Fill a Vacant MaPS or AUPE Research Manager/Supervisor Position (change to position information required)

Purpose

Use this job aid to change, post for and hire a vacant (or soon to be vacant) Fixed Term MaPS or AUPE position* (funded from a research project) that has direct reports (e.g. Lab Manager).

NOTE: Although the majority of Fixed Term jobs are not positioned in PeopleSoft, position numbers are assigned to Fixed Term jobs when the role:

1. has direct reports; or
2. is funded from a project budgeted at a detailed level (based on size and/or length of funding) – For more information on these projects contact Research Accounting

If a position already exists for the job you are hiring, follow this job aid to ensure you hire into the existing position number rather than creating a new position. If you are hiring a net-new position or a non-positioned Fixed Term job, follow the *Recruit for a New MaPS or AUPE Research Employee (Fixed Term)* job aid.

***This job aid should be used when changes to the existing position attributes are required. Changes to one or more of the following attributes constitute a position change:

- Department
- Job Code / classification
- Full/Part-time
- Standard Hours
- Reports to Manager
- Position Title

If you are filling a vacant position for which changes to these attributes are **NOT** required, follow the *Fill a Vacant MaPS or AUPE Research Manager/Supervisor Position* job aid.

The purpose of the Job Opening Request form is to collect the information required to post the job, obtain the necessary approvals in preparation for selecting an appropriate candidate, and update the position information in the HR system.

Note:	If you need help selecting the right appointment type, view the ***Research Appointment Summary*** linked on the following website, which provides detailed information about appointment types that are funded from research project accounts, including information on recruitment requirements, benefits, etc. www.ucalgary.ca/hr/hr-process-for-researchers (Under ‘Hiring Research Staff’)

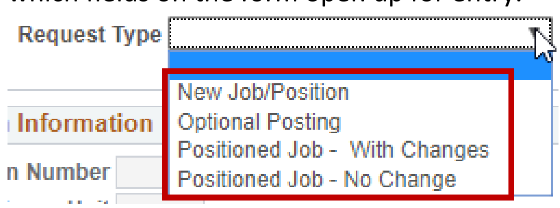
Prerequisites

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

- Upfront conversations with project budget owners and, if applicable, Research Accounting, to verify the budget exists for the role. Also ensure you obtain the project account string.
- 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:

	Step	Action
Access PeopleSoft	1.	Begin, by logging into the **myUofC** portal: • From the mega-menu, click the **My work** tab. • Click the **Job opening request** link from 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 filling a vacant Fixed Term position with changes required to the position attributes, so you will select **Positioned Job – With Changes**.
Enter Position Information	3.	• Enter the **Position Number** of the vacant role you are looking to fill. 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 (UCALT), 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.

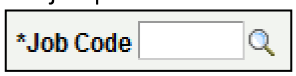
Enter New Position Information

4.

- In the **Department** field, enter the new five digit Dept ID, if this is changing. This is the department number under which the position/job resides. If you do not know the home **Department ID**, you can use the **Look Up** button and search for it using the **Description** field.

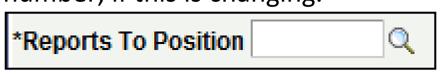
NOTE! The **Faculty/Unit** information auto-populates based on the **Department** selection.

- In the **Job Code** field, enter the new 6 digit **Job Code**, if this is changing. The **Job Code** is provided to the Initiator by their HR Services Advisor (or Talent Acquisition Advisor in the Cumming School of Medicine) through the job profile classification process.



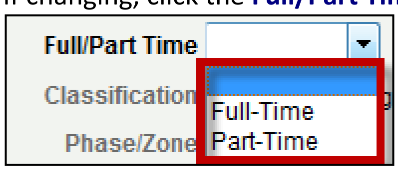
NOTE! Upon entering the **Job Code**, the **Job Family, Classification, Phase/Zone** and **Salary Range** fields auto-populate.

- In the **Reports To Position** field, enter the Reports to Manager's position number, if this is changing.

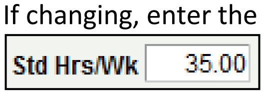


NOTE! Position number should not be confused with Employee ID number. If you do not know the Reports to Manager's position number, you can use the **Look Up** button and search for it using the Reports to Manager's name.

- If changing, click the **Full/Part Time** dropdown and make your selection**.**

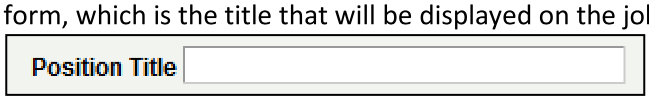


- If changing, enter the new **Std Hrs/Wk**.



NOTE! When filling a Recurring Part-time position, 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).

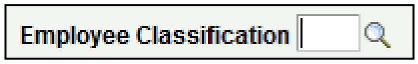
- Enter the revised **Position Title,** if a change is necessary. This field is the title of the position record and is limited to 30 characters in length. It is often an abbreviated version of the **Posting Title** identified later in the form, which is the title that will be displayed on the job posting.



Enter Job Information

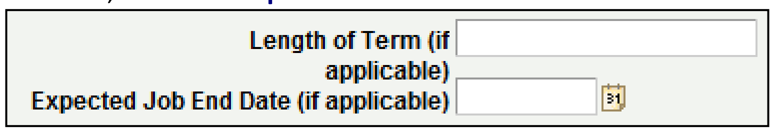
5.

- **Employee Classification** (**Empl Class**) is required for all project-funded employee types. Click the **Look Up** button and select the appropriate Empl Class.



NOTE! 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 Fixed Term jobs. If known, enter the **Expected Job End Date**.

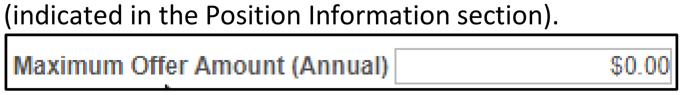


NOTE! The initial term for Fixed Term jobs cannot exceed five (5) years.

- Enter the **Project End Date**, which is a required field for all project-funded jobs.

NOTE! The **Expected Job End Date** of the job cannot surpass the end date of the project.

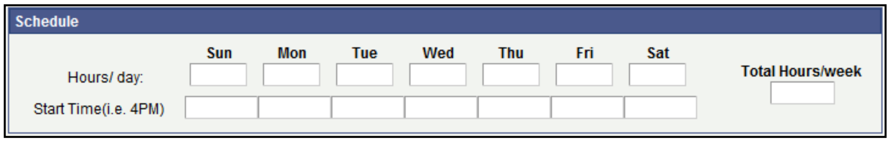
- Enter the **Maximum Offer Amount** is the maximum annualized budgeted salary amount for the role. Include this if the max salary you have budgeted for is below the top of the salary band for the job (indicated in the Position Information section).

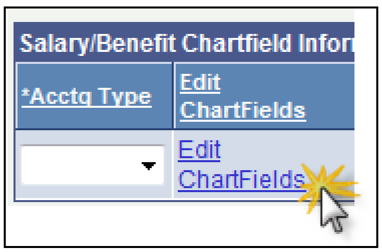
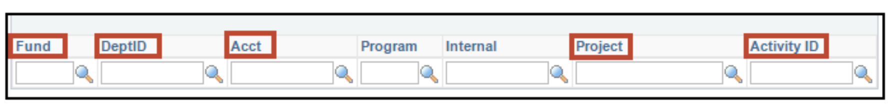


- Enter the employee ID number (UCID) of the **Employee Being Replaced** and indicate the **Replacement Reason** from the list of options provided.

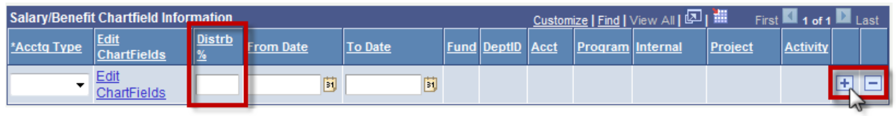
- If there is a **Strong Internal Candidate**, check this box and fill in the **Empl ID** of the candidate.

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

	Step	Action
Enter Job Information		• 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! **Hours/day** and **Total Hours/week** should not exceed the standard hours for that job family.

Enter Salary / Benefit Chartfield Information	6.	• Under the **Salary/Benefits ChartField Information** section, enter the chartfields from which the position will be paid.
		
		• Click the **Edit ChartFields** link.
		
		
		• Enter the following fields:
		  o **Fund** - always required
		  o **DeptID** - always required
		  o **Acct** - always required and will be 54995 for salaried Fixed Term jobs (the exception is Recurring Part-time (hourly), for which the actual account should be used).
		  o **Program / Internal** - only if applicable
		  o **Project and Activity ID** - always required for jobs funded out of a project
		
		
		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.

<table>
<tr><th></th><th>Step</th><th>Action</th></tr>
<tr><td>Adding additional rows for split distribution</td><td>7.</td><td>
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.

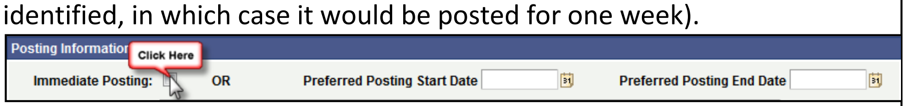


In situations where benefits must be charged to a different project than the salary, use the Accounting Type (Acctg Type) dropdown menu to identify which account should be used for benefits and which should be used for salary.

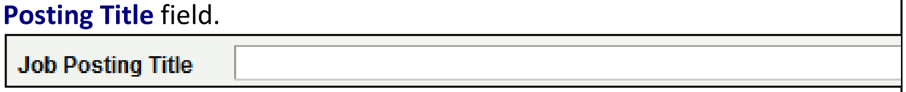
NOTE! Separate benefit accounting should only be entered when it is different from the salary account. If no benefit line is entered, it is assumed benefits costs are to be charged to the salary account.

</td></tr>
<tr><td>Enter Posting Information</td><td>8.</td><td>

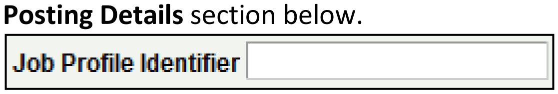
Click the Immediate Posting option when you want the job posted as soon as possible when received by the Talent Acquisition Advisor. Alternatively, you can define start and end dates for posting. If not specified, the Talent Acquisition Advisor will post the job immediately for the standard two weeks (unless a Strong Internal Candidate was identified, in which case it would be posted for one week).



Enter the title you would like displayed on the job posting into the Job Posting Title field.



The Job Profile Identifier 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 Job Profile Identifier field. If no Job Profile number exists, please copy and paste the job profile into the Summary of Key Responsibilities / Posting Details section below.



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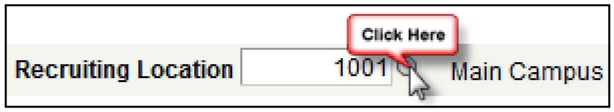
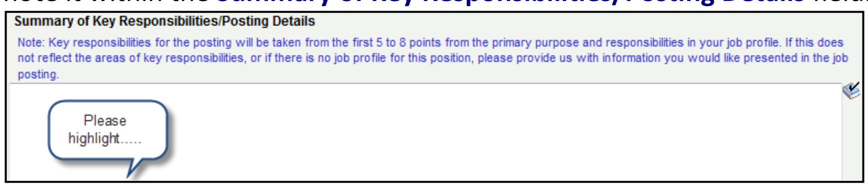
<tr><th></th><th>Step</th><th>Action</th></tr>
<tr><td>Enter Posting Information</td><td></td><td>

- The **Recruiting Location** 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 **Look Up** button.

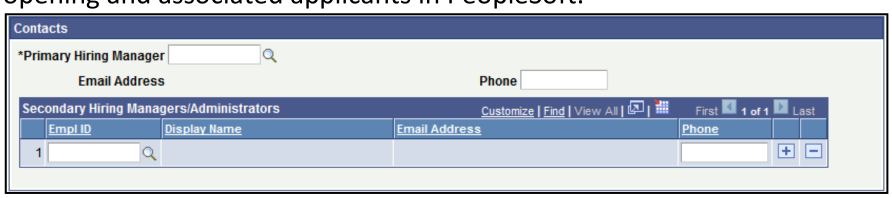


- If you would like specific information included in the job posting (e.g. a description of your department or research project), or you would like to highlight key information from the job profile that should be included, note it within the **Summary of Key Responsibilities/Posting Details** field.



</td></tr>
<tr><td>Enter Contacts, Notes / Comments</td><td>9.</td><td>

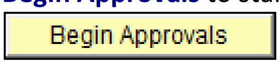
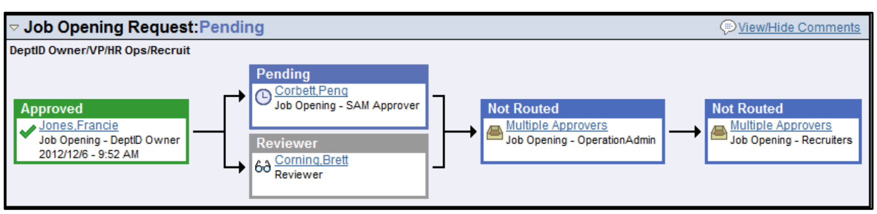
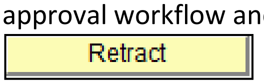
- Under **Contacts**, enter those who should be associated with this job opening, meaning those individuals who require access to view the job opening and associated applicants in PeopleSoft.



- 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.

</td></tr>
</table>

	Step	Action
Enter Contacts, Notes / Comments		• 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 may explain the reason for the vacancy, the reason for the changes, enter special requests, or ask for external advertising (which should 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. 
Click Begin Approvals	11.	• Once you have completed all required fields and saving the form, click **Begin Approvals** to start the automated approval process.  • 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.  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.  • Once the necessary changes are made, the Initiator should repeats 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 U of C 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.