Create Position

Overview

This job aid outlines the tasks for a HR Partner, HR Contact and Manager to create a position

Prerequisites: N/A

Important Information:

- The employing Supervisory Organization is responsible for ensuring appropriate approvals and budget authority prior to initiating any Create Position event (including any additional approvals required beyond what is configured in Workday)
- Costing allocations do not dictate when an employee gets paid. An employee will get paid if the date is within the annual work period. If no costing allocations are assigned for a period of time the salary will be charged to a System Member's default account

Steps

Initiate Create Position Process

From the Workday Home page:

1. Type “Create Position” in the Search bar and click the Create Position task from the dropdown list

The Create Position page displays

2. At the top of the page, enter the Supervisory Organization where the position has to be created (enter supervisors name)

3. At the top of the page, complete the following fields:
   - Position Request Reason (as New or Replacement-Temp)
   - Job Posting Title - Working Title
   - Number of Positions

4. On the Hiring Restrictions tab, complete / confirm the following fields:
   - Availability Date-use current date
   - Earliest Start Date-use current date
   - Skip Job Family
   - Job Profile-Pay Plan title
   - Job Description Summary
   - Job Description-pulls to posting
   - Location-type-enter city
   - Time Type- part or full time
   - Worker Type - employee (contingent if not being paid)
   - Worker Sub-Type-click Worker Type and indicate type (student, staff, etc)
   - Skip Critical Job and Difficulty to Fill
   - Enter 3 questions in Comments
Note: *Click Qualifications tab to enter details

- The **Availability Date** is the first date that any event can be started on the position, including creating a requisition, etc.

- The **Earliest Hire Date** prevents an employee from being hired earlier than the indicated date. It is recommended to use the same date for the **Availability Date** and **Earliest Hire Date**

- After you enter the **Job Profile**, the corresponding **Job Description Summary** and **Job Description** will default (if available)

5. Enter any comments if necessary. Enter 3 questions.

Note: The following fields are not currently used:

- **No Job Restrictions**
- **Critical Job**
- **Difficulty to Fill**

6. Click **Submit**

The next task in the process is the **Default Compensation Change** task. This task routes to the Manager, HR Partner or HR Contact depending on the initiator of the event

**Note:** Default compensation is required on a position for a **Faculty** and **Staff** worker type

**Default Compensation Change**

The Manager can access the **Default Compensation Change** task in their Inbox

From the Workday Home page:

1. Click the **Inbox** worklet

2. Click the “Default Compensation” action item

3. On the Default Compensation Change page, scroll down to the **Salary** or **Hourly** section. Click the Edit icon to enter the **pay rate** and **Frequency** for the position

**Note:** Select one of the following options as the pay frequency: *(how you want position to be paid)*

- If the position is an hourly paid position, select **Hourly**
- If the position is a salary paid position, select **Monthly**

4. Click the **Save** icon after entering the correct salary and frequency

5. Click **Approve**

The next step is **Change Organization Assignments** for the position completed by the manager

**Change Organization Assignments**

1. On the Change Organization Assignments page, confirm the **Company** and **TAMUS**
System Member Hierarchy organizations are correct. Change if needed.

2. Click Submit
The process then routes to the appropriate approver(s).

Approve Position Details (Dept Head/Exec App)
From the Workday Home page:
1. Click the Inbox worklet again
2. Click the “Create Position” action item
3. Review all the details about the position and click Approve, Send Back or Deny

Note: Approval routing is based on Employee Type and Job Family
Next, the Assign Cost Allocation task is routed to the Manager, HR Partner or HR Contact (Initiator).

Note: Assign Costing Allocation is not required for positions with Student Worker types

Assign Costing Allocation
From the Workday Home page:
1. Click the Inbox worklet again
2. Click the “Costing Allocation for Create Position” action item

Note: When entering / searching for the account number, the account should always include “TAMUS Cost Center”. Projects are searchable from this field, but should not be selected

3. On the Assign Costing Allocation for Create Position page, click Add to assign the costing allocation

4. Enter the duration of the costing allocation. Complete the following fields:
   - Start Date
   - End Date (Optional)

Note: End Date signifies the last date that the salary / wages will be charged to the designated account

5. Update the account number in the Worktags field (e.g., Business Computing Services).
   Click the Add Row icon and use the Prompt icon to select an account

6. The Distribution Percentage will default as 100%. To distribute percentages costs across multiple account numbers, click the Add Row icon and enter distribution percentage for each account number

7. Click Submit
To view more information, open the Details and Process section and click the Details or Process tab.

This completes the Create Position process.

*Qualifications
Certifications- Optional
Competencies- NA
Education - Preferred
Work Experience - Preferred
Languages - Optional
Responsibilities - Duties
Skills - Optional
Training- Optional
THESE ITEMS WILL NOT AUTO POPULATE ON THE POSTING. IF YOU WANT THESE TIMES TO APPEAR ON THE POSTING YOU WILL NEED TO ADD THEM TO THE JOB DESCPRITION FIELD

Create Position (Staff/Research)
1) Initiated by HR Contact
2) Review by HR Partner/Research Partner
3) Back to HR Contact to assign Default Compensation and Organizational Assignment
4) Back to HR Partner to approve
5) Routes to Dept Head to approve
6) Routes to Executive Approver to approve
7) Position is created once approved by Executive Approver, and available to see within suporg
   a. Simultaneously trigger to HR Contact to assign Cost Allocation
   b. Routes to Cost Center Approver to approve (EPA Approver) -END
   c. Routes to SRS for approval (for research accounts) if needed – END

Create Position (Grad)
1) Initiated by HR Contact
2) Review by HR Partner/Research Partner
3) Back to HR Contact to assign Default Compensation and Organizational Assignment
4) Back to HR Partner to approve
5) Routes to Dept Head to approve
6) Position is created once approved by Department Head, and available to see within suporg
   a. Simultaneously trigger to HR Contact to assign Cost Allocation
   b. Routes to Cost Center Approver to approve (EPA Approver) -END
   c. Routes to SRS for approval (for research accounts) if needed – END

Create Position (Student)
1) Initiated by HR Contact
2) Review by HR Partner
3) End

NOTES: when creating a student position approvals are not needed and do not need to be attached in Workday.