Position change is a process when an employee is changing from one position (their current) to another position, and remaining in their current org unit/department, under their current manager.

Prerequisites

- The position that the employee is changing over to must be created or maintained in Org Management (OM), through completion of a Create Position form (if the position doesn’t yet exist) or Maintain Position form (if the position already exists) by the employee’s manager.
- Maintaining the position addresses any applicable changes to personnel areas, personnel sub-areas, employee groups, or employee sub-groups, position title, position number (for faculty, if applicable), and the budgeted amount on the position.
- Faculty - If the position title is amended, then the new position title (rank) must first be in an approved status within FACTS.
- 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 the form.

Differences: Position Change vs. Transfer

Position Change = Employee is moving into a different position – while remaining in their current department and under their current manager.

Transfer = Employee is moving into a different position and into a different org unit/department, under a different manager.

Overview – Position Change

Accessing the Position Change Form

1. From the BUnworks 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 Position Change form is assigned.
   Tip: You can expand the display of the Org Structure by clicking the arrow next to an Org Unit (e.g., ENO Administration).
4. From the display of employees, click the Selection button to choose the specific employee for whom you’ll be completing a Position Change form. Note the row becomes yellow.
5. Click Position Change.

Completing the Position Change Form

1. Position Change Effective Date – Enter the date the position change should occur (i.e., date the change is effective).
2. Click Continue Editing Form. The form is expanded as illustrated in the column to the right.

4. Action Reason - Select the reason for the position change.
5. New Position - Select the vacant position the employee is moving into, using the dropdown menu.
6. New Mail Code - Click the selection icon, double-click the appropriate mail code from the list and click OK. The form is expanded.
7. Service Date - This field is required by Time Management to calculate quotas (e.g., sick or vacation time). This date should be changed to the date you entered in step 1 if the employee is moving from a position that would not have any quotas (e.g., non-compensated or temporary) to one that does and vice-versa.

In the Work Schedule area of the Position Change form:
8. Work Schedule Rule – Enter the applicable work schedule rule for the position (e.g., 8 hours 5 day – Sept - May).
9. Percent Time Employed – Using a 2-decimal entry, enter the percent time of employment (e.g. 100.00).
10. Assignment Duration – Enter the applicable assignment duration (e.g. 9 Month – 39 weeks). (Proceed to page 2 of this guide)
Quick Reference Guide
Personnel Administration – Completing a Position Change Form (page 2 of 2)

Completing the Position Change form (cont.)

(Continued from page 1) In the Basic Pay area of the Position Change form:

9. **Pay Scale Level** – Select the appropriate pay scale level. Confirm the value is accurate. Contact Compensation with any questions.

10. **Monthly Pay Period Amount (or Hourly Rate)**
    This field is driven by the position the employee is moving into and is pre-populated. Confirm the value is accurate & contact Compensation with any questions.

    **Tip:** If changes are made to this or the **Pay Scale Level** field, click **Recalculate Salary** to see how the changes impact salary.

Cost Distribution - “New Entries” (continued)

12. As needed, you have the option to make changes to cost distributions within the **New Entries** section of the Position Change form.

   **Notes:**
   - As always, distributions must total to %100.00
   - The **Begin Date** is driven by the **Date of Action** of the Position Change that you entered at the top of the form
   - Within the **New Entries** section, buttons appear:
     - Allows you to delete a distribution.
     - Allows you to restore the distribution settings to how they initially appeared on the form prior to changes you made.
     - 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 line you wish to take action on and then click the button.

Completing the Position Change Form (cont.)

13. **Corporate Function 1** – (Optional) Select the option labeled **Patent Policy Agreement**.

   (Continued in the next column)

Completing the Position Change Form (cont.)

14. **Date Acquired** – (Optional) Select the date that the **Patent Policy Agreement** was received from the employee. This is usually the date the employee starts at the position.

   **Note:** If there is no additional **corporate function** information to enter, proceed to entering the appropriate value in the **Building** field.

15. **Building** – Selecting the building location from the dropdown menu will populate the, the **Street 1, City, State, and ZIP** fields.

16. **Room** – The number identifying the specific room where the equipment or functional location is located.

17. **Office Phone** - The telephone number at the employee's place of work/ where position is based (e.g. 617-353-0000)

   **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.

18. Via **Attachments**, use **Browse...** > **Attach File** to upload any back-up docs used for approval of the position change.

19. **New Comments** - Supply additional info pertaining to the position change to help expedite the Workflow approval for your form. Your comments appear to approvers only.

20. Click **Review** to review your form entries.

21. Click **Submit**.

   **You’ve submitted the Position Change form! Workflow Approvals can be tracked via your Request Tracker.**