UNIVERSITY OF NORTH CAROLINA
SCHOOL OF THE ARTS
HUMAN RESOURCES

POSITION MANAGEMENT LEARNING
ORIGINATOR ROLE
JOB AID RESOURCE INDEX

Direct Access to Originator Job Aid Flows:

SHRA Staff
Create New Position
Update Existing Position
Supplemental Pay
Termination

EHRA Faculty
Create New Position
Update Existing Position
Supplemental Pay
Termination

Temporary/Student
Create New Position

EHRA Non-Faculty
Create New Position
Update Existing Position
Supplemental Pay
Termination

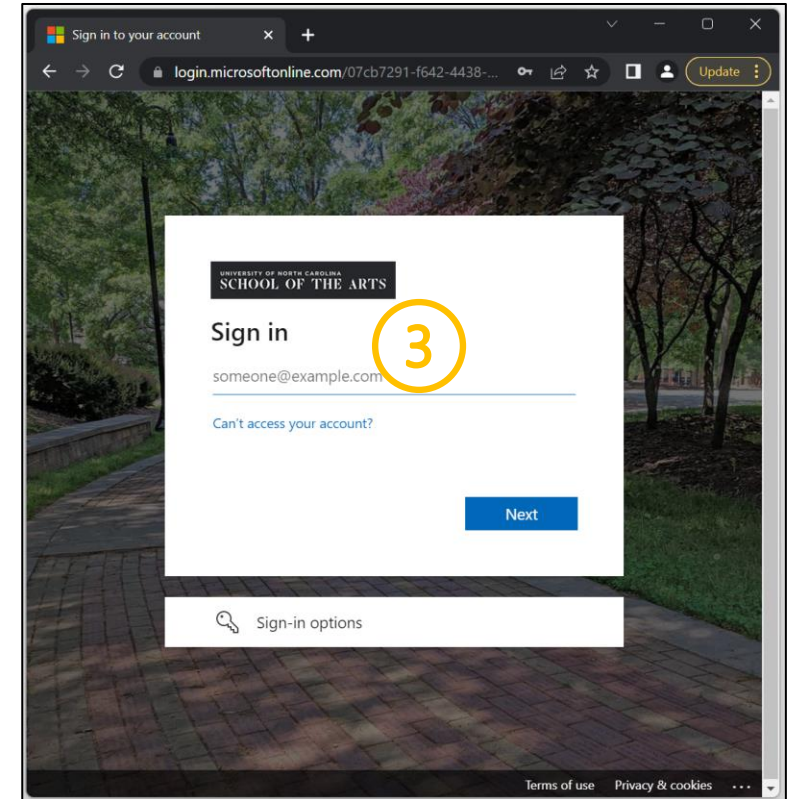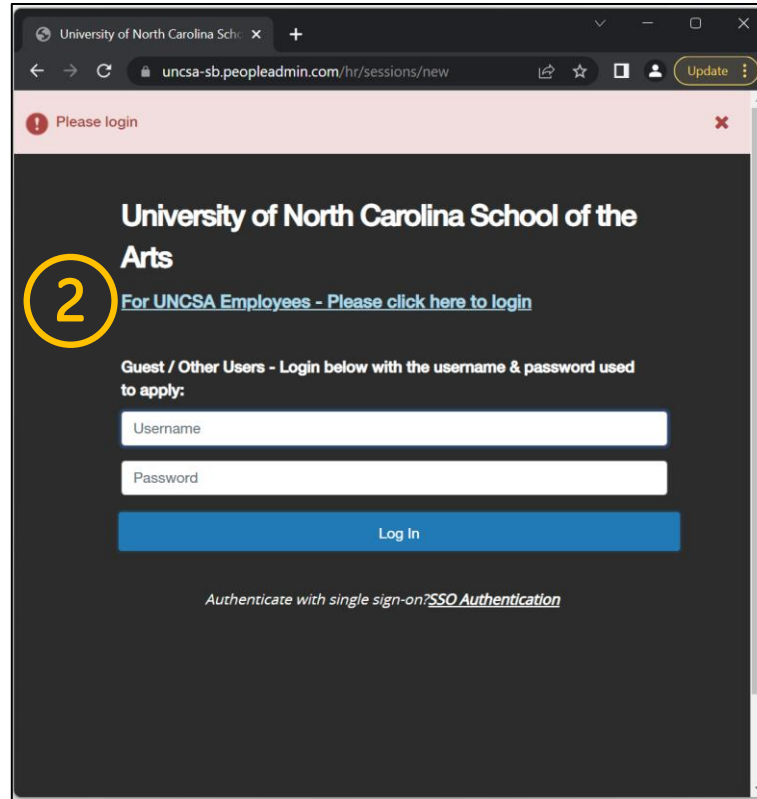*Note: Click Link to Navigate Directly*

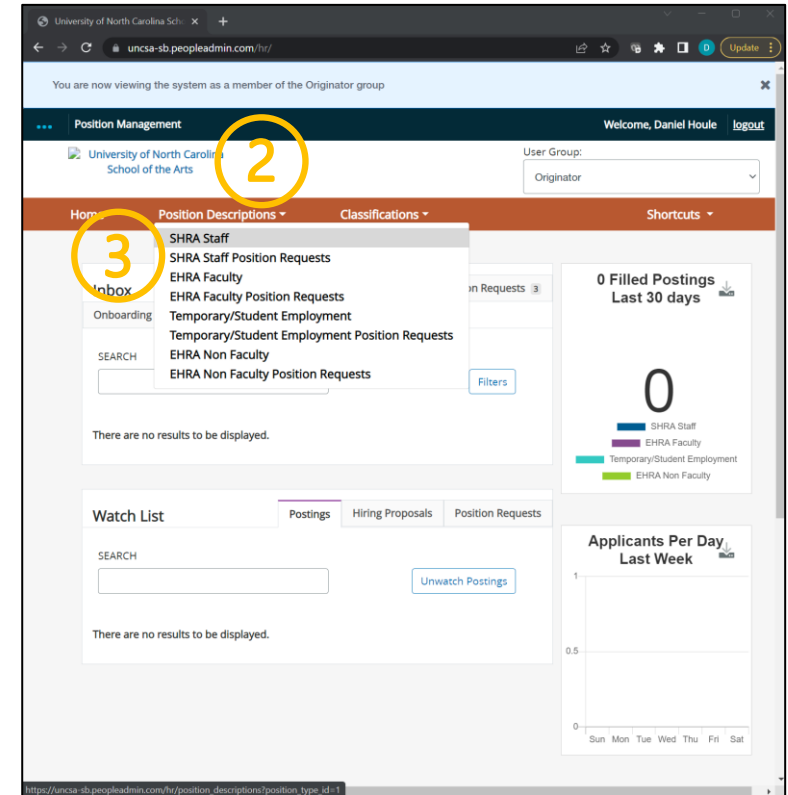*Slide Navigation: Click Return to Index button at any time to return here*

UNCSA

STEPS

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

UNCSA

STEPS

1. **Change User Group to Originator**

2. **Click Positions Descriptions**

3. **Select SHRA Staff**

UNCSA

STEPS

1. **Click Create New Position**

2. **If New, Fill Out Required Fields**

3. **If Copying an Existing Position,**

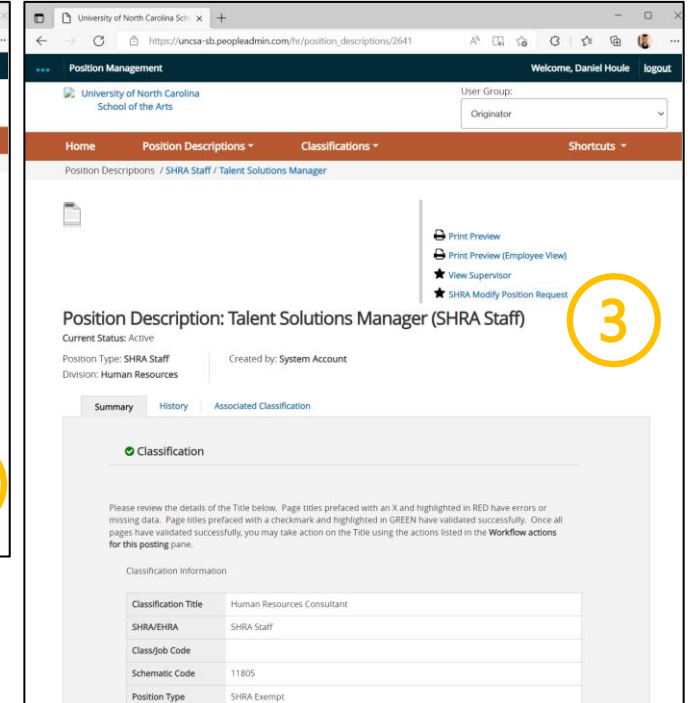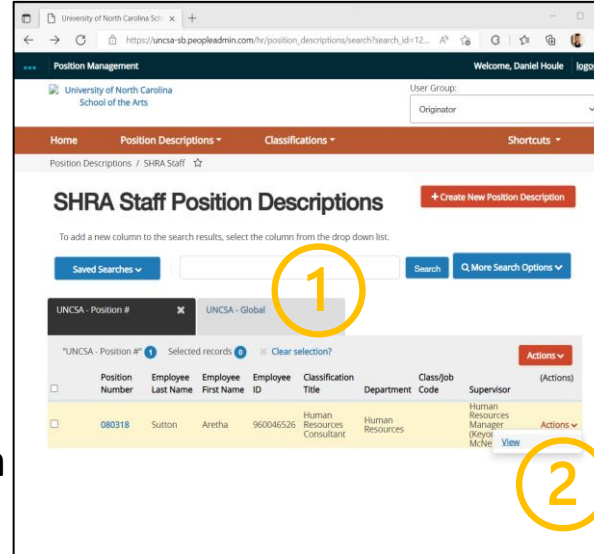   **Search & Select for Position Number**

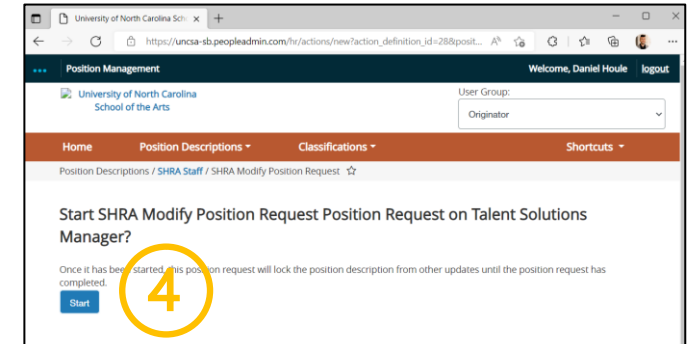4. **Click Start Position Request**

Modifying an Existing Position? Skip to the next slide!

UNCSA

STEPS

1. **Search for Position**

2. **Click Actions on the Position Row, Select View**

3. **Click SHRA Modify Position Request**

4. **Click Start on the Modify Position Confirmation**

If you're creating a New Position, Skip to the next slide!

◀◀ **RETURN TO INDEX** ▶▶

UNCSA

STEPS

1. **Complete Reason for Request**

2. **Indicate Changes Requested, Click Save**

3. **Move to Position Details**

4. **Complete Information as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to Position Budget Information**

2. **Complete Information as Needed, Click Save**

3. **Move to Competencies**

4. **Complete Information as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to Responsibilities and Duties**

2. **Complete Information as Needed, Click Save**

3. **Move to Additional Information**

4. **Complete Information as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to ADA Checklist**

2. **Complete Information as Needed, Click Save**

3. **Move to Position Documents**

4. **Upload PDFs as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to Training and Access**

2. **Complete Information as Needed, Click Save**

3. **Move to Position Request Summary**

4. **Review Position Request Summary**

UNCSA

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Select Correct Approver**

4. **Click Submit!**

UNCSA

STEPS

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

UNCSA

STEPS
Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select SHRA Staff**

STEPS

1. **Search for Employee**

2. **Click Actions Next to Position Row & Click View**

3. **Click SHRA Modify Position Request**

4. **Click Start on the Modify Confirmation Page**

STEPS

1. **Complete Reason for Supplemental Pay Request**

   • **Reason for Request & Effective Date**

2. **Select Supplemental Pay**

3. **Move to Position Budget Information**

4. **Click Add Supplemental Budget Summary Entry**

RETURN TO INDEX

UNCSA

STEPS

1. **Complete All Supplemental Pay fields**

   • **Add additional details regarding the specifics behind the supplemental pay request in the Originator Comments field**

2. **Click Save**

UNCSA

STEPS

1. **Move to Position Request Summary**
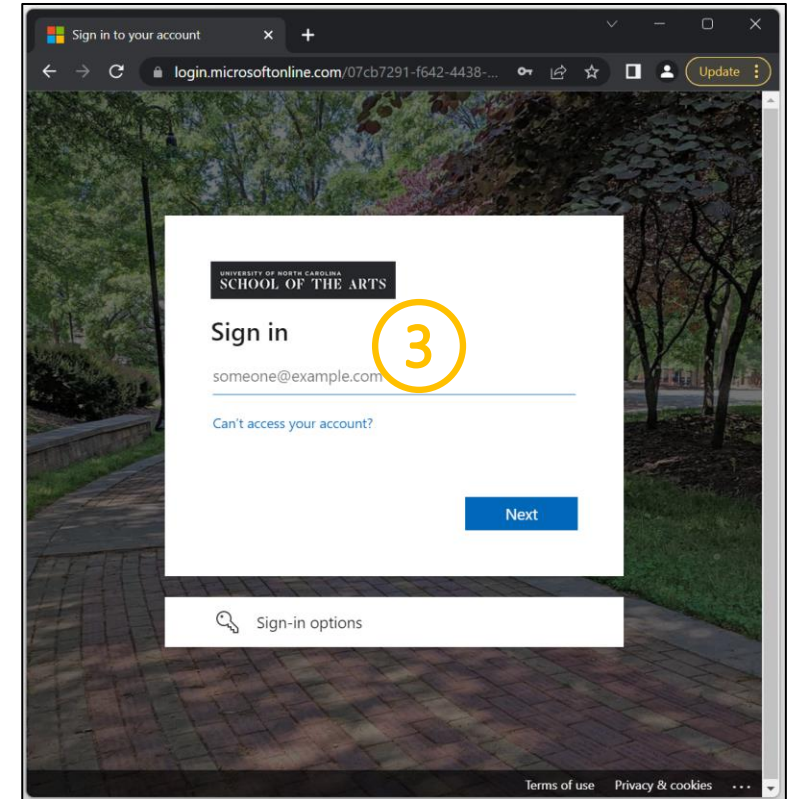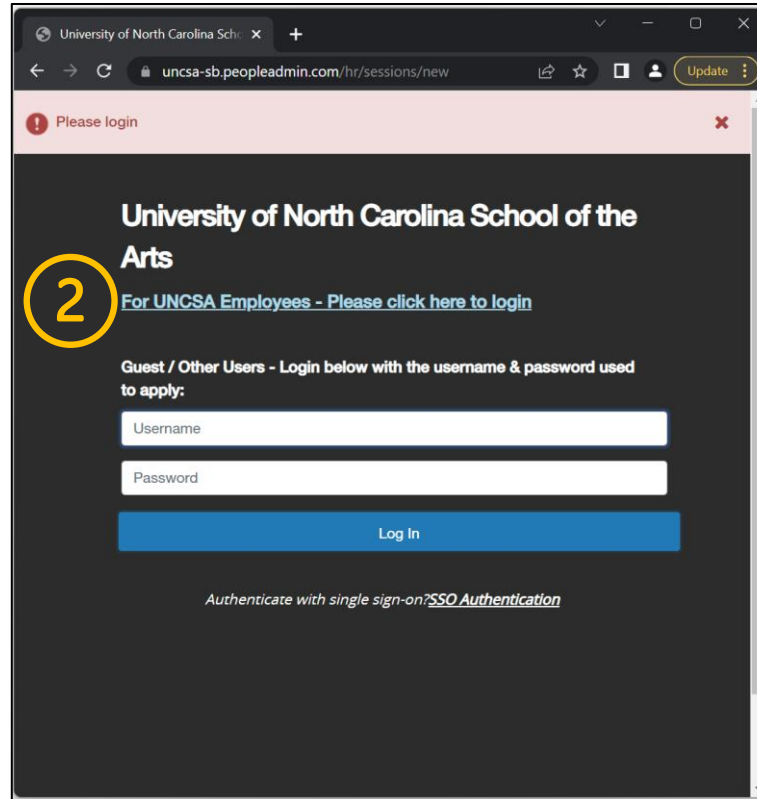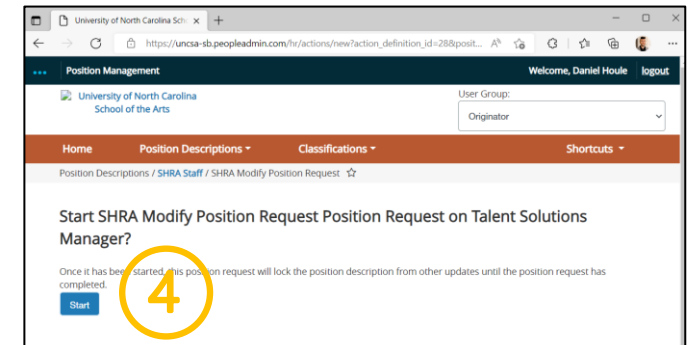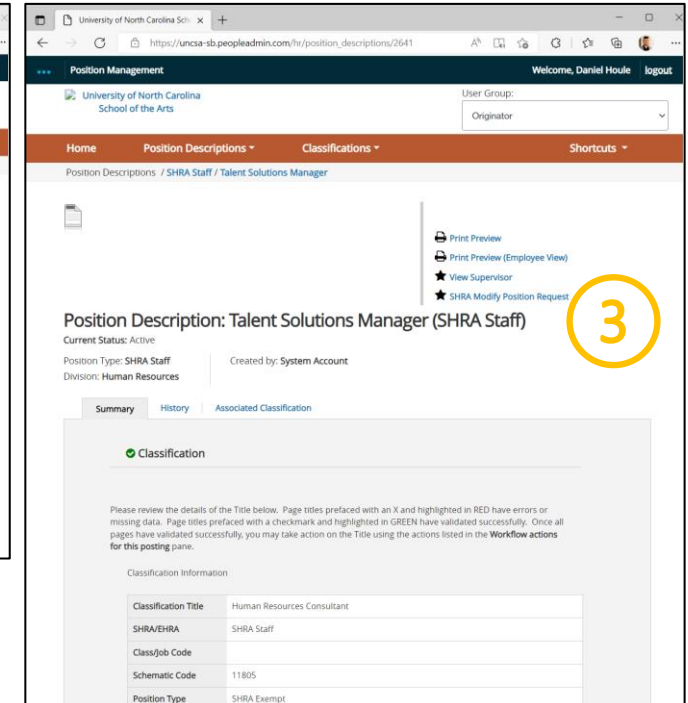
2. **Review Position Request Summary**

UNCSA

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Select Correct Approver**

4. **Click Submit!**

STEPS

1. **Access Position Management**
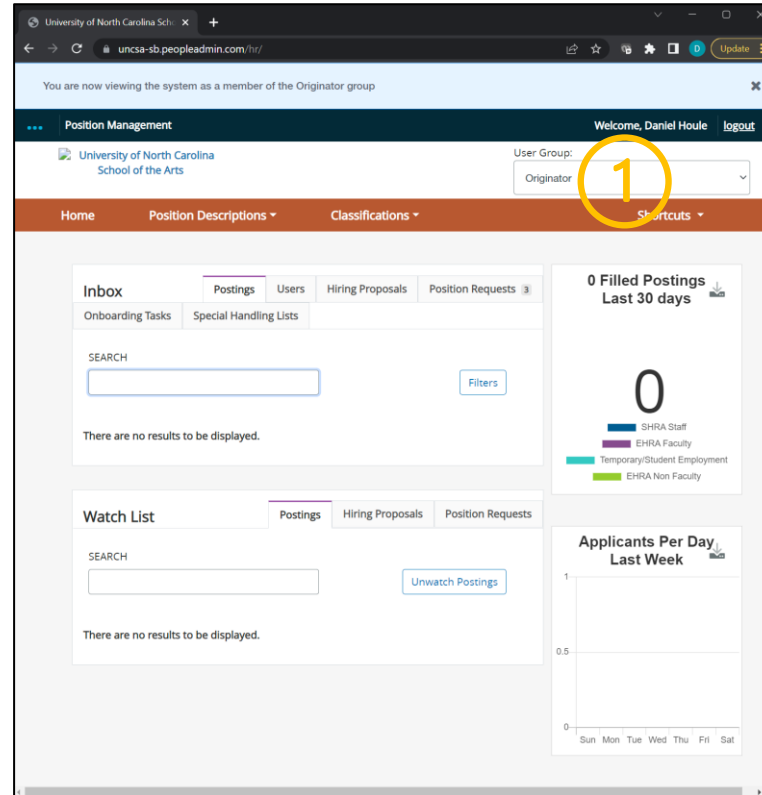
2. **Click For UNCSA Employees**

3. **Login with Microsoft**

UNCSA

STEPS

Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select SHRA Staff**

STEPS

1. **Search for Employee**

2. **Click Actions Next to Position Row & Click View**

3. **Click SHRA Modify Position Request**
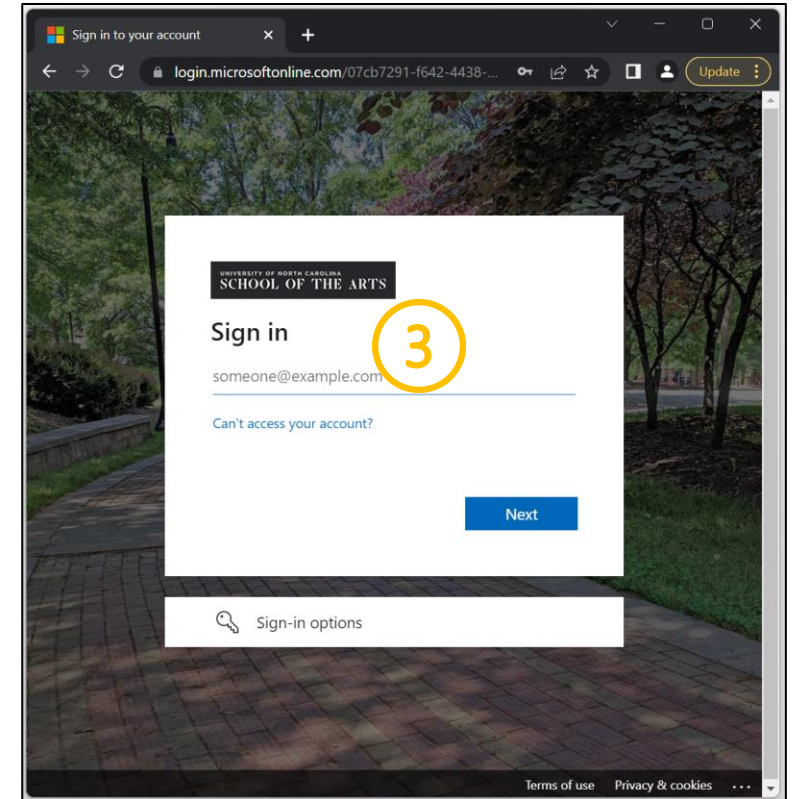
4. **Click Start on the Modify Confirmation Page**

UNCSA

STEPS

1. **Complete Reason for Termination**

   • **Reason for Termination & Effective Date**

2. **Select Termination, Click Save**

3. **Move to Position Documents**

4. **Go to Other, Click Actions, Click Upload New**

5. **Required: Upload Resignation Letter or other supporting documents**

6. **Click Save**

RETURN TO INDEX

UNCSA

STEPS

1. **Move to Position Request Summary**
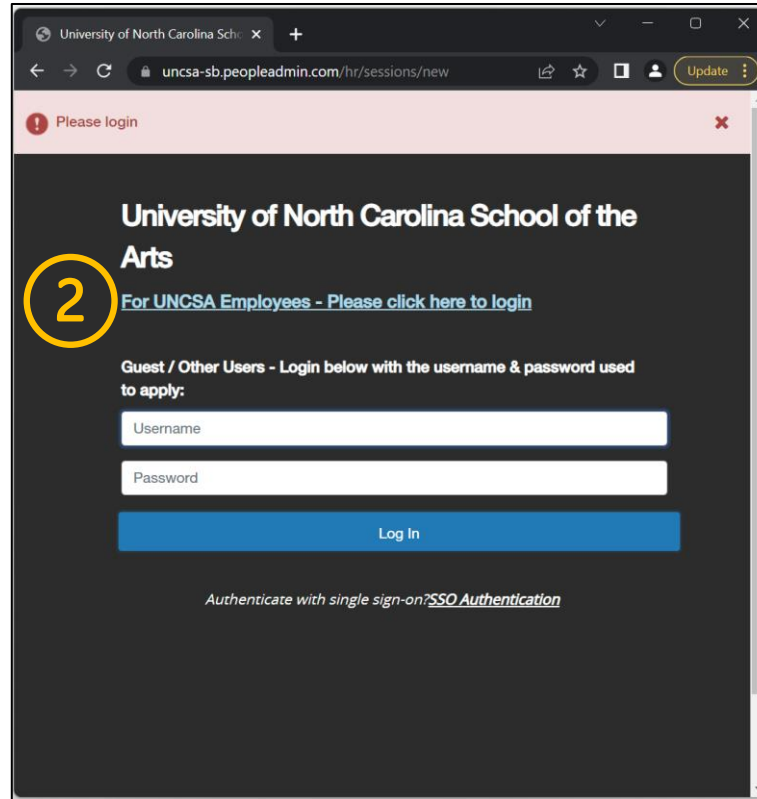
2. **Review Position Request Summary**

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Select Correct Approver**

4. **Click Submit!**

UNCSA

STEPS

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

UNCSA

STEPS
Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select EHRA Faculty**

STEPS

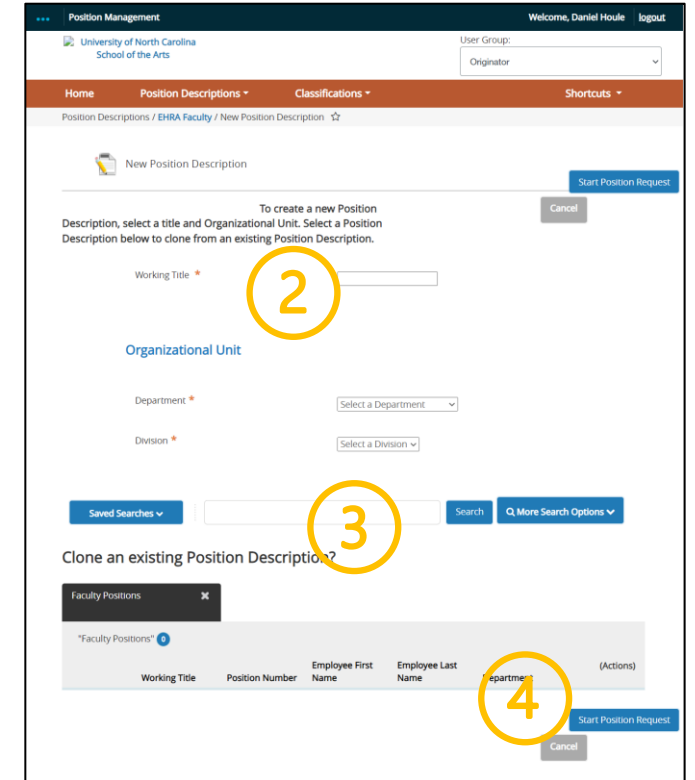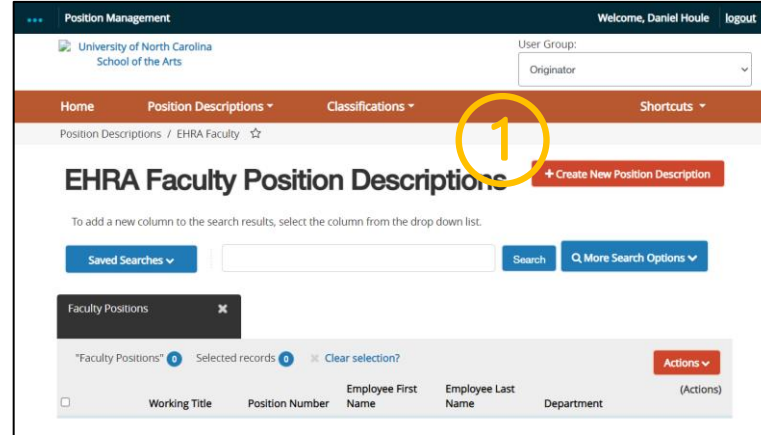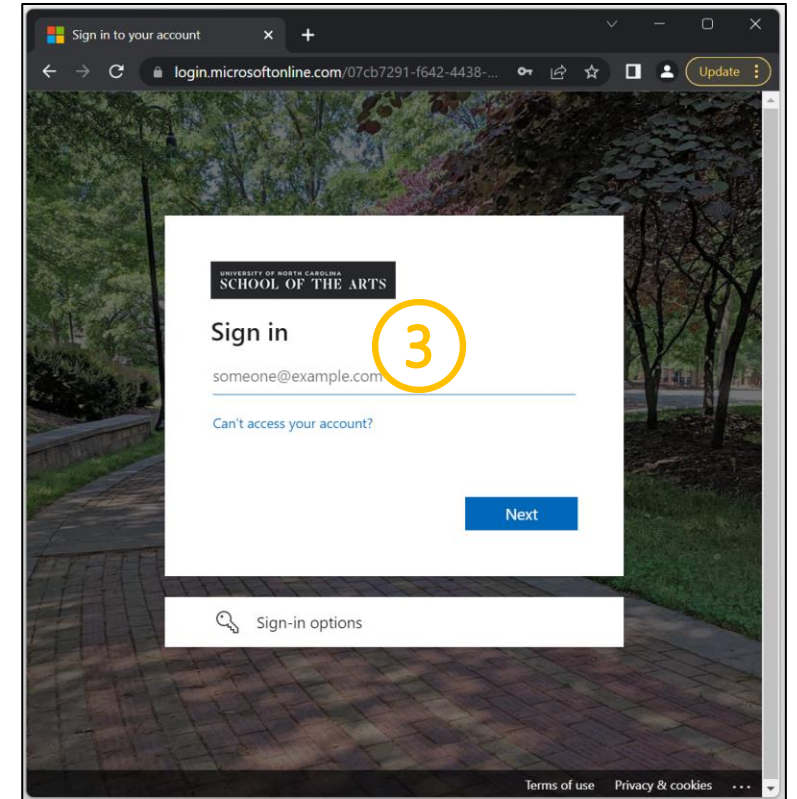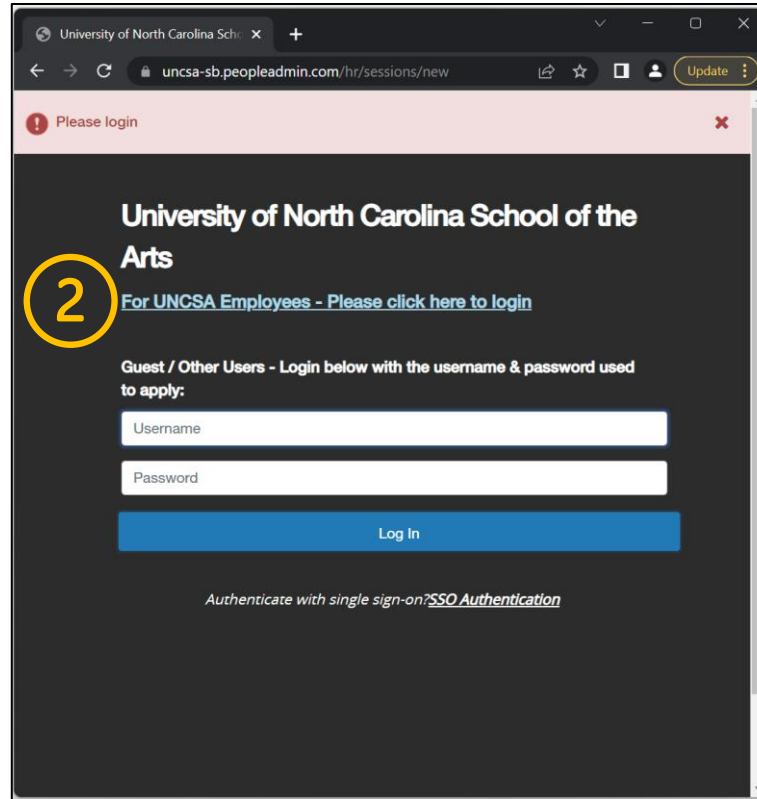1. **Click Create New Position**

2. **If New, Fill Out Required Fields**

3. **If Copying an Existing Position,**

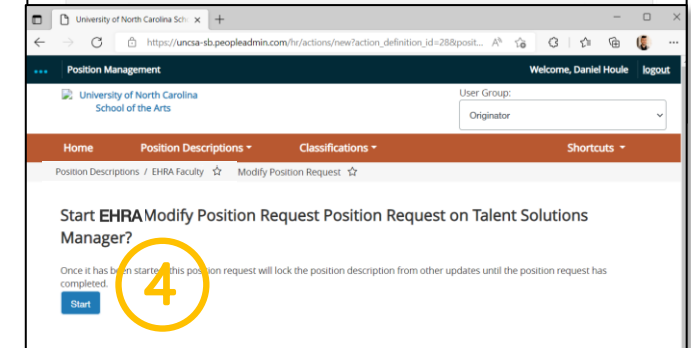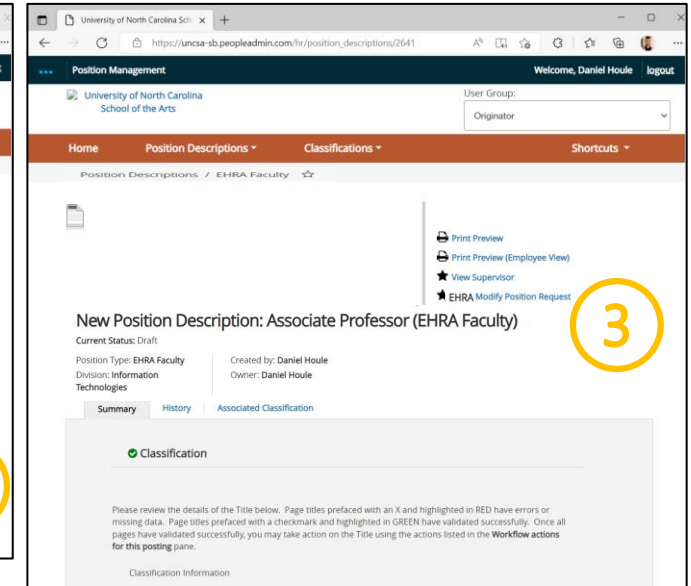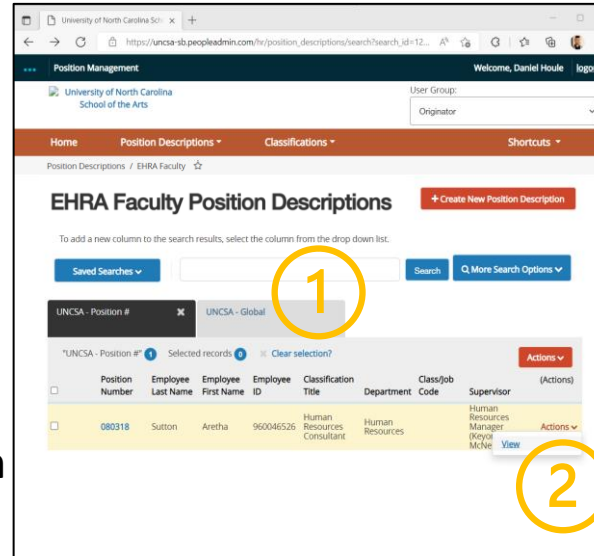   **Search & Select for Position Number**

4. **Click Start Position Request**

Modifying an Existing Position? Skip to the next slide!

UNCSA

STEPS

1. **Search for Position**

2. **Click Actions on the Position Row, Select View**

3. **Click EHRA Modify Position Request**

4. **Click Start on the Modify Position Confirmation**

If you're creating a New Position, Skip to the next slide!

⏮ **RETURN TO INDEX** ⏭

UNCSA

STEPS

1. **Complete Reason for Request**

2. **Indicate Changes Requested, Click Save**

3. **Move to Position Details**

4. **Complete Information as Needed**

5. **Click Save**

STEPS

1. **Move to Position Budget Information**

2. **Complete Information as Needed**

3. **Click Save**

RETURN TO INDEX

UNCSA

STEPS

1. **Move to Responsibilities and Duties**

2. **Complete Information as Needed, Click Save**

3. **Move to Additional Information**

4. **Complete Information as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to ADA Checklist**

2. **Complete Information as Needed, Click Save**

3. **Move to Position Documents**

4. **Upload PDFs as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to Training and Access**

2. **Complete Information as Needed, Click Save**

3. **Move to Position Request Summary**

4. **Review Position Request Summary**

UNCSA

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Click Submit!**

UNCSA

STEPS

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

STEPS
Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select EHRA Faculty**

STEPS

1. **Search for Position**

2. **Click Actions on the Position Row, Select View**

3. **Click EHRA Modify Position Request**

4. **Click Start on the Modify Position Confirmation**

If you're creating a New Position, Skip to the next slide!

RETURN TO INDEX

UNCSA

STEPS

1. **Complete Reason for Supplemental Pay**

   • **Reason for Request & Effective Date**

2. **Select Supplemental Pay, Click Save**

3. **Move to Position Budget Information**

4. **Complete Information as Needed**

UNCSA

STEPS

1. **Complete All Supplemental Pay fields**

   • **Add additional details regarding the**

     specifics behind the supplemental pay

     request in the Originator Comments field

2. **Click Save**

RETURN TO INDEX

UNCSA

STEPS

1. **Move to Position Request Summary**

2. **Review Position Request Summary**
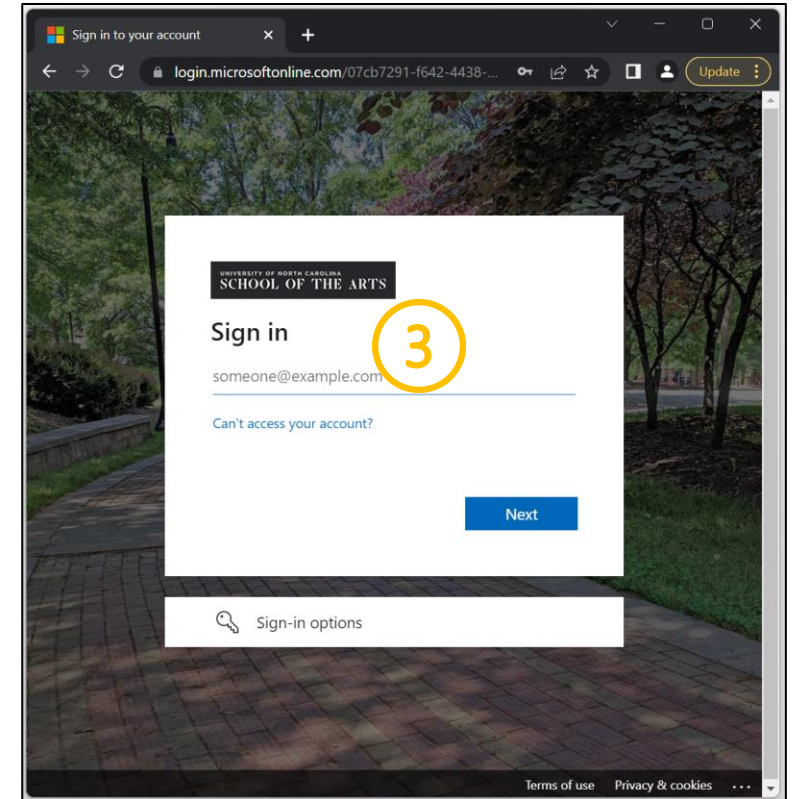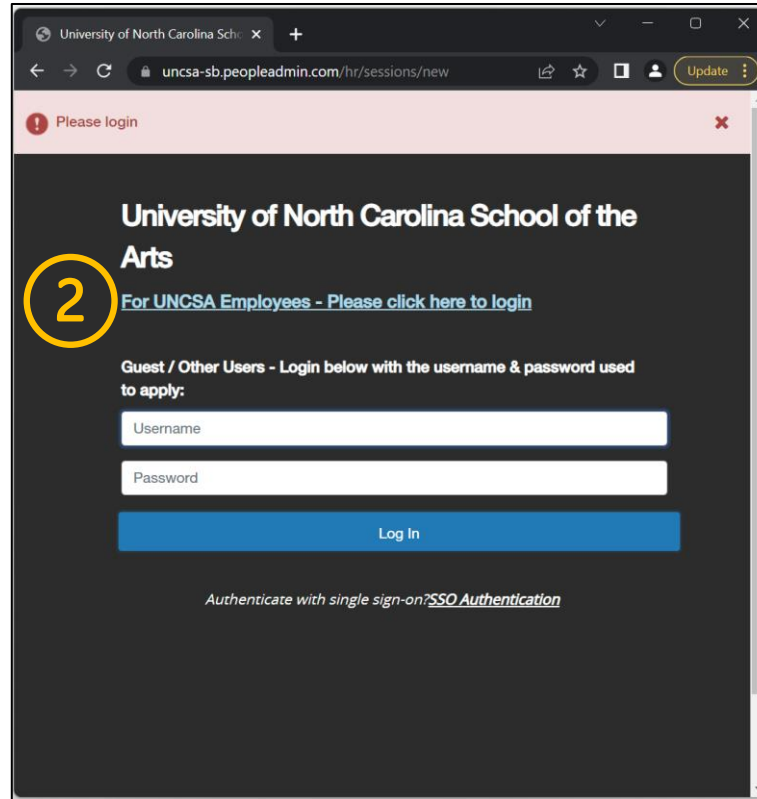
UNCSA

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Click Submit!**

UNCSA

STEPS

1. **Access [Position Management](#)**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

UNCSA

STEPS
Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select EHRA Faculty**

STEPS

1. **Search for Position**

2. **Click Actions on the Position Row, Select View**

3. **Click EHRA Modify Position Request**

4. **Click Start on the Modify Position Confirmation**

If you're creating a New Position, Skip to the next slide!

◀◀ **RETURN TO INDEX** ▶▶

UNCSA

STEPS

1. **Complete Reason for Termination**

   • **Reason for Termination & Effective Date**

2. **Select Termination, Click Save**

3. **Move to Position Documents**

4. **Required: Upload Resignation Letter or other**

   supporting documents

5. **Click Save**

RETURN TO INDEX

UNCSA

STEPS

1. **Move to Position Request Summary**

2. **Review Position Request Summary**
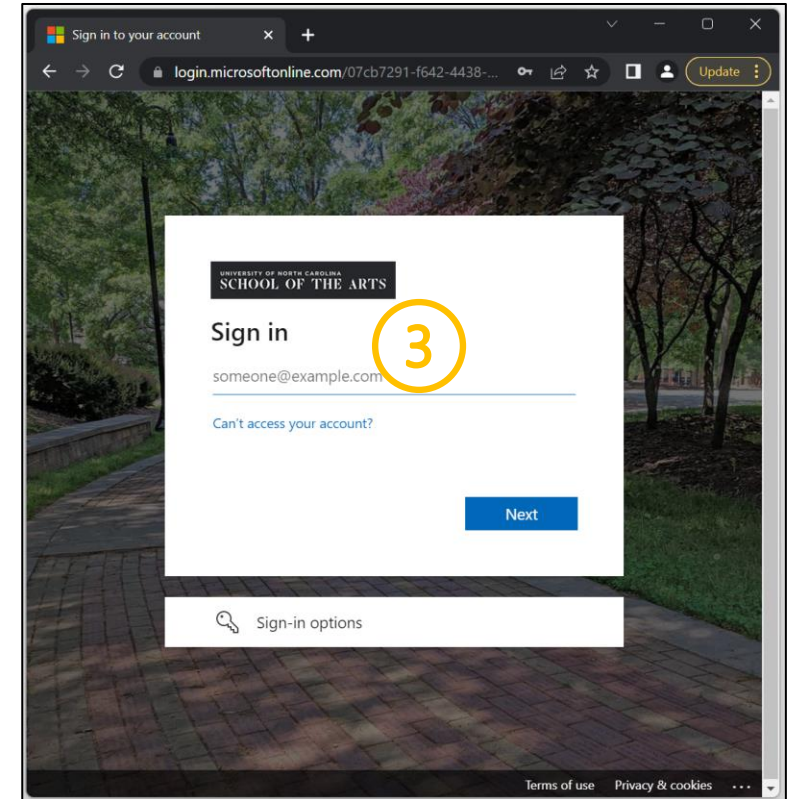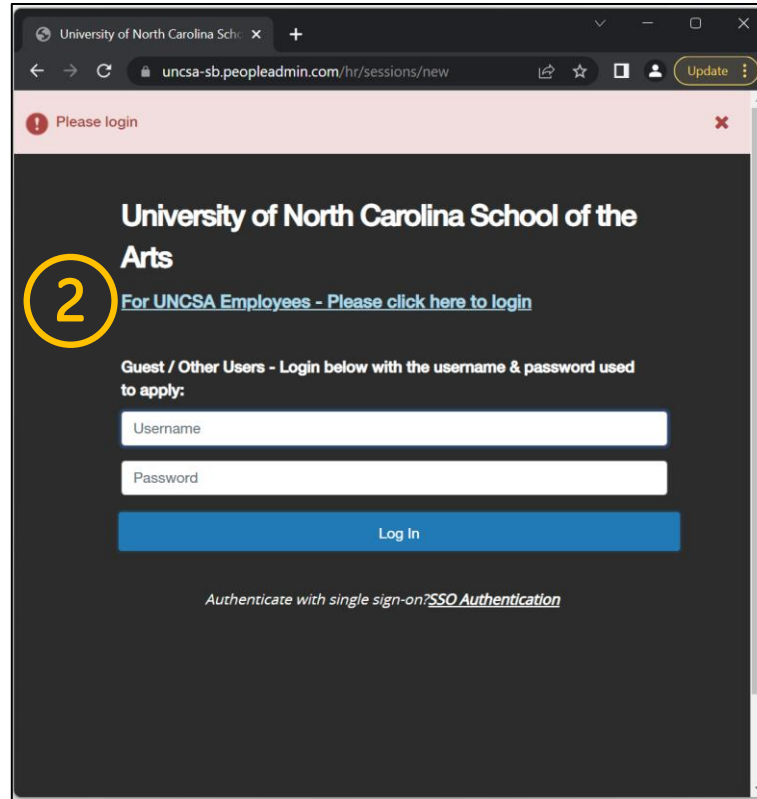
UNCSA

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Click Submit!**

UNCSA

STEPS

1. **Access [Position Management](#)**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

UNCSA

STEPS

1. **Change User Group to Originator**

2. **Click Positions Descriptions**

3. **Select Temporary/Student Employment**
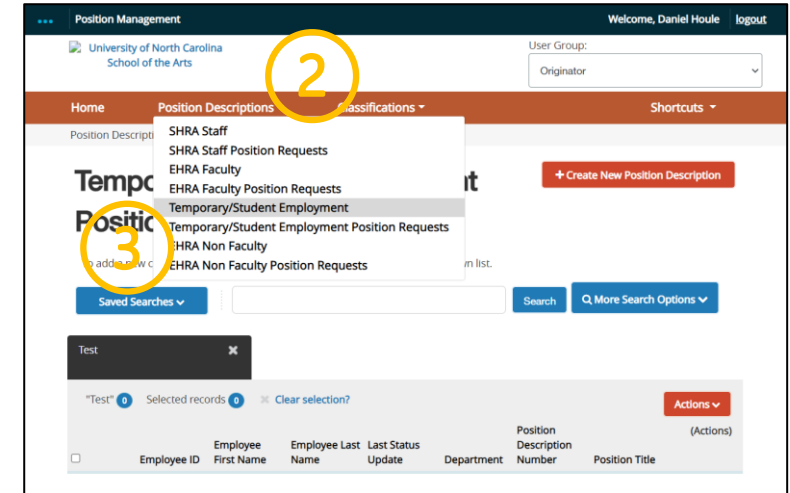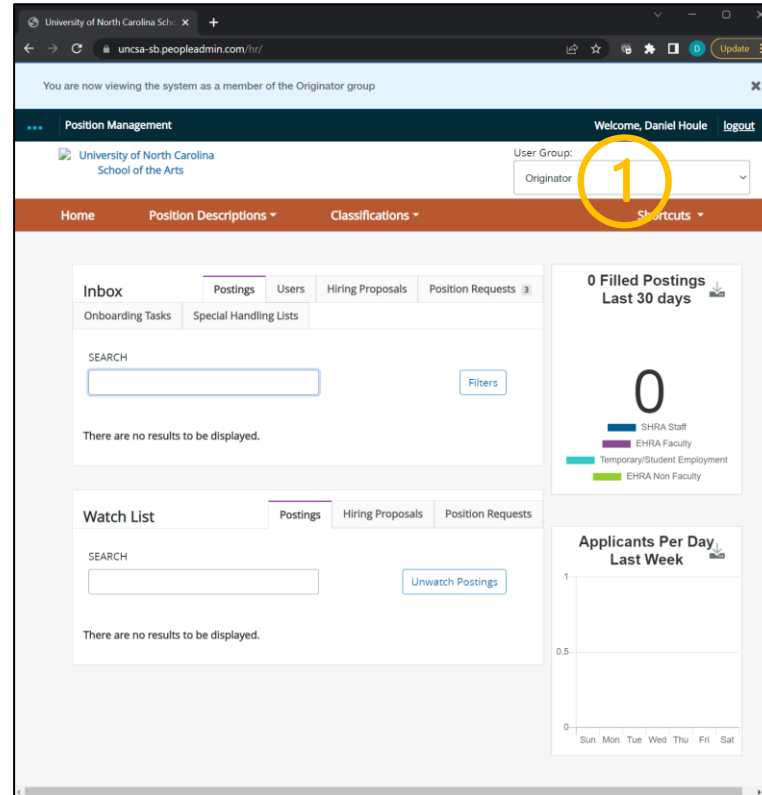
UNCSA

STEPS

1. **Click Create New Position**

2. **If New, Fill Out Required Fields**

3. **If Copying an Existing Position,**

   Search & Select for Position Number

4. **Click Start Position Request**

UNCSA
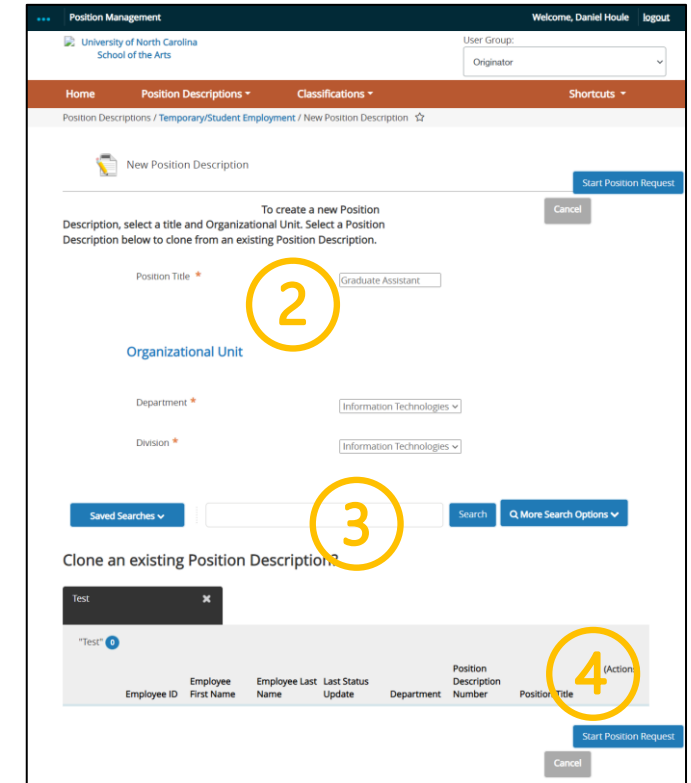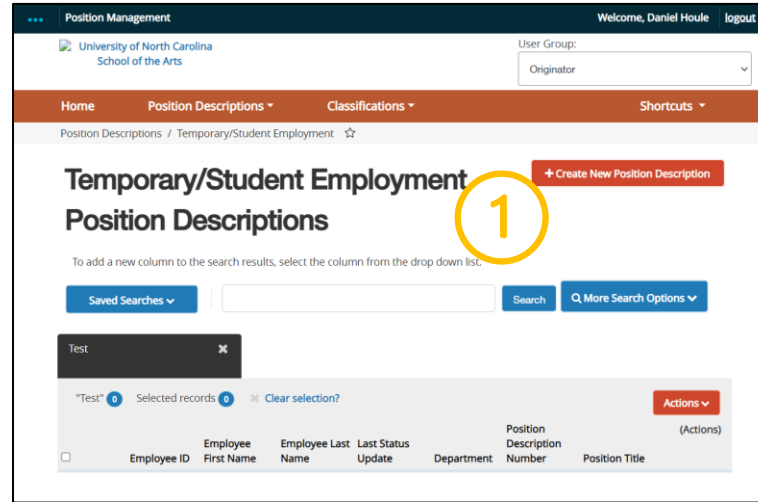
STEPS

1. **Complete Reason for Request**

2. **Complete Appointment & Payment Dates**

   Click Save

3. **Move to Employee Section**

4. **Select User from List, click Save**

Note: If you are adding a new person not on the list, move

to next the slide

RETURN TO INDEX

UNCSA

STEPS

1. **Move to Position Details Information**

2. **Complete Information as Needed, Click Save**

   - **If you need to add a new person, enter**

     Employee Name Details here

3. **Move to Position Budget Information**

4. **Complete Information as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to Responsibilities and Duties**

2. **Complete Information as Needed, Click Save**

3. **Move to Additional Information**

4. **Complete Information as Needed**

STEPS

1. **Move to ADA Checklist**

2. **Complete Information as Needed**

3. **Move to Position Documents**

4. **Upload PDFs as Needed**

UNCSA

STEPS

1. **Move to Training and Access**

2. **Complete Information as Needed**

3. **Move to Position Request Summary**

4. **Review Position Request Summary**

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Select Correct Approver**

4. **Click Submit!**

UNCSA

STEPS

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

STEPS
Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select EHRA Non-Faculty**

STEPS

1. **Click Create New Position**

2. **If New, Fill Out Required Fields**

3. **If Copying an Existing Position,**
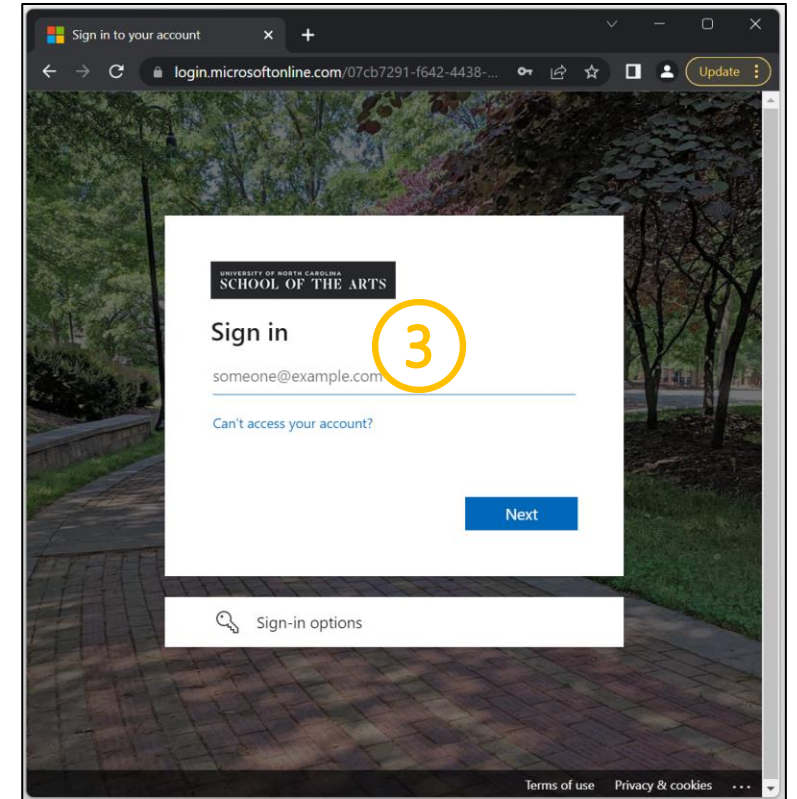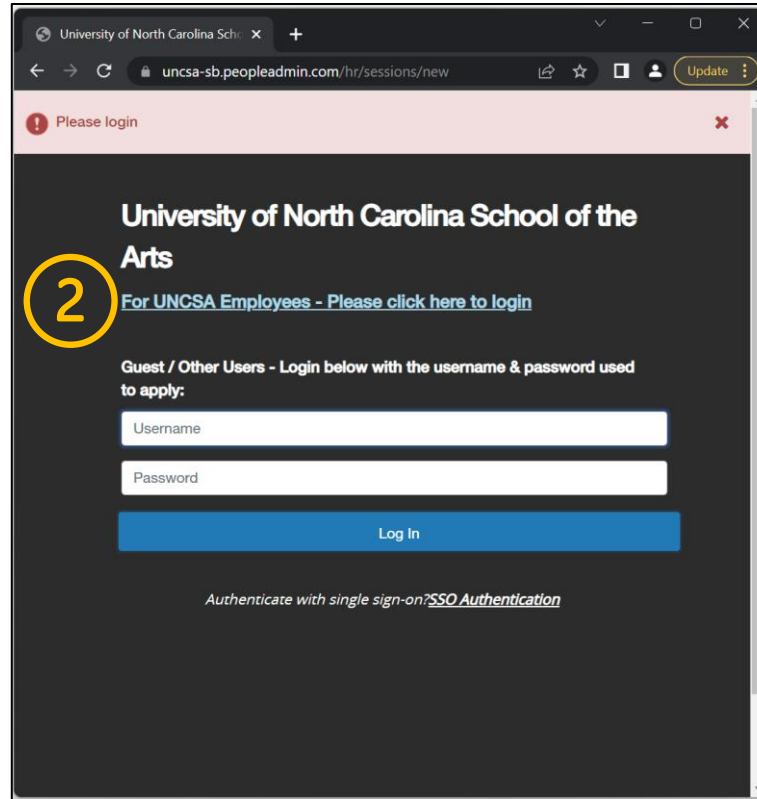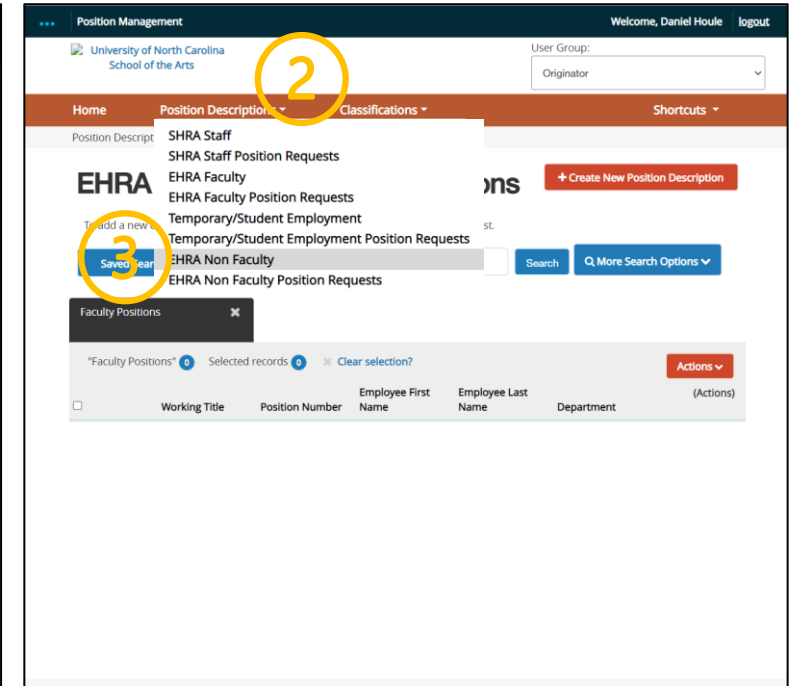
   Search & Select for Position Number

4. **Click Start Position Request**

Modifying an Existing Position? Skip to the next slide!

UNCSA

STEPS

1. **Search for Position**
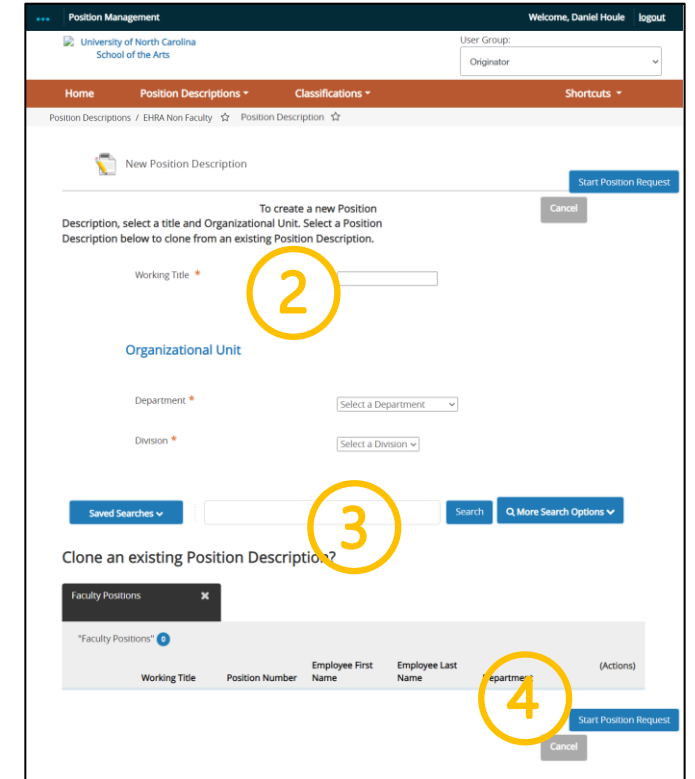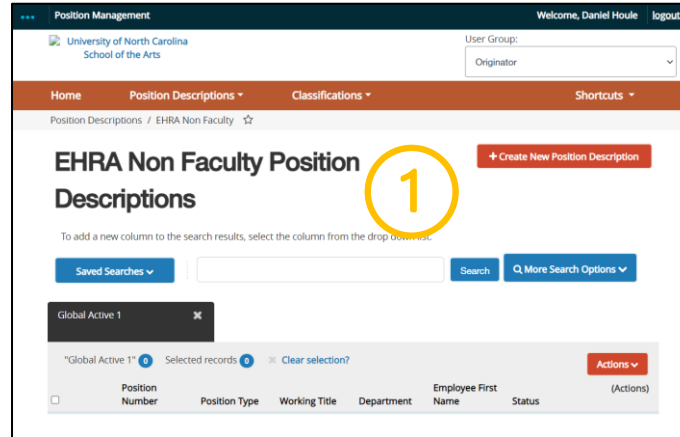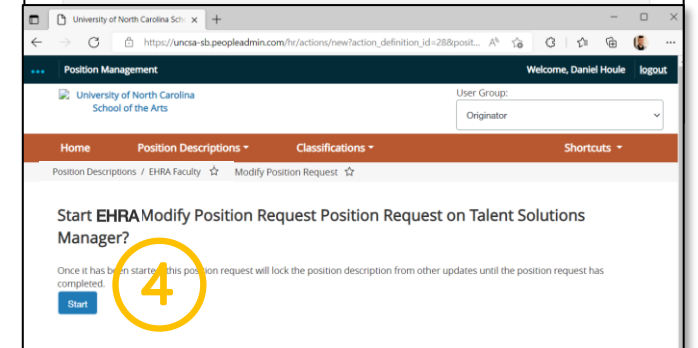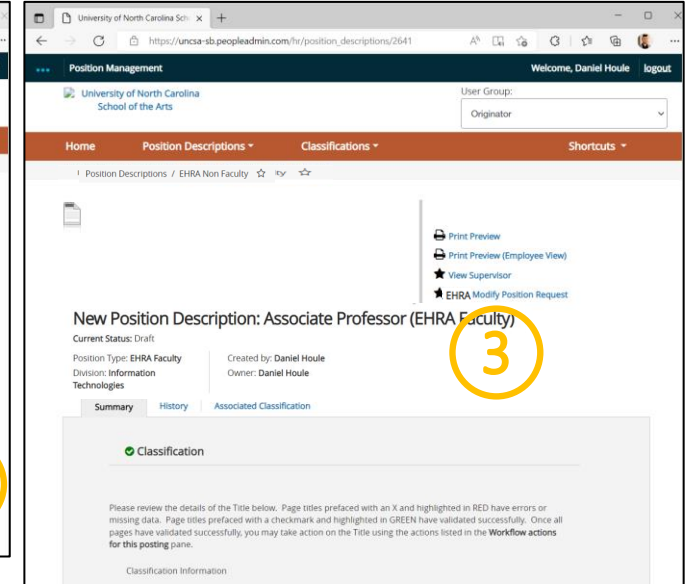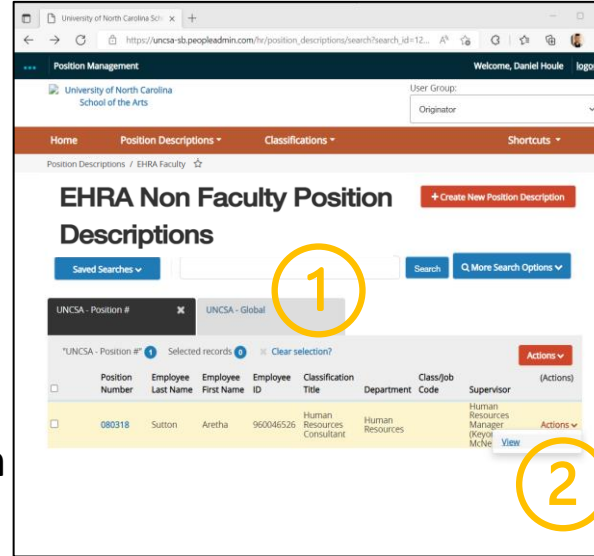
2. **Click Actions on the Position Row, Select View**

3. **Click EHRA Modify Position Request**

4. **Click Start on the Modify Position Confirmation**

If you're creating a New Position, Skip to the next slide!

⏮ **RETURN TO INDEX** ⏭

UNCSA

STEPS

1. **Complete Reason for Request**

2. **Indicate Changes Requested, Click Save**

3. **Move to Position Details**

4. **Complete Information as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to Position Budget Information**

2. **Complete Information as Needed**

3. **Click Save**

UNCSA

STEPS

1. **Move to Responsibilities and Duties**

2. **Complete Information as Needed, Click Save**

3. **Move to Additional Information**

4. **Complete Information as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to ADA Checklist**

2. **Complete Information as Needed, Click Save**

3. **Move to Position Documents**

4. **Upload PDFs as Needed**

5. **Click Save**

UNCSA

STEPS

1. **Move to Training and Access**

2. **Complete Information as Needed, Click Save**

3. **Move to Position Request Summary**

4. **Review Position Request Summary**

RETURN TO INDEX

UNCSA

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Click Submit!**

UNCSA

STEPS

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

STEPS
Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select EHRA Non-Faculty**

STEPS

1. **Search for Position**

2. **Click Actions on the Position Row, Select View**

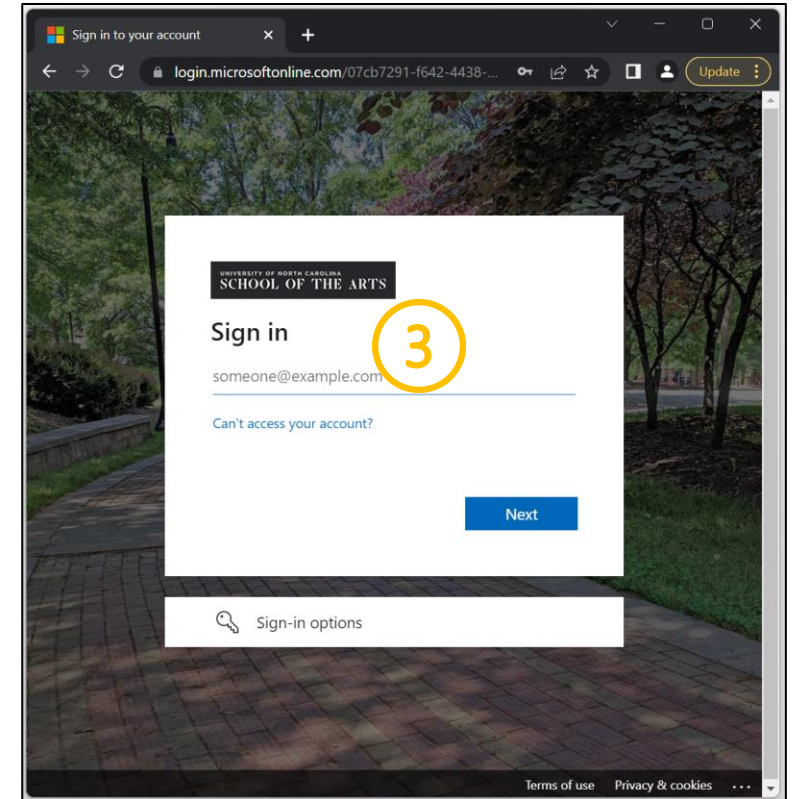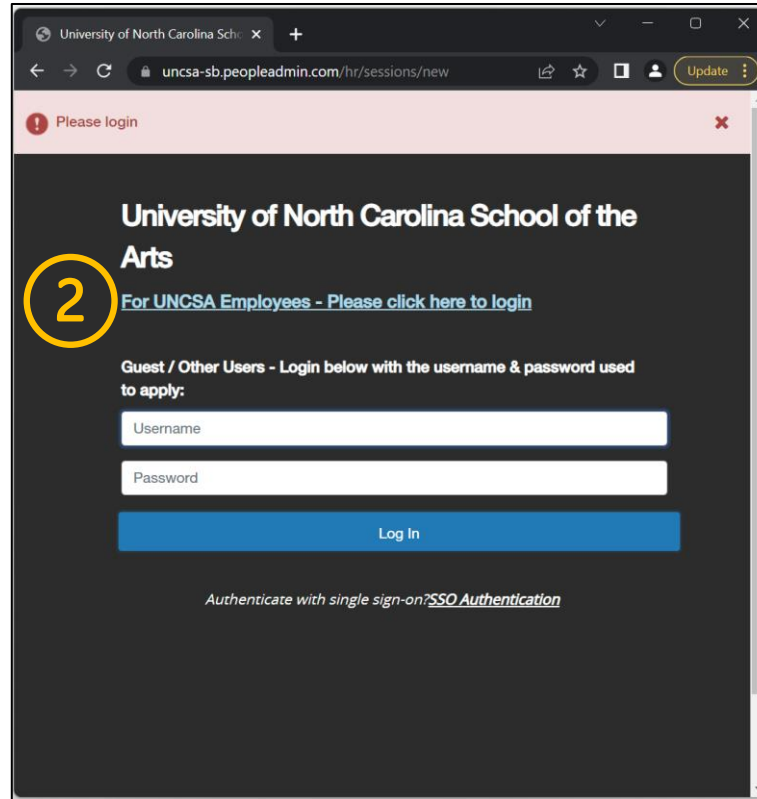3. **Click EHRA Modify Position Request**

4. **Click Start on the Modify Position Confirmation**

If you're creating a New Position, Skip to the next slide!

UNCSA

STEPS

1. **Complete Reason for Supplemental Pay**

   • **Reason for Request & Effective Date**

2. **Select Supplemental Pay, Click Save**

3. **Move to Position Budget Information**

4. **Complete Information as Needed**

5. **Click Save**

RETURN TO INDEX

UNCSA

STEPS

1. **Complete All Supplemental Pay fields**

   • **Add additional details regarding the specifics behind the supplemental pay request in the Originator Comments field**

2. **Click Save**

RETURN TO INDEX

UNCSA

STEPS

1. **Move to Position Request Summary**

2. **Review Position Request Summary**

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Click Submit!**

UNCSA

STEPS

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

STEPS

Change User Group to Originator

1. **Click Positions Descriptions**

2. **Select EHRA NON-FACULTY**

RETURN TO INDEX

UNCSA

STEPS

1. **Search for Position**
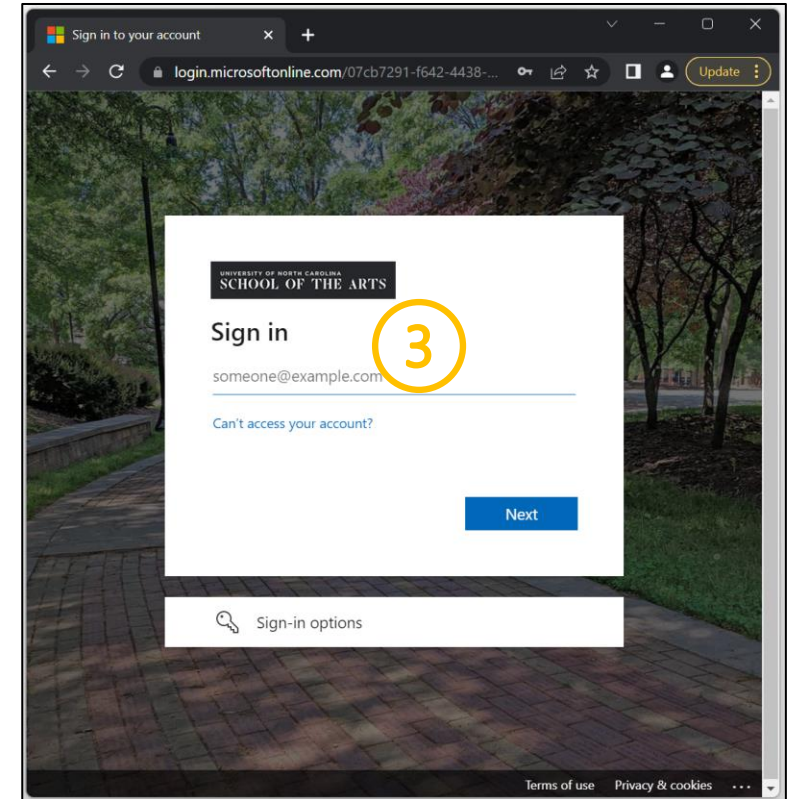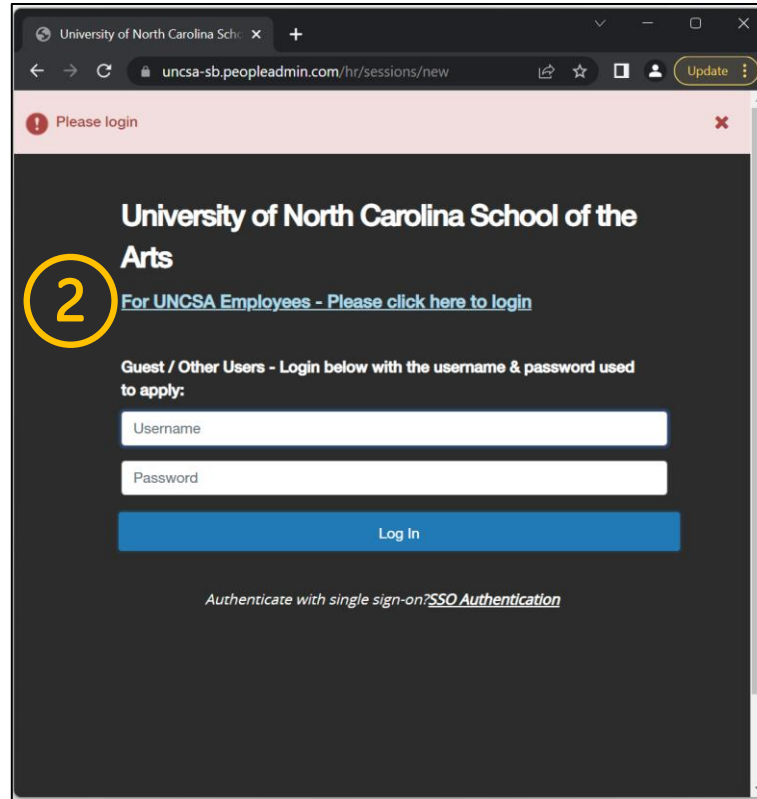
2. **Click Actions on the Position Row, Select View**

3. **Click EHRA Modify Position Request**

4. **Click Start on the Modify Position Confirmation**

If you're creating a New Position, Skip to the next slide!

⏮ **RETURN TO INDEX** ⏭

UNCSA

STEPS

1. **Complete Reason for Termination**

   - **Reason for Termination & Effective Date**

2. **Select Termination, Click Save**

3. **Move to Position Documents**

4. **Required: Upload Resignation Letter or other supporting documents**

5. **Click Save**

RETURN TO INDEX

UNCSA

STEPS

1. **Move to Position Request Summary**

2. **Review Position Request Summary**

UNCSA

STEPS

1. **Once Review is Complete, Select Take Action**

2. **Select Submit for Approval**

3. **Click Submit!**

UNCSA

UNCSA