Create Position Form

Process Overview

Form Overview

When to use

Use the **Create Position** form when a new position is needed by the department and there is not an existing, vacant position that matches the new position.

There are a few circumstances under which a new position **may** need to be created instead of maintaining an existing position. For further assistance in determining whether a position should be maintained or created, please reach out to HR Compensation at hrcomp@bu.edu.

⚠ ***Warning:*** If a corresponding PA form needs to be completed, the PA form must be completed *after* the create position form successfully completes workflow. **OM and PA forms cannot be completed simultaneously.**

Before you begin

Collect all information needed to complete the form. The in-progress form cannot be saved and must be completed in a single session. You will need the following information:

- Job
- Position Title
- Work Schedule
- Assignment Duration
- Percent Time
- Anticipated Compensation Amount
- Budgeted Salary Amount
- Cost Distribution
- Position Description and Requirements
- Building Address and Phone Number
- Mail Code
- Hiring Manager (if position is being posted)
- Posting Language (if position is being posted)

Note: Staff positions may require a compensation evaluation prior to submission in SAP. This is *not* a requirement for academic research or educator positions.

Incorrect information will result in longer processing times and may cause your form to be rejected. OM forms can only be rejected by HR Compensation and Budget; they cannot be returned.

To prevent late payment to an employee, pay careful attention to the form deadlines and plan accordingly.

References

- Refer to this matrix for employee actions that may require completion of a Create Position form.
- Click here for the Data Dictionary
- Click here for the OM and PA form deadlines.

Create Position Form: Step-by-Step

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Log into BUWorks using your BU login and Kerberos password at the following URL: https://ppo.buw.bu.edu</td></tr>
<tr><td>2</td><td><table><tr><th>IF your role is…</th><th>THEN click the…</th></tr><tr><td>Manager</td><td>Manager Self Service tab.</td></tr><tr><td>Payroll Coordinator</td><td>Payroll Coordinator tab.</td></tr></table></td></tr>
<tr><td>3</td><td>Click the Organization tab on the ribbon directly below your tabs.</td></tr>
<tr><td>4</td><td>Click on Create Position.

Result: The Create Position form opens and the first tab to complete is Action Type.

Warning: Forms must be completed one at a time; do not open multiple forms in multiple tabs.</td></tr>
<tr><td>5</td><td>Enter the number of positions to be created (default value is 1).

Note: If creating multiple positions, they will all have the same information and position set up (full-time/part-time, perm, represented/non-represented/etc.). Multiple positions should not be created unless they are going to be filled.</td></tr>
<tr><td>6</td><td>Select whether to create the position from a job or copying an existing position.

<table><tr><th>IF creating position…</th><th>THEN select…</th></tr><tr><td>Using a job</td><td>Create from Job radio button and enter the job code provided by Compensation or look up the job code via the search help box.

Note: if you are unsure what job code to use, please email hrcomp@bu.edu for assistance</td></tr><tr><td>Copying from an existing position</td><td>1. Select Copy from Position radio button and enter the position number to be copied or look up the position number using the search help box.
Note: An existing position should only be copied if the position description, job, exemption status, and grade of the existing position match those of the new position.
2. Click select position.</td></tr></table></td></tr>
</table>

Step	Action
7	Upload relevant documentation in the **Attachments** section. Please refer to the matrix if you need assistance determining what is required for attachments. ***Note:*** If the payment being entered or changed is on behalf of a department outside of your org structure, approval from the home department (department being charged) must be attached. **IF…** / **THEN…** There are documents to attach → Proceed to the next step There are no documents to attach → Proceed to Step 14 ***Warning:*** do not include attachments containing sensitive information such as social security number, date of birth, etc.
8	Click the **Choose File** button in the **Attachments** section. ***Result:*** The **Open** window appears.
9	Navigate to the appropriate file on your computer.
10	Click the title of the file.
11	Click the **Open** button. ***Result:*** The filename appears in the **Select File:** field.
12	Click the **Attach File** button. ***Result:*** The file now appears in the **Attachments** table.
13	Repeat steps 9–13 for each attachment.
14	Enter information in the comments (150 characters or less) including information about why this position is being created. ***This is a required field.***
15	Click **Continue** and then scroll to the top of the page.
16	Enter the **Effective Date** or use the search help box to select the date. ***Note:*** The Effective Date used on the Create Position form is the earliest date the position will appear in SAP and display in the organizational chart.
17	Enter the 8-digit **Organizational Unit** number (example: 100xxxxx) or use search help box to select the organizational unit. Click 'Verify OrgUnit Data'.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18</td><td>Enter the job. Click ‘Verify Selected Job’. If you selected ‘copy from job’ from step 6, this will pre-fill with that information.

Note: If you are unsure what job code to use, please email Compensation at hrcomp@bu.edu.</td></tr>
<tr><td>19</td><td>Enter the Position Long Name (Business Card Title). The position title entered here will be the basis of the position title entered by Compensation.</td></tr>
<tr><td>20</td><td>Enter the recruitment/hire indicator.
<table>
<tr><th>SELECT…</th><th>IF…</th></tr>
<tr><td>Mark this Position Open for Hire</td><td>An employee will be hired or moved into this position.
The position should not be posted to the HR Website and/or the position offer will not be extended by HR Talent Recruitment Services.
Then enter the Earliest Hire Action Date.</td></tr>
<tr><td>Mark this Position Open for Hire and Post to the HR Recruitment Website</td><td>The position should be opened and posted to the Careers section of the HR website.
Then enter the Posting Date.</td></tr>
</table></td></tr>
<tr><td>21</td><td>In the section called Other Position Information, please indicate if this will be an overlap position.
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>This position will be used as an overlap position for an incumbent being replaced by a new employee</td><td>Check off the checkbox called Position overlaps an existing position and enter the position number</td></tr>
<tr><td>This is not an overlap position</td><td>Proceed to step 22</td></tr>
</table></td></tr>
<tr><td>22</td><td>Enter the weekly Work Schedule as text.

Note: The days and hours indicated in this section will dictate the work schedule rule that is set by Compensation.</td></tr>
<tr><td>23</td><td>Select the Assignment Duration via dropdown (10 months, 11 months, and 12 months are grouped with the 1 month options).

Note: The Assignment Duration selected will determine which Employee Subgroup is assigned to position. Employees who work under 9 months (i.e., 8.8 months or less) are considered temporary employees. Employees expected to work 9 months or more are considered regular employees.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>24</td><td>Enter the Percent Time as a whole number. The Create Position form does not accept decimals; percent times with decimals should be rounded.</td></tr>
<tr><td>25</td><td>Enter the Proposed Compensation Amount. This is the amount you intend to pay the employee. This amount will be validated by HR Compensation to ensure compliance with state and federal law.
<table>
<tr><th>IF the position will be…</th><th>THEN…</th></tr>
<tr><td>Paid monthly</td><td>Enter an annual dollar amount (e.g., $50,000).

Note: If the employee is under 12 months and/or 100% time, the department must include the FTE in the comments.</td></tr>
<tr><td>Paid weekly</td><td>Enter the hourly amount (e.g., $15.00)</td></tr>
</table>
<table>
<tr><th>IF the position is…</th><th>THEN…</th></tr>
<tr><td>Temporary or non-compensated</td><td>Proceed to Step 29</td></tr>
<tr><td>For all other positions</td><td>Proceed to the next step</td></tr>
</table></td></tr>
<tr><td>26</td><td>The Position Planning No. is optional but should be filled in if the position was requested through the annual budget process. If you are unsure, please contact your Budget Analyst to confirm.</td></tr>
<tr><td>27</td><td>The Recurring Position Budget should match the Proposed Compensation Amount unless otherwise directed by your Budget Analyst.</td></tr>
<tr><td>28</td><td>Faculty Stipend Information should only be entered if a faculty member has an administrative CE appointment for which they receive additional salary. If this is the case, the faculty member must have a corresponding CE appointment in SAP.</td></tr>
<tr><td>29</td><td>The Master Cost Center will automatically populate based on the organizational unit selected.</td></tr>
<tr><td>30</td><td>Click Continue and then scroll to the top of the page.
<table>
<tr><th>IF the position is…</th><th>THEN…</th></tr>
<tr><td>Temporary or non-compensated</td><td>Proceed to Step 33</td></tr>
<tr><td>For all other positions</td><td>Proceed to next step</td></tr>
</table></td></tr>
</table>

Step	Action
31	Enter the **Cost Distribution** under the cost center column. The Cost Distribution dictates how the position budget is allocated**.** The cost distributions should be in sync on the data with the PA side, with the exception of grants. In cases where the position is grant-funded, the generic grant number 9559999990 must be entered under the Order column. The PA will allow entry of the applicable grant account number(s). This field is not required for temporary positions (excluding L509 employees) or non-compensated employees. ***Warning*:** The cost distribution percentage must equal 100%. In addition, if the Proposed Compensation Amount is not filled under the Position Details tab you will be unable to enter the cost distribution.
32	Click **Continue** and then scroll to the top of the page.
33	Enter the **Position Description Details**. If copying from an existing position, the **Position Description Details** will automatically populate based on the current position. This is a high level, general summary of the position. Review and/or update this summary if necessary. *Please do not include bullets or hyperlinks.*
34	Click **Continue** and then scroll to the top of the page.
35	Please list at least six **Essential Functions** of the position with the approximate percentage of time spent on each function. *Please do not include bullets or hyperlinks.* ***Warning*:** the percentages must equal 100% and are a minimum of 5%.
36	Click **Continue** and then scroll to the top of the page.
37	For **Position Requirements**, please highlight and select the appropriate Qualification Catalog, Qualification, and Proficiency via the dropdown. At a minimum, the department needs to include the Education and Work Experience. **Reference:** Position requirements need to be selected both by highlighting the row and selecting the dropdowns in a particular order; otherwise, the position requirements will not successfully stick to the position. See [Scenario: Add, Edit, or Remove Position Requirements]() for further guidance.
38	Click **Continue** and then scroll to the top of the page.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>39</td><td>In the additional data tab, fill in the additional position information:

Building – select the building where the employee/position will work.
If this is an off-campus position enter the departmental address. Also note that this position is ‘Off Campus’ in the notes section.
Mail code – select mail code from the dropdown
Office phone – enter the position phone number. If the phone number is unknown, enter the department main line phone number.

<table>
<tr><th>IF the position is…</th><th>THEN…</th></tr>
<tr><td>Faculty
Academic Research
L509 Faculty
Temporary Staff</td><td>The position cannot be posted through the OM form. Please contact HR Talent Recruitment Services to post this position. Proceed to Step 49.</td></tr>
<tr><td>Non-compensated
Volunteer
Contracted</td><td>These positions are not posted on the HR website. Proceed to Step 49.</td></tr>
<tr><td>Staff AND recruitment indicator selected is “Mark this position open for hire/post to HR recruitment website”</td><td>Proceed to the next step</td></tr>
<tr><td>Staff AND the recruitment indicator selected is “Mark this Position Open for Hire”</td><td>Proceed to Step 49</td></tr>
</table></td></tr>
<tr><td>40</td><td>Complete the Recruitment Information section for positions which are to be posted on the Human Resources Jobs website.</td></tr>
<tr><td>41</td><td>If posting the position, select the hiring manager by clicking on the box called Get Hiring Manager Info. Search for the hiring manager by first and last name.

Result: The email and phone of the hiring manager will fill in.</td></tr>
<tr><td>42</td><td>Select the recruiting department via the drop-down menu or look up the manager by using the search help box.

Note: If the field is blank or the information is incorrect, please email hrsys@bu.edu for assistance.</td></tr>
</table>

Step	Action
43	The information under **Planned Work Schedule Info** automatically populates based on the information listed on the tab in **Position Details.** Edit if needed (this will change the information on the Position Details tab). • Assignment Duration • Weekly Work Schedule • Weekly Work Hours • Employment Percent
44	Under Additional Info: 1. Select **New Position** via drop-down menu next to **New/Existing Position.** 2. Specify if **grant funded** by selecting yes, no, or partially (depending on the amount of salary covered by grant funding).
45	In the section called **Recruitment Posting Information,** provide HR Talent Recruitment Services with information about the position.
46	**Posting Description for HR Website** should include a description of 5-8 sentences about the primary purpose of this position. This section is viewable by applicants. This field is required and if left blank will result in delayed posting. **Format:** • General opening 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 ***Note:*** The position's **General Description Blurb** can be a helpful starting point for this description.
47	**Posting Requirements for HR Website** is a list of requirements and qualifications needed to successfully perform the responsibilities of the position. This section is viewable by applicants. **Format:** • **First requirement** is education requirements. Use abbreviation of B.A. or B.S. for bachelor's degree and include the specific area of study if necessary. • **Second requirement** is years of experience. Include specific experience if necessary (*e.g.,* one to three years administrative experience working in academic environment). • **Remaining requirements** then follow (*e.g.,* excellent communication, problem solving, analytical skills, etc.). • Include any additional, specific information related to the position that a candidate should know about (*e.g.,* some travel required, must be available to work on weekends, etc.). ***Note:*** The information on the **Position Requirements** tab must be consistent with the information on the **Posting Requirements for HR Website.**

Step	Action
48	Enter information in **recruitment comments** section (*e.g.* expecting to hire candidate by 6/1/21, anticipated recruiting range, requesting a waiver of posting, etc.). ***Note:*** The information entered here isn't posted on the HR website. This section is only intended for communicating directly with Talent Recruitment Services.
49	Review data to ensure it is correct. Approvers do not have an option to return this form, only reject.
50	Review data again, if needed; otherwise, click **Continue** > **Next Department > Exit.** Depending on the computer or browser you are using, you may need to scroll down to see the green checkmark to confirm the submission was successful. Once the form is submitted, this form can be tracked via **Request Tracker**. ***Note:*** There is currently no option to save information entered on this form. To exit without saving, click on Exit. To change any information click **back** to return to the previous step or click the appropriate tab at the top of the screen (i.e. Cost Distributions). ***Result:*** The form is submitted for approval via workflow. You can track the form progress through Request Tracker. You will receive an email notification when the form is approved.