

# Position Change Form

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**When to use** Complete a **Position Change** form when an employee moves from one position to another position within the same organizational structure (under the same Manager and/or Payroll Coordinator).

 **Warning:** If the employee is moving to a position in a different organizational structure (under a different Payroll Coordinator), use the [Transfer](#) form.

**Before you begin** Ensure any necessary organization management (OM) forms have been submitted and approved before submitting the personnel actions form. See the [BUworks Form Decision Guide](#) for a complete list of forms necessary for each action type.

 **Note:** The position may need to be posted through HR Talent Recruitment Services and an offer extended to the employee before the Position Change can be initiated. HR Compensation will determine whether the position requires posting when the Create Position form goes through workflow.

You will need the following information:

- Effective date of action
- Action Reason
- New position number and details (position title, job, org unit, personnel area, personnel subarea, employee group, employee subgroup)
- Mail Code
- Work Schedule Rule
- Assignment Duration
- Percent Time Employed
- Hourly Rate or Semi-Monthly Pay Amount
- Cost Distribution
- Office Address and Phone Number

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

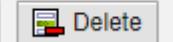
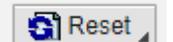
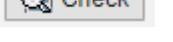
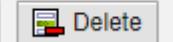
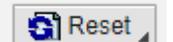
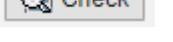
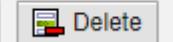
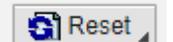
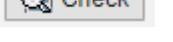
- Click [here](#) for the Data Dictionary

## Position Change Form: Step-by-Step

Step	Action
1	<p>Initiate the <b>Position Change</b> form.</p> <p> <b>Warning:</b> Forms must be completed one at a time; do not open multiple forms in multiple tabs.</p> <p> <b>Reference:</b> <a href="#">Initiate a Personnel Administration (PA) Form</a></p>
2	<p>Enter the effective date for the payment in the <b>Position Change Effective Date</b> field in mm/dd/yyyy format. If preferred, click the <b>Calendar Lookup</b> icon to select the effective date of hire from the calendar.</p> <p> <b>Note:</b> If the salary is changing, it will be pro-rated based on the effective date used. Please remember that if exempt there are two pay periods per each month which is usually the 1st – 15th and 16 – 30/31st.</p> <p> <b>Warning:</b> To avoid potential delays in payment to the employee, take note of the <a href="#">assigned PA deadline</a> for the intended pay period and plan accordingly.</p>
3	<p>Click the <b>Continue Editing Form</b> button.</p> <p> <b>Result:</b></p> <ul style="list-style-type: none"> <li>• The <b>Employee Information as of</b> section is populated with the employee's information as of the effective date used.</li> <li>• The <b>Updated Employee Information</b> section describes the new employee information.</li> <li>• The <b>Attachments</b> and <b>Comments</b> sections of the form appear.</li> </ul>
4	<p>Select the reason for the position change from the <b>Action Reason</b> dropdown menu.</p>

Step	Action
5	<p>Select the employee's new position from the <b>New Position</b> dropdown menu.</p> <p> <b>Note:</b> If the position number does not appear in the dropdown, confirm the position is open using the Vacancy is open by reviewing the maintain position form under 'Position Details'. If the position is marked as No/Remove recruitment or hire selection, process another <a href="#">Maintain Position</a> form to open the position. The form will need to complete workflow prior to initiating the Position Change form again.</p> <p> <b>Result:</b></p> <ul style="list-style-type: none"> <li>• The <b>Mail Code, Work Schedule, Basic Pay, Cost Distribution, Corporate Function, and Office Location</b> fields appear.</li> <li>• The following fields are populated with the information for the employee's new position: <ul style="list-style-type: none"> <li>○ New Job</li> <li>○ New Org. Unit</li> <li>○ New Pers. Area</li> <li>○ New Pers. Subarea</li> <li>○ New Emp. Group</li> <li>○ New Emp. Subgroup</li> </ul> </li> </ul> <p>Validate the data pulling up on this form is accurate. If the information is inaccurate either the data on the position is incorrect or the effective date is a later date.</p> <p>If the information is <i>not</i> correct:</p> <ul style="list-style-type: none"> <li>• Using the Request Tracker, confirm the OM form submitted for this action completed workflow</li> </ul> <p> <b>Note:</b> 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"> <li>• Check to make sure the effective date used is the same as, or later than, the effective date used on the corresponding OM form</li> </ul> <p>If the above do not resolve the issue, cease processing and contact HR Compensation (<a href="mailto:hrcomp@bu.edu">hrcomp@bu.edu</a>) for guidance. Include details of what you checked and the corresponding OM tracking number from the Request Tracker.</p>
6	<p>Enter the mail code for the new position in the <b>New Mail Code</b> field.</p> <p> <b>Information:</b> 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>
7	<p>In the <b>Work Schedule</b> section, select the appropriate <b>Work Schedule Rule</b> from the dropdown menu.</p>

Step	Action						
8	<p>In the <b>Work Schedule</b> section, select:</p> <table border="1" data-bbox="289 331 1451 562"> <thead> <tr> <th data-bbox="289 331 553 422">IF the employee is...</th> <th data-bbox="553 331 1451 422">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 422 553 474">Full-time</td> <td data-bbox="553 422 1451 474">Proceed to the next step</td> </tr> <tr> <td data-bbox="289 474 553 562">Part-time</td> <td data-bbox="553 474 1451 562">Enter the percent time of employment in the <b>Percent Time Employed</b> field.</td> </tr> </tbody> </table>	IF the employee is...	THEN...	Full-time	Proceed to the next step	Part-time	Enter the percent time of employment in the <b>Percent Time Employed</b> field.
IF the employee is...	THEN...						
Full-time	Proceed to the next step						
Part-time	Enter the percent time of employment in the <b>Percent Time Employed</b> field.						
9	<p>In the <b>Work Schedule</b> section, select the <b>Assignment Duration</b> from the dropdown menu.</p>						
10	<p>In the <b>Work Schedule</b> section:</p> <table border="1" data-bbox="289 751 1451 1100"> <thead> <tr> <th data-bbox="289 751 631 814">IF the position is...</th> <th data-bbox="631 751 1451 814">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 814 631 905">Exempt (semi-monthly paid)</td> <td data-bbox="631 814 1451 905">Proceed to the next step</td> </tr> <tr> <td data-bbox="289 905 631 1100">Non-Exempt (hourly paid)</td> <td data-bbox="631 905 1451 1100">Confirm the hours per week are correct. If they are not, cease processing the form and process a Maintain Position form. Note the hours per week in the Weekly Work schedule field and note in the <b>Comments</b> the Work Schedule Rule needs to be changed by Compensation.</td> </tr> </tbody> </table>	IF the position is...	THEN...	Exempt (semi-monthly paid)	Proceed to the next step	Non-Exempt (hourly paid)	Confirm the hours per week are correct. If they are not, cease processing the form and process a Maintain Position form. Note the hours per week in the Weekly Work schedule field and note in the <b>Comments</b> the Work Schedule Rule needs to be changed by Compensation.
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11	<p>In the <b>Basic Pay</b> section, select the <b>Pay Scale Level</b> from the dropdown menu. This is typically 00 or 01, unless the position is represented by L615-SvcMaint.</p> <p><b>i Information:</b> When a Pay Scale Level is changed for Personnel Subarea L615-SvcMaint, the associated hourly rate is auto-populated.</p>						
12	<p>In the <b>Basic Pay</b> section:</p> <table border="1" data-bbox="289 1402 1451 1633"> <thead> <tr> <th data-bbox="289 1402 691 1455">IF...</th> <th data-bbox="691 1402 1451 1455">THEN enter...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 1455 691 1545">The position is non-exempt (hourly paid)</td> <td data-bbox="691 1455 1451 1545">The hourly rate in the <b>Hourly Rate</b> field.</td> </tr> <tr> <td data-bbox="289 1545 691 1633">The position is exempt (semi-monthly paid)</td> <td data-bbox="691 1545 1451 1633">The semi-monthly amount in the <b>Amt Per Pay Period</b> field.</td> </tr> </tbody> </table>	IF...	THEN enter...	The position is non-exempt (hourly paid)	The hourly rate in the <b>Hourly Rate</b> field.	The position is exempt (semi-monthly paid)	The semi-monthly amount in the <b>Amt Per Pay Period</b> field.
IF...	THEN enter...						
The position is non-exempt (hourly paid)	The hourly rate in the <b>Hourly Rate</b> field.						
The position is exempt (semi-monthly paid)	The semi-monthly amount in the <b>Amt Per Pay Period</b> field.						
13	<p>Click the <b>Recalculate Salary</b> button.</p> <p><b>✓ Result:</b> 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								
14	Review the <b>Cost Distribution</b> section for accuracy: <table border="1" data-bbox="285 331 1430 527" style="margin-left: 20px;"> <thead> <tr> <th data-bbox="285 331 634 384">IF...</th> <th data-bbox="634 331 1430 384">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 384 634 436">Changes are needed</td> <td data-bbox="634 384 1430 436">Proceed to the next step</td> </tr> <tr> <td data-bbox="285 436 634 527">No changes are needed</td> <td data-bbox="634 436 1430 527">Select No Change in the Reason for Change dropdown and skip to step 18</td> </tr> </tbody> </table>	IF...	THEN...	Changes are needed	Proceed to the next step	No changes are needed	Select No Change in the Reason for Change dropdown and skip to step 18		
IF...	THEN...								
Changes are needed	Proceed to the next step								
No changes are needed	Select No Change in the Reason for Change dropdown and skip to step 18								
15	Select the reason for changing the cost distribution from the <b>Reason for Change</b> dropdown menu.								
16	Complete the cost distribution fields in the New Entries section: <ul style="list-style-type: none"> <li>• Cost Center                             <ul style="list-style-type: none"> <li> <b>Information:</b> If you don't know the cost center, click the button in the <b>Cost Center</b> field to search for the cost center.</li> </ul> </li> <li>• Order Number, as applicable</li> <li>• WBS Element, as applicable</li> <li>• Percentage                             <ul style="list-style-type: none"> <li> <b>Warning:</b> The <b>Total Percentage</b> field must equal 100%.</li> </ul> </li> <li>• End Date                             <ul style="list-style-type: none"> <li> <b>Information:</b> 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.</li> </ul> </li> </ul> <p> <b>Note:</b> The buttons below allow you to edit input in the New Entries section:</p> <table border="1" data-bbox="285 1115 1446 1417" style="margin-left: 20px;"> <thead> <tr> <th data-bbox="285 1115 492 1167">Option</th> <th data-bbox="492 1115 1446 1167">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 1167 492 1241"></td> <td data-bbox="492 1167 1446 1241">Delete a line of the distribution</td> </tr> <tr> <td data-bbox="285 1241 492 1335"></td> <td data-bbox="492 1241 1446 1335">Restore the distribution settings to how they initially appeared on the form prior to the changes you made</td> </tr> <tr> <td data-bbox="285 1335 492 1417"></td> <td data-bbox="492 1335 1446 1417">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.
Option	Description								
	Delete a line of the distribution								
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17	Click the <b>Check</b> button to review percentages and populate the Description field. Confirm the cost distribution is correct based on the Description.								
18	Complete the <b>Corporate Function</b> section, if appropriate. This is typically used if an employee signed a Patent Policy Agreement.								
19	Select the employee's office location from the <b>Building</b> dropdown menu.								
20	Enter the employee's phone number in the <b>Office Phone</b> field.								

Step	Action						
21	<p>Upload any relevant documentation for the leave in the <b>Attachments</b> section of the form. Please refer to the <a href="#">matrix</a> if you need assistance determining what is required for attachments.</p> <table border="1" data-bbox="285 359 1227 516"> <thead> <tr> <th data-bbox="285 359 748 411">IF...</th> <th data-bbox="748 359 1227 411">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 411 748 464">There are documents to attach</td> <td data-bbox="748 411 1227 464">Proceed to the next step</td> </tr> <tr> <td data-bbox="285 464 748 516">There are no documents to attach</td> <td data-bbox="748 464 1227 516">Proceed to Step 28</td> </tr> </tbody> </table> <p> <b>Warning:</b> 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 28
IF...	THEN...						
There are documents to attach	Proceed to the next step						
There are no documents to attach	Proceed to Step 28						
22	<p>Click the <b>Browse</b> button in the <b>Attachments</b> section.</p> <p> <b>Result:</b> The <b>Open</b> window appears.</p>						
23	<p>Navigate to the appropriate file on your computer.</p>						
24	<p>Click the title of the file.</p>						
25	<p>Click the <b>Open</b> button.</p> <p> <b>Result:</b> The filename appears in the <b>Select File:</b> field.</p>						
26	<p>Click the <b>Attach File</b> button.</p> <p> <b>Result:</b> The file now appears in the <b>Attachments</b> table.</p>						
27	<p>Repeat steps 22-26 for each attachment.</p>						
28	<p>Enter additional information in the <b>New Comments</b> section for both future reference and to provide additional details to the approvers. This may include comments related to discussions with the manager, your Compensation Analyst, your Talent Recruitment Services contact, etc.</p>						
29	<p>Click the <b>Review</b> button at the bottom of the page. This will check for errors on the form.</p> <p> <b>Result:</b> Error messages appear at the top of the form.</p>						
30	<p>Review the form for accuracy.</p>						

Step	Action						
31	<table border="1" data-bbox="289 300 1133 546"> <thead> <tr> <th data-bbox="289 300 553 352">IF the form...</th> <th data-bbox="553 300 1133 352">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 352 553 405">Is accurate</td> <td data-bbox="553 352 1133 405">Click the <b>Submit</b> button</td> </tr> <tr> <td data-bbox="289 405 553 546">Requires updates</td> <td data-bbox="553 405 1133 546"> <ul style="list-style-type: none"> <li>• Click the <b>Back</b> button</li> <li>• Make any necessary updates</li> <li>• Return to step 30</li> </ul> </td> </tr> </tbody> </table> <p data-bbox="289 573 1382 646">  <b>Result:</b> The form is submitted for approval via workflow. You can track the form progress through <a href="#">Request Tracker</a>. You will receive an email notification when the form is approved.                 </p> <p data-bbox="289 680 1446 894">  <b>Warning:</b> 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 <b>Submit</b> button	Requires updates	<ul style="list-style-type: none"> <li>• Click the <b>Back</b> button</li> <li>• Make any necessary updates</li> <li>• Return to step 30</li> </ul>
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