THE UNIVERSITY OF MEMPHIS

WorkforUM Training

Part 3: Requests to Create a New Position

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Types of Requests

The process of requesting a new position is a key component of WorkforUM functionality, which allows users to both request the creation of a new position as well as prepare this new position for advertising within the same request. New position requests are divided into three types. These are **staff/administrative executive/contract coach** positions, **full-time faculty/academic executive** positions, and **part-time faculty** positions.

Staff/administrative executive/contract coach positions refer to regular pay plan positions for administrative/professional and clerical/support staff, select executives, and coaches on an athletic contract. After leaving the Executive Authority, these requests are fielded by the Human Resources and Financial Planning (or sometimes Grants Accounting) offices.

Full-time faculty/academic executive positions refer to regular positions held by the faculty and academic deans of the University. After leaving the Executive Authority, these requests are fielded by Financial Planning (or sometimes Grants Accounting) and Institutional Equity.

Part-time faculty positions refer to group positions held by individuals teaching solely on a part-time basis for an academic department. Any request for a new part-time faculty position will be routed similarly to that of a full-time faculty position.

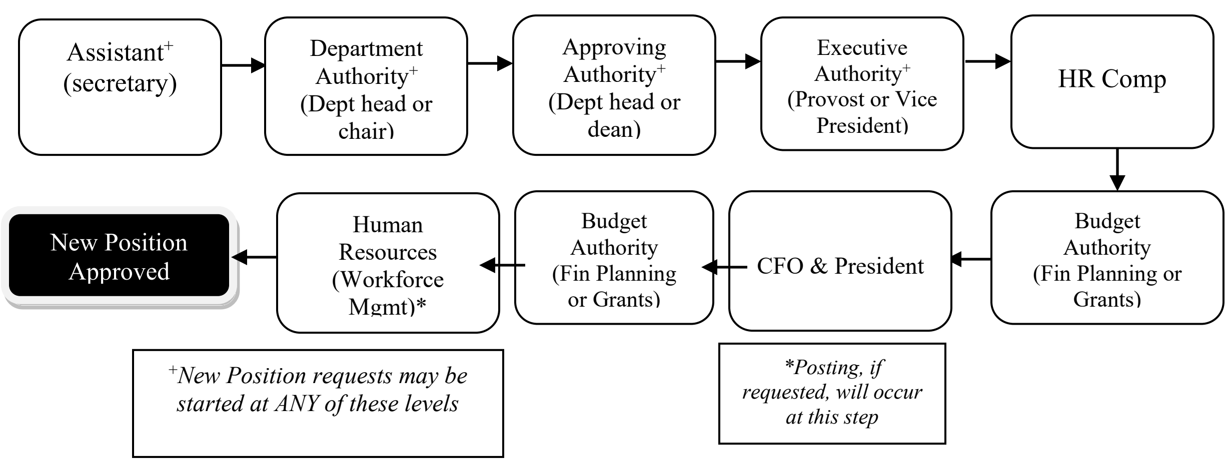
Request Routing

The type of position for which a new position request is being completed will determine the workflow it will follow in getting approved. Workflows typically involve going from the departmental level through the approving, executive, and specialized authorities, as appropriate.

Staff/administrative executive/contract coach new position requests typically begin with either an Assistant or a Department Authority making the initial request, though any step in the workflow may begin one. If an Assistant (generally a secretary) begins the request, it can then only be submitted to that Assistant's Department Authority (the department head or his/her proxy). Whether the Department Authority begins the request or merely reviews/approves the request submitted by the Assistant, the record will then be submitted to the next appropriate level.

- Requests to create new positions, regardless of type, must be accompanied by the appropriate budget revisions. These forms are available electronically through the Supplemental Documentation tab on the electronic request within WorkforUM. If valid budgetary paperwork has not been uploaded by the time the request routes to the Budget Authority (Financial Planning and/or Grants Accounting), the request will be returned to the submitter for revision. **New positions cannot be created without the necessary funding having been identified**.
- The Position Description Questionnaire and FP-02 New Position Budget Detail forms are housed within the new position action itself, rather than as separate external documents.
- **PLEASE NOTE:** In many cases, most often with non-academic departments, the Department Authority and Approving Authority may be composed of the same individuals. Where academic departments generally have three levels of approval (chair to dean to provost), most non-academic areas have just two (director to vice president). In such cases, the Department Authority may end up submitting records to themselves. This can be avoided when requests are begun at the Approving Authority level, when possible. The User Type dropdown box in the upper-right corner of WorkforUM can be used to toggle between user roles in the system.

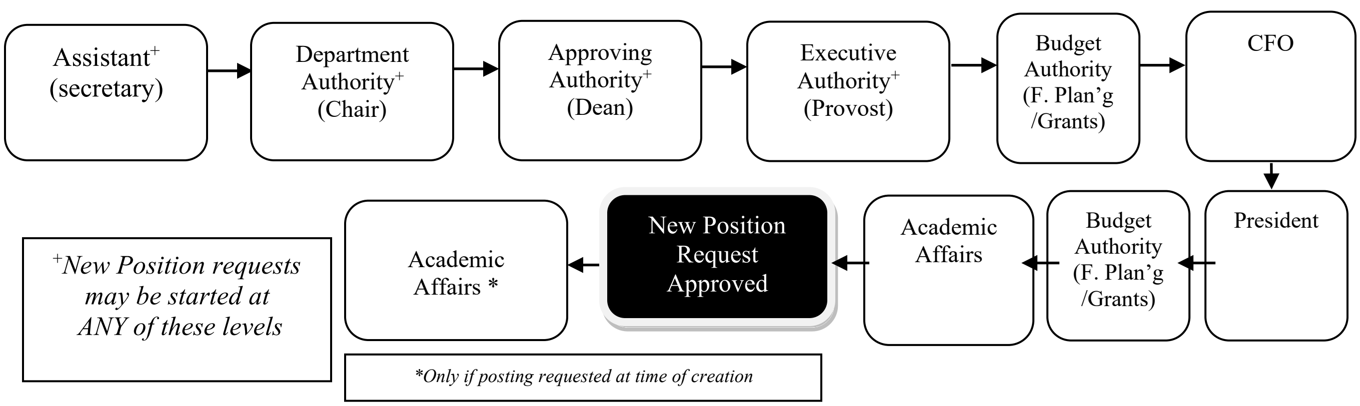
New Staff/Administrative Executive/Contract Coach Position Request Workflow



New full-time faculty/part-time faculty/academic executive position requests also typically begin with either an Assistant or a Department Authority making the initial request, though any step in the workflow may begin one. However, the request does not follow the exact same workflow.

If an Assistant (generally a secretary) begins the request, it can then only be submitted to that Assistant's Department Authority (the departmental chair or his/her proxy). Whether the Department Authority begins the request or merely reviews/approves the request submitted by the Assistant, the record will then be submitted to the Approving Authority. The Approving Authority for faculty positions is always the Dean or his/her proxy. If approved, the Dean will submit the request to the Executive Authority (always the Provost or his/her proxy for faculty positions). If approved by the Executive Authority, the request will be forwarded to the Budget Authority (Financial Planning or Grants Accounting) and will be followed by the CFO and the President. Once those approvals are in place, Budget will then officially assign a new position number. After the position number is assigned in the system, the request then goes to Academic Affairs if the new position also requires posting.

New Full-Time Faculty/Part-Time Faculty/Academic Executive Position Request Workflow



Completing a Request

To begin completing a Request for New Position, you may wish to begin by verifying that you are logged in under the appropriate user type. In the upper-right of the WorkforUM screen, your current role is specified in a dropdown box at the top. If you need to change user type, select a different role from the dropdown box and click the refresh arrow.

To start your Request for New Position, you will need to navigate to the Position Management module of the system. This module always features a header stripe that is orange in color. In the far upper-left portion of the screen, choose the three dots and select Positions. Selecting this option will reset the screen to the "orange side" of the system.

Across the top menu, roll your mouse over the **Positions** tab. A fly-out menu will appear, and from this menu you will either select **Staff, Administrative Executive, & Contract Coaches** OR **Full-Time Faculty & Academic Executive**. Once you have made you selection, in the upper-right corner of the screen you will see an orange button labeled **Create New Position**. Click that button to begin the new position request. You will then select **New Position** from the small pop-up screen. You will be asked to list the Proposed Advertised Title for the position you are creating, and the division, dean, and office levels where the position will be located. Once this information has been entered, click the **Start Action** button in the upper-right. You will need to proceed through a series of tabs in order to complete your request. Each of these tabs and its requirements will be discussed in this training individually.

Proposed Title Tab

The Proposed Title tab displays all job classifications at the University. You will scroll through the list as necessary and click the radio button for the classification that is most appropriate for your new position. Please note that this selection may be changed by a higher authority later in the workflow. Once you have made your selection, click the **Next** button at the top or bottom of the screen.

New Position Budget Detail Tab

This tab replaces portions of the previously external PDQ and FP-02 forms. On this tab, you will specify the justification for why this position is needed, as well as indicate where the position is to be housed and as of what dates. If you have questions regarding the fields required on this tab, please contact Financial Planning at budget@memphis.edu.

Department Tab

The **Department** tab houses a field in which you will identify the department you would want displayed on a potential job posting for this position as the hiring department. Make your selection from the dropdown box, and click the **Next** button at the top or bottom of the screen.

Major Duties and Responsibilities Tab (Staff/administrative executive/contract coach positions only)

The **Major Duties and Responsibilities** tab only appears for Staff/administrative executive/contract coach positions and replaces some fields previous found on the PDQ form. On this tab, you will list the specific duties that are expected from this potential individual position. Most duties will tend to be in the 10%-25% range. All duties must also be marked as either Essential or Marginal. In most cases, most duties as listed as Essential.

Keep in mind that the system does not automatically calculate your percentage totals; please double check and make sure your percentages add up to 100%.

When posting, applicants to your position will only see the duties themselves, not the percentages or Essential/Marginal designations.

After finalizing your entries, if any, click **Next** to save and move to the next tab.

Additional Position Description Information Tab (Staff/administrative executive/contract coach positions only)

On this tab, complete the fields for Judgment and Resourcefulness and Other Information as appropriate. After finalizing your entries, if any, click **Next** to save and move to the next tab.

Position Tab

Should you also be wishing to post your new position once it is established, this tab contains much of the key information related how your position's information will appear on that posting. The first section is related to the position itself and the values that is possesses as a member of the job classification on the first tab. Under the University's pay plan beginning in last 2012, the key to this position's place in the pay plan is the PCLS code. The PCLS code and title are displayed in the next two fields. Several fields on this tab will be automatically populated based on values assigned to that PCLS code.

You will see three title fields displayed for your position. The PCLS title directly correlates to the PCLS code. The Banner Title is a 30-character max field that reflects your position's title within the Banner system. Because of this field's space limitations, abbreviations will often appear. The Advertised Title field allows you to spell out these abbreviations, making a much clearer job title viewable to the applicant. Keep in mind that ONLY the Advertised Title is displayed to the applicant. You may make this advertised title more specific if you wish. For example, the Banner title might be "Asst Professor," but the Advertised Title might be "Assistant/Associate Professor of British Literature."

The Salary (Internal View) field allows you to communicate any budgetary limitations or scenarios to the other approvers of this action. This field is NOT viewable to the applicant.

The Campus Location field allows you to indicate at which University location this position is primarily located. This should help applicants find positions of geographical interest to them.

The Work Schedule field appears for Staff/administrative executive/contract coach positions and should be completed even if the position works a standard Monday-Friday 8am-4:30pm schedule. If your position works an atypical schedule or requires overtime during peak periods, you would indicate that in this field.

A key field for faculty/academic executive/athletic contract positions is the Position Summary field. This field only appears for these job types and is a free-form field where the department can communicate the duties of the position, as well as more general information about the University and the city. Consider this a "catch all" field for your position's general information. It appears to the applicant as written.

The Minimum Classification Qualifications field is automatically populated based on your position's PCLS code. This is a statement of the minimum education and experience for all positions within your position's PCLS designation and is not changeable. However, you will state in the Minimum Position Qualifications field what the minimum education and experience qualifications are to be for your specific position. You can keep the default values from the classification, or you may raise them slightly should your position have additional requirements that you can defend if questioned. Keep in mind that your minimum position qualifications may not be LESS than the minimum classification qualifications, nor can they surpass them greatly. Only the Minimum Position Qualifications field is displayed to the applicant. In order to use a given item as a disqualifying factor, that item should be listed in this section.

The Special Conditions field remains in place should there be unusual circumstances related to your position of which you would like to alert applicants. For example, a grant-funded may have a future funding statement in this field. Keep in mind that unusual schedules and campus locations now have their own fields, so this information would not need to go under Special Conditions any longer.

The Working Conditions field is pre-populated based on the PCLS code, but if your position has additional working conditions beyond these defaults, you may list them in the Additional Working Conditions field. Both of these fields display to the applicant.

If the position you are requesting to fill will be supervising other positions, please include a basic statement to that effect in the Positions Supervised field.

Next, you will see a field that asks for the contact information for an individual within the department whom other authorities in the workflow could contact with additional questions should the need arise. This contact information is *not* viewable by applicants.

The last field is the Hiring Range field, and this salary field WILL display to applicants. The values that initially appear will show a minimum and midpoint salary for this position's PCLS code, which should depict a very wide range. You may either keep this range in place, or change it to say something general like "Open," "Commensurate with education and experience," "Competitive." Keep in mind your statements in this field WILL be viewable to the applicant, and your entries will be reviewed prior to being posted.

Supervisor Tab

On this tab, you will identify the position to which this new position will report once established. Keep in mind that you are mapping a position to a position, not a person to a person. Select the appropriate radio button for the supervisory position, and click **Next** to continue.

Supplemental Documentation Tab

This tab allows you to upload pertinent documents related to your new position request. These documents MUST include appropriate budget revisions, but may also include organization chart sand other documents. To upload a document, mouse over the Actions link on the far right, and you will have choices to upload a file from your computer or key the information in directly. Once you have done so, confirm your upload.

After making your entries, if any, click **Next** to save and move to the next tab.

Requisition Form Tab

To be completed only if you are also requesting your new position to be posted as well, the Requisition Form tab allows you to indicate the date you would like your posting to activate to the public. The posting date is the date that the job announcement will first be seen by the public, beginning at midnight on that date. By clicking in this field, you will be able to choose a date from the widget that appears and your selection will be automatically formatted to the current format. The closing date is the date that the online announcement will expire and close to the public. This will happen after 11:59 p.m. on the supplied closing date. Posting for an advertisement must be at least five (5) working days for any staff position and at least ten (10) working days from the time of approval for any faculty position. Faculty and executive positions are typically advertised for much longer than 10 days. Longer posting periods for staff positions can be requested. Please allow for approval time when stating your anticipated posting dates. Many faculty and executive positions may require checking the “May Continue Until Filled” box, which means the system will not cause the job posting to automatically expire; rather, the office responsible for posting (Academic Affairs for faculty; Human Resources for contract coach positions) must be contacted and told to manually remove the posting at the appropriate time. Keep in mind that any applications received while a job posting remains online MUST be evaluated before a hiring proposal may be started. If you do wish to use the May Continue Until Filled checkbox, do NOT enter a value in the Closing Date field. Staff/administrative executive/contract coach positions typically do not use the May Continue Until Filled checkbox.

The Special Instructions to Applicants field allows you to communicate any special or unusual information to your potential applicants. They will see this information prior to applying for the position. If you have specific documents you would like applicants to provide in the “Other Document” section of the upcoming Applicant Documents tab, you could indicate that information here.

The requisition form also has a free-form text-entry field in which you can indicate where you plan to advertise this position (other than WorkforUM). Complete this section appropriately given the position you are requesting to have created. Institutional Equity will need to ensure that you are casting your net as widely as possible to attract a diverse applicant pool. Keep in mind all external advertisements are funded by your department. All full-time faculty and academic executive positions are automatically posted on HigherEdJobs.com. Monthly and administrative executive positions may also post there on request.

On faculty requests, there is an additional series of field on the Requisition tab related to electronic reference letters. Should your department be interested in using electronic reference letters, a standard set of messages will be used in these communications. Should you have additional instructions for the applicant and/or the reference provider, you may complete the next three fields, indicating the applicant instructions, the reference provider instructions, and the on-screen message the provider will see once his/her action is complete. In this process, the applicant will provide the e-mail addresses of a specified number of potential reference providers. These individuals will be automatically sent an e-mail with an embedded link which, when accessed, will allow that provider to upload/write a reference letter whose contents will not be visible to the applicant. Should you not be using this functionality, these fields can be disregarded.

The Instructions to Applicant field is a statement to the applicant displayed PRIOR to applying. The Instructions to Reference Provider field displays a message to the provider should there be any special requirements you are seeking within his/her letter. The Completed Message to Reference Provider is for any special thank you message, etc., that you might wish to display to the reference provider. A generic thank you message will appear automatically, so this field may be left blank if you wish.

Please note: in the upgrade to WorkforUM, applicants may now provide electronic reference letters even if the department is not requesting them. Departments may review or ignore such letters at their discretion. The three electronic reference letter fields generally contain pre-written text that you will need to customize before finalizing.

Supplemental Questions Tab

(Complete only when also requesting posting) The Supplemental Questions tab is a section that will allow hiring officials to have a specific question or questions answered by applicants prior to being interviewed. This functionality will allow departments to view an applicant's answer(s) to pertinent questions to better screen for potential interviewees. If you wish to add a question to your posting, click the Add a Question link.

Previously-used questions may be selected from the box, or a new question may be written from scratch by clicking the Add a New One link.

Answers to posting specific questions may be multiple-choice (Predefined) or free-form (Open-Ended) text, must be directly related to the posting, and may not ask for information that could be used in an inappropriately discriminatory manner. Additionally, you may not ask question that goes above and beyond requirements of the job description; that is, if a position requires only a bachelor's degree, you may not use a question such as, "Do you have a master's degree?" unless you have specifically stated that you are interested in candidates with a master's degree.

If asking a question with predefined answers, you have the ability to score the responses to these questions. Once the question has been added, click on the text of the question again. You are encouraged to make the least favorable response to a given question have a score of zero (0), and increment the more favorable responses by one (1). This incremental scoring system is suggested so that questions throughout the WorkforUM question bank will have roughly the same scoring system throughout the University.

You also have the ability to make a given response automatically disqualify an applicant from consideration. However, you are only to use this functionality when the question is driving at a de facto job requirement. For example, a position requiring a valid driver's license might disqualify applicants who do not possess one. Please exercise great caution when using this feature, and know that your entries here will be vetted by Human Resources, Academic Affairs, and/or Institutional Equity.

You can also make questions required and/or drag questions to list them in a particular order.

After making your entries, if any, click Next to save and move to the next tab.

Applicant Documents Tab

(Complete only when also requesting posting) On this tab, you may indicate which types of documents (resumes, cover letters, etc.) you wish to allow/require potential applicants to provide when applying to your posting. By clicking the checkbox in the Included column, the applicant is given the opportunity to upload that document. By ALSO clicking the checkbox in the Required column, the applicant MUST provide that document in order to make your pool of applicants. Please note that for a document to be required, BOTH checkboxes must be checked. This list of documents can be dragged and re-ordered to your liking. After making your selections, if any, click **Next** to save and move to the next tab.

Action Summary Tab

The final tab on any New Position action is a summary screen which tracks all entries made on the other series of tabs. The system will perform error checking and indicate any problem areas with orange icons containing exclamation points. Successfully-completed sections will be noted with a blue check mark icon. If you have errors, you may click the **Edit** link by any section heading to make changes.

You have now completed your New Position Request, and now it can be routed to the next appropriate level, returned to the previous level, saved for further revision at a later time, or cancelled. In the upper-right corner of the Action Summary tab, look for the **Take Action on Action** orange button. Roll your mouse over this button and make the appropriate selection. You are able to enter any comments you may have at this point. All parties within the action's workflow can leave comments that will be viewable by all other levels and included in e-mail notification messages. This comments section can be a helpful method of communication between offices and departments as the hiring process begins.

You may also choose to add this action to your Watch List by checking the corresponding checkbox. This will give you access on the front page of WorkforUM to track your action's progress as it is being handled by other user types in the workflow.

If you send this action to the next level in the workflow, the members of that level will receive an e-mail notification that they have an item in his/her **In Box** for their attention within WorkforUM.

Additional Training

This concludes the training session on Requests to Fill. Further WorkforUM training is available for the following topics.

- Introduction to the System
- Requesting to Fill Existing Positions
- Requesting to Reclassify/Retitle an Existing Position
- Tracking, Reviewing, and Processing Applicant Pools
- Hiring an Applicant and Completing a Hiring Proposal
- Changing a Position's Supervisor
- Part-Time Faculty