Fac2b: Creating a New Position

Overview

- This job aid is intended for HCM Initiators who create new Job and Job Profiles and HCM Initiators who create new Positions.
- This job aid will cover:
  - How to create a new position

- This should only be done when it's a brand new position number that does not yet exist in iO. (Existing position numbers should already be loaded into iO.)

- Note that there are at least two steps in this process:
  1. For posting a new position:
     a. Create the new position
     b. Start a Job Requisition in iO
  2. For adding a new position for an existing faculty member:
     a. Create the new position
     b. Assign a faculty member to this new position (Add an Assignment)

- PLEASE BE CAREFUL and follow directions closely! If a position is not set up exactly right, you may end up having to scrap a job requisition or assignment, as well as the position itself, and start again from scratch!

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1. **Navigate to Workforce Structures**

1. You can navigate to Workforce Structures two different ways:

   a. (Option 1) From the iO Home Page, select the **My Client Groups** tab.

      i. In the Apps directory, select **Workforce Structures**.

   b. (Option 2) Click on the **Navigator** on the top left of the home screen.

      i. Select **Workforce Structures** from **My Client Groups**.
2. Do You Need a New Position?
   1. From the Workforce Structures page, navigate to Manage Positions from the Workforce Structures menu.
      a. Select Manage Positions from the Workforce Structures menu.

   ![Image of Workforce Structures page]

   2. In the Search section at the top is where you can search to make sure the position doesn’t already exist.
      a. You could search by the position number using Code:
b. Or by the name of the **Incumbent:**

![Image of Manage Positions page]

**3. Create a New Position**

1. Now that you’re sure this position needs to be created, select the **+ Create** button:

![Image of Manage Positions page with + Create highlighted]
a. Enter position basic details:

1. **Effective Start Date**: Pay attention to this date. Don’t leave it as today’s date if you want it to be retroactive. You won’t be able to change it later without starting over again.

2. **Business Unit**: **GENERAL** (always)

3. **Name**: For a budgeted position, the **position name** is the **title** of the position, **usually the rank** (Example: Professor). Endowed chair titles can be entered later as the Assignment Title, and it is preferable to leave the position title as the more generic title.

4. **Code**: The position number
   - **Budgeted positions**: obtain the position number from your dean’s office or the budget office. For a regular position, the 6-digit number will be followed by "-00". (Example: 453657-00)
   - **Summer salary**: the 6-digit position number will be the same as for the primary position, but the suffix will be "-09". (Example: 453657-09)
   - **Pooled positions**: Here are some common pooled position naming conventions. **REMEMBER THAT THESE TITLES ARE NOT WHAT WILL SHOW IN THE DIRECTORY.** *(The Assignment Name is what will show publicly; that will be added when you add a person to this position as an assignment.)*
     i. **NTT pools**: xxxx – xxxx (job code – org #) (Example: 95102 – 23420 means Lecturer – Humanities – Philosophy)
        See **Job Categories Cheatsheet** in the top section for complete list of Job Codes.
     ii. **Administrative Appointments**: When primary faculty also has an administrative appointment for which there is no
extra direct pay, this can be set up in a pooled position as FA001 – xxxx (org #). (Example: FA001 – 23420 means Faculty Administrative Role – Humanities – Philosophy)

iii. **Department Chair:** CHAIR – xxxx (org #) (Example: CHAIR – 23420 mean Department Chair – Philosophy)

iv. **Joint Appointment:** JNTxx – xxxx (first pair of x’s indicates TTT rank – org #)

   JNTAT = Joint Assistant Professor
   JNTAO = Joint Associate Professor
   JNTPF = Joint Professor

(Example: JNTAT – 23420 means Joint Assistant Professor Faculty Appointment – Philosophy)

Skip Action Reason.

b. Scroll to the top of the page, select Next.

4. Enter the following in the Position Description region on the Position Details page:
   a. **Status:** Active

b. **Department:** Search by org # or name

c. **Job:** This is a faculty category; see Job Categories Cheatsheet in the top section for a complete list.

d. **Location:** Not required here; leave blank

e. **Essential Position:** Leave blank

f. **Assignment Category:** Choose from dropdown.

   Note: **Full Time or Part Time** and **Regular or Temporary** are Auto populated from the Job value.

   g. **Hiring Status:** Approved

h. **Type:** Single incumbent or Pooled

i. **FTE:** Usually 1
j. **Head Count:** 1 for budgeted position; if pooled, estimate how many people might be in this specific kind of position in this department at one time.

k. **Overlap Allowed:** Yes. The Overlap Allowed field designates if a position can have more than one incumbent at one time.

l. Next, scroll down to **Work Terms, Standard Working Hours** and **Frequency**.

   Note: For Full Time positions, **Standard Working Hours** should be 40 with a **Frequency** of **Weekly**.

m. Scroll to the top of the page, click Next, until you arrive at the Review page.
5. Review all information on the Review page. Then, select **Submit**.

*Please note:* Workflow will be triggered for this transaction.

a. Click **Yes** on the confirmation page.