Talent Management System (TMS)

How to Create or Modify a Position Description in TMS
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 the TMS.
Creating a New Position Description or Modifying a Current One

- 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, some modifications will result in a ‘reclassification’ (Technical/Support I → Technical/Support II) which in turn, will ‘re-version’ the position number (.0001 → .0002). If a modification of a position description results in a new classification and ‘version’ number, an AAR is most likely required.

  - If you are modifying a position description to add or change duties, updating the salary, updating the working title, or preparing the position for a promotion, please reach out to OEO prior to initiating the position modification to discuss the next steps. For additional help, please see the When is an AAR Required guide.

- If you are creating a new position description or cloning (page 14) a current position description, requiring a new Position.Version # (creating a position that doesn’t exist yet) please skip to page 11.

- If you need to transfer a position description to a new department or unit, please see the user guide and transfer request form located here. All transfers will result in a new ‘version’ number. Please know, a position ‘re-versioning’ due to a department transfer ONLY does not require an AAR.
How to **Modify** a Position Description

1. Select the Position Management module by clicking the three dots in the top-left corner of the screen.

2. Select Initiator from the User Group drop-down menu.
How to **Modify** a Position Description

1. Click on Position Descriptions from the top menu and select Admin Professional/Research Professional.

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

Once a created or modified 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 search for and **Modify** a Position Description

Note: When you first navigate to the position library, you will be able to see every active position description within the department(s) for which you have the Initiator user group assigned.

1. To search for the specific position description you wish to modify, click the More Search Options Button to expand the additional search option fields.

2. When you have located the position you wish to modify, click on its working title.
How to **Modify** a Position Description

1. Click Modify AP Position.
How to **Modify** a Position Description

Start Modify AP Position Position Request on Academic Success 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 Start.
How to *Modify* a Position Description

From here, you may now follow the remaining instructions starting on page 17.
How to **Create** a Position Description

1. Select the Position Management module by clicking the three dots in the top-left corner of the screen.

2. Select Initiator from the User Group drop-down menu.
How to **Create** a Position Description

1. Click on Position Descriptions from the top and select Admin Professional/Research Professional.

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Once a created or modified 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. Click Create New Position Description.
How to **Create** a Position Description

1. Enter the title of the position in the Working Title field.

   - **Working Title**

2. When ready, click the Start Position Request button.

   - **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 information from these drop-down menus.
How to **Create** a Position Description – **Cloning**

Note: If you are creating a position description that closely mirrors a current position description or is identical to a current position description in your department/unit, you may choose to ‘Clone’ an already existing position description as opposed to creating a new one.

This is a helpful option if this is a ‘reoccurring’ hire and a similar position description already exists, or if the department is making multiple hires out of a single search and you need an identical copy of the original position.

1. To clone an already created position description, click the More Search Options button.
How to **Create** a Position Description – **Cloning**

1. To search for the position you wish to clone, enter its position number in the Position Number field found in the More Search Options drop-down menu, then click Search.

2. The position you wish to clone should appear in the list below. Select the position by checking the radio button next to the working title. This tells the system that you will be creating a new position description based on the selected position description which in turn will clone/pull over many of the fields found on the selected position description.

3. When the correct position description is selected, click Start Position Request.
Position Justification Page – Creating a New Position

Note: When you create or clone a position description, you will be redirected to the Position Justification page. If a position was cloned, information from the cloned position description will appear in the fields below. Please be sure to update these fields accordingly. Please note that this is the only page that is different between the create/clone option and the modify option. Please navigate to page 17 to view the ‘modification’ required fields. To continue the create/clone process, please navigate to page 19 once you are finished filling out the Position Justification page.

1. Fill out the Justification of Need field 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.
Position Justification Page – *Modifying a Position*

Note: When you *modify* a position description, you will be redirected to the Position Justification page. Please note that the Position Justification page is the only page with differences between the create/clone option and the modify option as it has the additional Reason for Modification multiselect field. All other fields are the same.

1. Select your reason for modification. Multiple options may be selected. The selections made here help HR determine how to prioritize the many requests that come in.
1. Fill in the Justification of Need field with as much detail as possible. It’s helpful to include information regarding the specific modifications you will be making to the position description i.e. “We are updating the degree requirement from a Bachelor’s to a Masters”. “We are updating the Supervisor essential job duty entry to include additional responsibilities” etc. 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.
1. When you are finished filling out the Position Justification page, click Save & Continue to navigate to the Classification Selection page.
Note: The Classification Section page is optional. The classification selection will be finalized once the Human Resources Classification and Compensation team reviews the position description and determines the AP Framework classification at the workflow state ‘HR Position Review/Compensation Analysis’.

If you are modifying a position, a classification may already be selected.

1. When ready, click Save & Continue.
Note: The following slides will demonstrate what needs to be included on the Position Details page. All fields highlighted in red are required.

If this is a cloned or modified position description, many of these fields may already be filled in. Be sure to review the information to ensure it is correct and make any edits/updates as needed.

Note: For additional help/information regarding writing/creating position descriptions, please see the How to Write an Effective Position Description guide.

1. Many of the top fields on the Position Details page will not be editable. Scroll down to continue filling out the page. If this is a new position description, the Classification Title and Classification Code may be blank.
Position Details Page (cont.)

1. The position’s Working Title will appear in this field. You may make edits if needed.

Note: The Employee Information section will only appear on modified positions. If you modify an occupied position description, the current incumbent’s information will appear here.

2. Enter the position’s supervisor’s email address.

Note: A Position Number will only appear if you are modifying a position description.

3. Select the position’s employment category from the drop-down menu. If this is a modified or cloned position, a selection may already be made.

Note: These two fields will not be editable by you.

4. Enter the position’s salary or salary range.

5. Select a salary basis from the Salary Basis drop-down menu. Most AP positions are 12-month.
1. Fill in the Description of Work Unit field. Use the gray help text below this field if you need help crafting language. This information may be available on your department's website. For additional language about CSU, Fort Collins and employee benefits, please see the Sample Language Guide.

Note: If you modified or cloned a position, many of these fields may already be filled in.

2. Fill in the Position Summary field. This should be a brief summary of what the position entails.

Note: Please do not include job duties in the Position Summary field. Job duties will need to be entered on the Essential Job Duties page.

3. 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.

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

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

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.

Note: For help formatting any text field with bullets, please see the TMS Formatting Guide.

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.
1. Enter at least one Hiring Authority in the Hiring Authority field by typing in their name. You may list multiple Hiring Authorities. 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 the amount of hours in 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 Save & Continue.
Note: On the Essential Job Duties page you will be required to enter 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.

If this is a modified or cloned position, essential job duties may already be filled in. Make any updates if needed.

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 Save & Continue.

Note: If you need to remove an entry, check the Remove Entry? checkbox and click Save.
Note: On the Functional Attributes page 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 Save & Continue.
Note: On the Position Budget Information page you may click on the Add Budget Summary Entry button to fill in the Budget Account Number, Percentage Funded, and Budget Account Name fields. While not required, this page 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 ready, click Save & Continue.
Note: On the Background Check Requirement page 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.

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

Note: If a Motor Vehicle Record Check is required for the position, it 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.

2. When ready, click Save & Continue.
Note: On the Supervisory Position page you will need to locate and select the current supervisor for the position. If you are modifying a position or cloning a position, a supervisor may already be selected. If you need to replace a selected supervisor, follow the same instructions as selecting one for the first time.

1. The easiest way to select a supervisor is to search for their position description. To do so, click Filter these results.
Note: If you are unable to locate the supervisor’s position, ensure you are searching under the correct 'Position Type'. For example, if a Faculty member is supervising an Administrative Professional research position, ensure you switch the Position Type field to 'Faculty' before clicking Search.

1. In the pop-up window, search for the supervisor's position by either entering their position number, searching within a specific department or by entering their last name. When ready, click Search.
1. Once you've located the correct position, check the radio button next to the position then click Save.
Note: The Employee tab will only appear if you are modifying a position description. If you are modifying an occupied position description, the employee's name will appear on this page. If you wish to ‘Vacate’ the occupant, you may do so on this page, otherwise, move forward by clicking on the Position Documents tab.

Note: The selected supervisor should now appear below.
Note: On the Position Documents page, you will be required to upload 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, hover over Actions and select Upload New from the drop-down menu.
1. Click on the Choose File button.

2. Find the file you wish to upload and click Open.

3. Once the correct file has been selected, click Submit.
Note: A banner across the top of the page will let you know that your upload was successful.

1. When complete, click Save & Continue to progress to the Summary page.

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

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. When you are ready to move the request forward, click Submit.

Note: While on the Summary page you may review and edit any of the previous pages prior to moving it forward to the Hiring Authority.

Note: Submit to Initiator (move to Initiator) allows you to delegate the position description request to another individual. Be sure to select the correct 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 make the changes themselves by clicking the Edit button.

1. Once the Hiring Authority has reviewed the position and is ready to move it forward 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: The Classification and Compensation unit in Human Resources will review the position, classify it and perform a compensation analysis prior to moving it forward in workflow.

1. Once Human Resources has reviewed and classified the position and is ready to move it forward 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).
Review and Approval – Signature Authority

Note: The Signature Authority will review the position. Please know that since the position has already gone through classification and compensation, the Signature Authority will not have editing ability. If there are any needed changes, the Signature Authority must send the position back to the Initiator or Hiring Authority.

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 (Records). When ready to move it forward, click Submit.
Note: The Records unit within Human Resources will review the position. If this is a new position description, Records will assign it an unique position number. If this is a modification AND the classification changed, Records will re-version the position number (ex. .0002 → .0003). Position numbers will only re-version in two instances: if the classification changed or if the position transferred departments/units. If the version number changed due to a change in classification, an AAR may be required. Please see the When is an AAR Required guide for additional help.

1. Once Records has reviewed the position, they will move it into it's final workflow state, Position Approved/Initiate Posting.
Hello Hiring Authority,

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

**Please forward this email to your initiator so that they may complete any of the TMS actions listed below.**

If you are planning to conduct a search for this position, you may proceed by creating a posting from this position description.

For further instructions regarding the Administrative Professional posting process, please review the training guide at this link: [https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and/Edit-an-Admin-Pro-Job-Posting.pdf](https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and/Edit-an-Admin-Pro-Job-Posting.pdf)

For further help with creating a Faculty posting, please review the training guide at this link: [https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-a-Faculty-Job-Posting.pdf](https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-a-Faculty-Job-Posting.pdf)

If you are planning to hire out of a general open pool, please create a secondary open pool posting using this approved position description. Please see our Open Pool Guide, Step 3 located here: [https://oeo.colostate.edu/media/sites/144/2017/05/How-to-Create-and-Utilize-Open-Pools-Step-3.pdf](https://oeo.colostate.edu/media/sites/144/2017/05/How-to-Create-and-Utilize-Open-Pools-Step-3.pdf)

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 Administrative Professional AAR posting, please review the training guide at this link: [https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-an-Admin-Pro-Aalt-Appt-Request.pdf](https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-an-Admin-Pro-Aalt-Appt-Request.pdf)

For further instructions for creating a Faculty AAR posting, please review the training guide at this link: [https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-a-Faculty-Aalt-Appt-Request.pdf](https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-a-Faculty-Aalt-Appt-Request.pdf)

*If the position modification resulted in a new position version number or a new classification and you are unsure if an Alternative Appointment Request (AAR) is needed, please contact OEO at oeo@colostate.edu or 491-5836 or review the When is an AAR Required. guide.*

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

Position #: 012341-0001
Classification: Prof/Indiv Contrib II
Job Title: Academic Success Coordinator
Department: College of TMS Training
Status: Position Approved/Initiate Posting

Thank you,
Human Resources
Colorado State University

Note: The Hiring Authority will receive an email notification alerting them that the position has been approved.
Next Steps

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 submitted to update duties and/or title in relation to a promotion and **the classification changed resulting in a position re-version**, an AAR will be required to complete **the process**. For detailed directions, please see our [AP AAR guide](#).

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](#).

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](#).
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