

# University Staff & Classified Guide

---

HRBP Guide

## Smartsheet: Transaction Center Entries – Position Management Guide

# Smartsheet: Transaction Center Entries – Position Management Guide

This guide will provide step-by-step instructions on how to accurately enter a Position Management request using the new Smartsheet Transaction Center.

Additional guidance and support resources, including how to track your requests using Smartsheet: Dynamic View and/or how to interpret the status of your request based on the “Current Status” field can be found on the [Smartsheet Resources: University Staff & State Classified](#) landing page.

If you need additional system support or have questions that are not currently covered in this guide, please contact your Central HR Classification Consultant or the technical support Smartsheet Support Team below:

- Stephen Lewis ([stephen.d.lewis@cuanschutz.edu](mailto:stephen.d.lewis@cuanschutz.edu))
- Keerthi Chittimalla ([keerthi.chittimalla@cuanschutz.edu](mailto:keerthi.chittimalla@cuanschutz.edu))
- Elby Potter ([elby.potter@cuanschutz.edu](mailto:elby.potter@cuanschutz.edu))

## Index

- Index..... 2
- Step-by-Step: Instructions All Requests ..... 3
- Step-by-Step: New Supervisor/Manager - RPT ..... 4
- Step-by-Step: Change PCT Time/STD Hours - PCT ..... 5
- Step-by-Step: Department Changes - DPT ..... 6
- Step-by-Step: Change in Working Title - DES ..... 7
- Step-by-Step: Change in FLSA - FLS..... 8
- Step-by-Step: Location Change - LOC ..... 10
- Step-by-Step: Change in Appointing Authority - APA..... 11
- Step-by-Step: Campus Box Change - CBX ..... 12
- Step-by-Step: Change in Permanent/Temp Status - RTP ..... 13

## Step-by-Step: Instructions All Requests

---

***\*If you do not see a Reason Code Listed, please reference our FAQ Guide or contact your Classification Consultant for additional guidance.***

**Step #1 – What Transaction do You Wish to Perform?:** Select the Position Management – Modify option.

**Step #2 – Reason Codes:** Using the check boxes please identify what updates you would like to make to a position #. Multiple updates can be made within the same request, please select all relevant boxes.

New Supervisor/Manager - RPT

Change PCT Time/STD Hours - PCT

Department Change - DPC

Change in Working Title - DES

Change in FLSA Status - FLS

Location Change - LOC

Change Appointing Authority - APA

Campus Box Change - CBX

Change Regular/Temp Status - RTP

***Quick Tip!*** As you check the boxes, additional fields relevant to each Reason Code will populate in the form. Please complete **all** additional fields before submitting your request. **Incomplete requests or requests submitted for a faculty, PRA or temporary position will be denied.**

## Step-by-Step: New Supervisor/Manager - RPT

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. Multiple email addresses must be separated by a (,) comma.

Ex: [john.doe@cuanschut.edu](mailto:john.doe@cuanschut.edu), [jane.doe@cuanschut.edu](mailto:jane.doe@cuanschut.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – Current Supervisor Name:** Please enter the supervisor's first and last names.

**Step #6 – Current Supervisor Position Number:** Please enter the current supervisor's position number. Please include all leading zeros.

**Step #7 – Current Supervisor Job Code Title:** Please enter the current supervisor's job code/Title (Ex. IT Director).

**Step #8 – Proposed Supervisor Name:** Please enter the proposed supervisor's first and last name.

**Step #9 – Proposed Supervisor Position Number:** Please enter the proposed supervisor's position number. Please include all leading zeros.

**Step #10 – Proposed Supervisor Job Code Title:** Please enter the proposed supervisor's job code/Title (Ex. IT Director).

**Step #11 – Is Employee in Current Supervisor/Manager role:** Using the drop-down menu, please confirm whether this position also acts as a formal supervisor or manager. This information will help us determine if the new reporting structure is appropriate.

**Step #12 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Change PCT Time/STD Hours - PCT

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschutz.edu](mailto:john.doe@cuanschutz.edu), [jane.doe@cuanschutz.edu](mailto:jane.doe@cuanschutz.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – Current STD Hours:** Please note how many standard hours this position currently works (ex. 40 hours/week).

**Step #6 – Proposed STD Hours:** Please note how many standard hours this position will be expected to work (ex. 20 hours/week).

**Step #7 – Is employee FTE going below 0.50 FTE?:** Using the drop-down menu, please confirm whether the position will drop below 0.50 FTE (i.e. benefits eligibility).

**Quick Tip!** For encumbered positions, an Addendum LOO will be required if there is a change in benefits eligibility.

**Step #8 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Department Changes - DPT

---

**Step #1 – Funding:** If you are changing the Dept ID connected to an existing position number, the HCM system will require a funding confirmation prior to saving the entry. Please use these additional funding fields to record all relevant speedtypes, percentages and funding end dates.

Speedtype 1

Speedtype 1 Percent

Funding End Date - Speedtype 1

**Quick Tip!** Similar to the 2LA Budget Process, please complete and skip any unnecessary rows accordingly.

**Step #2 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #3 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschultz.edu](mailto:john.doe@cuanschultz.edu), [jane.doe@cuanschultz.edu](mailto:jane.doe@cuanschultz.edu)

**Step #4 – Effective Date:** Please enter the desired effective date of this change.

**Step #5 – Dept ID:** Select the current Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #6 – Proposed Dept ID:** Select the desired Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #7 – Location Name:** Using the drop-down menu, please select the appropriate location name.

**Step #8 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Change in Working Title - DES

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschutz.edu](mailto:john.doe@cuanschutz.edu), [jane.doe@cuanschutz.edu](mailto:jane.doe@cuanschutz.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – Working Title:** Enter the current working title of the position in this field.

**Step #6 – Proposed Working Title:** Enter the desired working title for this position in this field.

**Quick Tip!** When developing a working title, please ensure it aligns with the **level and family** of the position.

**Step #7 – Attachments:** Using the checkboxes, please indicate which attachments have been included in this request.

Have you attached the Org Chart?

Have you attached the Job Description?

**Quick Tip!** To expedite working title changes, it is recommended to include a copy of the job description. For some positions, it may also be helpful to receive a copy of your department's organizational chart; your Classification Consultant will be in touch if additional information is needed.

**Step #8 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Change in FLSA - FLS

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschutz.edu](mailto:john.doe@cuanschutz.edu), [jane.doe@cuanschutz.edu](mailto:jane.doe@cuanschutz.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – FLSA Status:** Using the drop-down menu, please select the current FLSA status of the position.

**Exempt = Not eligible for Over-time**  
**Non-Exempt = Eligible for Over-time**

**Step #6 – Proposed FLSA Status:** Using the drop-down menu, please select the desired FLSA status of the position.

**Exempt = Not eligible for Over-time**  
**Non-Exempt = Eligible for Over-time**

**Quick Tip!** For encumbered positions, an Addendum LOO will be required if there is a change in FLSA status.

**Step #7 – Attachments:** Using the checkboxes, please indicate which attachments have been included in this request.

Have you attached the Org Chart?

Have you attached the Job Description?

**Quick Tip!** To expedite FLSA changes, it is recommended to include a copy of the job description. For some positions, it may also be helpful to receive a copy of your department's organizational chart; your Classification Consultant will be in touch if additional information is needed.

**Step #8 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Location Change - LOC

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschutz.edu](mailto:john.doe@cuanschutz.edu), [jane.doe@cuanschutz.edu](mailto:jane.doe@cuanschutz.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – Location Name:** Using the drop-down menu, please select the current location assigned to this position.

**Step #6 – Proposed Location Name:** Using the drop-down menu, please select the desired location assigned to this position.

**Step #7 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Change in Appointing Authority - APA

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschutz.edu](mailto:john.doe@cuanschutz.edu), [jane.doe@cuanschutz.edu](mailto:jane.doe@cuanschutz.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – Current Appointing Authority Name:** Please enter the current appointing authority's first and last name in this field.

**Step #6 - Current Appointing Authority Position Number:** Please enter the current appointing authority's position number. Please make sure to include all leading zeros.

**Step #7 – Proposed Appointing Authority Name:** Please enter the desired appointing authority's first and last name in this field.

**Step #8 – Proposed Appointing Authority Position Number:** Please enter the desired appointing authority's position number. Please make sure to include all leading zeros.

**Step #9 – Is this person at the officer level or above?:** Using the drop-down menu, please confirm whether or not the proposed Appointing Authority is at or above the officer level.

**Step #9 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Campus Box Change - CBX

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschultz.edu](mailto:john.doe@cuanschultz.edu), [jane.doe@cuanschultz.edu](mailto:jane.doe@cuanschultz.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – Current Campus Box:** Please enter the current campus box assigned to this position number.

**Step #6 – Proposed Campus Box:** Please enter the desired campus box assigned to this position number.

**Step #7 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.

## Step-by-Step: Change in Permanent/Temp Status - RTP

---

**Step #1 – Position Number:** Please enter the current position number in this field. Please make sure to include all leading zeros.

**Step #2 – HRBP Contact Email:** Enter the email address(es) of the relevant HR Business Partner contact for this search. A (,) coma must separate multiple email addresses.

Ex: [john.doe@cuanschutz.edu](mailto:john.doe@cuanschutz.edu), [jane.doe@cuanschutz.edu](mailto:jane.doe@cuanschutz.edu)

**Step #3 – Effective Date:** Please enter the desired effective date of this change.

**Step #4 – Dept ID:** Select the appropriate Dept ID using the drop-down menu provided. Please contact your classification consultant if you do not see your Dept ID listed.

**Step #5 – Current Reg/Temp Status:** Using the drop-down menu, please identify the current status of the position (Regular or Temporary).

**Step #6 – Proposed Reg/Temp Status:** Using the drop-down menu, please identify the desired status of the position (Regular or Temporary).

**Step #7 – Summary/Justification:** If you have any additional notes to provide, please document them in this section.