CSU Talent Management
User Guide – Admin/Research Professional
How to Create or Modify a Position Description in TMS

Last Updated: 11/10/2017
Position Descriptions represent a job within the University and describe the job in its present state.

**Position Descriptions may only be created by individuals with Initiator access in the TMS.**

Below are the steps in the creation and approval of a Position Description.

The steps in the following slides explain how to create and edit Position Descriptions.
In most cases, you will be ‘modifying’ a current position description for an existing Position.Version # (position that has already been created), which is stored in the position library of the Talent Management System. To do this please follow the next 7 pages.

Please note, if the modification of a position results in a new ‘version’ number (e.g. .0001 to .0002), departments will need to complete an Oracle action to finalize the change. Please contact HR Records at hr_records@mail.colostate.edu if you have any questions.

If you are creating a new position description, requiring a new Position.Version# (creating a position that doesn’t exist yet) please skip to page 11.

**Please contact the Human Resources Classification/Compensation unit if you have any questions at hr_cca@mail.colostate.edu**
How to **Modify** a Position Description

1. Select ‘Position Management’.

2. Ensure that you have changed your user role to Initiator.
How to *Modify* a Position Description

1. Hover over the 'Position Descriptions' tab and select 'Admin Professional/Research Professional'.

Note: Position descriptions can be found in two separate areas. Positions that have been created or modified and are either moving through the approval process or have been saved for later will be found under the 'Requests' options.

Once a position has been 'approved', the updated position can be found in the position 'library' (the library options are those without 'Requests' in the name). If you are creating a position description for the first time or just starting a modification, you will start in the position 'library'.
1. Click on the working title of the position you wish to modify.

Note: To search for an existing position description to modify, click on the ‘More search options’ button to drop down the advanced search menu. Then type the Position Number in the ‘Position Number’ field and click ‘Search’.

Note: You’ll notice that two position descriptions appeared when searching with the Position Number. These positions have different ‘Version’ numbers (.0001 vs. .0002). The highest ‘version number’ corresponds to the most recently updated position. You’ll also notice that version .0001 has been moved to ‘Inactive’ since version .0002 is the most current position.
**Admin Professional/ Research Professional Position Descriptions**

1. Click on the ‘Working Title’ of the ‘Active’ position description to start the modification.

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**Note:** You can also search for a position description to modify using the name of the individual currently seated in that position.
1. Click on ‘Modify AP Position’.
How to Modify a Position Description

Start Modify AP Position Position Request on Lab Coordinator?

Once it has been started, this position request will lock the position description from other updates until the position request has completed.

1. Click on ‘Start’.
How to *Modify* a Position Description

From here, you may now following the remaining slides starting on page 19.
How to *Create* a Position Description

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How to **Create** a Position Description

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Once a position has been 'approved', the updated position can be found in the position 'library' (the library options are those without 'Requests' in the name). If you are creating a position description for the first time or just starting a modification, you will start in the position 'library'.
How to Create a Position Description

1. Select ‘Create New Position Description’.
How to **Create** a Position Description

1. Select ‘Create New AP Position’.
How to **Create** a Position Description

1. Enter in the ‘Working Title’ of the position, then click ‘Start Position Request’.

Note: The ‘Organizational Unit’ details may or may not be editable by the Initiator. If you only have access to one department in TMS, your assigned Division, Academic/Reporting Area and Department will automatically pull through. If you are assigned to multiple departments/units, you will need to select the correct drop down selections for this new position.
Note: If you are creating a position description that very closely mirrors a current position in your department/unit, you can choose to ‘Clone’ an already existing position description.

This is helpful if this is a ‘reoccurring’ hire and a similar position description already exists.

1. To clone an existing position description, click ‘Filter these results’.
1. To search for a position description to clone, use the pop up search box. The easiest way to clone the exact position you are looking for is to copy and paste the Position Number into the ‘Position Number’ field. Then click ‘Search’.

2. The position you wish to clone will appear in the list below. Select the radio check box next to the working title. This indicates that you are creating a new position description which will clone/pull over many of the fields from this selected position description. This is very helpful if you are hiring multiple people for the same position.

Note: On the ‘Position Justification’ tab, you will fill out the required and other fields about your position description (Justification of Need, gift or grant funded, etc.).

1. Fill out the ‘Justification of Need’ section with as much detail as possible. This helps HR determine how to prioritize the many requests that come in.

2. Select ‘Yes’ or ‘No’ from the ‘Is this position gift or grant funded?’ drop down menu.

3. If the position is gift or grant funded, please indicate the percentage in this field. If the position is not gift or grant funded, please enter 0.

4. Please indicate which funds the position is being funded from. If the position is not grant or gift funded, please enter 0.

Note: These two fields are optional. Please leave them blank if they do not apply to your position.
Note: If you are **Modifying** a position description, the ‘Position Justification’ tab will require one extra step compared to when you create a new position request or clone a position. On top of filling out the ‘Justification of Need’ text field, you will also be required to select one or more options from the ‘Reason for Position Modification’ multi-select field.

1. Fill out the ‘Justification of Need’ section with as much detail as possible. This will allow Human Resources to review and process positions according to department needs.
1. Select ‘Yes’ or ‘No’ from the ‘Is this position gift or grant funded?’ drop down menu.

2. If the position is gift or grant funded, please indicate the percentage in this field. If the position is not grant or grant funded, please enter 0.

4. Please indicate which funds the position is being funded from. If the position is not grant or gift funded, please enter 0.

Note: These two fields are optional. Please leave them blank if they do not apply to your position.
1. When you are finished filling out the 'Position Justification' tab, click 'Save'. Then select the 'Classification Selection' tab on the left side of the page.
Note: The ‘Classification Section’ tab is optional. This will be completed once Human Resources reviews the position and determines the AP Framework classification at the workflow state ‘HR Position Review/Compensation Analysis’.

If you are modifying a position, this section may already be filled out.

1. When you are finished with this tab, click ‘Next’.
Note: The following slides will demonstrate what needs to be included in the ‘Position Details’ tab. All fields highlighted in red are required. If this is a cloned or modified position description, most of these fields may already be filled in. Be sure to review the information and ensure it is correct, and make any edits/updates as needed.

Note: For additional information on how to write an effective position description, please visit: http://www.hrs.colostate.edu/compensation/documents/job_description_training.pdf
1. Select the position’s ‘Employment Category’ from the drop down menu. Postdoctoral Fellows, as well as positions that are under 50% time or will be less than a one year appointment will be ‘Temporary’. Positions that are partially or fully grant/gift funded are ‘Special’ and all other position types are ‘Regular’. If you need assistance selecting an employment category, please contact Human Resources.

2. Select ‘Yes’ or ‘No’ from the ‘Will Accelerated Search Be Used?’ drop down field. A position that makes less than $60,000 a year can qualify for an accelerated search.

3. Enter in a salary range into the ‘Proposed Annual Salary Range’ field.

4. Select the salary basis from the ‘Salary Basis’ drop down menu. Most AP searches will be 12-month.

5. Fill in the ‘Description of Work Unit’ field. Use the gray help text below to help craft language. This information may be available on the department’s website.
1. Fill out the ‘Position Summary’ field. This should be a brief summary of what the position entails.

2. Fill out the ‘Position Supervises’ field. Use the help text below to determine what needs to be entered. If this position will not be supervising others, state “none” or “no one” in this field.

3. Fill in the ‘Decision Making’ field. Use the help text below to determine what needs to be entered.

Note: Please do not include job duties in the Position Summary field. Job duties will need to be entered on the ‘Essential Job Duties’ tab.
1. In the ‘Conditions of Employment’ multi-select field, select any items that are required for this position. If you are creating or modifying this position description to fill an open vacancy, be sure to check the top box as a ‘Pre-employment Criminal Background Check’ is required for all new hires and rehires.

2. Fill in the ‘Required Job Qualifications’ field. These requirements must be met by candidates to be hired for the job. This field outlines the required education, experience, and skills needed to successfully perform the job.

3. You may choose to fill out the ‘Preferred Job Qualifications’ field. The successful candidate will ideally possess these preferred qualifications though they are not required for a candidate to be hired for the job.

Note: If the position requires driving to conduct CSU business, ‘Valid Driver’s License’ must be selected under Conditions of Employment.

Note: To format any text field with bullets, use the process of adding * (space) before sections of text.
1. Select at least one Hiring Authority in the ‘Hiring Authority’ field by typing in their name. You may have multiple Hiring Authorities listed. If your desired Hiring Authority does not appear in the list of options, please contact OEO at oeo@colostate.edu

2. Select ‘Yes’ or ‘No’ from the ‘Is this an Hourly position?’ drop down menu. Use the help text below if needed.

3. Enter how many hours a week the person in this position will be working in the ‘Work Hours/Week’ field. If it is a full-time appointment, enter 40.

4. When complete, click ‘Next’ to continue to the ‘Essential Job Duties’ tab, ‘Save’ to return to complete the position description at a later time, or ‘Prev’ to return to the previous tab.
Note: On the ‘Essential Job Duties’ tab you will need to fill in at least two ‘duties’ which total 100%. This includes the ‘Job Duty Category’, ‘Duty/Responsibility’, and ‘Percentage Of Time’ the job duty is performed. This section is required to provide information for the Duties Basis test for FMLA exemption status.

1. To add a job duty, click on the ‘Add Essential Job Duties Entry’ button. Ensure that all job duties add up to a total of 100%.

2. When complete, click ‘Next’ to continue to the ‘Functional Attributes’ tab, ‘Save’ to return to complete the position description at a later time, or ‘Prev’ to return to the previous tab.
Note: On the ‘Functional Attributes’ tab please complete the physical demands, mental functions, environmental conditions & physical surroundings, and hazards associated with the position.

1. To make a selection, click on the drop down menu next to each category and select one of the options that best aligns with the physical demands of the position.

2. When complete, click ‘Next’ to continue to the ‘Position Budget Information’ tab, ‘Save’ to return to complete the position description at a later time, or ‘Prev’ to return to the previous tab.
Note: On the ‘Position Budget Information’ tab you may click on the ‘Add Budget Summary Entry’ button to complete the Budget Account Number, Percentage Funded, and Budget Account Name. This tab is recommended and can be helpful when managing funding from multiple grants.

1. To add a budget summary entry, click on the ‘Add Budget Summary Entry’ button.

2. When complete, click ‘Next’ to continue to the ‘Background Check Requirements’ tab, ‘Save’ to return to complete the position description at a later time, or ‘Prev’ to return to the previous tab.
Background Check Requirement Tab

1. All drop down choices on this tab are optional, with the exception of the required Motor Vehicle background check option. You must select either 'Yes' or 'No'.

Note: The ‘Background Check Requirement’ tab allows you to select any additional background checks the department wishes to conduct for this position in addition to the automatic criminal history background check for new hires and rehires.

2. When complete, click ‘Next’ to continue to the ‘Supervisory Position’ tab, ‘Save’ to return to complete the position description at a later time, or ‘Prev’ to return to the previous tab.

Note: If a Motor Vehicle Record Check is required for this position, this must be reflected in the ‘Required Job Qualifications’ field by adding the language “Must have a valid driver’s license or the ability to obtain a driver’s license or access to a licensed driver by the employment start date”. ‘Valid Driver’s Licenses’ must also be selected in the ‘Conditions of Employment’ multi select field.
Note: On the ‘Supervisory Position’ tab you should select the current supervisor for the position. If you are modifying a position or cloning a position, this area will most likely have existing selections. To replace a selected supervisor, follow the same instructions as selecting one for the first time.

1. To select a supervisor, click on the ‘Filter these results’ button.
1. In the pop up window, type in the supervisor’s name. Be sure to select their ‘Position Type’ (Faculty, Administrative Professional, or State Classified). Then click ‘Search’.

Supervisory Position Tab - continued
1. Check the radio button next to the correct supervisor, then click 'Save'.
Note: The selected supervisor should now appear on this tab.

1. When complete, click ‘Save’.

Note: The ‘Employee’ tab will only appear if you are modifying a position description. This tab will show the employee who is currently seated in this position. If you are creating a new position description, the ‘Employee’ tab will not appear. If you are modifying a PD and wish to ‘Vacate’ the occupant, you may do so on this tab, otherwise click on the ‘Position Documents’ tab.
Position Documents Tab

Note: On the ‘Position Documents’ tab please add documents associated with the position, such as the required Organizational Chart. If you are modifying a position or cloning a position, an Organizational Chart may already be attached. Please make sure that it is the most current Organizational Chart for the department or unit.

1. To upload a document, click on the ‘Actions’ dropdown menu and select ‘Upload New’.
2. Find the file you wish to upload and click 'Open'.

3. Once the correct file has been selected, click 'Submit'.
1. When complete, click ‘Next’ to continue to the ‘Position Request Summary’ tab, ‘Save’ to return to complete the position description at a later time, or ‘Prev’ to return to the previous tab.

Note: The system will automatically convert all uploaded documents into PDFs.

Note: A banner across the top of the page will let you know that your upload was successful.
Summary Tab

Note: On the 'Summary' tab you may review and edit any of the previous pages before moving it forward to the Hiring Authority.

1. Once you have sufficiently reviewed the position description and are ready to move it to the Hiring Authority, hover over the orange 'Take Action on Position Request' drop down menu and select 'Submit (move to Hiring Authority)'.

2. In the pop up box, add any additional comments for the Hiring Authority. Check the 'Add this position request to your watch list?' box if you wish to add the request to your watch list. When you are ready to move forward, click 'Submit'.

Note: 'Submit to Initiator (move to Initiator)' allows you to delegate the position description request to another individual. If you know you are going to be out of the office and have not had the chance to finish the position request, use this option to move it into someone else’s ‘ownership’. Be sure to select their name from the drop down menu in the pop up window before clicking ‘Submit’.
Note: The Hiring Authority will review the position. If any changes need to be made, the Hiring Authority can return the position description to the Initiator, or can make the changes themselves by clicking the ‘Edit’ button.

1. Once the Hiring Authority has reviewed the position and is ready to move it to Human Resources for classification, the Hiring Authority will hover over the orange ‘Take Action on Position Request’ drop down and select ‘Approve (move to HR Position Review/Compensation Analysis)’.

2. In the pop up box, the Hiring Authority may add any additional comments for Human Resources. When ready to move forward, click ‘Submit’.
Note: Human Resources will review the position, classify it and perform a compensation analysis.

1. Once Human Resources has reviewed the position and is ready to move it to the Signature Authority, they will hover over the orange ‘Take Action on Position Request’ button and select ‘Approve (move to Signature Authority Review/Approve)’. 
Note: The Signature Authority will review the position.

1. Once the Signature Authority has reviewed the position and is ready to move it to HR Position Assignment, the Signature Authority will hover over the orange ‘Take Action on Position Request’ button and select ‘Approve (move to HR Position Assignment)’.

2. In the pop up box, the Signature Authority may add any additional comments for Human Resources. When ready to move it forward, click ‘Submit’.
Note: HR will review the position and assign the Position Number.

1. Once Human Resources has reviewed the position, they will move it to 'Approve (move to Position Approved/Initiate Posting)'.

Historical Notes:
Currently: blank

Notes:

Position Justification:

[STATE UNIVERSITY]

[DATE]

[NAME]

[DEPARTMENT]

[POSITION]

[LOCATION]

[PHONE NUMBER]

[EMAIL ADDRESS]

[signature]

[DATE]

[INITIALS]

[DATE]

[INITIALS]

[DATE]

[INITIALS]
Hello Emily Rogers,

The Lab Coordinator position has been placed in the status of "Position Approved/Initiate Posting"

If you are planning to conduct a search for this position, you may proceed by creating a posting from this position description. Please forward this email to your Initiator to begin the posting process.

If you will request to hire someone through the **Alternative Appointment Request (AAR)** process, please create an Alternative Appointment Request posting from this position description. For further instructions for creating an AAR posting, please review the training guide at this link: [How to Create and Edit an Administrative Professional Alternative Appointment Request (AAR)](#).

If you are unsure if an Alternative Appointment Request (AAR) is needed for this new/modified position, please contact OEO at oeo@colostate.edu or 491-5836.

If you are only updating the position description to fill in missing information, you do not need to initiate a posting request.

For further instructions regarding the Administrative Professional posting process, please review the training guide at this link: [How to Create and Edit an Administrative Professional Job Posting](#).

For further help with creating a Faculty posting, please review the training guide at this link: [How to Create or Edit a Faculty Job Posting](#).

Position #: 016681.0002  
Job Title: Financial Transactions Coordinator  
Department: Vice President for Research Office  
Status: Position Approved/Initiate Posting

Thank you,  
Human Resources  
Colorado State University

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Note: The Hiring Authority will receive an email notification alerting them that the position has been approved.
Once a position description, either new or modified, has reached the status of ‘Position Approved/Initiate Posting’ all required steps on the Position Management (orange) side of TMS are now complete.

If a position description creation/modification request was done to add a position into the AP Framework or to make a slight change in duties not resulting in a classification change, all required steps are now complete; the newly created/updated position description is now located in the position library.

If the position description creation/modification request was created to fill a vacancy in the department, the Initiator may now transition to the Applicant Tracking (blue) side of TMS to start the process of creating a posting request from this newly approved position description. For detailed directions on how to create a job posting, please view our AP Posting guide located here:  

If the position description creation/modification request was created to hire someone through the Alternative Appointment Request (AAR) process, the Initiator may now transition to the Applicant Tracking (blue) side of TMS to create a posting request for an AAR. For detailed directions, please see our AP AAR guide located here: http://oeo.colostate.edu/Data/Sites/1/tms-pdf-guides/csu-create-and-edit-an-admin-pro-alt-appt-request.pdf
Need further help?

Please visit the OEO website for more resources on the CSU Talent Management System (TMS) at:

www.oeo.colostate.edu/talent-management-system-tms

For assistance/questions regarding the creation of Position Descriptions, please contact the classification/compensation unit in Human Resources at

hr_cca@mail.colostate.edu