific information
- Attached documents will live on the Position after it's created. They can be viewed via the Maintain Position form after approval. Attachments do not appear in the back-end/SAP
- Info contained within an attachment is not extracted or validated; therefore it will not be searchable nor reportable (i.e. accessible via reporting) in SAP

To upload an attachment:

A. Click [Browse...] to locate the file on your computer

B. Select the file from your local drive. It will then appear on the Maintain Position form (by name) in the textbox.

C. Click [Attach File].

"Comments"

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"Comments"

Notes:

- Comments are MANDATORY. They have a character limit of roughly 150 (which includes spaces), so be concise in what you enter
- Make it a habit to always specify these three items:
  - **If this is a temporary position or not**
  - **If the position is full time or part time**
  - **The assignment duration of the position**
- Comments are not seen by the HR Recruitment team, only those in Workflow approval groups (Budget, Comp, Level 1 and/or Level 2 approvers, etc.)
- There is a specific field which will be seen later on the *Additional Data* tab called *Recruitment Comments* which can be used to enter comments intended specifically for Recruitment

Other Tabs on the Maintain Position Form

Cost Distribution

It is best practice to keep salary cost distributions on the OM position forms consistent with cost distributions changed via the Personnel Administration form "Salary Cost Distribution".

Tip: If you have used up all three lines which are (by default) provided on the Cost Distribution tab and need to add another line, click the button labeled [Add Blank Cost Distribution Line]

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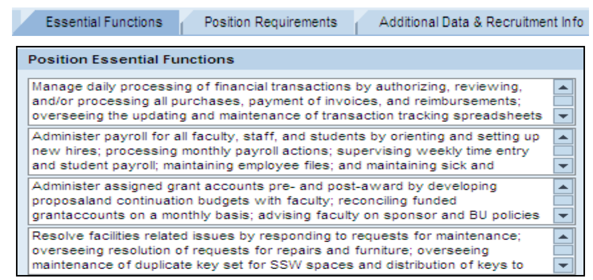
Other Tabs on the Maintain Position Form (cont.)

Description Details

This tab is where you would go to maintain the "General Description Blurb" for the position. **Note**: This does not get updated in the posting.

Essential Functions



This tab is to maintain "Essential Functions" for the position

- Up to 6 Essential Functions can be listed on this tab
- For posted Staff positions, edits made here do not get updated within the posting (see the Additional Data tab)
- For Staff positions and Temp employees you want to pay monthly, you MUST include the approximate % of time the employee will spend performing each group of functions (this helps HR/Compensation)
- Entering percentages is recommended, but not required, for Faculty, Non-Comp, Academic Research, and temporary employees that are paid weekly

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Other Tabs on the Maintain Position Form (cont.)

Position Requirements

Though not required, you may use the dropdown menus available in this tab (*Qualification Catalog, Qualification* and *Proficiency*) to highlight general skills and qualifications related to the position the hire should either be required to possess or you would prefer they possess. This is not part of the position posting for Staff positions

Additional Data & Recruitment Info

Additional Data & Recruitment Info

This tab is made of 2 halves: **Additional Position Information** and **Recruiting Information.**

The "Recruiting Information" section within this tab must be completed ONLY for Staff positions which are to be posted on the BU Human Resources Jobs website. Do NOT complete this section for faculty, temporary, academic research, non-compensated or other positions which are NOT hired or posted through Human Resources.

If, on the "Position Details" tab, you did not select the "Recruitment/Hire indicator" of

Mark this Position open for Hire and Post to HR Recruitment Website

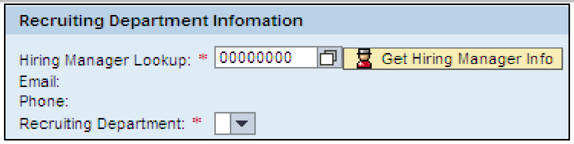
the Recruitment Information section will not be available for completion.

The Recruiting Information section is broken into 4 sub-sections:

- ***Recruiting Department Information***
- ***Planned Work Schedule Info***
- ***Additional Info***
- ***Recruitment Posting Information***

Let's look at each section in more detail.

"Recruiting Department Information"


Recruiting Department Infomation
Hiring Manager Lookup: * 00000000 Get Hiring Manager Info
Email:
Phone:
Recruiting Department: *

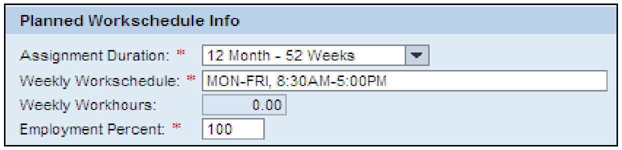
NOTE: This section cannot be left blank for ANY positions.

Hiring Manager Lookup – Click the icon to locate the hiring manager's name (i.e. who runs the department the position is in) from the list you want to change. Then:

Click Get Hiring Manager Info. This will auto-populate the **Hiring Manager's Name**, along with the **Email** and **Phone** fields.

Recruiting Department - Via the drop-down menu, select the (only option that appears for the) Recruiting Department. This value is linked to the Org Unit initially selected for this position currently being created.

"Planned Work Schedule Info"


Planned Workschedule Info
Assignment Duration: * 12 Month - 52 Weeks
Weekly Workschedule: * MON-FRI, 8:30AM-5:00PM
Weekly Workhours: 0.00
Employment Percent: * 100

This area is where you can modify any of the following fields, as needed, to accurately reflect changes to the position in the posting. **NOTE:** This is **NOT** the "Work Schedule Rule".

Assignment Duration - This pre-populates, based upon data that appeared on the Position Details tab.

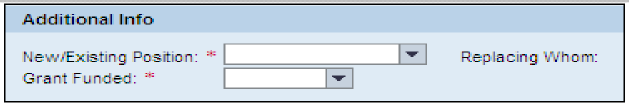
Weekly Work Schedule - This pre-populates, based upon data that appeared on the Position Details tab.

"Planned Work Schedule Info" (cont.)

Weekly Work Hours - (Skip, as this field is grayed out). Note: This field is entered later, by Compensation.

Employment Percent - This pre-populates, based upon data entered on the Position Details tab.

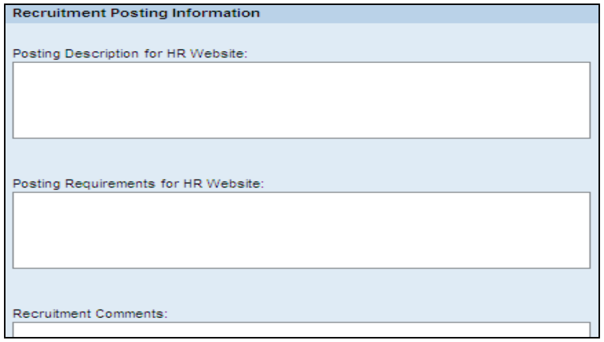
"Additional Info"


Additional Info
New/Existing Position: * Replacing Whom:
Grant Funded: *

New/Existing Position - Given we are completing a Maintain Position form, you would select ***Existing Position***.

Grant Funded – You can change to *No, Yes,* or *Partially.Note:* This information is soley to help the Recruitment team. It DOES NOT impact/drive actual funding of the position.

"Recruitment Posting Info"


Recruitment Posting Information
Posting Description for HR Website:
Posting Requirements for HR Website:
Recruitment Comments:

We're now at the **Recruitment Posting Information** section of the Additional Data tab, where you would provide information to the HR/Recruitment team on the position being maintained, want them to post and get filled.

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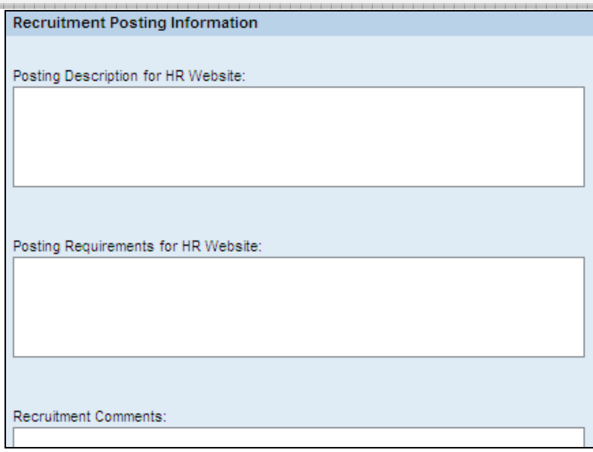
"Recruitment Posting Info" (continued)


Recruitment Posting Information

Posting Description for HR Website:

Posting Requirements for HR Website:

Recruitment Comments:

This area is made of 3 text areas:

- **Posting Description for HR Website**
- **Posting Requirements for HR Website**
- **Recruitment Comments**

Reminders:

- The Recruitment Posting Information section must be completed ONLY for positions which are to be posted on the BU Human Resources Jobs website
- **Do NOT complete the Recruitment Posting Information section for faculty, temporary, academic research, non-compensated or other positions which are not hired or posted through HR**

Let's look at each of the text areas provided (proceed to the next 2 columns):

"Recruitment Posting Info" (continued)

Posting Description for HR Website

This area is for a 5-8 sentence description providing the primary function/purpose of the position. **Note**: It will be viewable by potential applicants.

Format:

- The 1st sentence is a general opening summary statement about the position
- Use present tense
- Each statement should start with an action word that is linked to a value, product, outcome, service or objective
- There should be an emphasis on connecting the position to the mission of the department

Tip: Refer to the following tabs on the Position forms:

- Descriptions tab: The Position's "*General Description Blurb*" provides a good starting point for the description
- Essential Functions tab: Provides the main position functions to highlight in the description

Posting Requirements for HR Website

This area is for a description of the requirements and qualifications needed to perform the position. **Note**: It will be viewable by potential applicants.

Format:

- **1st requirement** is the educational requirements (use abbreviation of *B.A.* or *B.S.* for *Bachelor's degree* and include the specific area of study if necessary i.e. *B.A. in Biology or Chemistry*)
- **2nd requirement** is years of work experience (include specific type of experience if necessary (i.e. *one to three years of related administrative experience working in an academic environment.)*

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"Recruitment Posting Info" (continued)

- **Remaining requirements** then follow (i.e. *excellent communications skills and customer service skills, strong analytical and problem solving skills, experience developing front-end/server side applications using HTML, JavaScript, AJAX, and CSS*)

Tips:

- Info within the "Position Requirements" tab of the Position should be consistent with info in the "Posting Requirements for HR website" text area
- If a skill/experience is "preferred" or "desirable," designate it as such
- Include any additional, specific information related to the position that a candidate should know about (i.e. *this position requires travel, is a live-on position, requires weekend hours during peak periods,* etc.)

Recruitment Comments

This text area is to communicate directly with HR/Recruitment. It is **NOT** part of the posting.

To submit the Maintain Position form

1. Click Continue. Review each tab and the data entered. **Tip**: To change any info, click Back to return to the previous steps *or* click on the appropriate tab number at the top of the screen.
2. Click Submit to submit the Maintain Position form for approval (Workflow).
3. Click Exit to close the window.

You've completed the Maintain Position form!

Track approval via Request Tracker.