Scenario: Create Overlap Position (Staff)

When to use

Overlap positions are created in the following circumstances (assuming, funding supports the overlap):

- When there is a need for an outgoing employee to train an incoming employee
- When an outgoing employee's date of departure is *after* the start date of the incoming employee hired to fill the position
- When the position needs to be maintained for posting *without* changing the current employee's record

  Note: If making changes to the position, check with HR Compensation (hrcomp@bu.edu) if a temporary overlap position is necessary based on the situation.

Overlap positions are temporary in nature and must be delimited once the current employee vacates the position. This means a new temporary overlap position must always be created, even if one was created in prior years.

Warning: When the original position is copied to create the temporary overlap position, the overlap position will *not* have the same security roles as the original position (*e.g.*, Manager Self-Service, Payroll Coordinator, etc.) If the security roles are still needed for the current employee, your department DSA will need to request the appropriate roles be added to the overlap position. Please plan accordingly.

Order of operations

The process for temporary overlap positions needs to follow a specific order. This order will prevent delays and minimize disruptions to your employees:

1) Maintain the current position to post.
2) Create the temporary overlap position (instructions below).
3) Submit a Position Change form to move the **current employee** into the temporary overlap position.

   Warning: The corresponding Position Change form must be completed *after* the Create Position form successfully completes workflow. **OM and PA forms cannot be completed simultaneously.**

4) The incoming employee is hired into the original position. For employees who are not currently in SAP, the Hire form will be processed by HR Talent Recruitment Services. For employees who are currently in SAP, the Position Change or Transfer form needs to be completed, depending on the situation.

5) Once the Position Change form completes workflow, process the Termination or Retirement form for the outgoing employee.

   Warning: Do not process the Termination form until the current employee is moved into the overlap position. If the Termination form was already processed, and the employee has not yet been moved into the overlap position, submit a ticket to HR Information Systems (hrsys@bu.edu) requesting the Termination action be reversed. Include the employee's name, BU ID, and the tracking number of the Termination action. The Termination action can be reprocessed after the employee moves into the overlap position.

6) Once the outgoing employee vacates the temporary overlap position, delimit the overlap position.

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:

- Effective date the employee will need to be moved into the overlap position (choose a date prior to the new employee's start date)
- Position number of the current employee's position
- Percent time
- If the employee is in an exempt (monthly paid) position *and* will be working a reduced schedule, check with HR Compensation (hrcomp@bu.edu) if the overlap position still qualifies as exempt under FLSA.

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

- Click here for the Data Dictionary
- Click here for the OM and PA form deadlines.

Create Overlap Position (Staff): 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). In the case of a temporary overlap position, this should remain 1.</td></tr>
<tr><td>6</td><td>Select the Copy from Position radio button and enter the current employee’s position number.</td></tr>
<tr><td>7</td><td>Click Select Position.</td></tr>
<tr><td>8</td><td>Upload relevant documentation in the Attachments section. Please refer to the matrix if you need assistance determining what is required for attachments.

<table><tr><th>IF…</th><th>THEN…</th></tr><tr><td>There are documents to attach</td><td>Proceed to the next step</td></tr><tr><td>There are no documents to attach</td><td>Proceed to Step 15</td></tr></table>
Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</td></tr>
<tr><td>9</td><td>Click the Choose File button in the Attachments section.

Result: The Open window appears.</td></tr>
<tr><td>10</td><td>Navigate to the appropriate file on your computer.</td></tr>
<tr><td>11</td><td>Click the title of the file.</td></tr>
</table>

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Step	Action
12	Click the **Open** button. ***Result:*** The filename appears in the **Select File:** field.
13	Click the **Attach File** button. ***Result:*** The file now appears in the **Attachments** table.
14	Repeat steps 9–13 for each attachment.
15	Enter information in the comments (150 characters or less) including information about why this position is being created. ***This is a required field.***
16	Click **Continue** and then scroll to the top of the page.
17	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.
18	The **Organizational Unit** will populate with the organizational unit number of the existing position. Change if needed.
19	The **Job** will populate with the job number of the existing position. Change if instructed by HR Compensation.
20	The **Position Long Name** (Business Card Title) will populate with the position long name of the existing position.
21	Select the radio button **Mark this Position Open for Hire** then enter the **Earliest Hire Action Date**. ***Note:*** Overlap positions should never be posted to the HR website for recruitment.
22	In the section called **Other Position Information**, indicate this will be an overlap position by selecting the checkbox called **Position overlaps an existing position**. Enter the position number of the current position.
23	Enter the weekly **Work Schedule** as text. ***Note:*** The days and hours indicated in this section will dictate the work schedule rule selected by Compensation.
24	Select the **Assignment Duration** via dropdown (10 months, 11 months, and 12 months are grouped with the 1 month options). Use the same assignment duration as the current position (*i.e.*, do not select the expected duration of the overlap position itself). ***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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>25</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>26</td><td>Enter the Proposed Compensation Amount. This is the amount the current employee is paid. 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 hourly</td><td>Enter the hourly amount (e.g., $15.00)</td></tr>
</table></td></tr>
<tr><td>27</td><td>Skip the Position Planning No. field.</td></tr>
<tr><td>28</td><td>The Recurring Position Budget should match the Proposed Compensation Amount unless otherwise directed by your Budget Analyst.</td></tr>
<tr><td>29</td><td>Skip the Faculty Stipend Information field.</td></tr>
<tr><td>30</td><td>The Master Cost Center will automatically populate based on the organizational unit selected.</td></tr>
<tr><td>31</td><td>Click Continue and then scroll to the top of the page.</td></tr>
<tr><td>32</td><td>The Cost Distribution will populate with the cost distribution of the existing position. Adjust as needed. 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.

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.</td></tr>
<tr><td>33</td><td>Click Continue and then scroll to the top of the page.</td></tr>
<tr><td>34</td><td>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.</td></tr>
<tr><td>35</td><td>Click Continue and then scroll to the top of the page.</td></tr>
<tr><td>36</td><td>The Essential Functions will automatically populate based on the current position. Please do not include bullets or hyperlinks.

Warning: the percentages must equal 100% and are a minimum of 5%.</td></tr>
</table>

Step	Action
37	Click **Continue** and then scroll to the top of the page.
38	The **Position Requirements** will automatically populate based on the current position. **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.
39	Click **Continue** and then scroll to the top of the page.
40	In the additional data tab, fill in the **additional position information**: • **Building** – select the building where the employee/position will work. • **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.
41	Review data to ensure it is correct. Approvers do not have an option to return this form, only reject.
42	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.

Next Steps: After the Create Position form completes workflow, continue the temporary overlap process using the guide Move Employee into an Overlap Position (Staff).