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*
ORIGINATOR ROLE: SHRA STAFF NEW POSITION & UPDATE POSITION | Login

**STEPS**

1. Access **Position Management**

2. Click For UNCSA Employees

3. Login with Microsoft
STEPS

1. Change User Group to Originator
2. Click Positions Descriptions
3. Select SHRA Staff
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!
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!
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
ORIGINATOR ROLE: SHRA STAFF NEW POSITION & UPDATE POSITION | Complete Position Information

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

RETURN TO INDEX
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
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
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
STEPS

1. Once Review is Complete, Select Take Action

2. Select Submit for Approval

3. Select Correct Approver

4. Click Submit!
ORIGINATOR ROLE: SHRA STAFF SUPPLEMENTAL PAY | Login

**STEPS**

1. Access [Position Management](#)

2. Click For UNCSA Employees

3. Login with Microsoft

RETURN TO INDEX
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
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
ORIGINATOR ROLE: SHRA STAFF SUPPLEMENTAL PAY | Complete Position Information

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!
ORIGINATOR ROLE: SHRA STAFF TERMINATION | Login

**STEPS**

1. **Access Position Management**

2. **Click For UNCSA Employees**

3. **Login with Microsoft**

RETURN TO INDEX
**STEPS**

Change User Group to Originator

1. Click Positions Descriptions

2. Select SHRA Staff
ORIGINATOR ROLE: SHRA STAFF TERMINATION | Search for Position

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 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
ORIGINATOR ROLE: SHRA STAFF TERMINATION | Complete Position Information

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!
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. 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!
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!
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
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
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
ORIGINATOR ROLE: EHRA FACULTY NEW POSITION & UPDATE POSITION | Complete Position Information

**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
ORIGINATOR ROLE: EHRA FACULTY NEW POSITION & UPDATE POSITION | Submit for Approval

**STEPS**

1. Once Review is Complete, Select Take Action
2. Select Submit for Approval
3. Click Submit!
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!
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
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
ORIGINATOR ROLE: EHRA FACULTY SUPPLEMENTAL PAY | Review Request Summary

STEPS

1. Move to Position Request Summary

2. Review Position Request Summary

RETURN TO INDEX
STEPS

1. Once Review is Complete, Select Take Action
2. Select Submit for Approval
3. Click Submit!
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!
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
1. Move to Position Request Summary

2. Review Position Request Summary
ORIGINATOR ROLE: EHRA FACULTY TERMINATION | Submit for Approval

STEPS

1. Once Review is Complete, Select Take Action
2. Select Submit for Approval
3. Click Submit!
ORIGINATOR ROLE: TEMPORARY/STUDENT NEW POSITION | Login

**STEPS**

1. Access Position Management
2. Click For UNCSA Employees
3. Login with Microsoft
STEPS

1. Change User Group to Originator
2. Click Positions Descriptions
3. Select Temporary/Student Employment
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
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
**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
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
STEPS

1. Move to Training and Access
2. Complete Information as Needed
3. Move to Position Request Summary
4. Review Position Request Summary

RETURN TO INDEX
ORIGINATOR ROLE: TEMPORARY/STUDENT | Submit for Approval

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

RETURN TO INDEX
STEPS
Change User Group to Originator

1. Click Positions Descriptions
2. Select EHRA Non-Faculty
ORIGINATOR ROLE: EHRA NON-FACULTY NEW POSITION & UPDATE POSITION | Create New Position

**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!
ORIGINATOR ROLE: EHRA NON-FACULTY NEW POSITION & UPDATE POSITION | Modify Existing Position

**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!
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

RETURN TO INDEX
STEPS

1. Move to Position Budget Information
2. Complete Information as Needed
3. Click Save
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
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
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
STEPS

1. Once Review is Complete, Select Take Action
2. Select Submit for Approval
3. Click Submit!

RETURN TO INDEX
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!
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
**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
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!
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
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!
ORIGINATOR ROLE: EHRA NON-FACULTY TERMINATION | Complete Information for Termination

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**
ORIGINATOR ROLE: EHRA NON-FACULTY TERMINATION | Review Request Summary

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!

ORIGINATOR ROLE: EHRA NON-FACULTY TERMINATION | Submit for Approval