Completing an Employee Position Update (EPU)-Quick Reference Guide

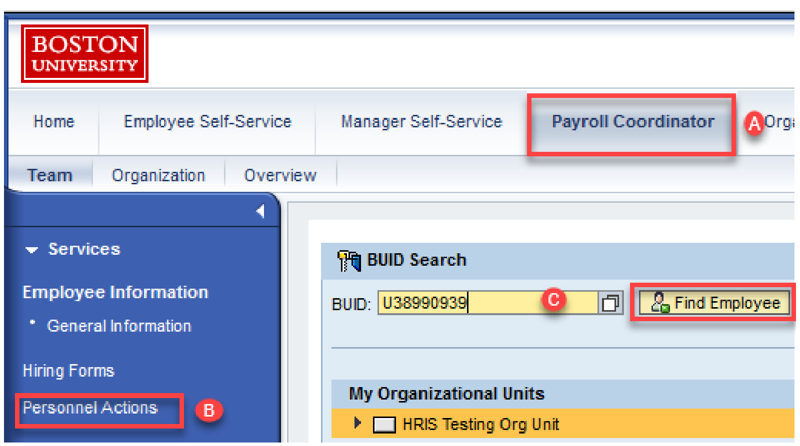
Managers or Payroll Coordinators must process an Employee Position Update (EPU) form when the attributes of an employee's record need to change due to a revision in employee's position. Examples of such changes include:

- Position's title
- Personnel Area (e.g., CRC,BUMC), Personnel Sub-Area (NREP/REP Staff, NREP/REP-Faculty)
- Changes to Employee Group (e.g., FT to PT or to Non-Comp Faculty, FT to PT or to Non-Comp Exempt/Non-Exempt Staff)
- Changes to Employee Subgroup (e.g. Public Safety Officer to Police Officer), changes to % Time without affecting the Employee Group (e.g., going from 75% to 60%)
- Change in Assignment Duration without affecting the Employee Group (e.g., 10 months to 12 months).

As a pre-requisite action, some EPUs require the position to be maintained in Org Management (OM), via a **Maintain Position** form. Please refer to Form-Letter-Matrix document to understand which business scenarios need maintenance of position prior to EPU.

While the Salary Cost Distribution section in the form allows you to edit or add new cost distributions, if all that needs to be changed is the cost distribution, please use the **Salary Cost Distribution** form from Personnel Actions menu *instead of using the EPU*.

As a pre-requisite to faculty actions, please contact the Faculty Actions Manager for the IT9001 Data Sheet to enter the correct values in the Faculty Contract Information section of this form.



1.Log on to **BUworks Central** https://ppo.buw.bu.edu

2. Based on your privileges, you will see either the **Manager Self Service** OR the **Payroll Coordinator** tab. Click on the tab

3. Click on **Personnel Actions**

4. Enter a BUID and click on **Find Employee**. Alternatively, via the My Organizational Units area of the screen, click on the black arrow ▸ to expand the Org Units. Click on a specific Org. Unit of the employee for whom you'll be initiating the Employee Position Update (EPU). From the display of employees, click on the **specific employee**. The row gets highlighted in yellow. Click on Select Form located at the bottom of the screen

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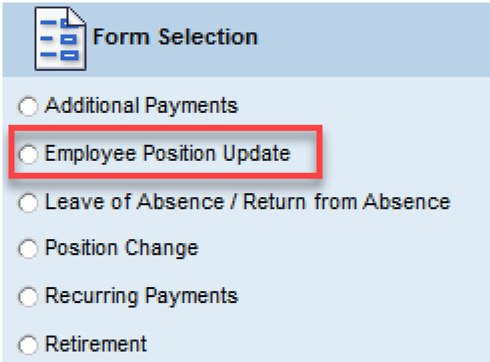
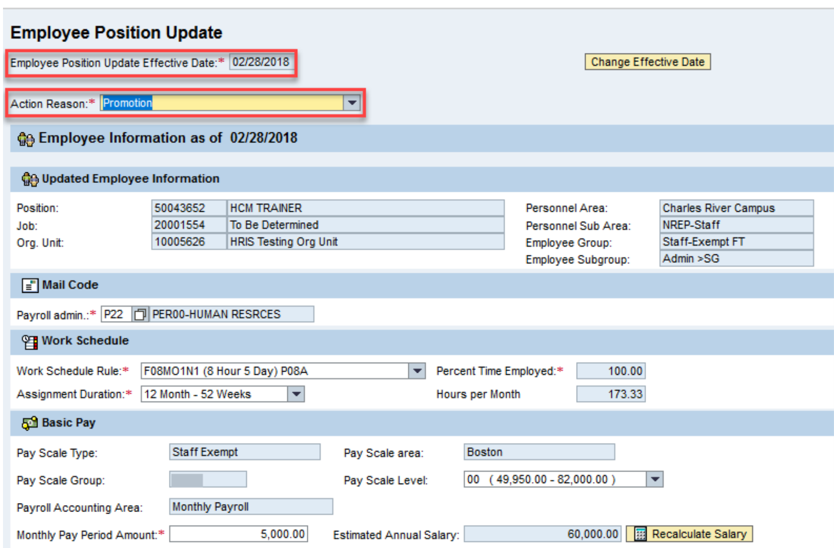


5. Click on the **Employee Position Update** radio button



6. **Employee Position Update Effective Date** – Indicate the date the update(s) you're making should take effect

7. Click on **Continue Editing Form.** The form automatically expands to show details of the employee such as BUID, Main Assignment, Org. Unit, % time employed, work schedule, Personnel area, Personnel sub-area, Employee group, employee subgroup, base rate amount, salary etc

8. **Action Reason** - Select the appropriate reason for the position revision by clicking on the **Action Reason** drop-down

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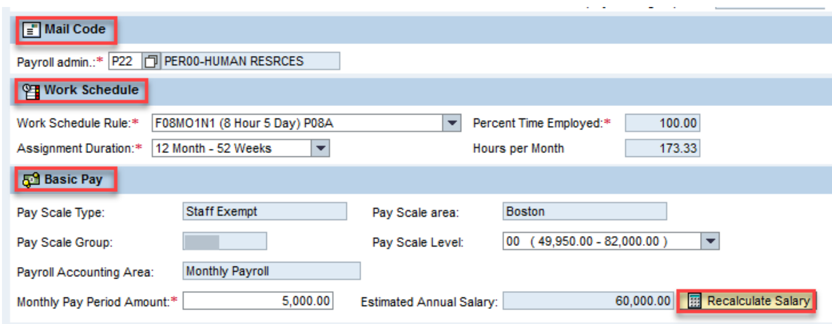


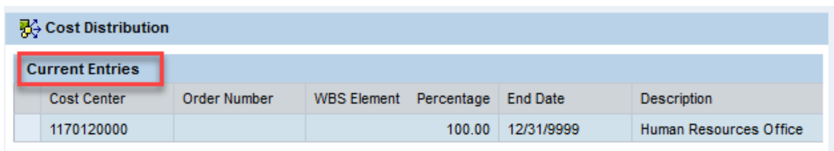
9. **Mail Code -** Select an appropriate mail code from the drop-down

10. **Work Schedule Rule** – Confirm that the WSR is correct. If not, select the appropriate **Work Schedule** from the drop-down

11. **Assignment Duration** – Confirm that the duration is correct. If not, select the appropriate **Assignment Duration** from the drop-down

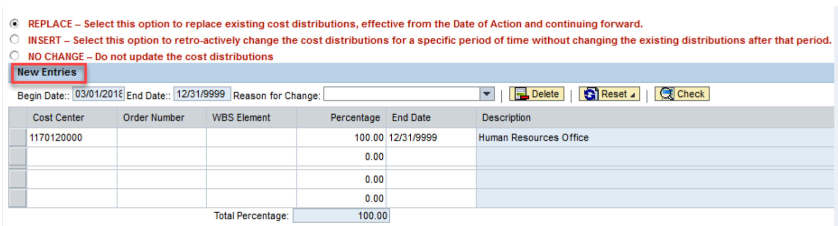
12. **Pay Scale Level –** Confirm that the pay scale is correct. If not, select the appropriate pay scale from the drop-down

13. Confirm the **(Monthly or Weekly) Pay Period** Amount is correct. If not, edit the amount and click on **Recalculate Salary**



14. The Cost Distribution area is divided into two sections:

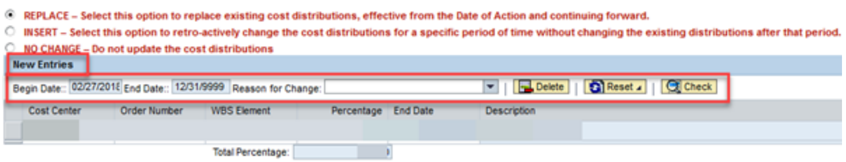
The **Current Entries** section and the **New Entries** section. The Current Entries displays all existing distributions as of Effective Date entered in Step 8 and are not editable



In the **New Entries** section, you can add or make edits to a cost distribution, such as changing an End Date which stops a cost distribution

Click on **REPLACE** when you want to remove existing cost distributions, from the Effective Date that you entered, continuing forward. These may be retro-active or prospective changes. Click on **INSERT** when you want to insert a change to a particular cost distribution – but only within a specific period of time that you designate. Existing distributions after that specified period of time continue forward

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*"



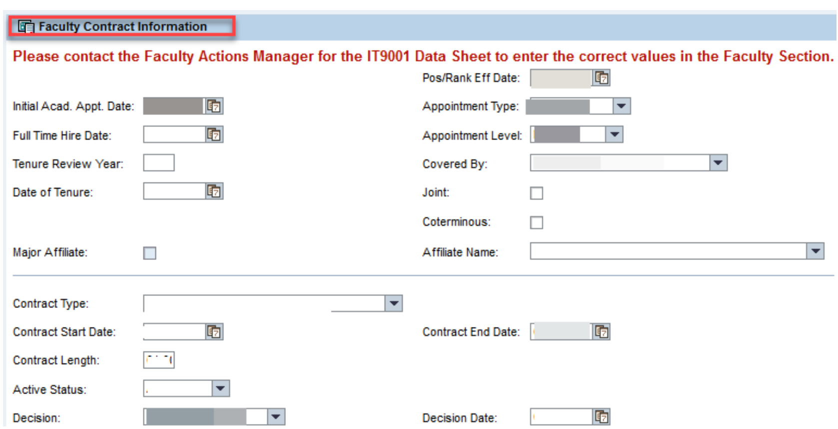
15. Enter the **Begin** and **End Dates** and from the drop-down menu, select the **Reason for Change**

16. Enter **Cost Center, Order Number** and/or **WBS element, Percentage** up to two decimals

Use the following buttons to edit/check distributions:

The **Delete** button allows you to delete a distribution
The **Reset** button allows you to restore the distribution settings to how they initially appeared on the form prior to any changes
The **Check** button allows you to perform a check for formatting of the entries up to two decimal places

17. 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



18. 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

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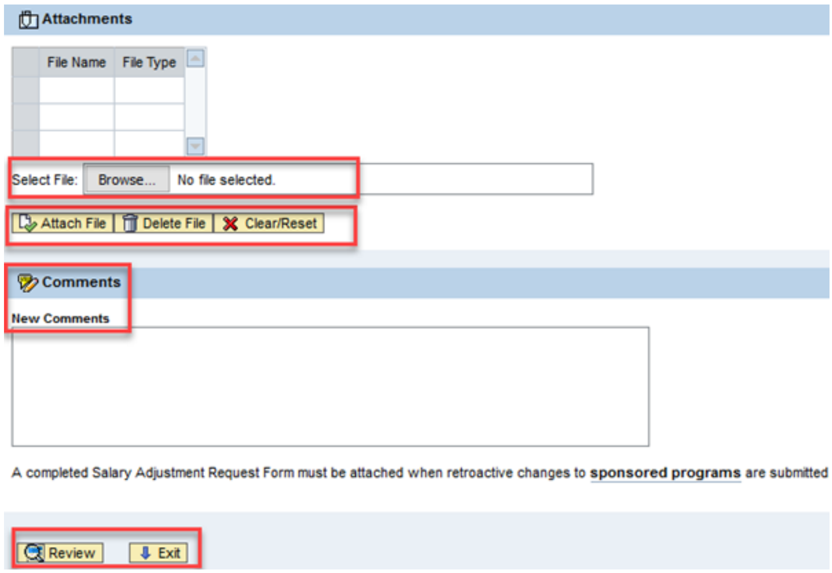

19. **Attachments -** Upload any back-up documents used to facilitate the approval of new entries. When retroactive adjustments are being made, a completed Salary Adjustment Request form (SARF) **must** be attached for review by Office of Sponsored Programs

20. **Comments** – Supply a descriptive comment with additional information pertaining to the salary cost distribution to help expedite the workflow approval

21. Click on **Review** to review your entries. If all the data is accurate and there are no errors, Click on **Submit.** Track your submission via the **Request Tracker**