Quick Reference Guide - Personnel Administration
Completing an Employee Position Update Form (formerly Position Revision) – (page 1 of 2)

Overview
Complete an Employee Position Update form (formerly known as a Position Revision form) whenever there is a need to change attributes of an employee's position. Examples include:

- A position title change
- A change to an employee’s Personnel Area (e.g., CRC, BUMC) or Personnel Sub-Area (NREP Staff, NREP-Faculty)
- When an employee is changing between Faculty, Staff, Union, or Student Employment
- When there is a change to an employee’s Employee Group (e.g., Faculty full-time, Faculty part-time, Faculty Non-Comp, Staff Exempt full-time, Staff exempt part-time, Staff non-exempt full-time, Staff non-exempt part-time, Staff Non-Comp, etc.)
- When an employee is changing from one Employee Subgroup to another (e.g. Public Safety Officer to Police Officer)
- When an employee is changing their Percent Time only - and it doesn’t affect the Employee Group they are in (e.g., going from 75% to 60%)
- When an employee is changing their Assignment Duration and it does not affect the Employee Group they are in (e.g., 9 months to 12 months)

NOTE: While the form provides an area for you to update salary cost distributions as needed/ in conjunction with changes listed above, you should use the Salary Cost Distribution form if you intend only to change cost distributions.

Distribution updates can be done:

- From an Employee Position Update Effective Date you specify onward
- For a specific period only - You can retroactively insert a change within a window of time you designate - yet do so without impacting other/existing distributions

Notes
- Some employee position updates require changes to the position in Org Management (OM), via a Maintain Position form. Refer to “Personnel Admin Processes and Org Mgmt Form Prerequisites” on the Training Portal for details
- As always, cost distributions must always total to 100%
- Back-up documentation used for approval should be attached to the Employee Position Update form prior to submission (e.g., a completed Salary Change form must be attached when retroactive changes to sponsored programs are submitted)
- Prerequisite for Faculty - You must contact the Faculty Actions Manager for the IT9001 Data Sheet to enter the correct values in the Faculty Contract Information section of this form

Accessing the Employee Position Update Form

1. From the BUworks Central portal, based upon your role, begin by selecting either the Manager Self-Service or Payroll Coordinator tab.
2. Click the link labeled Personnel Actions.
3. Via the Organizational Structure area of the screen, click on the Org Unit in which the employee for whom you’ll be completing a Employee Position Update form is assigned.
   Tip: You can expand the display of the Org Structure by clicking the arrow next to an Org Unit (e.g., ENG Administration).
4. From the display of employees, click the Selection button to choose the specific employee for whom you’ll be completing a Employee Position Update form.
5. Click Select Form.
6. Click the radio button Employee Position Update, which will appear in a new window, showing detailed employee data.

Completing the Employee Position Update Form
1. Employee Position Update Effective Date— Indicate the date the update(s) you’re making should take effect. Entering a past date allows you to view cost distributions that were active from that past date you entered onward.
2. Click Continue Editing Form.
3. Choose an Action Reason for the update you’re making.
4. Confirm the Mail Code is correct.
5. Confirm the Work Schedule Rule is correct.
6. Confirm the Assignment Duration is correct.
7. Confirm the Pay Scale Level is correct.
8. Confirm the (Monthly or Weekly) Pay Period Amount is correct.

The Current Entries and New Entries Sections

A. Current Entries
   This section displays all existing and past salary cost distributions as of the Employee Position Update Effective Date you initially entered (step 1, above). For example: If you entered an Employee Position Update Effective Date of 02/01/2012, any salary cost distributions active as of 02/01/2012 would be displayed (and available for changes) within the second section: New Entries.
   To change the date, click Change Date of Action.

B. New Entries
   This section is where you add or make edits to a cost distribution, such as changing an End Date – which stops a cost distribution. (Proceed to page 2)
Before continuing with the section:

8. You’ll note that within the Current Entries section, there are three radio buttons: (a default of) REPLACE, a second radio button labeled INSERT and a third labeled NO CHANGE:

- REPLACE - Select this option to replace existing cost distributions, effective from the Date of Action and continuing forward.
- INSERT - Select this option to retroactively change the cost distributions for a specific period of time without changing the existing.
- NO CHANGE - Do not update the cost distributions

Let’s look at each of these options:

- **REPLACE** is used when you want to remove existing cost distributions, effective from the Date of Action you entered, and continuing forward. These may be retro-active or prospective changes.

- **INSERT** is used when you want to make (insert) a retro-active change to a particular cost distribution – but only within a specific period of time that you designate.

The insert option allows you to make the change, but avoid changing/impacting any other existing distributions after that period of time.

**Note:** When using INSERT, the End Dates of the cost distributions have to be the same. If this is not the case, you’ll receive an error: “End dates of cost distributions need to match on Insert”

(Continued in the next column)

9. You make changes to cost distributions within the New Entries section of the Position Revision form.

Note: within the New Entries section, buttons appear:

- **Delete**
  - Allows you to delete a distribution.

- **Reset**
  - Allows you to restore the distribution settings to how they initially appeared on the form, prior to changes you just made.

- **Check**
  - Allows you to perform a check for formatting of entries (e.g., it will insert .00 if you entered a percentage as simply 25, so that it’s updated to a correct format of 25.00).

To take the above actions:

- Click the Selection button ⬅️ for the distribution you wish to take action on
- Click the appropriate button listed above

(Continued in the next column)

10. From the drop-down menu, select the Reason for Change you are making.
11. Enter the Cost Center, Order Number, and/or WBS Element.
12. Enter the Percentage.
13. Enter the End Date for the individual cost distribution. If the end date is invalid, it will be highlighted in red and must be changed:

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>Order Number</th>
<th>WBS Element</th>
<th>Percentage</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>950011</td>
<td>100.00</td>
<td>04/30/2011</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** As noted on page one of this guide as a prerequisite, for Faculty members, you must contact the Faculty Actions Manager for the IT9001 Data Sheet. This will allow you to enter the correct values in the Faculty Contract Information section of the form.

Adding Attachments and Comments

14. Use > Attach File to upload any back-up documents used for approval.
15. **New Comments** - Briefly supply additional information pertaining to the salary cost distribution to help expedite the Workflow approval for your form updates. Only Workflow approvers can view your comments.
16. Click to review your entries.
17. Click to submit.

You’ve submitted the Employee Position Update form!

Workflow approvals are tracked via your Request Tracker.