Creating a non-budgeted Position

This job aid will provide step by step instructions on how to create a non-budgeted position. This action can be initiated by a Manager, Recruiter or an HR Partner.

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

Step 2: Select **Create Position**.

Step 3: Confirm that 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.
Step 4: Enter the position information. In the 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).

**Note:** Selecting *Permanent* as a worker subtype will generate an error message. Permanent positions will only be created through the appropriate budget processes. You will need to select an appropriate non-budgeted position type (i.e. Temporary, Limited Duration, Seasonal, etc.)

![Diagram of Workday system with highlighted fields and notes](image)

- 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.
Step 5: Overwrite the general class specifications populated in the Job Description box with the position description information:

- **Program and Position information**
  - Describe the program in which the position exists. Include the program purpose, who’s 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:

- **Description of Duties:**
  - 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.

- **Working Conditions:**
  - Describe any on-going working conditions. Include any physical, sensory and environmental demands. State the frequency of exposure to these conditions.

Click Submit.
Step 6: The “Up Next” Manager will receive To Do’s in his or her inbox. The following tasks may not be in this exact order. Answer as they appear.

Step 7: Click on the “+” icon to add row. Insert Additional Job Description. Click Submit > Done.
Step 8: If this is a new position created as part of the Legislative Process, provide the **PPDB Position Number** that matches the PICS position number (1) (Do not add a PPDB Position Number for non-budgeted positions). Assign the **PDC Number** (2) and **RDC Number** (3). Check the **Position Pending Budget Approval** box to identify non-budgeted position awaiting Budget Authorization and funding. 

Submit > Done.

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**Instructions**

- The PPDB Position Number can be left blank for non-budgeted positions. For budgeted positions the PPDB Position Number needs to match to the Position Inventory Control System (PICS) position number. If you have questions about this number contact your agency budget department.
- The PDC is optional and can be left blank. If you add values to this field the values must be numeric and it must not be longer than 5 characters.
- The RDC is required and it must have 3 numeric characters. This is required by the payroll integration. If your agency does not use the RDC field, you can populate this with 999.
- Pending Budget Approval is used to identify non-budgeted position awaiting Budget Authorization and funding. The PPDB number has to match the PPDB number from PICS/ORPICS and the Budget Authorization Number must be blank.

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**Position Details**

<table>
<thead>
<tr>
<th>PPDB Position Number</th>
<th>PDC Number</th>
<th>RDC Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2100031</td>
<td>304</td>
<td>304</td>
</tr>
</tbody>
</table>

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To ensure a non-budgeted position is correctly selected for the PICS Roll process the:

1. **PPDB Position** number provided on the position must match the PICS position number; and
2. The **Position Pending Budget Approval** box must be checked as it is used to identify non-budgeted positions awaiting Budget Authorization and funding.

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Step 9: Select from the list to assign Position Requirements. Click **Submit > Done**.
Step 10: Assign Work Contacts. Click **Submit > Done**.

Step 11: Assign Manager to the position. Click **Submit > Done**.
Step 12: Assign Budget Authority. Click **Submit > Done.**

Step 13: *Up Next* the HR Partner will receive an *Inbox* task to add the Position Job Classifications. From the menu prompt, select the **Job Classification** for each of the 6 required fields listed below.

For each *Job Classifications* menu, there will be a sub menu that will contain information for all classification types.

**Required Job Classifications:**
- Holiday Code
- Timesheet Code
- Overtime Eligible
- Pay Basis Code
- Service Type Code
- PERS Class Plan
Step 14: *Up Next* the Compensation Partner will receive a To Do inbox item to Review Additional Data on Position.

![Complete To Do补偿伙伴审核附加数据](image)

**Instructions**
- **ATTENTION:**
  - A position has been created. Please review the position, and the associated additional data before assigning organizations, or default compensation.
  - The position is created. If you need to modify the position description, and additional data you need to work with the manager to make these changes. If you need to remove this position for any reason, you need to rescind the position from the manager’s organization.
  - By hitting submit you will receive tasks to assign the necessary organizations to the position, and the default compensation.

Step 15: From the **Inbox** task item you will **Assign Organizations to the Position.** Scroll down to the **Organizations** section. Click on the pencil icon to open the **Other** section and add the **Agency Cross References.** Click the check to save your selection. Repeat this step to add the **Position Representation and PERS Position Classification.**

![Assign Organizations](image)

Step 16: **Click Submit**

![Submit Button](image)
Step 17: *Up Next* the Compensation Partner will *Assign Compensation* to the position. From the *Inbox* item, scroll down to *Guidelines*. Click on the pencil icon to edit the *Compensation Package* and select *General Compensation Package*. Click on the check ✓ to save the change.

Step 18: Click **Approve**. The process is completed.

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You can 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.