Recruit for a New Position (Regular, Sessional, Temporary, or Recurring Part-time)

Purpose
Use this job aid to create and post for a net new Senior Leadership Team (SLT) member, MaPS or Support Staff Regular or Temporary position, or Support Staff Sessional or Recurring Part-time position funded from operating funds. If you are hiring a MaPS or Support Staff Limited Term position, please follow the job aid for Recruit for a New Limited Term Position. If you are hiring a new Academic position, follow the Recruit for a New Academic Position job aid.

This process should be used when you need to hire a new off-cycle position that was not approved as part of the budgeting process. If a ‘To Be Classified’ position has been created for this role as part of the budgeting process, you will need to follow either the Fill a Vacant Position (change to position information required) or Fill a Vacant Position job aid, depending on whether or not you need to make changes to the position information.

The purpose of the Job Opening Request form is to obtain authorization to hire into a position, validate budget/funding, assign the role a position number, and to collect the information required to post the job.

| Note: | If you need help selecting the right appointment type, the Staff Groups Defined website provides detailed information about appointment types, including information on recruitment requirements, benefits, etc. |

Prerequisites
Before you proceed with this transaction, ensure the following has occurred:

- Upfront conversations with senior management/budget owners to identify the source of new funds, budget amount, and budget department ID for this position. You will need this information to complete the JOR.
- Confirm that a ‘To Be Classified’ position has not already been created for this role as part of the budgeting process. If so, you will need to follow either the Fill a Vacant Position (change to position information required) or Fill a Vacant Position job aid, depending on whether or not you need to make changes to the position.
- The job profile for this position has been created or updated.
- The job profile has been sent to HR. Once the job profile is reviewed and the appointment is classified and assigned a Job Code, you will be provided with the classification, including the Job Code that should be used to hire the job.

Once the prerequisite steps are complete, you are ready to initiate a Job Opening Request form following the steps below:
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| **Access PeopleSoft** | Begin by logging into the myUofC portal:  
- From the mega-menu, click the My work tab.  
- Click the Job opening request link under the People management heading. |
| **Initiate a Job Opening Request** | 2. For this example, we will be initiating a new transaction. Click the Add button.  
- Click the Request Type dropdown list. The Request Type chosen drives which fields on the form open up for entry.  
- In this example we are hiring a new positioned job, so you will select New Job/Position. |
| **Enter Position Information** | 3. Because this is a base operating funded job, enter UCALG in the Business Unit field.  
- Enter the five-digit Department ID (i.e. the ‘home’ department under which the position/job resides).  
  
  **NOTE!** The Faculty/Unit information auto-populates based on the Department selection.  
- The Job Code is provided to the Initiator by the HR Compensation Analyst through the job profile classification process. Enter the 6 digit Job Code next.  
  
  **NOTE!** Upon entering the Job Code, the Job Family, Classification, Phase/Zone and Salary Range fields auto-populate. |
**Job Opening Request**

<table>
<thead>
<tr>
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<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enter Position Information</strong></td>
<td>- In the <strong>Reports To Position</strong> field, enter the Reports to Manager’s position number.</td>
</tr>
<tr>
<td></td>
<td>- Click the <strong>Full/Part Time</strong> dropdown and make your selection.</td>
</tr>
<tr>
<td></td>
<td>- The <strong>Std Hrs/Wk</strong> field defaults based on the standard weekly hours for the <strong>Job Code</strong> selected. <em>Adjust the standard hours per week as necessary for part-time positions.</em></td>
</tr>
<tr>
<td></td>
<td>- The <strong>Position Title</strong> field is the title of the position record and is limited to 30 characters in length. This title is often an abbreviated version of the <strong>Posting Title</strong> identified later in the form, which is the title that will be displayed on the job posting.</td>
</tr>
<tr>
<td></td>
<td>- If the role will have direct reports, click the checkbox provided.</td>
</tr>
</tbody>
</table>

**NOTE!** Position number should not be confused with Employee ID number. If you are unsure of the position number, you can use the **Look Up** button and search for it using the Reports to Manager’s name.

**NOTE!** When hiring a Recurring Part-time employee, enter Part-time in the **Full/Part Time** field, but leave **Std Hrs/Wk** as full-time weekly hours (i.e. 35 or 37.5).
Enter Budget Information

4. 

- If the Business Unit entered above is UCALG, the following budget information sections display. If the role is UCALT, you can skip to Step 5.

- Click the Funding Source dropdown to make your selection - either Base Funded or One-Time Funding. If One-Time Funding is selected, the Funding End Date is required.

  ![Funding Source and Funding End Date](image)

- The Recovery Information section should be completed if the funds for this position will be recovered from a project. Check the box to indicate there is a recovery, indicate the Recovery Percent, and if known, enter the Project being recovered from.

  ![Recovery Information](image)

- The VP Bridge Information section is to identify when temporary VP funding for a permanent hire has been obtained that “bridges” the time between an immediate staffing need and when a Faculty/Unit can self-fund the position. If the position is VP Bridge Funded, check the box and indicate the VP Bridge End Date (date when the bridge funding ends).

  ![VP Bridge Information](image)

  **NOTE:** When VP Bridge Funding is identified the Funding Source selected above should = Base Funded

- The Base Funding Start Date is the date when the Faculty/Unit begins self-funding the position. Indicate the 5-digit Dept ID of the department which will fund the position in the Base Funding Dept ID.

  ![Base Funding Information](image)

- In the Budget Data Information section the Budget Department is the five digit Dept ID code of the Department that will be funding the position.

- The Approved Budget Amount is the budgeted annual salary amount for the position.

  ![Budget Data Information](image)
### Step 4: Enter Budget Information

- If the funding for the position will be split between multiple departments, you can add additional rows by using the + sign.

<table>
<thead>
<tr>
<th>Budget Data Information</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Department</td>
<td>Approved Budget Amount</td>
<td>Salary Recovery</td>
<td>Exception</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE!** If the salary for the position will be recovered from a project, enter one line for the budget amount, and a second line showing the amount recovered and check the **Salary Recovery** box. Below is an example where the salary is being 100% recovered.

<table>
<thead>
<tr>
<th>Budget Data Information</th>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Budget Department       | Approved Budget Amount | Salary Recovery | Exception |
|                         | $80,000.00 |          |          |
|                         | $-80,000.00 |        |          |

**NOTE!** If you are unsure what to enter here, please contact your Finance Partner.

### Step 5: Enter Job Information

- **Employee Classification (Empl Class)** is required for Temporary, Sessional and Recurring Part-time employee types. Click the **Look Up** button and select the appropriate **Empl Class**.

  ![Employee Classification](image)

  **NOTE!** For Regular (Permanent) positions leave Empl Class blank. View the **Empl Class Quick Reference Sheet** for more details on Empl Class options.

- The **Length of Term** and if known, the **Expected Job End Date** fields are only required for Temporary positions, and must be between 20 days and six months.

  ![Length of Term](image)

- Enter the **Maximum Offer Amount** which indicates the maximum annualized budgeted salary amount for the position. This amount should not exceed the **Approved Budget Amount** entered in the **Budget Data** section above.

  ![Maximum Offer Amount](image)

  **NOTE!** Job offers cannot exceed the **Maximum Offer Amount** noted on the JOR without evidence of an additional allocation of budget to the position.
<table>
<thead>
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</tr>
</thead>
</table>
| Enter Job Information | • If there is a **Strong Internal Candidate**, check this box and fill in the **Empl ID** of the candidate.  

**NOTE!** Jobs with strong internal candidates will be posted for 7 days on the internal Careers site only.  

• Enter in the schedule for this job in the **Schedule** section. Enter the **Hours/Day** and the associated **Start Time** under the appropriate days. As you enter hours, the **Total Hours/Week** field auto-calculates.  

**NOTE!** The **Hours/day** and **Total Hours/week** should not exceed the standard hours for that job family.  

**NOTE!** For Recurring Part-time positions, the **Schedule** section is not required. |
### Edit Salary Chartfield Information

<table>
<thead>
<tr>
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</tr>
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</table>
| 6.   | • Under the **Salary/Benefits ChartField Information** section, enter the accounting string from which the position will be paid.  
• Click the **Edit ChartFields** link.  

![Salary/Benefit Chartfield Information](image1)

• Verify/complete* the following fields:  
  o **Fund** – always required  
  o **DeptID** - always required  
  o **Acct** - always required and will be 54995  
  o **Program / Internal** - only if applicable  

*For operating-funded jobs only, the default accounting is shown and will populate into the form when you click the **OK** button. The default accounting can be edited as required.  

![Fund DeptID Acct Program Internal](image2)

**NOTE!** Do NOT enter a **Combination Code (Combo Code)**. Enter the **ChartFields** and the system will populate the correct **Combo Code** based on your entries.  

• Once the chartfield has been entered/verified, click the **OK** button.  

### Adding additional rows for split distribution

<table>
<thead>
<tr>
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</table>
| 7.   | • Additional rows can be added by using the + sign for split distributions. You can split the salary by percentage across multiple **ChartFields** using the **Distrb%** field (the total must always add up to 100%) or between specific dates using the **From/To Date** fields when required.  

![Salary/Benefit Chartfield Information](image3)
<table>
<thead>
<tr>
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<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>• Click the <strong>Immediate Posting</strong> option when you want the job posted as soon as possible. Alternatively, you can define start and end dates for posting. If not specified, HR will post the job immediately for the standard two weeks (unless a <strong>Strong Internal Candidate</strong> was identified, in which case it would be posted for 1 week).</td>
</tr>
<tr>
<td></td>
<td>• Enter the title you would like displayed on the job posting into the <strong>Job Posting Title</strong> field.</td>
</tr>
<tr>
<td></td>
<td>• The <strong>Job Profile Identifier</strong> field is used to enter the Job Profile number for the associated job profile. Enter the Job Profile number provided to you into the <strong>Job Profile Identifier</strong> field. If no Job Profile number exists, copy and paste the job profile into the <strong>Summary of Key Responsibilities/Posting Details</strong> section below.</td>
</tr>
<tr>
<td></td>
<td>• The <strong>Recruiting Location</strong> field defaults based on the faculty/unit entered prior and indicates the physical location of the job. This can be changed, if required, by clicking the <strong>Look Up</strong> button.</td>
</tr>
<tr>
<td></td>
<td>• If you would like specific information included in the job posting (e.g. a description of your department), or you would like to highlight key information from the job profile that should be included, note it within the <strong>Summary of Key Responsibilities/Posting Details</strong> field.</td>
</tr>
</tbody>
</table>
## Enter Contacts, Notes / Comments

<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 9.   | • Under **Contacts**, enter those who should be associated with this job opening, meaning those individuals who require access to view the job opening and associated applicants in PeopleSoft.  

<table>
<thead>
<tr>
<th>Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Primary Hiring Manager</em></td>
</tr>
<tr>
<td>Email Address</td>
</tr>
<tr>
<td>Phone</td>
</tr>
<tr>
<td>Secondary Hiring Manager/Administrators</td>
</tr>
<tr>
<td>Empl ID</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

- The **Reports to Manager** should be entered as the **Primary Hiring Manager**. If you know the **Empl ID** of the **Reports to Manager**, simply enter this here, otherwise, click the **Look Up** button to search by name.  
- The email will auto-populate, but the phone number does not, so enter it in the **Phone Number** field.  
- If required, **Secondary Hiring Manager(s)** can be specified as well. Additional rows can be added by using the + sign for multiple Secondary Hiring Managers.  

**NOTE!** Only those with the correct security role will display for selection or entry into this field.  

- Use the **New Position Rationale** box to identify the justification for this position and highlight any relevant budget related information for approvers including:  
  - the budget start date if the budget is only for a partial year or if the budget is not in the current fiscal year  
  - identify if the position has no remuneration  

**NOTE!** If the above information is not properly identified, it will result in delays in the approval process or the denial of the request.  

- In the **Comments** field, add any additional notes or comments about the request – either for the approvers or those processing the request. As an example, you could enter special requests or ask for external advertising (include the account string the expense will be charged to).
Click Save

10. • At any point, you can click the Save button to save the request and return later to complete and submit the form.

   ![Save]

Click Begin Approvals

11. • Once you have completed all required fields and saved the form, click Begin Approvals to start the automated approval process.

   ![Begin Approvals]

• Click the Job Opening Approvals link.

• The Job Opening Approval workflow displays the status of the request as Pending. This page allows initiators to monitor the progress of their requests. The status remains Pending until all approvers have approved the request, at which point, the status changes to Approved.

• Required approvals are shown in blue in the approval workflow, and display as Pending or Not Yet Routed when the form is first submitted. Reviewers are shown in grey, and receive notification of the request, but are not required to approve the transaction.

   ![Job Opening Request Workflow]

   **NOTE!** If a correction to the information on the form is required after it has been submitted for approval, the Initiator can click Retract to stop the approval workflow and open up the form for editing.

   ![Retract]

Once the necessary changes are made, the Initiator should repeat steps 10 and 11 to start the approval process from the beginning.

End of Procedure.

Results

Completion of this transaction results in the following:

• Job Opening Request is saved and submitted for approval

• Generation of a Job Opening Request ID (which can be used for tracking purposes)
Job Opening Request

- Position Management will update the Position Number field of the JOR with the assigned number

Next Steps

Once you have completed this transaction, the following will occur:

- Once approved, the job is assigned a position number, is posted on the UCalgary Careers website, and the recruitment process begins
- The initiator and Reports to Manager will be notified by HR once the job posting is created
- Once the job is posted, applications can be viewed by the Hiring Manager(s) at any time, but they will be prompted to review the applicants once the posting closes. For information on how to view applicants in PeopleSoft, please refer to the Managing Applicants in PeopleSoft quick reference guide.