

Employee Position Update Form

When to use

Use this form when any of the following attributes of an employee's record need to change:

- Position title
- Salary Grade
- Personnel Area (*i.e.*, CRC, BUMC, etc.)
- Personnel Subarea (*i.e.*, NREP-Staff, NREP-Faculty, L2324-Cler/Srv/Tech, L615-Svc/Maint, etc.)
- Employee Group (*i.e.*, part-time to full-time, staff to faculty, exempt to non-exempt, etc.)
- Employee Subgroup (*i.e.*, temporary to non-temporary)
- Percent Time (*i.e.*, 75% to 60%, etc.)
- Assignment Duration (*i.e.*, 10 months to 12 months, etc.)

 **Note:** If the employee is moving from an assignment duration less than 9 months, a new position will need to be created and the employee moved into that position. The position *may* need to be posted prior to moving the employee into the position. Consult HR Compensation (hrcomp@bu.edu) for instructions specific to your situation.

 **Information:** An employee cannot move from a regular position (an assignment duration of 9 months or more) to a temporary position (an assignment duration less than 9 months). This often comes up when an outgoing employee will be overlapping with an incoming employee for training purposes. In these situations, the outgoing employee should be moved to an overlap position that is a duplicate of the original position. If an employee will be returning to BU in a temporary capacity within 30 days of termination, consult your [HR Business Partner](#) before proceeding.

 **Warning:** Do NOT use the EPU form in the below scenarios:

IF...	INSTEAD use the...
Only adding or editing cost distributions	Salary Cost Distribution form
Moving the employee to another department with a different manager	Transfer form
Moving the employee out of their current position within the same department	Position Change form

Before you begin **Maintain Position**

Most changes require a Maintain Position form to be submitted and complete workflow *before* the Employee Position Update (EPU) form can be initiated. The only changes that do not require a Maintain Position form to be submitted prior to the EPU form are:

- Changing Work Schedule Rule
- Changing Assignment Duration *if* the Employee Group is still the same
- Changing Percent Time *if* the employee is currently under 100% time and is remaining under 100% time

If you are unsure whether your situation requires a Maintain Position form contact HR Compensation (hrcomp@bu.edu) for guidance.

You will need the following information to complete the Employee Position Update:

- Effective date of action
- Action Reason
- Mail Code
- Work Schedule Rule
- Assignment Duration
- Percent Time Employed
- Hourly Rate or Semi-Monthly Pay Period Amount
- Cost Distribution

Incorrect information will result in longer processing times and may cause your form to be returned or rejected.

To prevent late payment to an employee, pay careful attention to the [form deadlines](#) and plan accordingly.

 **References**

- Refer to this [matrix](#) for employee actions that may require completion of a Create Position form.
- Click [here](#) for the Data Dictionary
- Click [here](#) for the OM and PA form deadlines.
- Click [here](#) for the Maintain Position form instructions.

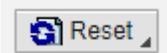
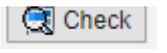
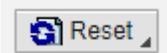
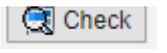
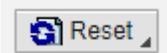
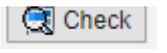
Employee Position Update Form: Step-by-Step

Step	Action				
1	<p>Initiate the Employee Position Update form.</p> <p> Warning: Forms must be completed one at a time; do not open multiple forms in multiple tabs.</p> <p> Reference: Initiate a Personnel Administration (PA) Form</p>				
2	<p>In the Employee Position Update Effective Date field, enter the date the employee’s position was updated (or will be) in mm/dd/yyyy format. If preferred, click the Calendar Lookup icon to select the effective date of hire from the calendar.</p> <p> Warning: To avoid potential delays in updating a position, take note of the assigned PA deadline for the intended pay period and plan accordingly.</p>				
3	<p>Click the Continue Editing Form button.</p> <p> Result: The following sections of the form will appear:</p> <ul style="list-style-type: none"> • The Employee Information as of section is populated with the employee's information as of the effective date used. • The Updated Employee Information section describes the new employee information. • The Mail Code, Work Schedule, Basic Pay, Cost Distribution, Attachments, and Comments sections of the form appear. • Required fields are indicated by a blue asterisk (*). <p> Warning: In the event of the error message <i>“Due to the chosen effective date, you cannot complete this form, as there is/are future dated data in SAP which will be overwritten with this change - contact HR/Provost for assistance:”</i></p> <p>This error indicates there is new data or an action in the employee’s record on the same date as, or later than, the effective date you are using. There are 2 possible ways to handle this error:</p> <table border="1" data-bbox="289 1493 1430 1818"> <thead> <tr> <th data-bbox="289 1493 639 1545">IF...</th> <th data-bbox="639 1493 1430 1545">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 1545 639 1818">An action already exists on the same date as, or later than, the effective date you are using</td> <td data-bbox="639 1545 1430 1818"> <ul style="list-style-type: none"> • Complete this form using an effective date the day after the actual effective date. In the Comments section (step 22), include the actual effective date and note a ticket will be submitted to HRIS to request the change. • Once the form completes workflow, submit a PA Correction Request form to request an update to the effective date. </td> </tr> </tbody> </table> <p style="text-align: right;"><i>Step continued on next page...</i></p>	IF...	THEN...	An action already exists on the same date as, or later than, the effective date you are using	<ul style="list-style-type: none"> • Complete this form using an effective date the day after the actual effective date. In the Comments section (step 22), include the actual effective date and note a ticket will be submitted to HRIS to request the change. • Once the form completes workflow, submit a PA Correction Request form to request an update to the effective date.
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4	<p>Select the appropriate reason for the position revision from the Action Reason dropdown menu. The action reason selected should reflect the <i>primary</i> change. Only use "Multiple Changes – Same Title" in instances where most fields are being updated (typically faculty or educator semester payment setup).</p>				
5	<p>Review the existing data in Updated Employee Information to ensure the information is correct. If the information is <i>not</i> correct:</p> <ul style="list-style-type: none"> • Using the Request Tracker, confirm the OM form submitted for this action completed workflow <p> Note: A form status of Wait4Payroll or Correction means the form did not complete workflow. The Status must display "Completed".</p> <ul style="list-style-type: none"> • Check to make sure the effective date used is the same as, or later than, the effective date used on the corresponding OM form <p>If the above do not resolve the issue, cease processing and contact HR Compensation (hrcomp@bu.edu) for guidance. Include details of what you checked and the corresponding OM tracking number from the Request Tracker.</p>				
6	<p>Enter the appropriate mail code in the Payroll admin. field of the Mail Code section.</p> <p> Information: If you don't know the mail code, click the  icon to the right of the entry field. This will open a pop-up to search for the mail code.</p>				

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7	<p>Review the Work Schedule section for accuracy:</p> <table border="1" data-bbox="285 327 1531 974"> <thead> <tr> <th data-bbox="285 327 586 380">IF...</th> <th data-bbox="586 327 1531 380">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 380 586 432">It is correct</td> <td data-bbox="586 380 1531 432">Proceed to the next step.</td> </tr> <tr> <td data-bbox="285 432 586 974">Changes are required</td> <td data-bbox="586 432 1531 974"> <p>As applicable:</p> <ul style="list-style-type: none"> • Select the correct work schedule rule from the Work Schedule dropdown menu • Select the correct Assignment Duration from the dropdown menu • Enter the percent time in the Percent Time Employed field <p> Note: This field will only allow entry if the position is part-time.</p> <p> Warning: In the event of the error message Assignment Duration/Percent Time Employed is invalid for Employee Group/SubGroup, cease processing and contact HR Compensation (hrcomp@bu.edu). Include the position number and the tracking number of the corresponding Maintain Position form. This error indicates the percent time and assignment duration combination entered on the EPU are not allowed based on the setup of the position.</p> </td> </tr> </tbody> </table>	IF...	THEN...	It is correct	Proceed to the next step.	Changes are required	<p>As applicable:</p> <ul style="list-style-type: none"> • Select the correct work schedule rule from the Work Schedule dropdown menu • Select the correct Assignment Duration from the dropdown menu • Enter the percent time in the Percent Time Employed field <p> Note: This field will only allow entry if the position is part-time.</p> <p> Warning: In the event of the error message Assignment Duration/Percent Time Employed is invalid for Employee Group/SubGroup, cease processing and contact HR Compensation (hrcomp@bu.edu). Include the position number and the tracking number of the corresponding Maintain Position form. This error indicates the percent time and assignment duration combination entered on the EPU are not allowed based on the setup of the position.</p>
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8	<p>Review the Basic Pay section for accuracy:</p> <table border="1" data-bbox="285 1066 1531 1381"> <thead> <tr> <th data-bbox="285 1066 646 1119">IF...</th> <th data-bbox="646 1066 1531 1119">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 1119 646 1171">It is correct</td> <td data-bbox="646 1119 1531 1171">Proceed to the next step.</td> </tr> <tr> <td data-bbox="285 1171 646 1381">Changes are required</td> <td data-bbox="646 1171 1531 1381"> <p>Enter the correct pay amount:</p> <ul style="list-style-type: none"> • If the position is non-exempt, enter the hourly rate in the Hourly Rate field. • If the position is exempt, enter the semi-monthly amount in the Amt Per Pay Period field. </td> </tr> </tbody> </table>	IF...	THEN...	It is correct	Proceed to the next step.	Changes are required	<p>Enter the correct pay amount:</p> <ul style="list-style-type: none"> • If the position is non-exempt, enter the hourly rate in the Hourly Rate field. • If the position is exempt, enter the semi-monthly amount in the Amt Per Pay Period field.
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9	<p>Click the Recalculate Salary button.</p> <p> Result: the Estimated Annual Salary field updates with the annual salary based on the new pay scale level and pay period amount and assignment duration of the position. If this amount is not as expected, double check the information entered into the form and the assignment duration.</p>						

Step	Action						
10	<p>Complete the Cost Distribution section. The Cost Distribution area is divided into two sections, Current Entries and New Entries:</p> <ul style="list-style-type: none"> • The Current Entries section displays all existing/active salary cost distributions as of the Date of Action you initially entered. • The New Entries section is where you add or make edits to an existing cost distribution. <table border="1" data-bbox="289 527 1539 688"> <thead> <tr> <th data-bbox="289 527 634 579">IF...</th> <th data-bbox="634 527 1539 579">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 579 634 632">Changes are needed</td> <td data-bbox="634 579 1539 632">Proceed to the next step</td> </tr> <tr> <td data-bbox="289 632 634 688">No changes are needed</td> <td data-bbox="634 632 1539 688">Select the No Change radio button and skip to step 13</td> </tr> </tbody> </table>	IF...	THEN...	Changes are needed	Proceed to the next step	No changes are needed	Select the No Change radio button and skip to step 13
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11	<p>If the Current Entries are not correct, select one of the following options:</p> <table border="1" data-bbox="289 774 1539 1115"> <thead> <tr> <th data-bbox="289 774 634 827">Option</th> <th data-bbox="634 774 1539 827">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 827 634 953">REPLACE</td> <td data-bbox="634 827 1539 953">Remove existing cost distributions effective from the Date of Action you entered and continuing forward. These may be retro-active or prospective changes.</td> </tr> <tr> <td data-bbox="289 953 634 1115">INSERT</td> <td data-bbox="634 953 1539 1115">Insert a retroactive change to a specific cost distribution, but only within a specific period of time as designated by the Date of Action and the End Date of the cost distribution. Existing distributions (as reflected in Current Entries) will be valid after the specified period of time.</td> </tr> </tbody> </table> <p> Note: When using INSERT, the End Dates of the cost distributions have to be the same. If this is not the case, you will receive an error: “End dates of cost distributions need to match on Insert”.</p>	Option	Description	REPLACE	Remove existing cost distributions effective from the Date of Action you entered and continuing forward. These may be retro-active or prospective changes.	INSERT	Insert a retroactive change to a specific cost distribution, but only within a specific period of time as designated by the Date of Action and the End Date of the cost distribution. Existing distributions (as reflected in Current Entries) will be valid after the specified period of time.
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12	<p>The Begin Date and End Date will default. Select the Reason for Change from the dropdown menu.</p> <p> Note: Enter the End Date for each cost distribution.</p>						

Step	Action								
13	<p>Complete the Cost Distribution fields in the New Entries section:</p> <ul style="list-style-type: none"> • Cost Center <ul style="list-style-type: none"> ○ If you don't know the cost center, click the button in the Cost Center field to search for the cost center. • Order Number, as applicable • Percentage, as applicable • End Date <ul style="list-style-type: none"> ○ If the end date is invalid, it will be highlighted in red and must be changed. This is typically due to the end date entered on the form not matching the end date of the account to be charged. <p> Warning: The Total Percentage field must equal 100%.</p> <p>The buttons below allow you to edit input in the New Entries section:</p> <table border="1" data-bbox="284 751 1539 1062"> <thead> <tr> <th data-bbox="284 751 488 804">Option</th> <th data-bbox="488 751 1539 804">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="284 804 488 884"></td> <td data-bbox="488 804 1539 884">Delete a line of the distribution</td> </tr> <tr> <td data-bbox="284 884 488 972"></td> <td data-bbox="488 884 1539 972">Restore the distribution settings to how they initially appeared on the form prior to the changes you made</td> </tr> <tr> <td data-bbox="284 972 488 1062"></td> <td data-bbox="488 972 1539 1062">Perform a check for formatting of the percent time entries up to two decimal places and populate the Description field.</td> </tr> </tbody> </table>	Option	Description		Delete a line of the distribution		Restore the distribution settings to how they initially appeared on the form prior to the changes you made		Perform a check for formatting of the percent time entries up to two decimal places and populate the Description field.
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14	<p>Click the Check button to review percentages and populate the Description field of the New Entries section. Confirm the cost distribution is correct based on the Description.</p>								
15	<p>Upload relevant documentation in the Attachments section. Please refer to the matrix if you need assistance determining what is required for attachments.</p> <table border="1" data-bbox="284 1262 1227 1423"> <thead> <tr> <th data-bbox="284 1262 748 1314">IF...</th> <th data-bbox="748 1262 1227 1314">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="284 1314 748 1367">There are documents to attach</td> <td data-bbox="748 1314 1227 1367">Proceed to the next step</td> </tr> <tr> <td data-bbox="284 1367 748 1423">There are no documents to attach</td> <td data-bbox="748 1367 1227 1423">Proceed to Step 22</td> </tr> </tbody> </table> <p> Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</p>	IF...	THEN...	There are documents to attach	Proceed to the next step	There are no documents to attach	Proceed to Step 22		
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16	<p>Click the Browse button in the Attachments section.</p> <p> Result: The Open window appears.</p>								
17	<p>Navigate to the appropriate file on your computer.</p>								
18	<p>Click the title of the file.</p>								

Step	Action						
19	Click the Open button.  Result: The filename appears in the Select File: field.						
20	Click the Attach File button.  Result: The file now appears in the Attachments table.						
21	Repeat steps 16-20 for each attachment.						
22	Enter additional information in the Comments section for both future reference and to provide additional details to the approvers. This may include reason for the position being updated such as a position title, work schedule rule, or, employee group change, etc.						
23	Click the Review button at the bottom of the page. This will check for errors on the form.  Result: Error messages appear at the top of the form.						
24	Review the form for accuracy.						
25	<table border="1" data-bbox="289 886 1133 1129"> <thead> <tr> <th data-bbox="289 886 553 938">IF the form...</th> <th data-bbox="553 886 1133 938">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 938 553 991">Is accurate</td> <td data-bbox="553 938 1133 991">Click the Submit button</td> </tr> <tr> <td data-bbox="289 991 553 1129">Requires updates</td> <td data-bbox="553 991 1133 1129"> <ul style="list-style-type: none"> • Click the Back button • Make any necessary updates • Return to step 23 </td> </tr> </tbody> </table> <p data-bbox="289 1157 1481 1230"> Result: The form is submitted for approval via workflow. You can track the form progress through Request Tracker. You will receive an email notification when the form is approved.</p> <p data-bbox="289 1266 1542 1444"> Warning: Being able to submit the form does not mean the action is error free. A crash will show in the Request Tracker with the current agent “SAP” and a status of “Correction”. If an error exists, the form will crash and HR Information Systems will receive an automatic notification (ticket). No action is required on the part of the initiator; HRIS will follow up if additional information is needed. HR Information Systems will resolve the issue as soon as possible. Payroll critical items are handled first.</p>	IF the form...	THEN...	Is accurate	Click the Submit button	Requires updates	<ul style="list-style-type: none"> • Click the Back button • Make any necessary updates • Return to step 23
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