Maintain Position Form

Process Overview

Form Overview

When to use

Use the **Maintain Position** to update an existing position. Some examples may include:

- Updating a position title
- Modifying the position description
- Changing the percent time
- Changing budget or enterprise structure (employee group/subgroup), etc.

The **Maintain Position** form is used to make changes to a position. Changes that also need to be made to an employee must be processed via PA (Personnel Action) form.

Note: If an employee is moving from non-compensated to compensated, a new position will need to be created and the employee moved into the new position. The existing non-compensated position should not be maintained.

Warning: If a corresponding PA form needs to be completed, the PA form must be completed *after* the maintain 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 OM and PA form deadlines
- Click here for the Data Dictionary
- Click here for instructions to initiate a PA form

BOSTON UNIVERSITY

Maintain 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 Maintain Position

Result: The Maintain Position selection page launches.

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 position number (example 500xxxxx) or lookup the position number by clicking on the search help box. Click select position.

Result: The maintain position window opens up. The data shown on the left side of the maintain position form is Current Position Data and is display only. The data on the right side is New Position Data, which is editable.</td></tr>
<tr><td>6</td><td>Enter the Effective Date or click on the search help box and select the effective date.

Note: The effective date on the Maintain Position form determines the date an action or change will occur.</td></tr>
<tr><td>7</td><td>Confirm or modify the 8-digit Organizational Unit number (example 100xxxxx). Click ‘Verify Selected Org Unit Data’.

Note: The organizational unit will automatically populate based on the current position information.</td></tr>
<tr><td>8</td><td>Enter the Job. Click ‘Verify Selected Job’.

Note: If you are unsure what job code to use, please email Compensation at hrcomp@bu.edu</td></tr>
<tr><td>9</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>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Select the recruitment/hire indicator:
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>No/Remove Recruitment or Hire Selection</td><td>There is an employee in the position and changes need to occur to the position with the intention of impacting the current incumbent.
Note: If changes need to be made to the position without impacting the current incumbent, the current incumbent needs to be moved into an overlap position before changes are made to the existing position.</td></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 HR website.
Then, enter the Posting Date.</td></tr>
</table></td></tr>
<tr><td>11</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 is not an overlap position</td><td>Proceed to Step 12</td></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>
</table></td></tr>
<tr><td>12</td><td>Enter the Weekly Work Schedule as text.

Note: The days and hours in this section will dictate the work schedule rule set by Compensation.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13</td><td>Select the Assignment Duration via dropdown.

Note: The Assignment Duration selected will determine the Employee Subgroup of the 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>
<tr><td>14</td><td>Enter the Percent Time as a whole number. The Maintain Position form does not accept decimals; percent times with decimals should be rounded.</td></tr>
<tr><td>15</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 incumbent is…</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>
</td></tr>
<tr><td>16</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>17</td><td>The Recurring Position Budget should match the Proposed Compensation Amount unless otherwise directed by your Budget Analyst.</td></tr>
<tr><td>18</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>19</td><td>The Master Cost Center will automatically populate based on the organizational unit selected.</td></tr>
<tr><td>20</td><td>Upload relevant documentation in the Attachments section. Please refer to the <u>matrix</u> 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 27</td></tr>
</table>

Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</td></tr>
</table>

Step	Action
21	Click the **Choose File** button in the **Attachments** section. ***Result:*** The **Open** window appears.
22	Navigate to the appropriate file on your computer.
23	Click the title of the file.
24	Click the **Open** button. ***Result:*** The filename appears in the **Select File:** field.
25	Click the **Attach File** button. ***Result:*** The file now appears in the **Attachments** table.
26	Repeat steps 21–25 for each attachment.
27	Enter information in the **Comments** section (150 characters or less) including information about what changes are being made to this position and the fields changed. ***This is a required field.***
28	Click **Continue** and then scroll to the top of the page, or scroll to the top of the form and click on the **Cost Distributions** tab.
29	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.
30	Click **Continue** and then scroll to the top of the page, or scroll to the top of the form and click on the **Description Details** tab. The **Description Details** will automatically fill in based on what is currently listed on the position. This is a blurb of the position description. Review and/or update this summary if needed.
31	Click **Continue** and then scroll to the top of the page, or scroll to the top of the form and click on the **Essential Functions** tab. 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%.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>32</td><td>Click Continue and then scroll to the top of the page, or scroll to the top of the form and click on the Position Requirements tab. The Position Requirements will automatically fill in based on what is currently listed on the 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.</td></tr>
<tr><td>33</td><td>Click Continue and then scroll to the top of the page, or scroll to the top of the form and click on the Additional Data & Recruitment Info tab. In the additional data tab, fill in the Additional Position Information:
Building – select the building where the employee/position will work
Note: If this is an off-campus position enter the departmental address and note the 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.</td></tr>
<tr><td>34</td><td>If the recruitment indicator “Mark this position open for hire/post to HR website” was selected on the Position Details tab, complete the Recruitment Information section for positions to be posted on the Human Resources Careers website. If this recruitment indicator was not selected, skip to Step 42.

<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 42.</td></tr>
<tr><td>Non-compensated
Volunteer
Contracted</td><td>These positions are not posted on the HR website. Proceed to Step 42.</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 42</td></tr>
</table></td></tr>
<tr><td>35</td><td>If posting this position, please 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>
</table>

Step	Action
36	Select the **Recruiting Department** via the dropdown menu. The available selection is based on the position org unit. If the field is blank or the information is incorrect cease processing and email hrsys@bu.edu for assistance.
37	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*
38	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).
39	In the **Recruitment Posting Information** section, provide Talent Recruitment Services with information about the position. **Posting Description for HR Website** (first section) should include a description of 5-8 sentences about the primary purpose of this position. This section is viewable by applicants. **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 may be a helpful starting point for this description.

Step	Action
40	**Posting Description for HR Website** (second section) is a list of requirements and qualifications needed to perform 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 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 should be consistent with the information on the Posting Requirements for HR Website.
41	Enter information in **Recruitment Comments** section (*e.g.*, expecting to hire candidate by 1/1/21). ***Note:*** The information entered here is not posted on the HR website. This section is only intended for communicating directly with Talent Recruitment Services.
42	Review data to ensure it is correct. Approvers do not have an option to return this form, only reject.
43	Review data again, if needed; otherwise, click **Validate Form Data** > **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. ***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 (*e.g.*, 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.