



People and Money system

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Hiring Guide- How to request a new position or position change

Hiring Manager / Line Manager / School/Dept. Admin / Business Support Team

Estimated time to complete: 12 minutes

Assumed Knowledge

You have read the [Guide to Job Classifications and Position Management](#).

New positions should only be requested when one doesn't currently exist within the structure of a specific department with the appropriate Job level.

The position change function can be used to make changes for the following reasons, please note there could be one or a combination of changes (e.g. increase FTE and add a new grade):

- Increase/Decrease the FTE of a position
- To add a new grade within a grade band on a position
- Change the position hiring status or close a position

To make any other changes, such as changing the position name please raise a service request using the category Enquiry>System Related.

Important - Changes made as a result of position change requests will affect all current incumbents of that position.

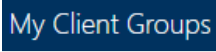
School/Department Administrators (SDA's) will be able to view all positions (both filled and vacant within the structure) and the FTE against these in the position detail page. Line Managers can view limited position details for their direct reports via the My Team app.

If a position is created for which the job requisition is subsequently rejected, the new position needs to be made inactive by resubmitting a request for a position change with the reason 'change position hiring status'.

Changes to a Job Level should be requested by completing the [Job level Change Form](#).

In Brief...

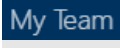
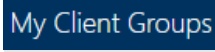

Search Positions

1. From the **Home** page, select **My Client Groups**  , **Show More** then select **Position Details** from the workforce structures section
2. Enter the **Position Name** into the search field then click the search icon
3. Select the **show filters** link to view further search options
4. Filter the results to also show **Inactive** positions and the relevant **Department**.
5. Click the position name to view more information held on that position

For detailed guidance see the [next section](#)

Request a New Position

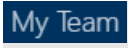
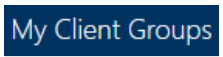
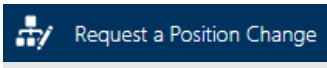
This is a simple overview of the process.

1. From the **Home** page:
 - click on **My Team**  if you are a Hiring Manager or Line Manager, or
 - click on **My Client Groups**  if you are Business Support or School/Department Administration.
2. Click **Show More** under **Quick Actions** and select **Request a New Position**

3. Select the **Budget Details** checkbox and click **Continue**.
4. Complete the 4 sections:
 - When and Why
 - Position Details
 - Budget Details
 - Comments & Attachments
5. Click **Submit**.

For detailed guidance, see the [next section](#).

Request a Position Change

1. From the **Home** page:

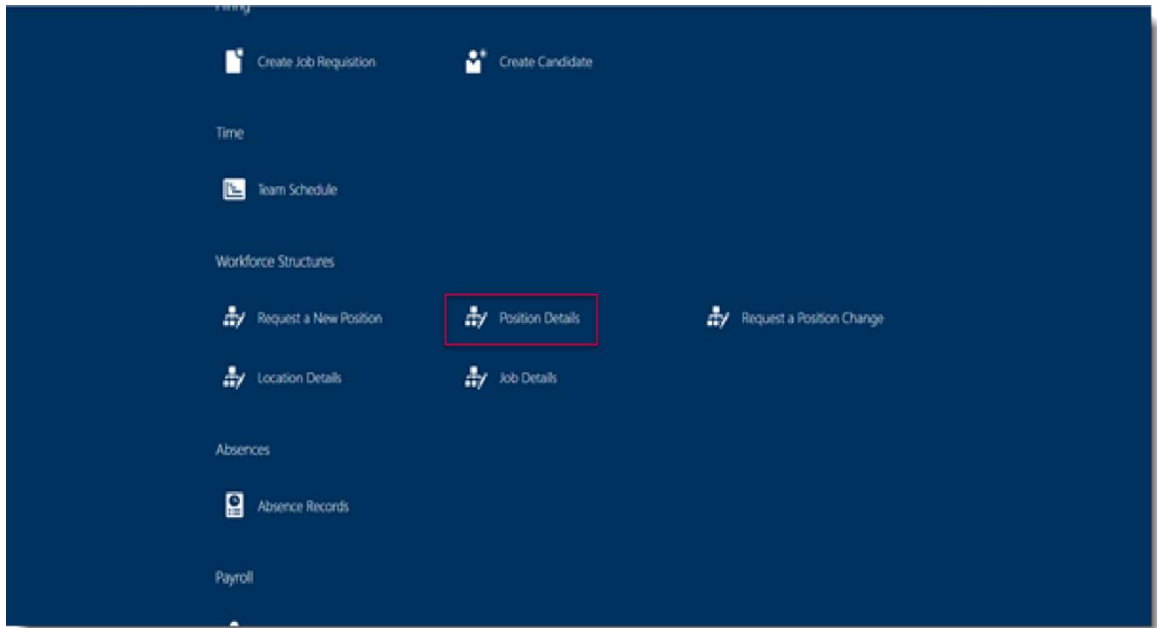
- click on **My Team**  if you are a Hiring Manager or Line Manager, or
 - click on **My Client Groups**  if you are Business Support or School/Department Administration
2. Click **Show More** under **Quick Actions** and select **Request a Position Change** 
 3. Search for the Position for which requires the request for change.
 4. Select the **Budget Details** checkbox and click **Continue**.
 5. Complete the 4 sections:
 - When and Why
 - Position Details
 - Budget Details
 - Comments and Attachments
 6. Click **Submit**.

For detailed guidance, see the [next section](#).

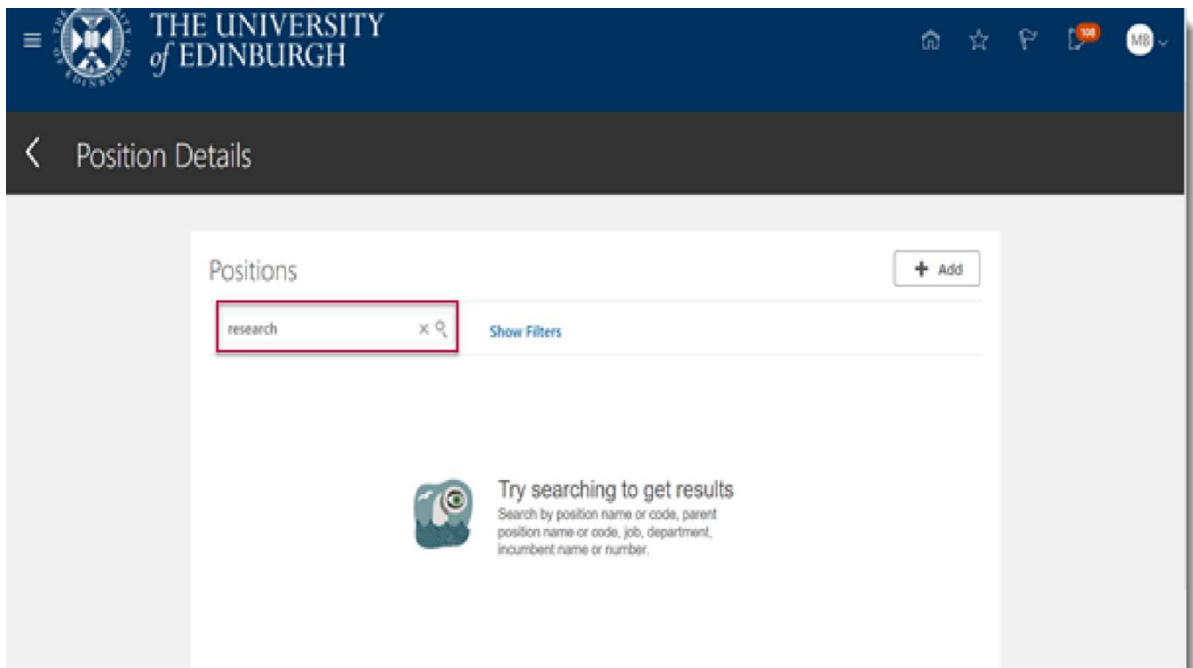
In Detail...

Search Positions

1. From the **Home** page, select **My Client Groups**, **Show More** then select **Position Details** from the workforce structures section.

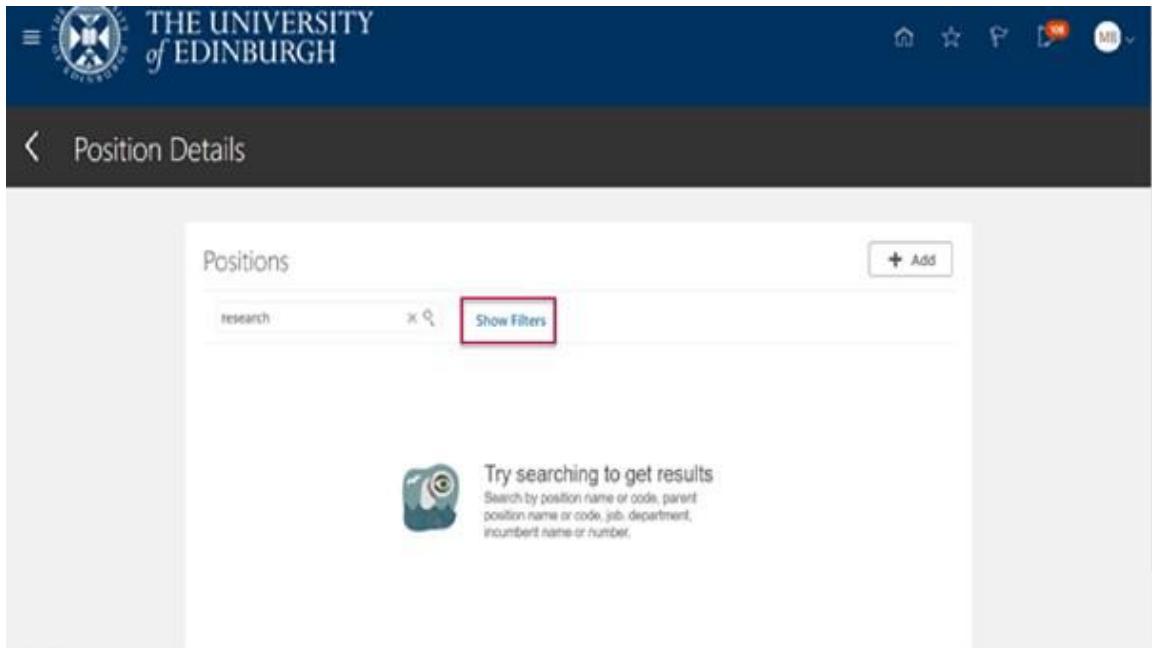


2. Enter the **Position Name** into the search field then click the search icon

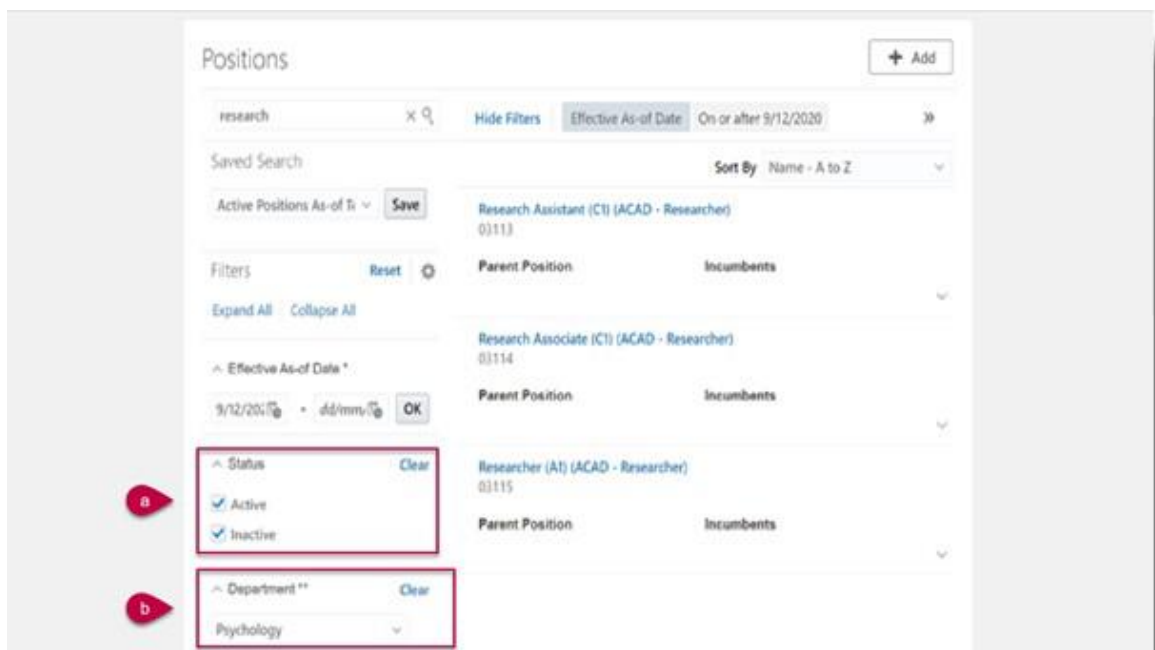


It's best to use generic job names where possible and search for 'administrator' rather than 'senior administrator' or 'Administration manager' to ensure you are presented with all options

3. Select the **show filters** link to view further search options



4. Filter the results to also show **Inactive** positions and the relevant **Department**



5. You can also establish the position number by going to My Client Groups -> Person Management -> Searching the person currently in post -> selecting the ellipsis next to position will give you the position name and number.

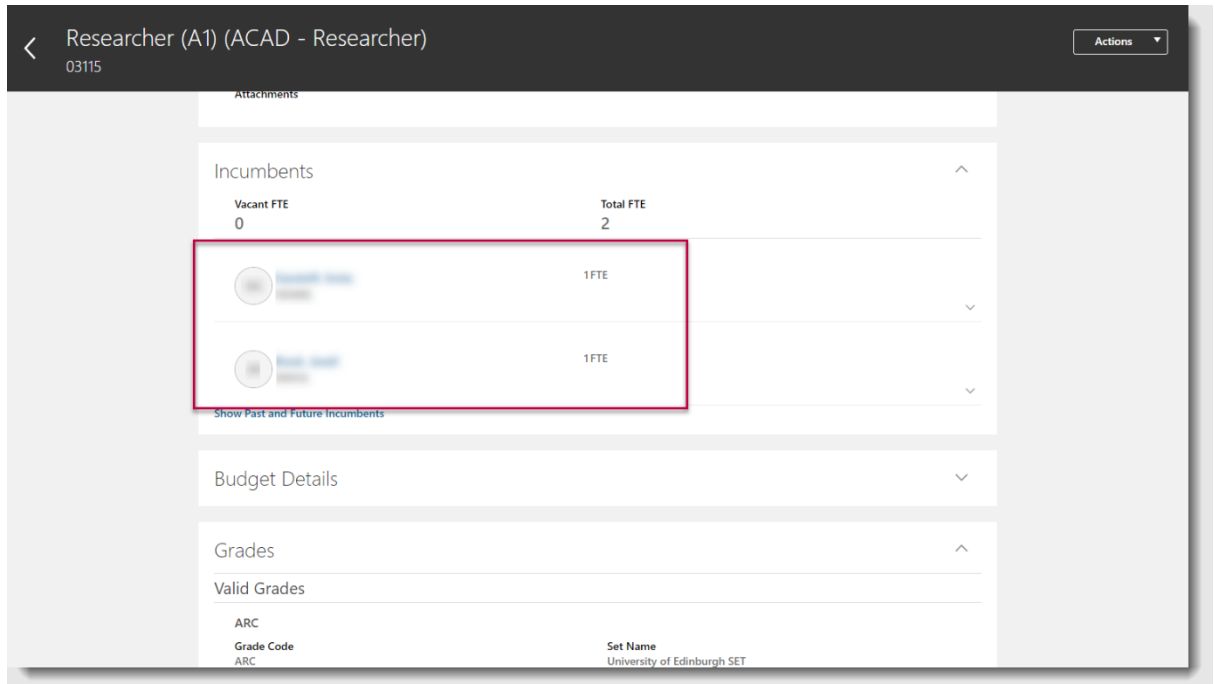
The screenshot displays the 'Employment' system interface. At the top, it shows 'Legal Employer: University of Edinburgh' and 'Country: United Kingdom'. Below this, 'Worker Type: Employee' and 'Hire Date: 21/09/2020' are listed. The main section is titled 'Assignment: Change Analyst' with an 'Edit' and 'View History' button. It shows 'Action: Extension of Fixed Term Contract' and 'Action Reason: Additional Funding Available'. The 'Effective Start Date' is 1/10/2021 and the 'Effective End Date' is blank. A 'Job Details' section is expanded, showing 'Position: Programme Coordinator (CI) (PAO - Administration)' with a red box around the position name. A modal window for 'Programme Coordina...' is open, showing 'Job: Programme Coordinator (CI) (PAO - Administration)', 'Grade Ladder: University Grade Ladder', 'Grade: UED6', and 'Department: Service Excellence Programme'. Other details include 'Reporting Establishment', 'Location: Argyle House, Floor 5, East', 'Working at Home: No', 'Worker Category: Fixed Term', 'Assignment Category: Regular or Temporary', 'Full Time or Part Time: No', 'Working as a Manager: No', 'Hourly Paid or Salaried: No', 'Working Hours: 35 Weekly', and 'Standard Working Hours: 35 Weekly'. The 'Assignment Status' is 'Active - Payroll Eligible', 'Primary: Yes', and 'Projected End Date: 31/10/2022'. Other fields include 'Headcount: 0', 'Start Time: 08:30 AM', 'End Time: 05:00 PM', 'Basis for Seniority Calculation: Days', 'Worker Engagement Details', 'Uniformed grade: —', 'Standard Working Hours Override', 'Role Identifier', 'Fixed Term Reason Code: NHS Honorary Contract', 'Contract Review Date', 'Research/Teaching/Research/Teaching Only', 'HESA Activity Standard: Occupational Classification', 'Business, Research and Administrative Professionals', 'Level: XperthR level L', 'HESA Reason for End of Contract: Clinical Increment Date', and 'People Group'.

6. If no positions are returned, you will need to request a new position
7. Click the position name of any results to view more information held on that position.

The screenshot shows the 'Position Details' page in the University of Edinburgh HR system. The header includes the university logo and name. The page title is 'Position Details'. Below the header, there is a search bar with 'researcher' entered. To the right of the search bar are 'Hide Filters', 'Effective As-of Date' (set to 'On or after 12/11/2020'), and 'Status' (set to 'Active'). Below the search bar, there is a 'Saved Search' section with 'Active Positions As-of Tr' and a 'Save' button. The search results are sorted by 'Name - A to Z'. The results show one position: 'Researcher (A1) (ACAD - Researcher)' with code '03115'. Below the position name, it shows 'Parent Position' and 'Incumbents' (2). There are also 'Filters' and 'Reset' buttons. The 'Effective As-of Date' filter is set to '12/11/20' and the 'Status' filter has 'Active' and 'Inactive' options. The 'Position Name' and 'Position Code' filters are also visible.

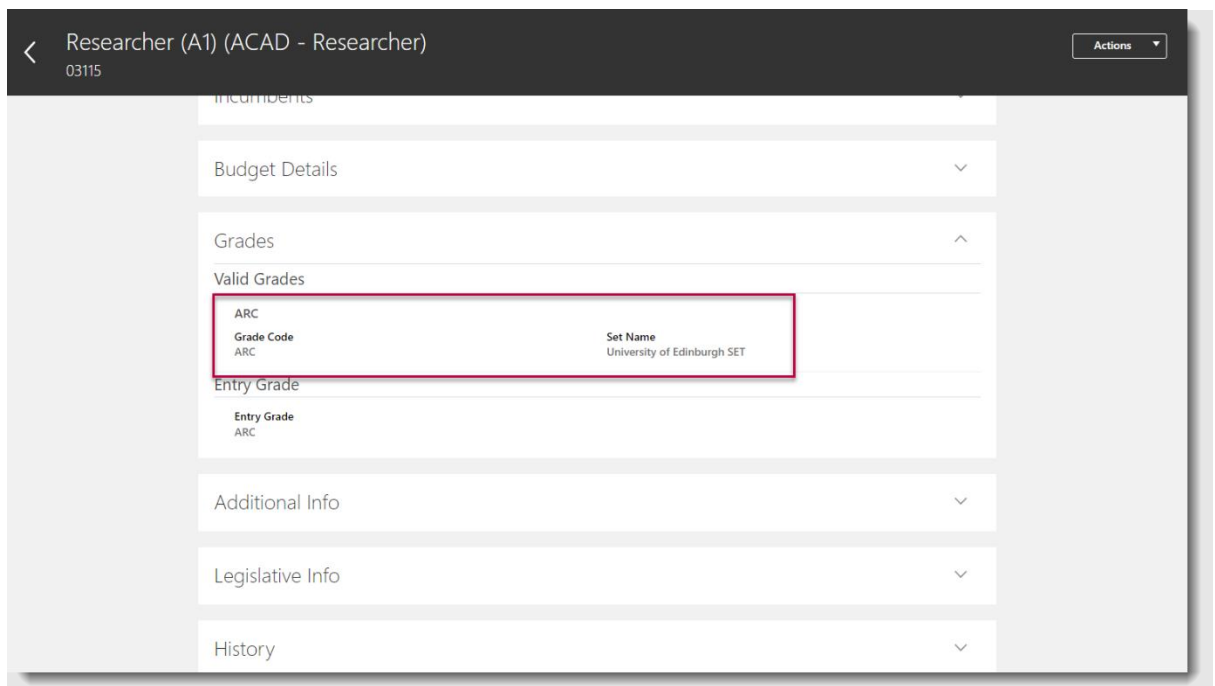
For details of the naming convention for positions see [Appendix 3](#).

- a) Check that those names listed as current incumbents of the position are in an equivalent role to the type of position you wish to recruit/appoint to



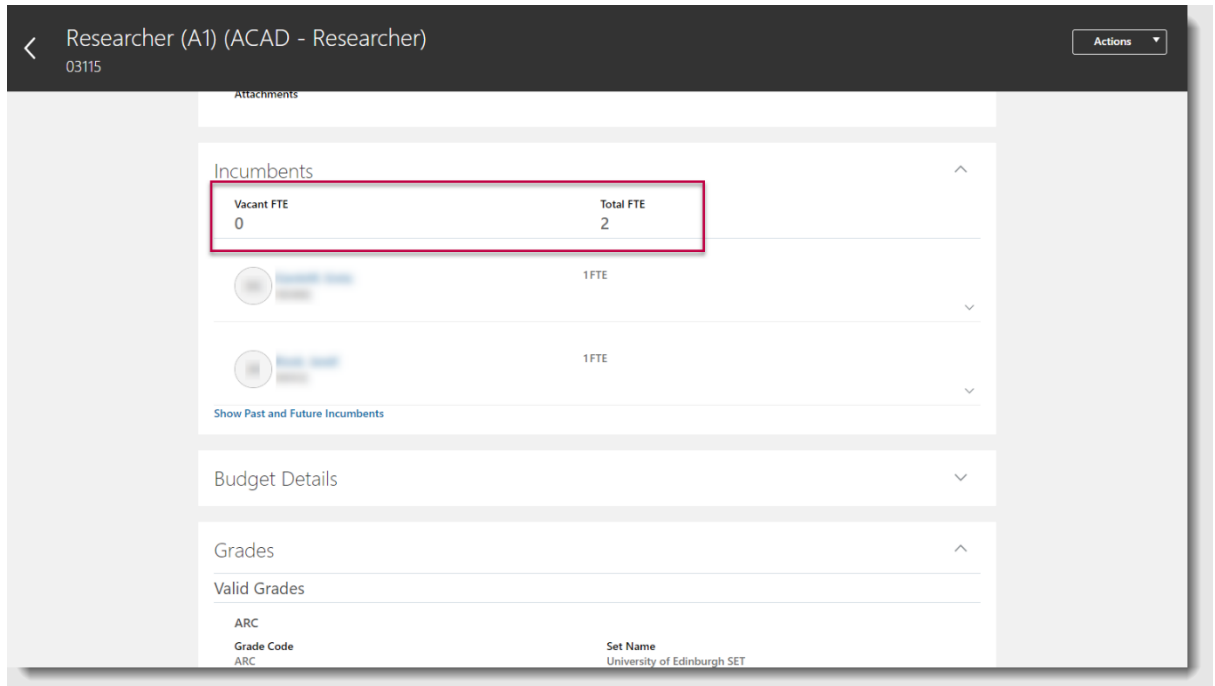
if Yes, continue, if no, select a different position from your search results or [Request a New Position](#)

- b) Check that the grades held against the position contain the one you wish to recruit/appoint to Yes



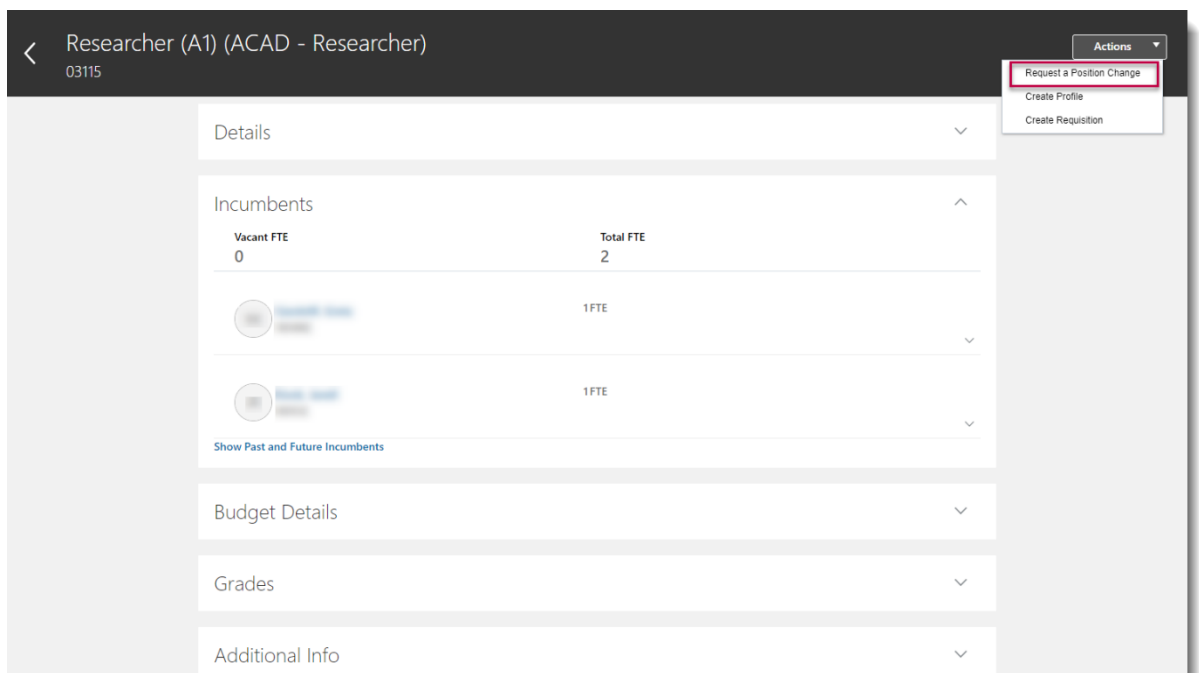
if Yes, continue, if no, select a different position from your search results or [Request a New Position](#)

- c) Check the Vacant FTE on the post is enough to cover your recruitment activity



If Yes, continue with your recruitment activity, noting the position number to recruit to. If no, see the steps below.

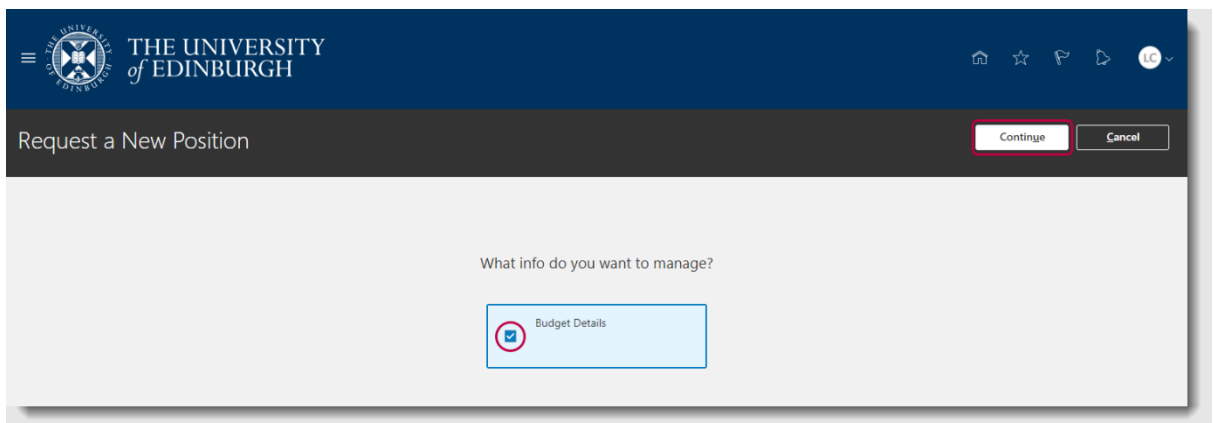
- If there is insufficient FTE to recruit/appoint your new hire, use the **Action** button to **Request a Position Change**



Then continue from Step 5 of the [Request a Position Change](#) instructions.

Request a new Position

1. From the **Home** page:
 - click on **My Team** if you are a Hiring Manager or Line Manager, or
 - click on **My Client Groups** if you are Business Support or School/Department Administration
2. In **Quick Actions**, click the **Show More** link (you may need to scroll).
3. From **Workforce Structures** select **Request a New Position** and the **Request a New Position** page opens.
4. Select the **Budget Details** checkbox and click **Continue**.



5. In the form that opens, there are 4 sections to complete before it can be submitted:
 - When and Why
 - Position Details
 - Budget Details
 - Comments & Attachments
6. Enter or update section **1 When and Why** ensuring the mandatory fields are not blank and click **Continue**.
 - a. If required, click on the calendar icon to change the date of **When does the new position start**.
 - b. Select the **What's the reason for this request?** (See [Appendix 1](#) for an explanation of the **Request a New Position reasons**.)

7. Enter or update section **2 Position Details**, ensuring that the fields are populated accordingly and click **Continue**:

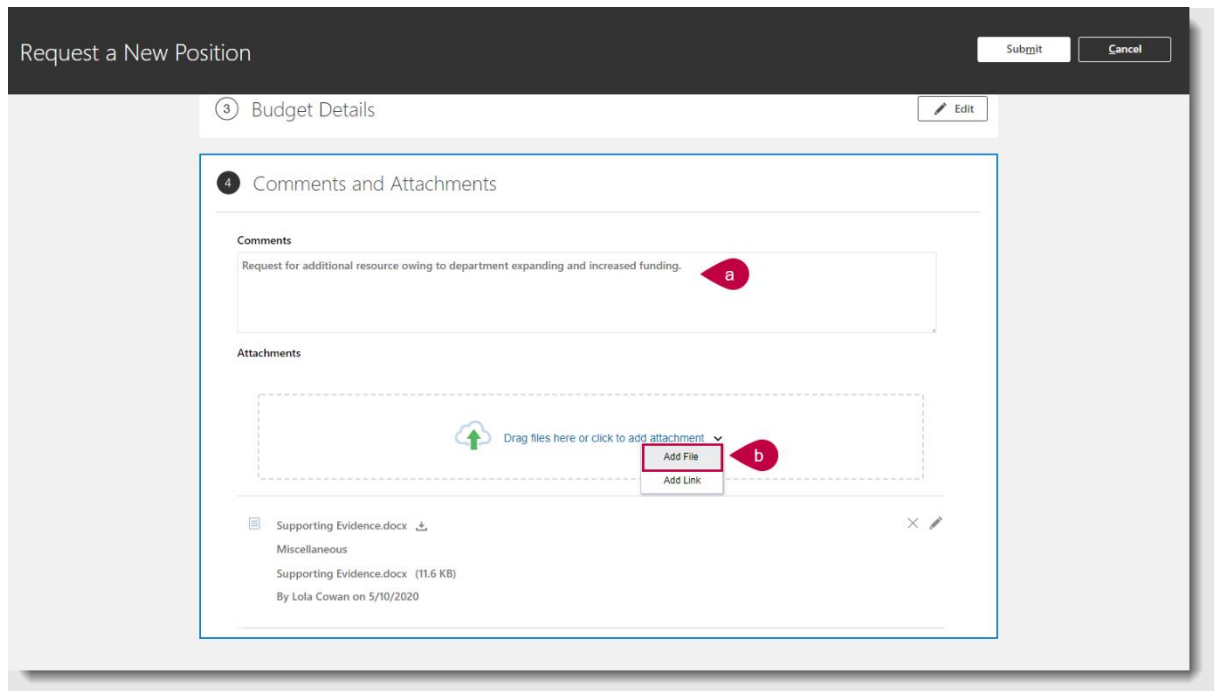
- **Parent Position** - This will populate but must be cleared
- **Business Unit** – select relevant Business Unit, e.g. University of Edinburgh
- **Name** –this must be the same name as the Job you select, we suggest selecting job first, copying this and then pasting into the Name field
- **Department** – select relevant department
- **Job** – select relevant job by typing in the name, e.g. ‘Admin’ and the relevant options will appear in the dropdown list. Select the appropriate Job Instance with the appropriate Job level.
- **Grade Ladder**– must be selected

- **Grade** – these will pull in automatically from the selected Job but this can be amended and new grades added
 - **Standard Working Hours** – this will automatically default to 35 Weekly but can be amended if required
 - **Working Hours** – this will default to 35 Weekly but both values must be removed so the fields are blank
 - **Hiring Status** – will default to ‘Approved’ do not change this
 - **Probation Period** – select the number and frequency
 - **Overlap Allowed** – this must always be set to **Yes**
8. Enter or update section **3 Budget Details** ensuring the mandatory fields are not blank and click **Continue**.

- Cost Center** is blank
- FTE** is set to the FTE required for the position being recruited to
- Type** is set to ‘Shared’

9. In section **4 Comments and Attachments**:

- Use the **comments box** to provide any supporting information
- Upload supporting documents to the **Attachments** section. To upload supporting documents, click on the down arrow next to **Drag files here or click to add attachment**, and select **Add File**. Navigate to the location where the document is stored, select it and the document name appears in the **Attachments** section.

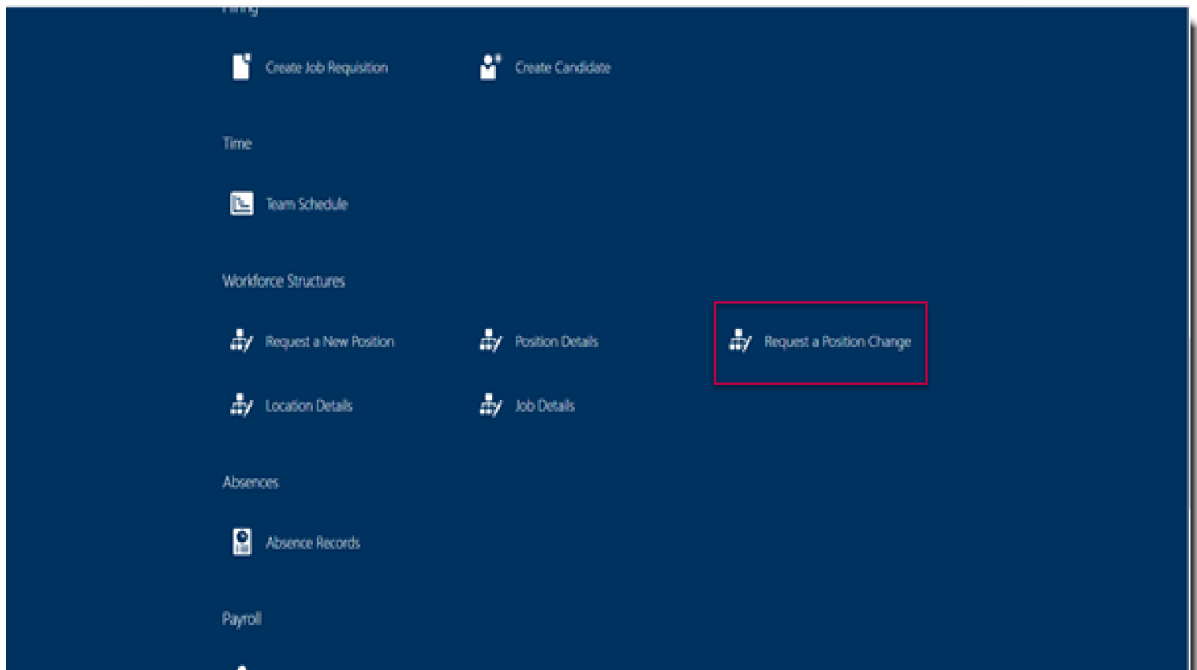


10. Before the form is submitted, you can review a section by clicking on the **Edit** button in the section heading to make any required modifications.

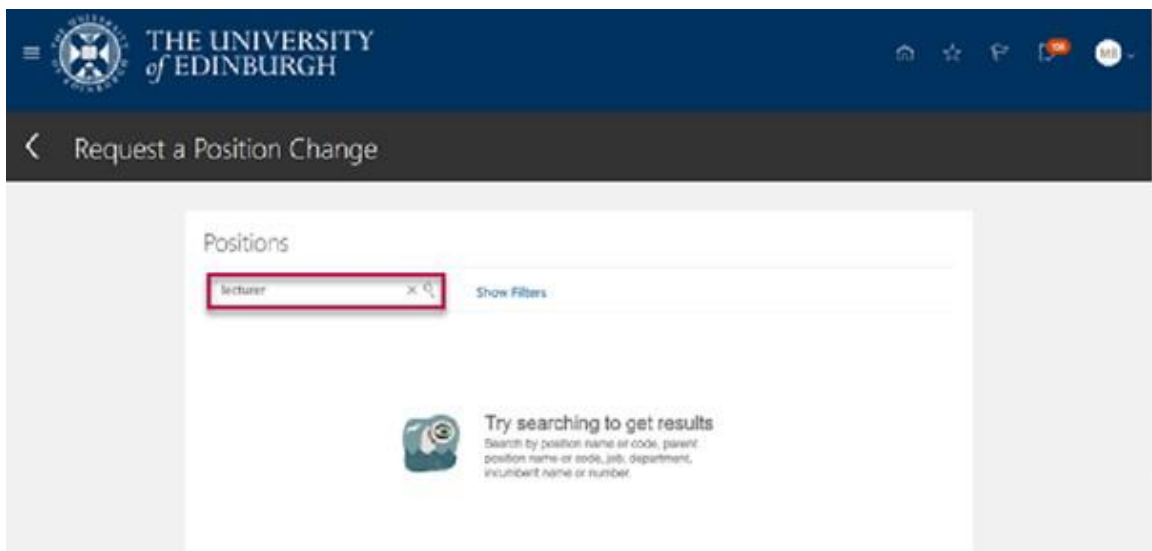
11. Finally, click the **Submit** button in the black banner to forward the request for approval and the **Home** page reopens. Note - In the event of rejection, review comments from HR Systems and re-submit a fresh transaction. It is not possible to re-draft a previous submission.

Request a Position Change

1. From the **Home** page:
 - click on **My Team** if you are a Hiring Manager or Line Manager, or
 - click on **My Client Groups** if you are Business Support or School/Department Administration.
2. In **Quick Actions**, click the **Show More** link (you may need to scroll).
3. From **Workforce Structures** select **Request a Position Change**.

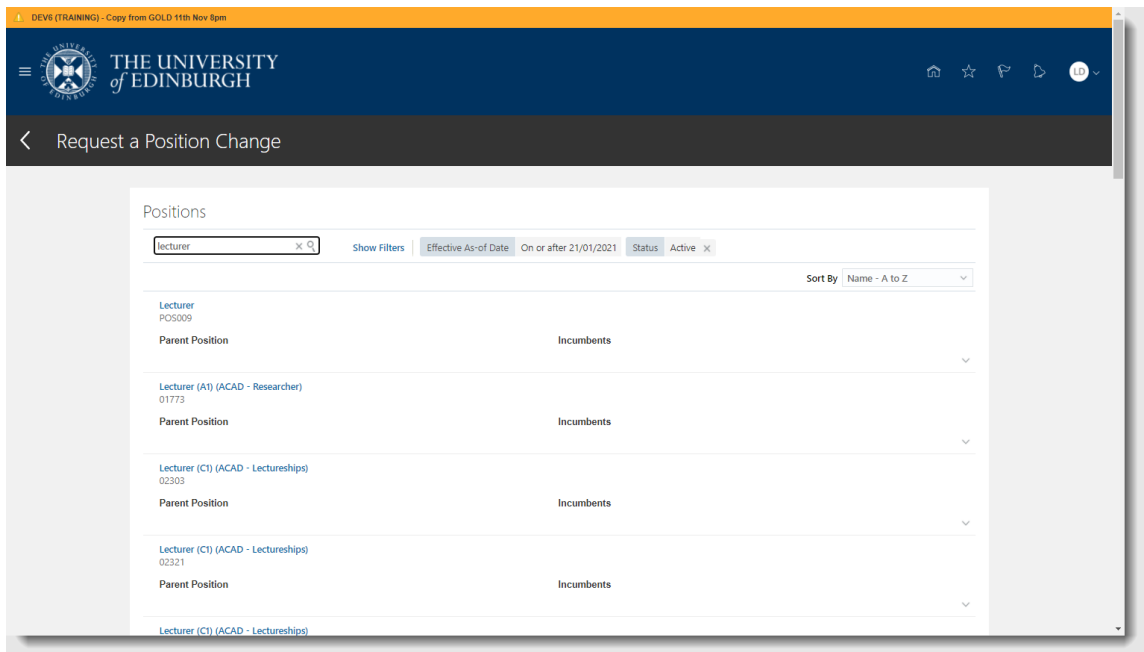


4. Click into the **Search** field, enter the **Position** and click the search icon. (**Warning:** If you click on the search icon without entering any characters, an error message is displayed. Click OK to dismiss the message.)

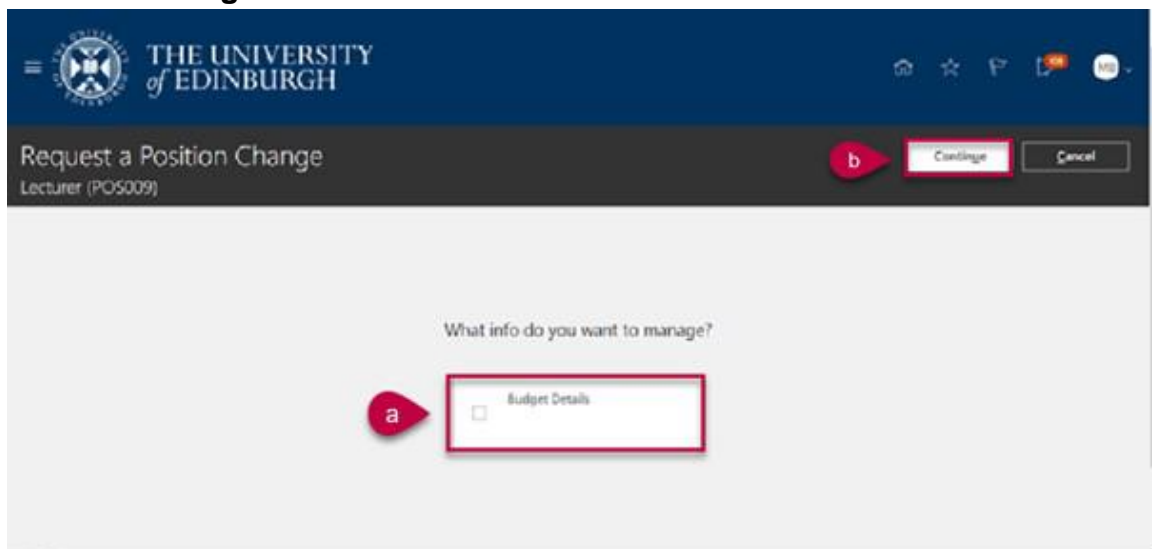


Note: To perform a more specific search, click on the **Show Filters** link and choose the applicable options (see [Search Positions](#)).

5. Click on the **Position** in the list of results.



6. Select the **Budget Details** checkbox and click **Continue**.



7. In the form that opens, there are 4 sections to complete before it can be submitted:

- When and Why
- Position Details
- Budget Details
- Comments & Attachments

8. Enter or update section **1 When and Why** ensuring the mandatory fields are not blank and click **Continue**.

- a. If required, click on the calendar icon to change the date of **When does the position change start**.

- b. Select the **What's the reason for this request?** (See [Appendix 2](#) for an explanation of the **Request a Position Change reasons.**)

9. Enter or update section **2 Position Details** ensuring that the fields are populated accordingly, and click **Continue**:

- a. **Status** – this should be kept as active unless there are no current or future incumbents of the position
- b. **Department** – this should not be changed
- c. **Job** – this should not be changed
- d. **Grade** – Review the grades listed against the position. If the grade you require is not listed add this. You **should not remove any grades** as

this will impact everyone on that grade within the position. Use the grade range provided in the [naming convention](#))

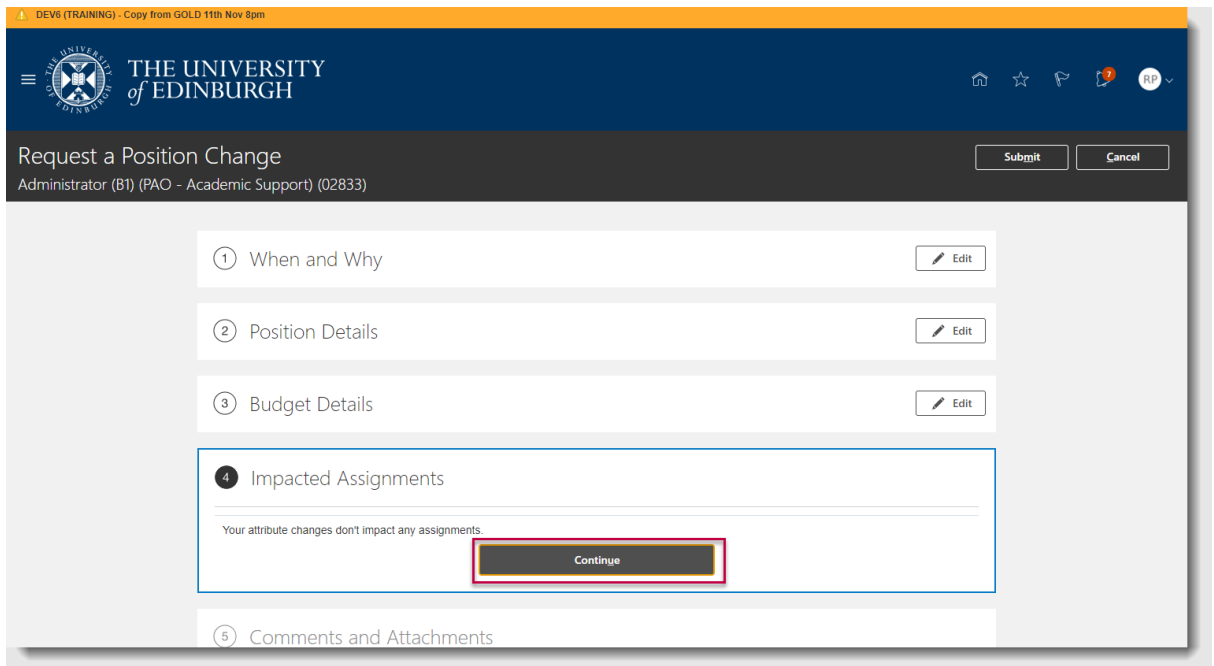
- e. **Entry Grade** – remove the default and leave this field blank
- f. **Standard Working Hours** – this should not be changed unless required
- g. **Working Hours** – this fields must be left blank
- h. **Hiring Status** – this should only be changed from Approved to Frozen if you have created a new position but the job requisition has been rejected and the position needs to be deactivated

10. Enter or update section **3 Budget Details** if required, e.g. if the FTE on the Position needs to be increased:

The screenshot shows a web browser window with the University of Edinburgh logo and navigation icons. The page title is 'Request a Position Change' for 'Lecturer (POS009)'. The form is divided into four sections: 1. When and Why, 2. Position Details, 3. Budget Details, and 4. Comments and Attachments. The 'Budget Details' section is highlighted with a blue border and contains a dropdown menu for 'Is the position budgeted?' with 'Yes' selected, and a text input field for 'FTE' with the value '6'. A 'Continue' button is visible below the input fields.

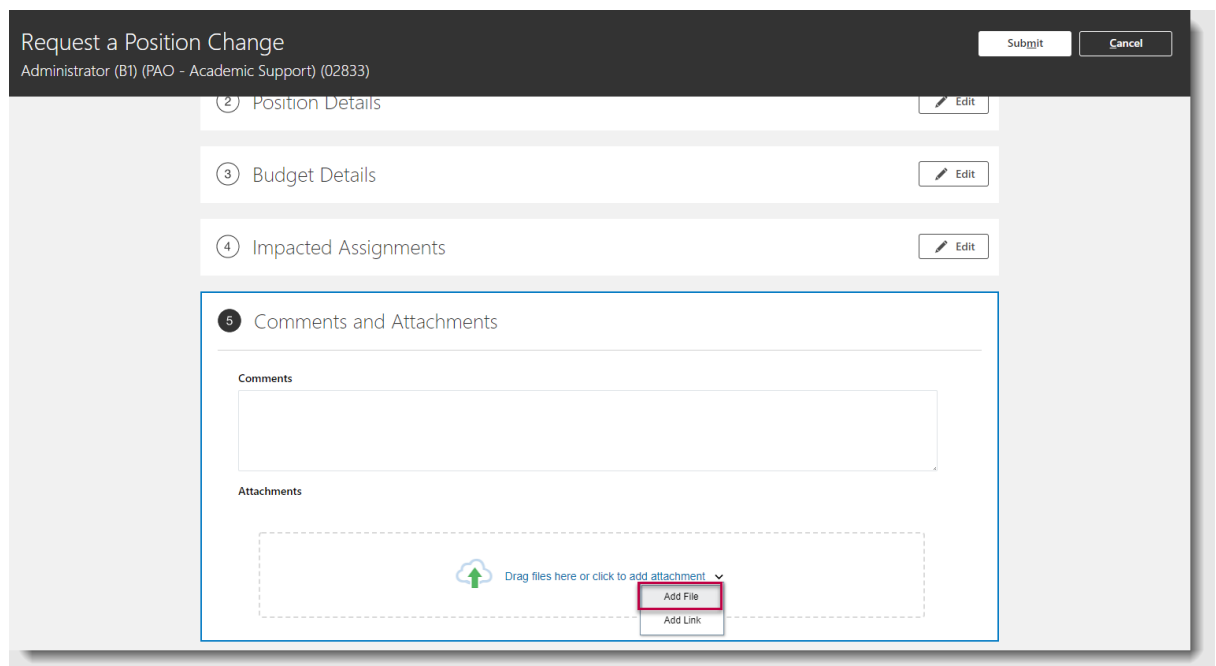
When increasing FTE, continue to increase the total FTE to the required amount i.e. an FTE increase of 1 to an existing FTE of 5 would require and FTE of 6 to be entered into the FTE field.

11. In section **4 Impacted Assignments** check that the changes you are making do not impact any current assignments then select **Continue**. **It's important to review that no grades have been changed for existing staff** as per Step 2 Position Details (d) above.



12. In section **5 Comments and Attachments**:

- a. Use the **comments box** to provide further details.
- b. Use the Attachments section to upload supporting documents. To upload supporting documents, click on the down arrow next to **Drag files here or click to add attachment**, and select **Add File**. Navigate to the location where the document is stored, select it and the document name appears in the **Attachments** section.



13. Before the form is submitted, you can review a section by clicking on the **Edit** button in the section heading to make any required modifications.

14. Finally, click the **Submit** button in the black banner to forward the request for approval and the **Home** page reopens. Note - In the event of rejection, review comments from HR Systems and re-submit a fresh transaction. It is not possible to re-draft a previous submission.

Appendix

Appendix 1 – Request a New Position reasons

New Position Request	Description
New Requirement	To create a new position to meet new business requirements
New Funding	To create a position with a new funding source or due to growth
TUPE	To create a position within a new legal employer
Restructure/Reorganisation	To create a position to sit in a restructured department
Newly Established Business Unit	To create a position within a newly created business unit created due to expansion

Appendix 2 – Request a Position Change reasons

Change Position Request	When to use
Change Position Hiring Status	Only use if job requisition rejected to inactivate position. A position can only be made inactive if there are no incumbents in the position and there are no future hires associated to it.
Grade Change	To add a new grade within a grade band on a position
Increase FTE	Increase headcount
Decrease FTE	Decrease headcount

Close down position	When a position is no longer needed.
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Appendix 3 – Position Naming Convention

Every job follows a strict Job naming convention, the image below shows an example. The position name will mirror that of the job naming convention. Please refer to the [Guide to Job Classifications and Position Management](#) for further details.

<i>Job Name</i>	<i>Grade Band</i>	<i>Job Level Instance</i>	<i>Family Short Code</i>	<i>Function</i>
<u>Director</u>	<u>D</u>	<u>1</u>	<u>POA</u>	<u>Estates and Facilities</u>

Each part of the naming convention has its own purpose:

Job Name	The generic job. All existing staff have been mapped into one of approximately 350 jobs.
Grade Band	For planning purposes, we have created a fictitious grade band. Some jobs at the University range over seven or eight grades which makes it difficult to use if you are planning using salary mid-points. We have split the jobs so that they don't span over more than three salary grades. See below for a full list of Grade Bands.
Job Level Instance	This is used for the Delegated Authority Schedule (DAS). If a job has more than one approval limit there will be more than one instance of a job level, for example D1, D2, D3. Each job level says how much someone can approve as per the DAS. Where there is more than one instance of a job level care should be taken to select the correct position. This should not be confused with the job level, see further details below under Job Level Management.
Family short code	This is the abbreviated title for Job Family. This short code saves some space in the job title, for example POA for Professional, Administration and Operational, ACAD for Academic. (See the Job Family table below for the full list).
Job Function	The role or service you provide, for example Estates and Facilities, Researcher, Student Services, Finance.

Job Family

Code	Family	Short Code
001	Academic	ACAD
002	Clinical	CLIN
003	Professional, Administration and Operational	PAO
004	Technical	TECH
005	Veterinary Clinical	VET

Grade Bands

Grade	Grade Band
AC3A	D
AC3B	D
ACN2	C
ACN3	D
ACN4	D
ACT3	D
ACT4	D
AM2	C
AM3A	D
AM3B	D
AMN2	C
AMN3	D
AMN4	D
AMT3	D
AMT4	D
ARC	A
ECA2	A
ECA3	A
ECA4	B
ECA5	B
ECA6	C
ECA7	C
ECA8	C
ECA9	D
ECAT	D
FAS5	B
FAS6	C
FAS7	C
NONE	AX

OTHS	DX
RCB3	CX
RCB4	CX
RCB5	CX
RCB6	BX
RCB7	BX
RCB8	AX
SDS1	A
TR01	C
UE01	A
UE02	A
UE03	A
UE04	B
UE05	B
UE06	C
UE07	C
UE08	C
UE09	D
UE10	D
UE5N	B
UE6N	C
UE7N	C
XM1	D
XM2B	D
XM3A	C
XM3B	C
XM4B	C
XM5B	C
XM6B	B
XM7B	A
MCA	C
MC1	C
AFC6	C
ECA05	C
XM5A	C
MC2	C
AFC7	C
ECA06	C
XM4A	C
AC2	C
MC3	C
ECA07	C
ECA08	D
XM2A	D
AC4	D

AM4	D
ECA09	D
ECA10	D
RCB2	DX