Quick Guide to creating a new HR Position Request

The form is designed to be used by hiring managers to submit job posting and reclassification requests. It can also be used by department administrators to submit position requests on behalf of others.

- Trouble accessing the HR Position Request form? Contact [ITServicedesk@hms.harvard.edu]
- Questions regarding the form itself? Contact your [Human Resources Coordinator]

1. User Roles

There are different roles who can use the HR Position Request form:

User Roles	Create (own)	Edit (own)	View (own)	View & Edit (others)	Submit to final to HR
Hiring Managers	✓	✓	✓		✓
Dept Admins and Heads	✓	✓	✓	✓	✓
Human Resources				✓	
Collaborators*				✓	

* Collaborators – A hiring manager or department administrators can add an employee or colleague as a collaborator to help prepare the position request. The collaborator will only be able to view the requests they have been assigned to. A collaborator can be added or removed at any time.

2. Create a Request

When you log in to the HR Position Request. Click the “Create” button in the upper right to start.

If you created requests in the past (or if your role allows you to see other requests), you’ll see a list of requests on this page.

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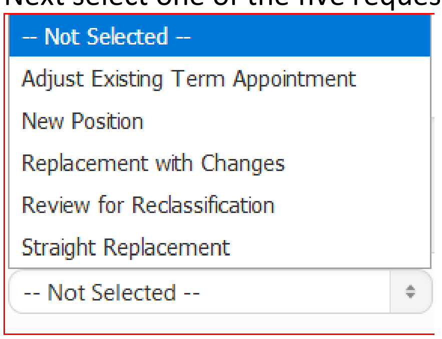
3. Select the Hiring Manager

The next page is "Basic Information." Click the "Search for Hiring Manager" button and type the hiring manager's name (first and/or last name), then click the "Go" button. Select the hiring manager name by clicking on the username in red. You'll be returned to the "Basic Information" page with the departmental data populated based on the hiring manager's department.

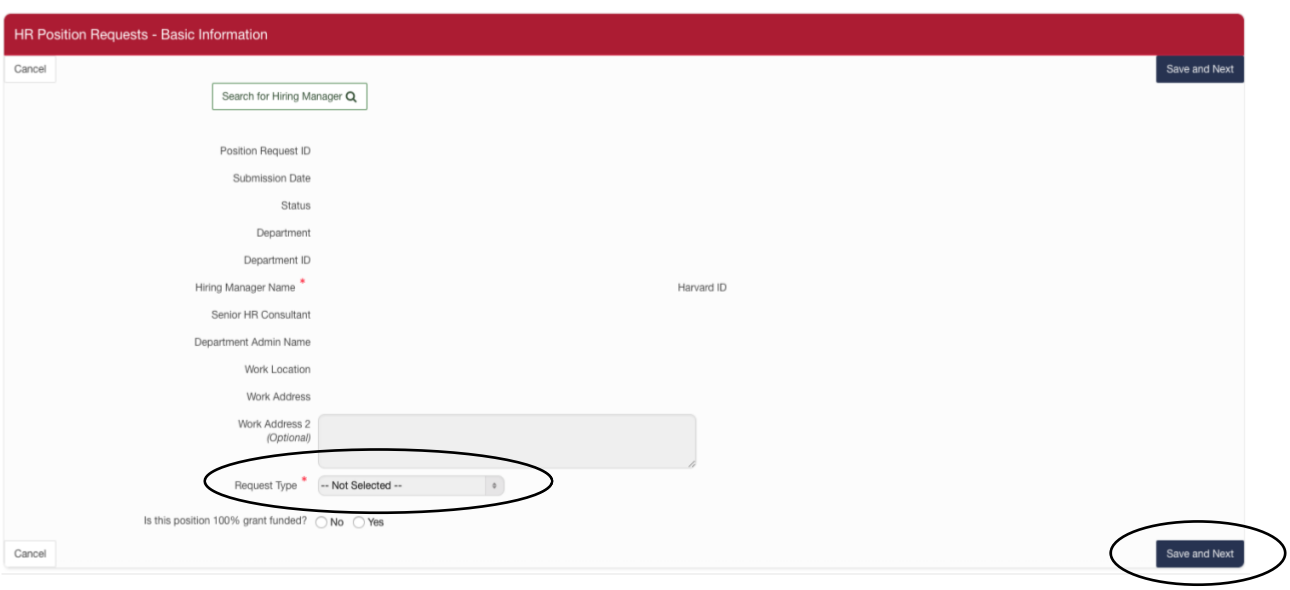
4. Select the Request Type

Next select one of the five request types:

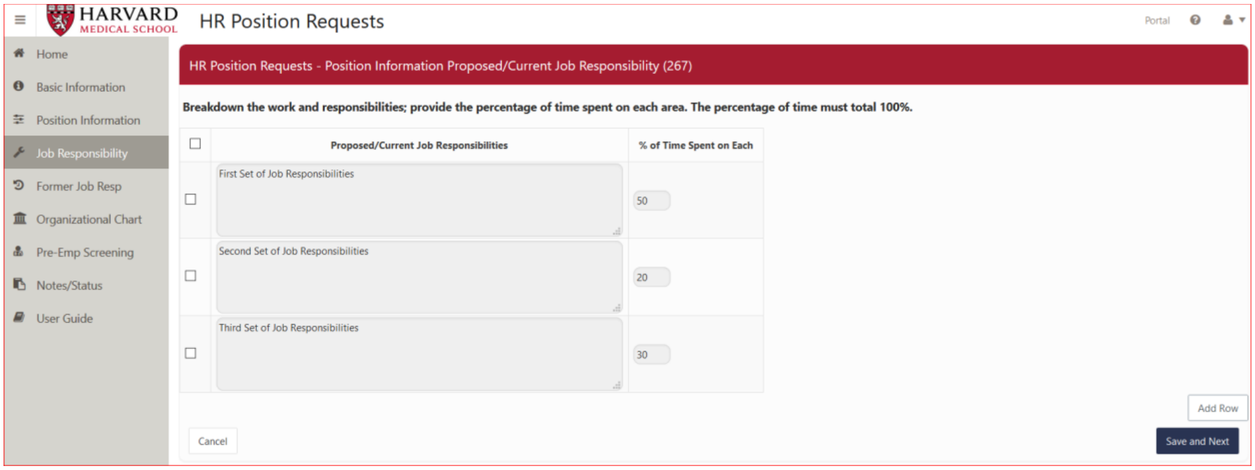


The request type determines the data elements required by HR for the particular position request. Complete the data fields and click "Save and Next."

Note: Once you save, you cannot change the "Request Type." If you want to create a different request, delete the request and create a new one with the correct "Request Type."



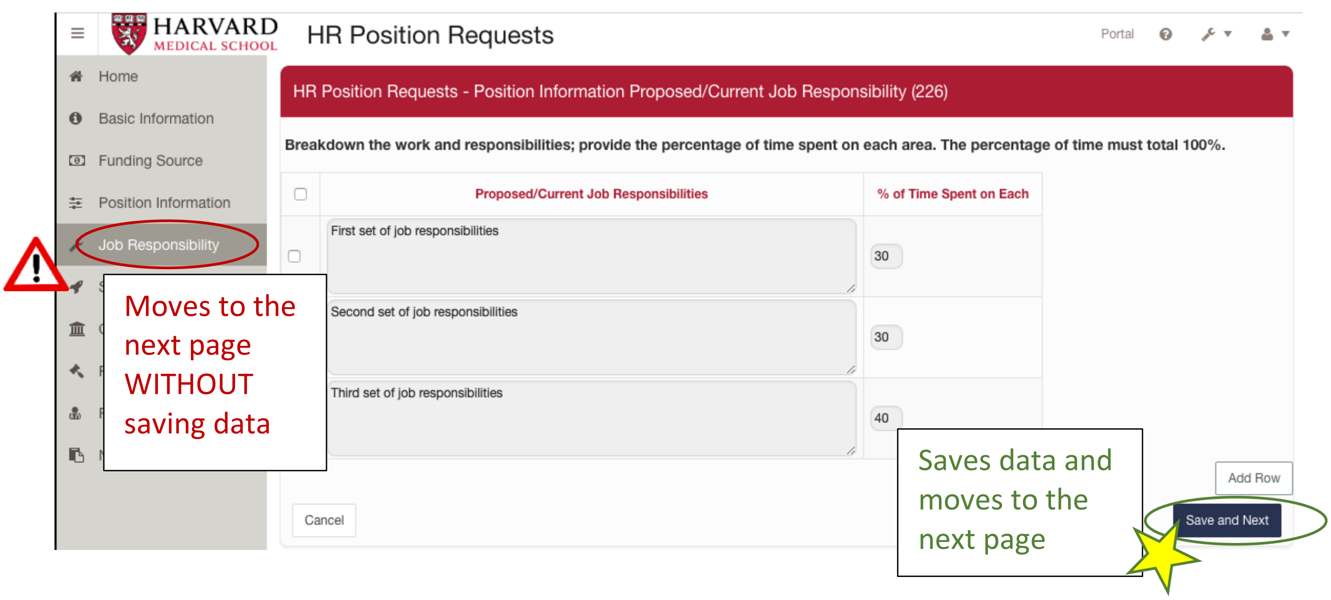
5. Complete the Form



Based on the request type, the form presents the required information for submission to HR.
Note: Most of the fields are not system required even though they are required by HR for review.

You must click the "Save and Next" button after you have entered information into the form or you will LOSE data.

The left side menu displays your progress through the required components. Clicking on the left side menu will bring you to the new section, but you will LOSE data that was not saved on a previous screen. Be sure to click "Save and Next" on every screen.

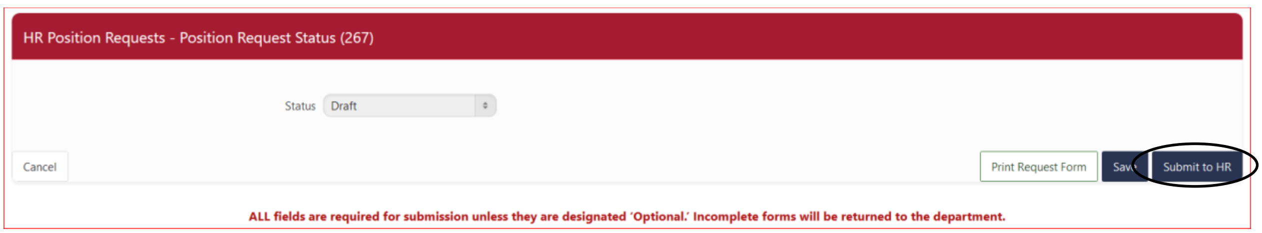


6. Add a Collaborator

If you'd like to add a collaborator, save your information and return to the "Basic Information" page. Click on the "Collaborators" button, then "Add," then "Search for Collaborator." Send your collaborator a note about what you need them to do. You can have multiple collaborators.

7. Add Notes, Print to PDF, and Submit to HR

The "Notes/Status" page allows you to add notes to HR or a collaborator.
If you would like an electronic copy of the form, click Print Request Form.
Once complete, click "Submit to HR", which will change the status from 'Draft' to 'Pending Approval.'



NOTE: There are no automatic notifications. These will be added in a future release. For now, send your HR coordinator or recruiter an email informing them that a form has been submitted, and include the Position Request ID which is at the top of each page in parentheses.

8. Frequently Asked Questions

Why can't I see some of the fields that I need to add in my request?

Some fields have dependencies based on other fields, for example: the "Number of Direct Reports" will only appear when you answer "Yes" to "Does this position manage others…?"

Can I change the status of my request form?

A newly created request will be in "Draft" status until the requestor hits "Submit to HR" button on the "Notes/Status" page which will change the status to "Pending Approval." Only HR can change the status of a submitted request.

Can I edit the form once I submit to HR?

No, once the form is submitted to HR, the creator can no longer edit it unless HR changes the status to "Require More Information." HR will review and update the form and status.

Do I need to inform anyone once I submit a form to HR?

For this first release, there are no automatic notifications setup. Communications during this first release still need to be communicated through email.