



## Procedures: Position Management for Staff Positions

### Introduction

In order to have a correct understanding of the true budget, it is necessary to have an accurate inventory of which staff positions are filled, which are waiting to be filled and which are no longer being used. A surplus of positions that are not expected to be filled in the near future may cause the budget to look as if the department/ university payroll is under budget.

To improve the accuracy of the NU position inventory, a Budgeted Salary field has been added to the Position Data table in HRIS.

The most important thing to remember about Position Management is:

- **Every vacant position must be filled or inactivated.**

This document will discuss the following procedures for using the Budgeted Salary field when managing staff positions in HRIS:

- Creating new staff positions
- Modifying existing staff positions
- Inactivating unused staff positions
- Reactivating staff positions to be filled

## New Positions

### Creating a new staff position

A new position is created in HRIS when a school or department is adding headcount (e.g. you have two project coordinators and need one more) or creating a new job function that did not previously exist (e.g. your department has received a large grant and you will add management responsibilities to one technician's duties).

The Position Management procedures require Payroll to do two things when a vacant position is filled:

- The position's Budgeted Salary field will be updated in HRIS with the new incumbent's actual salary. This information comes from the offer letter sent by HR Staffing and Consulting.
- The Budgeted Position button on the same page will be clicked on. At this point, the position information can be seen in Cognos. Additionally,
- For centrally funded positions (not paid for by grants), the department/school administrator will then notify the Budget Office and they will allocate funds to the CUFS accounts.

**NOTE: If you hire internally, the incumbent's old position must be inactivated or filled with a new person.**

## Modified Positions

### Modifying an existing staff position

Although positions can be modified for several reasons, the Position Management procedures are only concerned when a position is altered so much that it requires a new position to be opened. When an employee's job functions (key areas of responsibility) change or are added to, an audit might reveal that it is better to open a new position than to modify an existing one. Even if the current incumbent is expected to fill the 'new' position, the change in job function requires the job to be posted and open to other candidates.

After the modified position has been filled, one of three things should happen:

- If the position has been filled with an external candidate, follow the procedure for new positions.
- If the position was filled with someone from your own department, follow the Position Management procedure for a new position as well as the procedure for inactivating a position.
- If the position is filled by someone internally from another department, the department that hires them must follow the procedures for new positions and the incumbent's former department must inactivate or fill the position that person has vacated.

**Basically, if you hire internally, the incumbent's old position must be inactivated or filled with a new person.**

## Inactive Positions

### Inactivating a vacant staff position

Before the Position Management procedures were created, there was no procedure for processing inactive positions. Because it is so important to inactive positions that have not been posted or will not be filled for six months or more, a simple process has been put in place.

You can inactivate a position three ways:

- The department/school administrator can send an email to Payroll requesting that a specific position be inactivated. The email should include the position number and the effective date of inactivation.
- Through an HR staffing consultant.
- By using the Position form.

Payroll will enter the reactivated position information into HRIS.

Positions may be inactivated:

- As part of the budget planning process each year
- Immediately after a position has been vacated and it has been determined that their position does not need to be backfilled
- When an employee is hired/promoted into a new position in your department and their former position does not need to be filled immediately
- Any time department/school administrators have identified unnecessary positions. A Cognos report listing inactive positions is available to assist with this task. It can be run at any time, but should be reviewed at least once a year.

**Remember, if someone leaves a position in your area, their position must be inactivated or filled with a new person.**

## Reactivated Positions

### **Reactivating a staff position**

Before the Position Management procedures were created, there was no procedure for processing reactivated positions. Because it is sometimes more efficient to reactivate an old, vacant position that is inactive than to create a new one, a simple process has been put in place.

An email requesting that a specific position be reactivated should be sent to Payroll by the department/school administrator. Be sure to include the position number and the effective date of reactivation. Or, you can reactivate a position through your HR staffing consultant. Payroll will enter the reactivated position information into HRIS.

After the reactivated position has been filled, one of three things should happen:

- If the position has been filled with an external candidate, follow the procedure for new positions.
- If the position was filled with someone from your own department, follow the Position Management procedure for a new position as well as the procedure for inactivating a position.
- If the position is filled by someone from another department, the department that hires them must follow the procedures for new positions and the incumbent's former department must inactivate or fill the position that person has vacated.

**Don't forget, if you eventually fill the position internally, the incumbent's old position must be inactivated or filled with a new person.**