CUBS Online Hiring Application

Training Documentation

Role: ORIGINATOR
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**Hiring Phase II Overview:** Hiring Phase II (HPII) was a joint effort between the Office of Human Resources (CUOHR) and the Clemson Computing and Information Technology (CCIT) area. The goal of HPII was to automate the approval process for recruiting a position as well as the hiring of a candidate. HPII also includes the automation of these combined processes known as the Waiver process.

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Hiring Phase II – ORIGINATOR Role

Training Documentation

ORIGINATOR Role Overview: Add/update/view access for PreHire (Regular and Temp Positions), Waiver and Hire Candidate processes. The Originator will have access to add a new transaction for any of the processes listed. They will be able to review/update/approve changes to online position requirements and position description pages completed by PD Completer.

Prehire Approval Process (FTE Position – Create New)

The Prehire Approval Process is the approval process for recruiting for a vacant position. The request can be for a brand new position or for a refill. It includes FTE as well as Temporary Positions (Regular Temporary, Temporary Grant, and Time Limited Project).

Step 1: Navigation

Go to Workforce Administration, click on CU Reports/Processes, and choose the application by clicking on Recruit/Hire.

This brings up the Search dialog. You will use this to search for existing transactions you have already begun or you can choose to start a new transaction.

For all new transactions, you will click on Add a New Value.
Once you click on Add a New Value, another dialog will appear. Click on the Add button to proceed.

This will bring up a navigation page for you to choose which type of transaction you will be completing. For a Prehire Approval Request, you will click on PreHire Approval and then click Next.

The other transaction types will be covered further on in this training documentation.
Now you will choose the type of position you will be requesting. Your options are **FTE Position** or **Temporary Position**.

Choosing a position type will open up another box with additional options.

Choose **Create New Position** and click the **Next** button.
Step 2: Completing the Position Summary Information

When creating a new position, all information is required and must be entered. Since it is a brand new position, nothing will populate in the Current Position Information box.

Fields of Information (Requested Position Information):

**Fiscal Year** – Choose from the current Fiscal Year or the upcoming Fiscal Year (i.e. If the current date is 4/23/2010, the choices available are FY2009-2010 or FY2010-2011). This field determines which Fringe rates are populated in the Salary Information box. Please choose the Fiscal Year based on the Projected Hire Date. Fringe rates are only published for the current Fiscal Year and tentatively for the upcoming Fiscal Year so farther out Fiscal Years are not available. If you plan on hiring farther out than the Fiscal Years available, please choose the latest available Fiscal Year but realize the Fringe Rate will not be accurate based on when the position will actually be filled.
Department – Please type or choose from the lookup the department number for the position. You can only choose department numbers that you have security for.

Job Code – Please type or choose from the lookup the requested Job Code for the position.

Business Title – Please type in a Business Title or leave the State Title that has pre-populated.

Reports To – Please enter the position number of the supervisor the position will be reporting to.

FT/PT – Please choose whether the position will be Full Time, Part Time, or On Demand.

Hours – Please enter the hours the position will be working. Note: 37.5 is full time for Salaried employees and 40.0 is full time for Hourly employees.

FTE – Please enter the percent time the position will be working. Full time is 1.00 FTE for a 12-month employee and 0.75 FTE for a 9-month employee. Part time FTE can be calculated by dividing the hours by 40 for a 12-month employee. If a 9-month employee is going to be part-time, divide the hours by 40, then take that number and multiply it by 0.75 to get the part-time 9-month FTE.

FLSA – Please indicate the FLSA you think the position will be. Additional explanation for FLSA classification can be found by clicking on the Dept of Labor link.

Office Address – Please enter the mail address for the position.

Office Phone – Please enter the phone number for the position.

Projected Hire Date – Please enter the estimated date the department plans on hiring a candidate for the position. This date is an estimate and is not binding for either the department or CUOHR.
Fields of Information (Salary & Account Information):

**Requested Salary** – Please enter the estimated salary for the position. This is not a binding number and is an estimate.

**Previous Salary** – Even though this is a Create New, sometimes situations arise where a department is receiving a new position *number* for an already established *job*. If this is one of those situations, please indicate what the salary was for that job.

**Previous Incumbent** - Even though this is a Create New, sometimes situations arise where a department is receiving a new position *number* for an already established *job*. If this is one of those situations, please indicate who the incumbent was for that job.

**Fringe Type** – Please choose the fringe type for the position. The choices are as follows:

- **12 Month FT Employee** – All 12-month employees working 20 hours or more. Employees in this category have the STA or FED benefits participation code.
- **9 Month Employee** – All 9-month employees. Employees in this category have the 9MO benefits participation code.
- **Temp/Part Time FTE Employee** – All 12-month employees working 19.9 hours or less. Employees in this category have the TLR benefits participation code.

**Funding Justification** – Please enter detailed and specific information on the source of funding for this position. Since this is a new position, please indicate source of new funding for salary and fringe benefits (i.e. PSA, E&G, Aux, Grant and Contract, Other).

**Earnings Distribution Type** – Please choose either “By Amount” or “By Percent.”

**Earnings Code** – This code defaults in as “REG – Regular Earnings” but is updateable. By clicking on the magnifying glass, you will pull up all available values. These are the same values currently available in CUBS.

**Compensation Rate/Distrb %** - Please enter the Compensation Rate if you chose “By Amount” on the Earnings Distribution Type or enter the Distrb % if you chose “By Percent.”

**Edit Account Code** – Opens the Account Codes page. Enter the information for what account the position will be paid from.

![Account Codes](image)
**Additional Approvers:**

This dropdown box contains upper management approvers who are associated with your area and the department entered for the position. The people typically in the box are Department Chairs, Deans, Vice Presidents, Division Heads, etc. You may enter multiple approvers by clicking the “+” and inserting a row.

Once you have chosen an upper management approver, you must enter a number into the “Approval Order” box. This box indicates in what order you want the approvers to receive the request and approve it. If only 1 approver is selected, put them as order “1”.

**Note:** If you are **NOT** a PSA department, please do not choose the VP for PSA here. Please use the check box as described on page 10.

Two approvers can also be entered with the same Approval Order number. When this happens, both approvers get the request at the same time and as soon as one approves the transaction, it is moved on to the next approver in the sequence – both approvers are not required to click “Approve.”
Example:

Charles Widmore and Daniel Faraday will receive the transaction at the same time. If Charles Widmore approves the transaction, it will send the transaction along to Eloise Hawking. Daniel Faraday’s approval is not required if Charles Widmore approves it. Conversely, if Daniel Faraday approves it, it will continue on to Eloise Hawking without Charles Widmore’s approval.

Fields of Information (Position Justification & Provost/President/PSA Funding Approval):

*Position Justification* – Specific and detailed justification for the position. Please include specific reasons for why the position is needed. For faculty positions, include expected workload and courses to be taught.

*Provost Approval?* – Click this check box if the request must be approved by the Provost. This includes creating a new FTE position in an Academic Area.
President Approval? – Click this check box if the request must be approved by the President. This includes creating a new FTE position.

PSA Funding Approval? – Click this check box if the request includes funding from PSA and the position is NOT in a PSA department (if the position is in a PSA department, please choose the VP for PSA from the “Other Approvers” box as instructed on page 8). All positions utilizing PSA funding must be approved by the VP for PSA. Do NOT check this box if the VP for PSA has been chosen in the Other Approvers box. This will cause the VP to receive the transaction twice.

Save for Later – If you do not wish to submit the transaction at this time and would like to save it and come back to it later, click the “Save for Later” button. You do not need to click this for each tab or before navigating to the next tab.

Submit – Click this if you are only going to complete the Position Summary and get preliminary funding approval before completing the Position Description portion of the request. If you click this before the PD is completed, the transaction will come back to you after the Funding Approver approves the transaction.

Step 3: Completing the Other Funding Information (Optional)

The Other Funding tab is most often used by Academic Areas and areas using PSA funding (also known as the “Commitment Form”) but is open to use by other areas. This tab is optional based on your current business processes. However, if you begin entering information on this tab, you must complete the tab and enter all information. If you begin the tab in error, delete all entered information in order to continue.
**Fields of Information (Other Funding Information):**

*Other Funding Information* – Choose from “Faculty Salary”, “Fringe (if not E&G)”, “Moving Expenses”, “Other 1”, “Other 2”, “Search Costs”, “Staff Salary”, “Start-up”, “Summer Salary”, or “Travel.” Multiple funding types can be added by clicking on the “+”.

*Funding Frequency* – Choose from “New”, “One Time”, or “Recurring.”

*Funding Source* – Choose from “College”, “Department”, “Other”, “PSA”, or “Provost.” The option “Other” should be reserved for departments outside of your budget center. Only one “Other” can be entered. When you enter “Other,” a lookup box will appear for you to indicate what the other department is.

*Department* – Only available when “Other” is chosen as a funding source. Please type or choose from the lookup which department will be contributing funds to this position.

*Amount* – Please enter the amount associated with the funding type.

*Recalculate Totals* – Click to calculate all the totals you have entered. The totals will wipe out if you insert any rows in the Other Funding Information box so wait until you have entered all rows before clicking the “Recalculate Totals” button.

**Fields of Information (Explanation of Funding/Account Information):**

*Explanation of Funding* – Any information entered in the “Funding Justification” field on the Position Summary tab will appear here. If additional justification is needed for the funding added on the Other Funding tab, please add it here.
Account Information – Please enter the account information associated with the money entered on the Other Funding tab ONLY. If you are using money from another department in another budget center, please contact that area outside of CUBS to get the correct account code.

Fields of Information (Other Funding Approvers):

Other Funding Approvers – Any upper management approvers you entered on the Position Summary Tab will appear here as well. If you have chosen “Other” for the Funding Source and entered a department, the upper management approvers for that department are now available to be chosen in the drop down box. Please insert a row and add any additional approvers as needed.

PSA Funding Approval – This is not updateable and is for use by the PSA Funding Approver.

Save for Later – If you do not wish to submit the transaction at this time and would like to save it and come back to it later, click the “Save for Later” button. You do not need to click this for each tab or before navigating to the next tab.

Submit – Click this if you are only going to complete part of the request and get preliminary funding approval before completing the Position Description portion of the request. If you click this before the PD is completed, the transaction will come back to you after the Funding Approver approves the transaction.
Step 4: Completing Position Requirements

The Originator has 3 options when it comes to the completion of the Position Requirements. The Originator can:

1. Fully complete the Position Requirements. The request will continue through the approval process once submitted without returning to the Originator to enter any additional information. **The request must be marked as “Data Complete” on the Position Descriptions Tab.**

2. Not complete the Position Requirements at this time and get approval from their Funding approver before completing. The request will come back to the Originator once it has been approved by the designated funding approver and the Position Requirements can be completed at that time. **The request is marked as “Data Not Complete” by default. No action is necessary for this option.**

3. Not complete the Position Requirements but instead have a departmental employee complete this information. **The Request must be marked as “Data Not Complete; PD to be completed by Dept” on the Position Descriptions Tab.**

Fields of Information (Position Location Information):

```
<table>
<thead>
<tr>
<th>Position Summary</th>
<th>Other Funding</th>
<th>Posn Requirements</th>
<th>Posn Descriptions</th>
<th>Funding/FTE Approval</th>
</tr>
</thead>
</table>
```

**Transaction Number:** New  
**Department:** 5337  
**Position Number:**

### Position Location Information

#### Current Information

- **Division:**  
- **Section:**  
- **County:**  
- **Unit:**  
- **City:**

#### Requested Information

- **Division:** Financial Affairs  
- **Section:**  
- **County:**  
- **Unit:**  
- **City:**

**Division** – Will default in based on the requested department entered on the Position Summary Tab.
Section – Please enter the section the position will be in. An example of a section would be “Human Resources.”

Unit – Not all areas use the unit field. This field is not required and if your area does not use it please leave it blank. An example of a unit would be “Classification & Compensation.”

County – Please type or click the look up and choose the county code for the position’s location.

City – Please type the city the position will be located in.

Fields of Information (Job Requirements):

Click to view all defaulted rows.

Click to add a row.
**Additional Requirements** – Three requirements fields default in and are required. They are as follows:

- **Minimum Requirements** – For Classified positions, the State Minimum Requirements are pre-populated based on the requested Job Code and are not updateable. For Unclassified positions, no Minimum Requirements default in and this field is updateable.
- **Knowledge, Skills, and Abilities** – This field is required and must be completed.
- **Guidelines and Supervision** – This field is required and must be completed.

Other Position Requirements may be added. Click on the “+” sign. This will bring up a blank row.

Clicking on the magnifying glass will bring up the available codes to choose from:

- **Additional Comments** – Any additional comments about the position. This could include information about shift differentials, rotating weekends, travel, etc.
- **Physical Requirements** – Include any physical requirements associated with the job. This includes any requirements for heavy lifting, duration of physical activity, etc.
- **Preferred in Addition to Minimum Requirements** – Include any additional education or experience requirements that are preferred for a candidate working in this position.

Do not choose these since they are already defaulted in – you will receive an error.
Step 5: Completing Position Descriptions

The Originator has the same 3 options for the Position Descriptions Tab as they do for the Position Requirements Tab:

1. Fully complete the Position Descriptions. The request will continue through the approval process once submitted without returning to the Originator to enter any additional information. The request must be marked as “Data Complete” on the Position Descriptions Tab.
2. Not complete the Position Descriptions at this time and get approval from their Funding approver before completing. The request will come back to the Originator once it has been approved by the designated funding approver and the Position Descriptions can be completed at that time. The request is marked as “Data Not Complete” by default. No action is necessary for this option.
3. Not complete the Position Descriptions but instead have a departmental employee complete this information. The Request must be marked as “Data Not Complete; PD to be completed by Dept” on the Position Descriptions Tab.

The referenced area can be found here on the Position Descriptions Tab:

<table>
<thead>
<tr>
<th>Position Summary</th>
<th>Other Funding</th>
<th>Position Requirements</th>
<th>Position Descriptions</th>
<th>Funding/FTE Approval</th>
<th>Upper Mgmt Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transactional Number:</strong> New</td>
<td>Department:</td>
<td>Position Number:</td>
<td>Data Entered is Complete:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PD to be Completed by Dept</td>
<td></td>
</tr>
</tbody>
</table>

Click if ALL information on the request has been completed. This includes the Position Summary Tab, Position Requirements, and Position Descriptions Tab. By clicking this box, you are acknowledging that all information for the request is present and the request does not need to come back to you for additional data input.

Click if you have not completed all the information for the request and would like Funding approval before completing the data entry. The request will come back to you after approval by your designated Funding approver. At that time you must complete all information on the request. Note: “No” is the default value.

Click if you have not completed the Position Requirements or Descriptions and would like a departmental person to complete the information. The request will return to you for verification and/or correction once the departmental person has completed the PD information. Note: “Data Entered is Complete” will be set to “No” for this option.
Fields of Information (Job Functions):

Add Organizational Chart – You may attach an Org Chart. (.doc, .docx, .pdf, .ppt, or .pptx)

Code – Click on the magnifying glass to choose whether you’re entering a Job Function or a Job Purpose.

Job Category (Job Function) – Enter a Job Category. This should be a broad label for the function description. An example would be “Fiscal” or “Counseling”.

Description – Describe the job function and duties.

E/M – Choose Essential or Marginal.

% - Enter the percent time associated with this job function. Percentages must be at least 5% and no more than 95%. All percentages must add up to 100%.
Fields of Information (Job Purpose):

**Description** – Enter the Job Purpose. There can be only one job purpose.

Fields of Information (Supervisory Responsibilities/Additional Comments):

**THE LANGUAGE IN THIS DOCUMENT DOES NOT CREATE AN EMPLOYMENT CONTRACT BETWEEN THE EMPLOYEE AND THE AGENCY. THIS DOCUMENT DOES NOT CREATE ANY CONTRACTUAL RIGHTS OR ENTITLEMENTS. THE AGENCY RESERVES THE RIGHT TO REVISE THE CONTENT OF THIS DOCUMENT, IN WHOLE OR IN PART, NO PROMISES OR ASSURANCES, WHETHER WRITTEN OR ORAL, WHICH ARE CONTRARY TO OR INCONSISTENT WITH THE TERMS OF THIS PARAGRAPH CREATE ANY CONTRACT OF EMPLOYMENT.**
**Overall Number Supervised** – Enter the total number of employees that are under this position. This includes positions supervised by employees that report directly to this position.

Example – Ben and Ilana report to Richard. Richard reports to Jacob. The overall number supervised for Jacob is 3: Richard, Ben, and Ilana.

**State Title** – Type or choose from the look up the State Title(s) of the position(s) that report to your requested position.

**Number of Employees Directly Supervised** – Type the number of employees in the selected State Title that report directly to the requested position.

**Additional Comments** – Enter any additional comments as needed. This field is not required.

**Save for Later** – If you do not wish to submit the transaction at this time and would like to save it and come back to it later, click the “Save for Later” button.

**Submit** – This is the end of the transaction and there is no additional information that needs to be submitted. You may click “Submit” to send the transaction on for approval. Write down the generated Transaction number for future reference.

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**Step 6: Tracking Your Transaction’s Progress**

You can view your transaction to see where it is in the approval process by clicking on the Approval Status Tab:

Each transaction box will give you the status of that particular approver. If it is pending an approver, that approver has received the transaction but has not approved/denied it.
Approval Boxes

Each box in the workflow represents an approver. When an approver approves a transaction, the box changes from blue to green and is marked “Approved” along with the date and time stamp of when it was approved. If the approver denies the transaction, the box turns red, is marked as “Denied”, and the transaction stops. Any approvers in the workflow after the approver who denied the transaction will not get the transaction. If a transaction is denied, the Originator will receive an E-Mail notification letting them know the transaction was denied.

Each approval box has a link to the name of the approver. Some boxes say “Multiple Approvers” – if you click on the link, it will pull up a dialog box telling you what approvers are in this approval box. For boxes with multiple approvers, only 1 approval is necessary from any of the individuals listed in order to continue the transaction.

Transaction Status

There are 3 transaction statuses: Pending, Denied, and Approved. A transaction in Pending status has not gone through all the approvers and is still waiting approvals. A transaction in
Denied status has been denied by an approver. A transaction in Approved status has gone through all approvers and has received final approval. Both Denied and Approved transactions do not need any further action done to them.

E-Mail Notification and Worklist

When a transaction reaches an approver and is pending them, they will receive an E-Mail notification letting them know a transaction is awaiting their approval and the transaction will appear on their worklist.

Clicking on the link in either the worklist or the e-mail will take the approver to the transaction. Once the transaction is no longer pending the approver, it will disappear from their worklist.

Approver Entered Information
Some approvers (Funding Approver, FTE Approver, and C&C Analyst) enter information when approving a transaction. You can go to their respective approval tabs to see what information they have entered on their approval.

**Funding/FTE Approval Tab**

The Funding Approver will enter an approved salary range as well as any salary or fringe information for previous incumbents associated with the requested job. The FTE Approver will assign the CUBS position number for “Create New” transactions and will provide the State FTE information including the State Position Number, Class, and Slot of that CUBS position number.

If the Funding or FTE Approver were to deny a transaction, their comments on the reason for the deny can be found on this tab.

**Upper Management Approval Tab**

Upper Management includes Department Chairs, Deans, Directors, Division Heads, and Vice Presidents. Their tab includes a quick summary of the pertinent information about the position.
they can use for approval without getting too much detail. Upper Management also has “On Hold” functionality. If an Upper Management Approver clicks their “On Hold” button, the Originator will receive an e-mail informing them their request has been put on hold. This functionality is for requests that need more information, are pending action outside of the CUBS system, or the approver doesn’t anticipate approving right away. If a transaction is on hold, the status will remain “Pending.” If you need explanation for why a transaction was put on hold, please contact the approver who put the transaction on hold or their office. You can also check the Upper Management Approval tab to see when and by whom the transaction was put on hold.

All Upper Managers, the Provost, and the President will use this tab. They all have “On Hold” functionality.
Class & Comp Approval Tab

The Classification & Compensation Unit of CUOHR will have the final approval. All approved information will be entered on their approval tab.

Once the position has received final approval, you can click on “Generate Report” to generate a printable PD for the position.

If the Job Code requested is Non-Delegated, the transaction will need to be approved by State OHR. Class & Comp will still have the final approval, but additional approval information will be entered into a State OHR approval box on the tab.
Once Class & Comp has given the final approval, the Originator will receive an e-mail notifying them the transaction has been approved.

With receipt of the final approval, the department can now create the Requisition to post the position.
Prehire Approval Process (FTE – Refill)

Step 1: Navigation

Go to Workforce Administration, click on CU Reports/Processes, and choose the application by clicking on Recruit/Hire.

This brings up the Search dialog. You will use this to search for existing transactions you have already begun or you can choose to start a new transaction.

For all new transactions, you will click on Add a New Value.

Once you click on Add a New Value, another dialog will appear. Click on the Add button to proceed.
This will bring up a navigation page for you to choose which type of transaction you will be completing. For a Prehire Approval Request, you will click on PreHire Approval and then click Next.

Choose FTE Position and then Refill Vacancy. This will open a look-up box. You can type in the position (make sure to include the leading “0000” of the position) you wish to refill or click on the magnifying glass to search for it. Only positions you have security access for will appear.
Part 2: Completing the Position Summary Information

Completing the Position Summary Information for the FTE Refill is very similar to completing it for the FTE Create New transaction but with a few differences.

Since you are refilling an established position, there is now information populating in the “Current Position Information” box. If you are not making any changes to the position, you do not have to enter anything into the “Requested Position Information” box. However, if you are making changes, please make those changes and check the appropriate check box.

If you will be making any changes to the Position Requirements or Descriptions, please make sure to check **Update PD**.
The following changes need to have the listed check box checked.

<table>
<thead>
<tr>
<th>Change</th>
<th>Check Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Transfer</td>
</tr>
<tr>
<td>Job Code</td>
<td>Reclass (if changing to Classified)</td>
</tr>
<tr>
<td></td>
<td>Title Change (if changing to Unclassified)</td>
</tr>
<tr>
<td>Business Title</td>
<td>Update PD</td>
</tr>
<tr>
<td>Reports To</td>
<td>Supervisor Chg</td>
</tr>
<tr>
<td>FT/PT</td>
<td>FTE Chg</td>
</tr>
<tr>
<td>Hours</td>
<td>FTE Chg</td>
</tr>
<tr>
<td>FLSA</td>
<td>Update PD</td>
</tr>
<tr>
<td>Office Address</td>
<td>Update PD</td>
</tr>
<tr>
<td>Office Phone</td>
<td>Update PD</td>
</tr>
</tbody>
</table>

The remaining fields on the Position Summary Tab are to be completed in the same way they were for a Prehire FTE‐Create New.

**Step 3: Completing the Other Funding Information (Optional)**

Please refer to the directions for completing the Other Funding Information on page 10 under Prehire Approval (FTE‐Create New).

**Step 4: Completing the Position Requirements**

Just like the Position Summary Tab, information previously entered for the position is now populating in *(Note: With the initial roll-out of this application, no previous information has been stored so it will not be pre-populating until positions have run through the application at least once.)*. If you are not making any changes to the position requirements, you do not have to enter any information.

If there are changes that need to be made but a departmental person will be entering it, leave it blank and make sure to check “PD to be completed by department” on the Position Descriptions tab.
If you are not changing the previous information for the position, do not enter anything in. If you are, enter the new information in the bottom box.
Step 5: Completing the Position Descriptions

Just like the Position Summary and Position Requirements Tabs, information previously entered for the position is now populating in (Note: With the initial roll-out of this application, no previous information has been stored so it will not be pre-populating until positions have run through the application at least once.). If you are not making any changes to the position requirements, you do not have to enter any information into the bottom boxes.

If there are changes that need to be made but a departmental person will be entering it, leave it blank and make sure to check “PD to be completed by department”.

If you are not changing the previous information for the position, do not enter anything in. If you are, enter the new information in the bottom box.

An action needs to be chosen for each Job Function.
Job Functions – an action needs to be chosen for each Job Function whether there is a change or not. The actions are as follows:

- **Delete** – Choose this action if the entire Job Function needs to be removed.
- **No Changes** – Choose this action if the entire Job Function will remain the same.
- **Update** – Choose this action if you are making any changes to the current Job Function.

If you choose **Delete** or **No Changes** you do not need to enter anything into the bottom box. However, if you choose **Update**, you must enter your changes into the bottom box. This includes the corresponding **Essential/Marginal** and **Percent (%)**.

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**Additional Comments**

**Employee should be able to work in a fast-paced, highly stressful, and professional environment where deadlines must be met. Confidentiality is a requirement. Some overnight and light travel may be required.**

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**Step 6: Tracking Your Transaction’s Progress**

Please refer to the instructions on page 19 under Prehire FTE-Create New.
Step 1: Navigation

Choose temporary position and then choose Regular Temporary Position in the drop down box. Create New Position will automatically be selected and it will be display only because you cannot do a refill on a Regular Temporary Position.
Step 2: Completing the Position Summary Information

Completing the Position Summary Information for a Regular Temporary position is very similar to completing it for a FTE-Create New. Since you can’t do refills on Regular Temporary positions, there will never be any current information to pull in so you must complete all fields.

Since you cannot refill a Regular Temporary Position, there will never be any information populated here.

# Positions – List the number of positions you need. Must be more than 0.

# Months – Pick the number of months you want the position set up for. Choose 1-12.

Candidate – If you are not posting this position and already have a Candidate selected, please put their name here.
Previous Salary/Incumbent – If this job was being performed by an incumbent in a different Regular Temporary Position number, please indicate their salary and name. (i.e. This request is to request a new Regular Temporary Position to be set up since the previous one has expired.)

Fringe – The fringe rate is automatically set at the rate for Regular Temporary Positions and will calculate based on the requested salary.

Additional Approvers – If your area requires approval by your Funding Approver, they will show up in this drop down. The Funding Approver is not automatically entered into the workflow for temporary positions and must be chosen here.

Step 3: Completing the Other Funding Information (Optional)

Please refer to the directions for completing the Other Funding Information on page 10 under Prehire Approval (FTE-Create New).

Step 4: Completing the Position Requirements

Only the Minimum Requirements are required for Temporary Positions. These default in. All other information must be added by inserting a row.
Since only **Minimum Requirements (MRQ)** default in, you may choose all but Minimum Requirements in the lookup box.

**Part 5: Completing the Position Descriptions**

The Position Descriptions are to be completed the same way as for a FTE-Create New (Page 16). The only difference is the percentages. A Temporary position is allowed to have only 1 Job Function put at 100% (FTE has to have a minimum of 5% and no more than 95%). The maximum percentage for a Temporary Position Job Function is **100%**.

**Step 6: Tracking Your Transaction’s Progress**

Please refer to the instructions on page 19 under Prehire FTE-Create New.
PreHire Approval Process (TGP/TLPP – Create New)

Step 1: Navigation

Choose Temporary Grant or Time Limited position from the drop down.

Step 2: Completing the Position Summary Information

Completing the Position Summary Information for a Temporary Grant or Time Limited Project position is the same as for a Regular Temporary Position with one addition. For Time Limited Project Positions, the following box of information needs to be completed:

<table>
<thead>
<tr>
<th>Time Limited Project Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this Time Limited Project Position(s) associated with a contract?</td>
</tr>
<tr>
<td>Add Attachment</td>
</tr>
<tr>
<td>If YES, please attach a copy of the contract.</td>
</tr>
<tr>
<td>If NO, please complete the following contract information and attach a justification from the Dean or VP.</td>
</tr>
<tr>
<td>Begin Date:</td>
</tr>
<tr>
<td>(3 year maximum if not associated with a contract)</td>
</tr>
<tr>
<td>Project Ctrl #:</td>
</tr>
<tr>
<td>Principal Proj Contact (PPC):</td>
</tr>
<tr>
<td>Email Address</td>
</tr>
</tbody>
</table>
Is this Time Limited Project Position(s) associated with a contract? Y or N – If your requested TLP position(s) is associated with a contract that has been awarded to the University, click Yes. If it is associated with an internal project that does not have a contract, click No.

Add Attachment – This is required. If the position(s) is associated with a contract, scan the contract and attach it here. If you do not have a copy of the contract, please attach a brief description of the project along with a justification and acknowledgment from the Dean or Vice President of your area. If it is not associated with a contract, a justification from the Dean or Vice President must be attached.

Begin Date – The date the project begins. Only to be completed if NOT associated with a contract.

End Date – The date the project is expected to end. This cannot be more than 3 years past the entered Begin Date. Only to be completed if NOT associated with a contract.

Project Cntrl # - If you have set up other positions under this project, you will have been assigned a Project Control Number. Please enter that number here. If this is a new project, leave this blank.

Principal Project Contact (PPC) – This is the person who is responsible for the project. This is the equivalent of a PI on a grant. Please enter their name here. They are the main contact for the project.

Email Address – Enter the email address of the PPC.

Step 3: Completing the Other Funding Information (Optional)

Please refer to the directions for completing the Other Funding Information on page 10 under Prehire Approval (FTE – Create New).

Step 4: Completing the Position Requirements

Please refer to the directions for completing the Position Requirements on page 13 and 35 under Prehire Approval (FTE – Create New) and Prehire Approval (Regular Temporary – Create New) respectively.
Step 5: Completing the Position Descriptions

Please refer to the directions for completing the Position Requirements on page 16 and 36 under Prehire Approval (FTE – Create New) and Prehire Approval (Regular Temporary – Create New) respectively.

Step 6: Tracking Your Transaction’s Progress

Please refer to the instructions on page 19 under Prehire FTE-CREATE NEW.

PreHire Approval Process (TGP/TLPP – Refill)

Step 1: Navigation

Choose Temporary Grant or Time Limited position from the drop down.

Type in your position or search for it by clicking on the magnifying glass.
Step 2: Completing the Position Summary Information

Completing the Position Summary Information for a TGP or TLP position refill is very similar to completing one for a FTE position. The current information for the position populates on the left and you are only required to enter the information that you are changing. A check box must be checked for each check. The list of corresponding changes and check boxes can be found on Page 29. Additional instruction can be found on Page 28 and 37.

Step 3: Completing the Other Funding Information (Optional)

Please refer to the directions for completing the Other Funding Information on page 10 under Prehire Approval (FTE-Create New).

Step 4: Completing the Position Requirements
Please refer to the directions for completing the Position Requirements on page 13 and 35 under Prehire Approval (FTE – Create New) and Prehire Approval (Regular Temporary – Create New) respectively. Note: Unlike the PreHire Approval (FTE – Refill), previously entered information is not stored for Temporary Positions and must be re-entered for refill requests.

**Step 5: Completing the Position Descriptions**

Please refer to the directions for completing the Position Requirements on page 16 and 36 under Prehire Approval (FTE – Create New) and Prehire Approval (Regular Temporary – Create New) respectively. Note: Unlike the PreHire Approval (FTE – Refill), previously entered information is not stored for Temporary Positions and must be re-entered for refill requests.

**Step 6: Tracking Your Transaction’s Progress**

Please refer to the instructions on page 19 under Prehire FTE-Create New.
Waiver Approval Process (FTE – Create New)

The Waiver Approval process involves the approval of a position as well as a candidate at the same time when a department has waived posting.

**Step 1: Navigation**

- Navigate to the FTE Position defaults in and is Read Only.
- Waivers are not required for Temporary positions.
Step 2: Completing the Position Summary Information

Please refer to the instructions for completing the Position Summary Information under the PreHire Approval Process (FTE – Create New) on Page 4.

Step 3: Completing the Other Funding Information (Optional)

Please refer to the instructions for completing the Other Funding Information under the PreHire Approval Process (FTE – Create New) on Page 10.

Step 4: Completing the Position Requirements

Please refer to the instructions for completing the Position Requirements under the PreHire Approval Process (FTE – Create New) on Page 14.

Step 5: Completing the Position Descriptions

Please refer to the instructions for completing the Position Descriptions under the PreHire Approval Process (FTE – Create New) on Page 16.

Step 6: Completing the Waiver

The Waiver Tab is where you will enter information on the candidate you are waiving into the position.
Fields of Information (Waiver):

<table>
<thead>
<tr>
<th>Transaction Number: New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
</tr>
<tr>
<td>Position Number:</td>
</tr>
</tbody>
</table>

Requested Action: Choose from Assignment to New Position, Hire Above Minimum, Interagency Transfer, or New Hire. The following are explanations for your choices:

- **Assignment to New Position** – Choose this if you are hiring a current Clemson employee into a new position at the minimum of the band.
• **Hire Above Minimum** – Choose this if you are hiring a candidate (current CU employee or not) above the minimum of the state band for the requested Job Code.

• **Interagency Transfer** – Choose this if the candidate you are hiring is currently an employee at another State Agency.

• **New Hire** – Choose this if you are hiring a candidate at the minimum of the band who is neither a Clemson University employee nor an employee at another State Agency.

**EmplID** – Type or choose from the look up the candidate’s Employee ID. This field is optional and will only be used if the candidate you are hiring is a current CU employee.

**Name** – If you chose an EmplID, this field will populate the name of the employee. If the candidate you are hiring is NOT a CU Employee, please type their name in here. **Note: Please type in the PEOPLESOFT format of “Last Name,First Name”**.

**Is this candidate eligible to work in the United States? Yes or No** – Please indicate the candidate’s employment eligibility. If the candidate is an International and is not currently eligible to work in the US but will be after the Waiver is completed, please choose “No”.

**Underutilized Class(es)** – These will pre-populate based on the Job Code and are read only. The abbreviations are as follows:

- BF = Black Female
- BM = Black Male
- WF = White Female
- WM = White Male

**Candidate Demographic Information** – This is for voluntarily provided demographic information. If the candidate is a current CU employee or has been one in the past, this information will populate from what is already entered in CUBS.

**Race** – Choose from American Indian/Alaska Native, Asian/Pacific Islander, Black/African American, Hispanic/Latino, Native Hawaiian/Other Pacific Island, Not Specified, or White.

**Gender** – Choose from Male, Female, or Unknown.

**Veterans Status** – Choose from the following dropdown options:

**Waiver Justification** - Please provide detailed explanation for why the position is being waived. Also provide the training, education, and/or experience of the candidate that uniquely qualifies them for the appointment.
Step 7: Tracking Your Transaction’s Progress

Please refer to the instructions on page 19 under Prehire FTE-Create New.

Waiver Approval Process (FTE – Refill)

The Waiver Approval process involves the approval of a position as well as a candidate at the same time when a department has waived posting.

Step 1: Navigation

Choosing “Refill” will open a look-up box to choose the position number you’re refilling.

Step 2: Completing the Position Summary Information

Please refer to the instructions for completing the Position Summary Information under the PreHire Approval Process (FTE – Refill) on Page 28.

Step 3: Completing the Other Funding Information (Optional)
Please refer to the instructions for completing the Other Funding Information under the PreHire Approval Process (FTE – Create New) on Page 10.

**Step 4: Completing the Position Requirements**

Please refer to the instructions for completing the Position Requirements under the PreHire Approval Process (FTE – Refill) on Page 29.

**Step 5: Completing the Position Descriptions**

Please refer to the instructions for completing the Position Descriptions under the PreHire Approval Process (FTE – Refill) on Page 31.

**Step 6: Completing the Waiver**

Please refer to the instructions for completing the Waiver under the Waiver Approval Process (FTE – Create New) on page 43.

**Step 7: Tracking Your Transaction’s Progress**

Please refer to the instructions on page 19 under Prehire FTE-Create New.
Hire Candidate Approval Process

The Hire Candidate Approval Process is the approval process for the candidate chosen after a position has been posted. This form will be used for both Regular and Temporary positions that have been posted and interviewed for. This form will not include waived positions – those are handled through the Waiver Approval Process (pg. 42).

Step 1: Navigation

Choosing “Hire Candidate” and clicking “Next” will bring up the form.

Step 2: Completing the Hire Candidate Information

This will be where you enter the information for the chosen candidate. Since the position information was entered with a PreHire Approval form, it will pre-populate on this form and does not need to be re-entered.
Fields of Information (Hire Candidate):

**Requested Action** – Choose from Assignment to New Position, Hire Above Minimum, Interagency Transfer, or New Hire. The choices are to be used for the following situations:

- **Assignment to New Position** – Choose this if you are hiring a current Clemson employee into a new position at the minimum of the band.
- **Hire Above Minimum** – Choose this if you are hiring a candidate (current CU employee or not) above the minimum of the state band for the requested Job Code.
- **Interagency Transfer** – Choose this if the candidate you are hiring is currently an employee at another State Agency.

If the candidate is a current, active CU employee, this field will populate their current salary based on the EmplID you entered above.
• **New Hire** – Choose this if you are hiring a candidate at the minimum of the band who is neither a Clemson University employee nor an employee at another State Agency.

*Requisition Number* – Type or choose from the look up box the requisition number you are hiring for.

*Position Number* – If you chose a Requisition Number, the position number will default in and become read only. If you do not have a Requisition Number, please type or choose from the look up box the position you are hiring for.

*Applicant ID* – If you chose a Requisition Number, you can type or choose from the look up box all the applicants associated with that Requisition.

*Name* – If you chose a Requisition Number and then picked an Applicant ID, this field will default in the name and become Read Only. This field will also default in as Read Only if you chose an EmplID. However, if you do not have a Requisition or your chosen candidate does not have an Applicant ID or EmplID, please enter their name here. **Note: Please type in the PEOPLESOFT format of “Last Name, First Name”**.

*EmplID* – If you did not have a Requisition Number or your candidate did not have an Applicant ID but is a current CU employee, you may type or choose from the look up box their Employee ID. Choosing an EmplID will default in the name and make it read only.

*Requested Salary* – Please type in the requested salary for the candidate. This is the Base Salary ONLY.

*Projected Fill Date* – Please indicate what the projected start date is for the candidate.

*Fringe Type* – Choose from **12 Month FT Employee, 9 Month Employee, or Temp/Part Time FTE Employee**. The choices are to be used for the following situations:

• **12 Month FT Employee** – All 12-month employees working 20 hours or more and all Temporary Grant or Time Limited Project employees – Full Time or Part Time. Employees in this category have the STA, GST, or FED benefits participation code.

• **9 Month Employee** – All 9-month FTE employees – Full Time or Part Time. Employees in this category have the 9MO benefits participation code.

• **Temp/Part Time FTE Employee** – All 12-month FTE employees working 19.9 hours or less or all Regular Temporary employees – Full Time or Part Time. Employees in this category have the TLR or TMP benefits participation code.

*Position Information* – All fields default in based on what was requested/approved for the PreHire Approval Form.
Fields of Information (Hire Candidate – Additional Approvers/Justification)

**Additional Approvers** – This box functions in the same manner as the Additional Approvers box in the PreHire Approval Process form. Please refer to page 8 for detailed instruction on this box.

**Justification** – Please type justification for the candidate and the requested salary. Include information such as experience, education, and skills of the candidate.

**Provost/President/PSA Funding Approval?** – Please check the corresponding box if the Provost, President, and/or VP for PSA approval is needed.

**Save for Later** – If you do not wish to submit the transaction at this time and would like to save it and come back to it later, click the “Save for Later” button.

**Submit** – This is the end of the transaction and there is no additional information that needs to be submitted. You may click “Submit” to send the transaction on for approval. Write down the generated Transaction number for future reference.

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**Step 3: Tracking Your Transaction’s Progress**

Please refer to the instructions on page 19 under Prehire FTE-Create New.