

Position, create (including non-budgeted)

This job aid will provide step by step instructions on how to create a position (including non-budgeted). A Manager, Recruiter or an HR Partner can initiate this task.



If this is for a true non-budgeted position, please make sure to include in the *Comments* how you plan to resolve the budget for the position. It is the agency's responsibility to monitor the use of positions, including those that are non-budgeted.

Step 1: In the Search bar, type **Create Position**.

Step 2: Select **Create Position**.

Step 3: Confirm your position is ready to be created by reading the message. Use the prompt to select your supervisory organization. Click **OK**. Scroll down to continue adding information about the position.

Create Position

ATTENTION:

You have started the process to request for a new position. This will remain a non-budgeted position unless it is authorized in ORPICS, the budget system of record. A permanent position should only be created if the position is in the process to be authorized as permanent in the budget process. You need to discuss this with your budget professionals.

In the next steps you will be adding the necessary information that is distinguishing about your position.

The next steps include:

- Creating the Initial Position Details (Job Profile, Employee Type, etc.)
- Assigning PDC & RDC
- Adding the Additional Job Description
- Assigning the Position Requirements
- Assign Work Contacts to the Position
- Assigning the Reviewers for the Position
- Assigning Budget Authority for the Position

It is important that you have discussed this with your compensation partner prior to submitting each of these steps. The information contained in these areas justify the job profile you selected when you initiated this process.

At the completion of all your tasks your position will be available to view in your organization. However, your compensation partner will review the information you have provided, and determine if the correct job profile was selected based on the duties you have assigned and will give you the final approval of your position request. Your compensation partner will have the ability to rescind your position if these details are not right, and you will have to restart this process again.

If you have any questions about this process, please contact your compensation partner.

By hitting submit below, you are verifying that you have spoken with your compensation partner, and budget partner about this position request.

Supervisory Organization *

Step 4: Enter the position information. Workday system required fields are notated by a red asterisk (*), however, the State requires additional fields for creating a non-budgeted position (see the red highlighted fields below).



A permanent position should only be created if the position is in the process to be authorized as permanent in the budget process.

Supervisory Organization Ducks - D00

Position Request Reason [Dropdown]

Job Posting Title * Administrative Assistant

Number of Positions * 1

Hiring Restrictions | **Qualifications**

Availability Date * 07 / 17 / 2018 [Calendar]

Earliest Hire Date * 07 / / 2018 [Calendar]

No Job Restrictions

Job Family X Administrative Specialist

Job Profiles for Job Family
 Administrative Specialist 2 - SR20 - Non Exempt
 Administrative Specialist 2 - SR20 - Exempt
 Administrative Specialist 2 - SR19 - Non Exempt
 Administrative Specialist 2 - SR19 - Exempt
 Administrative Specialist 1 - SR17 - Non Exempt
 Administrative Specialist 1 - SR17 - Exempt

Job Profile X Administrative Specialist 1 - SR17 - Exempt

Job Description Summary

Job Description Format [Rich Text Editor]
 GENERAL DESCRIPTION OF CLASS
 The ADMINISTRATIVE SPECIALIST 1 performs and/or coordinates administrative tasks in support...

Location X Public Service Building

Time Type X Full time

Worker Type X Employee

Worker Sub-Type X Limited Duration (Fixed Term)

Submit Save for Later Cancel

This date needs to be prior to the date you want to hire for the position.

This date needs to be after the *Availability Date* (above).

Selecting the Job Profile before the Job Family, will populate the job description box with the general class specifications

You will over-write the general class specifications with the position specific duties (Position Description). See details on the next page.

Use *Limited Duration* for the Worker Sub-Type when creating a non-budgeted position for work out of class/job rotation.

Step 5: Enter the *Program and Position Information* in the **Job Description Summary** box:

- Program and Position Information – This information will load to *Section 2* of the position description.
 - Describe the program in which the position exists. Include the program purpose, who is affected, size and scope. Include relationship with agency mission.
 - Describe the purpose of this position and how it functions within this program. Complete this statement:

The primary purpose of this position is to . . .

The screenshot shows a web form for creating a position. On the left, there are various fields for 'Job Profile' and 'Job Description Summary'. The 'Job Profile' is set to 'Administrative Specialist 1 - SRTT - Exempt'. The 'Job Description Summary' contains the text: 'The ADMINISTRATIVE SPECIALIST 1 performs and/or...'. On the right, a 'Job Description' box is open, showing three sections: 'Program and Position Information', 'Description of Duties', and 'Working Conditions'. The 'Program and Position Information' section is highlighted in green and contains the text: 'Describe the program in which the position exists. Include the program purpose, who's affected, size and scope. Include relationship with agency mission. This position is part of the Department of Ducks, Business Support Unit This Unit... Describe the purpose of this position, and how it functions within this program. Complete this statement: The primary purpose of this position is to:'. The 'Description of Duties' section is highlighted in blue and contains the text: 'List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties, or "NC" for no change duties. Indicate whether the duty is an "essential" (E) or "non-essential" (NE) function. 60% - R - E - Office Support: Maintains and schedules meetings, conference rooms and check out vehicles. Orders office supplies. Composes metrics and reports on effectiveness. Completes travel vouchers, expense claims and reports for management and office staff.' The 'Working Conditions' section contains the text: 'Describe any on-going working conditions. Include any physical, sensory and environmental demands. State the frequency of exposure to these conditions. Works in an open office environment with a moderate ambient noise level. May experience frequent interruptions. Some physical demands include lifting, reaching, bending and/or standing for activities such as...'. At the bottom of the 'Job Description' box is a 'Done' button. At the bottom of the main form are 'Submit', 'Save for Later', and 'Cancel' buttons.

Step 6: Enter/overwrite the general class specifications populated in the *Job Description* box with the position description information:

- Description of Duties - This information will load to *Section 3* of the position description.
 - List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties, or “NC” for no change duties. Indicate whether the duty is an “essential” (E) or “non-essential” (NE) function.
 - Example:
 - **60% - R - E - Office Support:** Maintains and schedules meetings, conference rooms and check out vehicles. Orders office supplies. Composes metrics and reports on effectiveness. Completes travel vouchers, expense claims and reports for management and office staff.

Note: This process is to add additional job description information only.

Enter Location, Time Type, Worker Type, and Worker Sub-Type.

	<p>Do not use the “X” to remove the current location, instead use the menu prompt or type in the search field to select a new location. Clicking on the X will remove the job classification field.</p>
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Location * X Salem / Executive Building - DAS ⋮

Step 7: Check the check box if this is a **Critical Job**.

	<p><i>Critical Job</i> is the Workday term we know as “Essential Position.” Refer to policy and/or CBA to determine Critical Job (Essential Position) designation.</p>
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Critical Job

Difficulty to Fill

⋮

Reminder: If this is for a true non-budgeted position, please make sure to include in the *Comments* how you plan to resolve the budget for the position. It is the agency’s responsibility to monitor the use of positions, including those that are non-budgeted

Click **Submit**.

Up Next displays *Edit Additional Data* for the position. The Manager and Workforce Liaison will receive inbox tasks to complete or click **Edit Additional Data** to begin the process. Complete all tasks.

	<p>The following tasks may not appear in this exact order. Answer as they appear. Values in the first column of each section must be unique and cannot be repeated for multiple rows in the same section. Example: <i>Work Contacts</i> use <i>1. Public Agencies</i>, and then on the next row <i>2. Public Records Enforcement</i> to list multiple public contacts.</p>
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Step 8: Click Edit Additional Data. Click on the plus icon (+) to add a row. Enter/update *Budget Authority* information if the position has authority to commit agency operating money. This information will load to *Section 11* of the Position Description. If no budget authority, simply Click **Submit**.

Budget Authority

0 items

	*Operating Area	Biennial Amount	Fund Type
+			
No Data			

Step 9: Click Edit Additional Data. Click the plus icon (+) to add a row. Enter/update *Review of Work* information in the fields below. The *Position Number* should be the WD Position ID for the person who reviews the work. This information will load to *Section 8* of the Position Description. Click **Submit**.

Instructions

Please indicate who reviews employee's work.

Review of Work (Section 8)

0 items

	*Classification Title	Position Number	How	How Often
+				
No Data				

Step 10: Click Edit Additional Data. Click the plus icon (+) to add a row. Enter/update *Work Contacts* information. Click **Submit**. This information will load to *Section 6* of the Position Description.

Instructions

Please indicate the contacts the employee will need to work with and the frequency needed to get the work completed.

Work Contacts (Section 6)

0 items

	*Who Contacted	How	Purpose	How Often
+				
No Data				

Step 11: Click Edit Additional Data. Click the plus icon (+) to add a row. Enter/update *Additional Job Description* information. **Always enter "1" in the *Number column and make sure the information you want to show up in the position description is in the first row.** The *Section* information for the Position Description is noted below. Click **Submit**.

Additional Job Description

1 item

	*Number	Section 4	Section 5	Section 5	Section 7	Section 9	Section 10
+	1	Section 4: Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.	Section 5: Guidelines (List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures)	Section 5: Guidelines (How are these guidelines used?)	Section 7: Position Related Decision Making (Describe the typical decisions of this position. Explain the direct effect of these decisions.)	Section 9: Oversight Activities (For supervisory positions only)	Section 10: Additional Position Related Information (ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification)
-							

Step 12: Click **Edit Additional Data**. Enter the *PDC* & *RDC* numbers into the applicable fields. If this is a new position created as part of the Legislative Process, the *PPDB Position Number* can be left blank. If provided it serves as an internal reference within the agency to the historical records related to the position and may help track the position until its Workday ID is assigned in ORPICS. It may also serve as a tie for two individuals who job share as they are recommended to have the same number in this field. (Do not add a PPDB Position Number for non-budgeted positions). Check the **Position Pending Budget Approval** box to identify position awaiting Budget Authorization and funding. Click **Submit**.


Position Details

PPDB Position Number

PDC Number

RDC Number

Position Pending Budget Approval



To ensure a non-budgeted position is correctly selected for the PICS Roll process, the *Position Pending Budget Approval* box must be checked as it is used to identify non-budgeted positions awaiting Budget Authorization and funding.

Step 13: Click **Edit Additional Data**. Select from the list to assign *Position Requirements*. Click **Submit**.

Instructions

In this area please indicate all required assets to be used by the person filling this position.

Position Requirements

Uniform

Fingerprint Required

Boots

Safety Glasses

Rain Gear

ATV Safety Equipment

Tool Allowance

CDL is Required

Driving Required

Clothing Allowance Required

Step 14: If a Manager initiated the task, *Up Next* will be the Workforce Liaison and HR Partner to complete the task to *Edit Additional Data: Position Job Classifications Group*. If the task was initiated by the HR Partner, the *Who Reviews Employees Work* task will route to the Manager and Workforce Liaison to complete. Use the menu prompt to select the *Job Classification* for each of the required fields listed below.

Position Job Classification Group

Holiday	<input type="text"/>	
Timesheet	<input type="text"/>	
Job Share	<input type="text"/>	
OT Eligible	<input type="text"/>	
Pay Basis	<input type="text"/>	
Service Type	<input type="text"/>	
Exempt Reason	<input type="text"/>	
TOMP	<input type="text"/>	

Required Job Classifications:

- Holiday Code
- Timesheet Code
- Overtime Eligible
- Pay Basis Code
- Service Type Code

Step 15: The Compensation Partner will receive a To Do task to Review Additional Data on Position. Click **Submit**.

Complete To Do
[Compensation Partner To Review Additional Data on Position](#) Actions

Step 16: *Up Next* the Compensation Partner will assign *Organizations* to the position. Click **Open** or click on the inbox task. Scroll down to the *Organizations* section. Click on the pencil icon to edit each of the fields in the *Other* section. Click the checkmark to save. Click **Submit**.

Organizations

Company	Company *	
	Oregon Housing and Community Services	
Cost Center	Cost Center *	
	219863200000	
Other	Position Representation	
	PERS Position Classification	

Step 17: *Up Next* the Compensation Partner will *Assign Compensation* to the position. Click **Open** or click on the inbox task. Scroll down to the *Guidelines* section. Click on the pencil icon to edit the *Compensation Package* and select **General Compensation Package**. Select the *Grade*, *Grade Profile* (*PERS eligible grade (if appropriate)*) and *Step* (*first available step*) for the default compensation. Click the checkmark to save the changes. Click **Approve**.

Guidelines

Total Base Pay Range
3,600.00 - 4,959.00 USD Monthly

Compensation Package *

x General Compensation Package
...
☰

Grade *

x 19
...
☰

Grade Profile

☰

Step

☰

The process is now complete.



Verify the position has been added to the Supervisory Organization by looking at the org chart or the Supervisory Organizations details → *Unavailable to Fill*. A requisition can now be created to fill the non-budgeted position. Note: Compensation Partners do not have the ability to view the *Unavailable to Fill* tab.