Request a Permanent Change in Hours for an Existing Employee

Purpose

Use this job aid to request, post for and process a permanent change in hours for an existing MaPS or Support Staff position funded from operating funds. This process should be followed regardless of whether or not the position requires a job posting. Changes will include one or more of the following attributes:

- Full/Part-time
- Standard Hours

The purpose of the Job Opening Request is to validate budget, collect the information required to post the job, obtain the necessary approvals to make the change, and update the position information in the HR system.

Note:
If you need help selecting the right appointment type, the HR Summary by Staff Group 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 verify the position budget can accommodate the proposed changes in hours and to identify the funding source, budget Dept ID and maximum salary amount for the position.
- Any necessary updates to the job profile for this position have been made.
- If significant updates were made to the job profile, or if the profile has not been reviewed by HR in the last 12 months, the profile has been sent to your HR Advisor (or Talent Acquisition Advisor in the Cumming School of Medicine) for review and the classification has been confirmed, as required.

Once the prerequisite steps are complete, you are ready to initiate a Job Opening Request Form following the steps below:

<table>
<thead>
<tr>
<th>Access</th>
<th>PeopleSoft</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Action</td>
</tr>
</tbody>
</table>

1. Begin, by logging into the myUofC portal:
   - From the mega-menu, click the My work tab.
   - Click the Job opening request link from the People management heading.
## Initiate a Job Opening Request

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.   | • For this example, we will be initiating a new transaction. Click the **Add** button.  

**Add**  

• Click the **Request Type** dropdown list. The Request Type chosen drives which fields on the form open up for entry.  

**Request Type**  

- New Job/Position  
- Optional Posting  
- Positioned Job - With Changes  
- Positioned Job - No Change  

• In this example we are filling a vacant position with changes required to the position attributes, so you will select **Positioned Job – With Changes**. |
| 3.   | • Enter the **Position Number** of the position you are looking to change.  

**Position Information**  

*Position Number*  

**NOTE!** You will only have access to position numbers within the Departments you have security access to and/or those within your reporting structure.  

**NOTE!** If you do not know the position number, you can use the **Look Up** button and search for it using the fields provided (e.g. Business Unit (UCALG), Dept ID number, Reports to Position Number).  

• By entering the **Position Number**, all other fields in the **Position Information** section auto-populate and are not editable. The position information also populates under the **New Position Information** section, but here the information is editable so that you can indicate which attributes require changes. |
### Enter Position Number

<table>
<thead>
<tr>
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</thead>
</table>
| • The **Budget Information** section will populate with the **Budget Department** and **Approved Budget Amount** for the position and will identify if there is a salary recovery associated with the position and/or if there are any budget exceptions. Click the icon for a description of the exception.  

<table>
<thead>
<tr>
<th>Budget Data Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Department</td>
<td>Approved Budget Amount</td>
</tr>
<tr>
<td>64020</td>
<td>115,000.00</td>
</tr>
<tr>
<td>64020</td>
<td>(115,000.00)</td>
</tr>
</tbody>
</table>

**NOTE!** This section is not viewable to those with the **HR Forms Initiators** role.

**NOTE!** If you have any questions about the information in this section, please contact your Finance Partner.

### Enter New Position Information

<table>
<thead>
<tr>
<th>4.</th>
<th>Action</th>
</tr>
</thead>
</table>
| • If changing, click the **Full/Part Time** dropdown and make your selection.  

![Full/Part Time Dropdown]

• Enter the new **Std Hrs/Wk**.  

![Std Hrs/Wk]

• If it is changing, 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 Dropdown]

• If applicable, use the **Recovery Information** section to indicate 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 Section]
<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| Enter New Position Information | • If applicable, use the **VP Bridge Information** section 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).  
  
  • 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**.  
  
  ![VP Bridge Information](image)  
  
  **NOTE!** When VP Bridge Funding is identified the **Funding Source** selected above should = **Base Funded**. |
| Enter Job Information | 5. **Employee Classification (Empl Class)** is required for all Limited Term, 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. For more detail regarding Empl Class options, see the **Empl Class Quick Reference Sheet**.  
  
  • **Enter the Length of Term** which is a required field for all term positions. If known, enter the **Expected Job End Date**.  
  
  ![Length of Term](image) |
<table>
<thead>
<tr>
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</table>
| Enter Job Information | • The **Maximum Offer Amount** is the maximum annualized budgeted salary amount for the position. If there are no exceptions or recoveries in the **Budget Data Information** section above, this amount will auto-populate based on the **Approved Budget Amount** and is not editable.  

• If there are any budget exceptions or recoveries in the **Budget Data Information** section, this field will display as **$0.00** and a value must be entered. Contact your Finance Partner if you are unsure what to enter.  

| Maximum Offer Amount (Annual) | $0.00 |

**NOTE!** If the **Maximum Offer Amount** auto-populates based on the budget, it is **not viewable to those with the HR Forms Initiator role**.

**NOTE!** Job offers cannot exceed the **Maximum Offer Amount** noted on the JOR without evidence of an additional allocation of budget to the position (to be confirmed by the Finance Partner).  

• Enter the incumbent as the **Strong Internal Candidate**, check this box and fill in the **Empl ID** of the employee.  

| Strong Internal Candidate: | ☐ | Empl ID: |

**NOTE!** Support Staff 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.  

```
<table>
<thead>
<tr>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours/day:</td>
</tr>
<tr>
<td>Start Time(e.g: 8:00M)</td>
</tr>
</tbody>
</table>
```

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

• 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.
Step | Action
--- | ---
6. | • Under the **Salary/Benefits ChartField Information** section, enter the chartfields from which the position will be paid.

    • Click the **Edit ChartFields** link.

    ![ChartField Information](chartfield.png)

    • Complete/verify the following fields:
      - **Fund** – always required
      - **DeptID** - always required
      - **Acct** - always required and will be 54995
      - **Program / Internal** - only if applicable
      - **Project and Activity ID** – only if applicable

    ![ChartField Example](chartfield_example.png)

    **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 and verified, click the **OK** button.

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.

    ![ChartField Example](chartfield_example.png)
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<tr>
<td>8.</td>
<td>• Click the <strong>Immediate Posting</strong> option when you want the job posted as soon as possible when received by the Talent Acquisition Advisor. Alternatively, you can define start and end dates for posting. If not specified, the Talent Acquisition Advisor will post the job immediately for seven days.</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 by your HR Advisor (or Talent Acquisition Advisor in Medicine) into the <strong>Job Profile Identifier</strong> field. If no Job Profile number exists, please 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 (i.e. a description of your department or research project), 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>
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.

![Contacts](image)

• 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 and 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. If you have issues adding someone, please contact your **Talent Acquisition Advisor**.

• In the **Notes/Comments** field, provide clarification on the intent of the request and any additional relevant information – either for the approvers or those processing the request. For example, that might include:
  o reason for the changes
  o provide relevant details if budget adjustments are required including the source of funding
  o enter any special requests

![Notes/Comments](image)

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

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**Enter Contacts, Notes / Comments**

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**Step** | **Action**
---|---
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![Notes/Comments](image)

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

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

- 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.

- 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.

- 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)

Next Steps

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

- Once approved, the position information is updated in the system, the job is posted on the UCalgary Careers website, and the recruitment process begins
- The initiator and Reports to Manager will be notified by their Talent Acquisition Advisor 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 by their Talent Acquisition Advisor 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.