### Quick Reference Guide: Create Position & Edit Position Restrictions

#### Keep in mind

- Once created, the Earliest Hire Date and Availability Date of a position cannot be back-dated. The supervisory organization cannot be changed once a position is created. All other attributes can be changed using the business process *Edit Position Restrictions*.

- When creating a Work Study position, ensure that the Work Study Job Family is selected and an appropriate Work Study Student job profile is selected.

- All positions in Workday must be assigned a default FAS Account and FAS Sub Account. This account will be overridden once a worker is hired or moved in to the position.

- For *Graduate Student Lecturers*, the job profile of *Lecturer - Academic Regular Pay - X07536* should be selected. The worker sub-type should be *Student (fixed term)*.

- In the BSD, the Lead HR Partner or Lead Academic HR Partner will be sent the position to approve after the Budget Partner has approved the position (excludes student positions).

#### Information Needed

- The name of the supervisory organization in which the position will be created.

- If a Work Study position, the work study requisition number must be entered in the *Job Description Summary* field of the Workday position. The work study job description must be entered in the *Job Description* field.

- If the position will be affiliated with an outside organization (i.e. Argonne), the *affiliated organization* must be entered when the position is created/edited.

- The default *FAS Account* and *FAS Sub Account* that will be assigned to the position.

- The Chicago IDs of the UChicago *Time approvers* for the position.

- If requesting a *Posting Exception*, a justification will need to be provided within this process.
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Steps:

1. From the **Supervisory Org**, click on the **Related Actions Icon** to display the menu of **Available Actions**. Hover over **Staffing** and click on **Create Position**.

2. Ensure the correct **Supervisory Org** is listed and use the **Prompt Icon** to select the **Position Request Reason**.
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If requesting a **Posting Exception** for a staff position, use the Prompt Icon to select **Create Position > Created Position > New Position - Posting Exception**.

Locate the **Comment Box** at the bottom of the page and type in the justification for the posting exception. Justification must include changes in job profile, anticipated compensation changes, key responsibility changes with corresponding percentage.

Once the **Create Position** is submitted, the Budget Partner will route to the AVP of Human Resources and The Office of Equal
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Opportunity Programs for approval. Each will need to approve to move forward.

Note: A denied request will require the HRP to select a new **Position Request Reason**, to move the process forward.

3. Enter the **Job Posting Title**. This will be used to identify the position once it is created.

4. Enter the **Number of Positions**. Multiple positions can be created at one time, but must share the same attributes. Note: Each position that is created must have a corresponding job requisition (one to one ratio).

5. Use the **Calendar Icon** to enter the **Availability Date** and **Earliest Hire Date**.

   The **Availability Date** will prevent the hire of an individual prior to the date indicated, even if future-dated. The **Earliest Hire Date** will prevent the position from being hired into with a start date prior to the date indicated.

### Hiring Restrictions | Qualifications

<table>
<thead>
<tr>
<th>Availability Date</th>
<th>MM / DD / YYYY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earliest Hire Date</td>
<td>MM / DD / YYYY</td>
</tr>
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6. Use the **Prompt Icon** to select Job Family/Job Profile based on the following scenarios:

   a. **For Contingent Worker**: Select both the **Job Family** and **Job Profile**.

   b. **All other positions (i.e. staff)**: Select only the **Job Profile**.

   When creating a position for a **Contingent Worker**, ensure the **Non-Employee Job Family** is selected and a **Job Profile** from this job family is selected. **Note: this may not apply in the BSD.**

   If you know the **Job Profile**, select it first. You can then find the appropriate **Job Family** by selecting the **Related Actions**.

   ![Job Family and Job Profile selection](image)
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7. Enter the Job Description Summary and Job Description.

* If a student/Work Study position paste the summary from the online job description.

Note: For positions that will be posted, the Job Requisition field will flow into the Create Job Requisition process. The Job Description Summary field will not flow into the job requisition. This field can be left blank.

The Job Description section includes: Job Summary, Responsibilities, and Competencies.

For specific formatting instructions, go to the “Job Description Template” Job Aid, found in Service Now.

Note: The Additional Job Details and About the Unit described in the job description template will be populated during the Create Job Requisition process.
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8. Use the **Prompt Icon** to enter the **Location** and **Time Type**.

   ![Location and Time Type](image)

9. Use the **Prompt Icon** to select the **Worker Type** and **Worker Sub-Type**.

   ![Worker Type and Sub-Type](image)

   - The **Worker Sub-Type** field becomes active after the **Worker Type** has been populated:
   
   - If creating a **Contingent Worker** position for an individual that will have an academic appointment, ensure that **Academic Affiliate** is selected as the **Worker Sub-Type**.

   - The **Critical Job** check box should only be checked to indicate whether a position meets the L74's Academic Discretion criteria.

   - The **Difficulty to Fill** box should only be checked for Academic positions that will require a medical license.
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10. Click on the Submit Icon to submit this task.

11. In the Change Organization Assignments To-Do step, use the Prompt Icon to enter the organization and click the Submit Icon. Enter the default FAS Account and FAS Sub Account that will be assigned to the position.

12. In the Request Default Compensation for Position To-Do step, click the Open Icon. Use the Edit Icon to update the Amount in either the Hourly Section or Salary Section.

   *If you are adding an additional Compensation Plan, select the Add Icon.

   Click on the Save Icon to save your changes and then click Approve. Entering default compensation is optional and the opportunity to edit the default compensation will be presented when the Hire process is initiated for the position.

13. Once the position has been approved, two Time Approvers will need to be added.

14. You will receive two “To-Dos” in your Workday Inbox.

   a. An Enter Time Approvers for Position To-Do, assign time approvers to this position by navigating to the position in the supervisory organization in which it was created. Select the related action from the position and choose Additional Data > Edit”. This is necessary in order for the employee to have a primary and secondary time approver in UChicago Time. See the quick reference guide titled Enter Time Approvers for more information.

      🧠 If the time approvers for the position have not yet been determined, enter default time approvers. The time approvers can be changed at any time (i.e. after the hire process has been initiated).

   b. A Create Job Requisition To-Do, from this To-Do the HRP can create the Job Requisition for positions that require posting. Select “Create Job Requisition”.
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15. Click on Approve when you have completed the assignment for Time Approvers.

16. Once the Time Approvers have been entered, remember to navigate back to your inbox and click Submit on the To Do. The Create Position business process is now complete.

**Steps for Edit Position Restrictions**

If this process is completed when the position is filled, changes made when editing position restrictions will not reflect until the position is vacated.

1. From the Supervisory Org, click on the Staffing Tab to display open positions.

2. Click on the Related Actions Icon to display the menu of Available Actions off of the position you are editing. Hover over Position Restrictions and click on Edit Position Restrictions.
In order to initiate the *Edit the Position Restrictions* process for a position that is currently filled, navigate to the employee’s profile and click on the position in the *Job Details* tab.

In the *Position* profile, select the related action next to the *Position Restrictions*. Hover over the *Position Restrictions* available action and select *Edit Position Restrictions*. 
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3. Use the **Prompt Icon** to change any of the **hiring restrictions** listed on this screen.
   
   ![Prompt Icon](image)

   🚫 Remember, the **Earliest Hire Date** and **Availability Date** of a position **cannot be changed**.

4. Once you have navigated to the Edit Position Restrictions task, follow the same steps as the Create Position business process (above), starting with **Step 7**.

   ![Arrow Icon](image)

   🔄 Use the **Arrow Icon** to review the **Details and Process** information.

5. You will receive two “To-Dos” in your Workday Inbox.

   a. An **Enter Time Approvers for Position** To-Do, assign time approvers to this position by navigating to the position in the supervisory organization in which it was created. Select the related action from the position and choose Additional Data > Edit’. This is necessary in order for the employee to have a primary and secondary time approver in UChicago Time. See the quick reference guide titled **Enter Time Approvers** for more information.
If the time approvers for the position have not yet been determined, enter default time approvers. The time approvers can be changed at any time (i.e. after the hire process has been initiated).

b. A **Create Job Requisition** To-Do, from this To-Do the HRP can create the Job Requisition for positions that require posting. Select “**Create Job Requisition**”. 