

University of Idaho

# PeopleAdmin Training Guide

Faculty Position Description Module

Last Updated: July 29, 2014

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# Introduction to Position Management

Welcome to the Position Management module of PeopleAdmin. In this module, you will have the ability to create and/or modify vacancy announcements and complete the Position Authorization Form (PAF) for faculty positions. The vacancy announcement is the base for any job and helps applicants and employees understand what they will be doing for the University of Idaho, your College/Unit, and your department. Faculty position descriptions are negotiated on an annual basis and that original form must be completed upon hire. The PAF helps the University of Idaho manage our fiscal responsibilities.

During this training document, we will cover:

1. How to create a new faculty vacancy announcement and secure the proper approvals for posting the new position.
2. How to fill a vacant position using an existing vacancy announcement **OR PCN** and secure the proper approvals for posting the vacant position.
3. How to update an existing vacancy announcement with an incumbent seated in the position without desiring to post the position.

## Login Information:

1. For employee users: Go to website address: <https://uidaho.peopleadmin.com/hr/shibolet>
2. You will login with your current network login information.

University of Idaho  
Account Sign-In

University of Idaho

### University of Idaho Sign-In

Type your email address and password.




Email Address:

Password:

If you need assistance please contact the ITS Help Desk by email at [helpdesk@uidaho.edu](mailto:helpdesk@uidaho.edu) or by phone at 208-885-HELP (4357)

## Home Page:

Once you have logged into PeopleAdmin, the Home Page will display an inbox, watch list, and other items where you easily navigate to actions which need your attention. Below is a detailed list of the Home Page and the functions available:

<u>Functional Area</u>	<u>Location</u>	<u>Definition</u>
 <b>Inbox</b>	<b>CENTER</b> of Home Page upon log in	Displays all items requesting your attention (approval/review).
 <b>Watch List</b>	<b>BOTTOM</b> of Home Page upon log in	Displays any request you are watching (postings, position actions) for easy access.
<b>My Profile</b> <b>Help</b>	Columns at <b>TOP</b> of screen	Used to update your user account details and online help for using the system.
<b>Module Type Selection</b> <b>POSITION MANAGEMENT</b> ▾ <b>APPLICANT TRACKING</b> ▾	Upper <b>RIGHT</b> hand corner of screen	Used to toggle between the Position Management and Applicant Tracking modules.
<b>User Group Selection</b> Supervisor/Manager ▾	Upper <b>RIGHT</b> hand corner next to your name	Displays the user groups available to you and the arrow will toggle you into each user group. 

## Module Type Definitions

### **POSITION MANAGEMENT** ▾

Used to create or modify vacancy announcements, view vacancy announcements, and submit Position Actions.

### **APPLICANT TRACKING** ▾

Used to create and view Job Postings, view Applicants and application materials, complete Hiring Proposals, and navigate Onboarding.

## **User Group Definitions**

**AAC** – The Affirmative Action Coordinator (AAC) will approve all actions at the College/Unit level and will ensure proper routing and approvals. Can also create or edit position descriptions and announcements.

**Approver** – The Approver may include Deans, Directors, or higher level executives in the College/Unit that would need to approve a position action, as required by College/Unit needs.

**Employee** – The Employee can view position descriptions.

**Executive Approver** – The Executive Approver is dedicated to the Vice Presidents, the Provost and Executive Vice President, and the President (or designees). They have overall approval for position actions (PAF and Hiring Proposal).

**HRAI** – Human Rights, Access, and Inclusion (HRAI) will review and approve position actions, announcements, posting materials, and applicant demographics based on Equal Opportunity and Affirmative Action standards.

**HRS** – Human Resource Services (HRS) will review and approve all position actions, announcements, and hiring proposals at the University level.

**Office of Sponsored Programs** – The Office of Sponsored Programs will review position actions that have any grant funding.

**Position Control** – Position Control is the Budget Office review of position actions. The primary reviewer is the Executive Director of Planning and Budget.

**Search Committee Member** – The Search Committee Member is designated to participate in review of candidates and/or interviews.

**Search Coordinator** – The Search Coordinator is responsible for the administrative support for searches. They may not necessarily be the Manager or the Search Chair of the position, but they will help with documenting notes or uploading information for those individuals.

**Supervisor/Manager** – The Supervisor/Manager creates or edits the position descriptions and announcements for their employees.

**Please note: Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions.**

# Position Management Module

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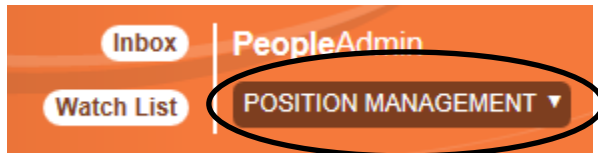
## Core Functions of the Position Management Module

- View vacancy announcements
  - Hover over 'Position Descriptions' and click **Faculty**
- Create, refill, or modify position actions (position descriptions and PAFs)
  - Hover over 'Position Descriptions' and click **Faculty**
- View actions in process and all approved actions
  - Hover over position descriptions and click **Faculty Actions**

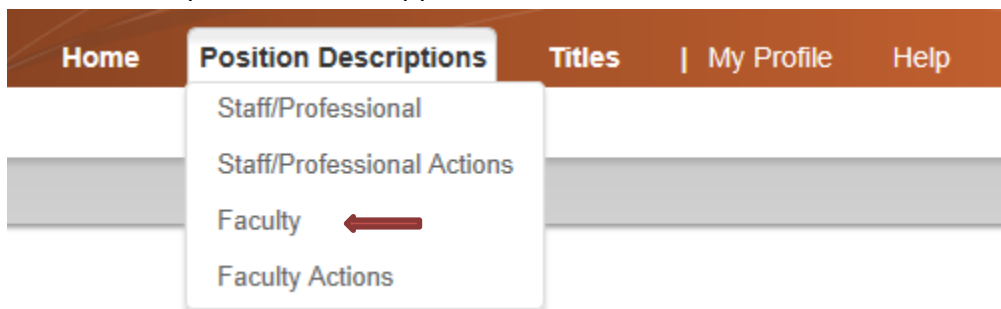
[\\*All job postings must first have an approved action prior to initiating a posting.](#)


# Creating and Requesting a New Position:

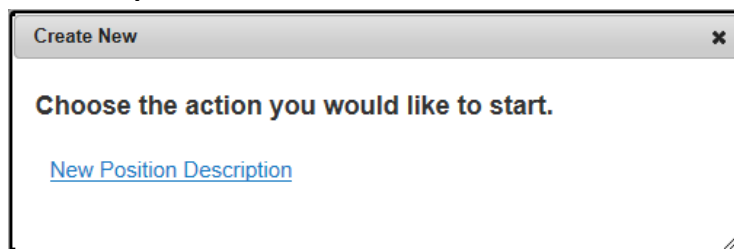
1. Verify you are in the 'Position Management' module and authorized to create a position description (vacancy announcement for faculty) (Supervisor/Manager or AAC).



2. Hover over 'Position Descriptions' and click **Faculty**. **NOTE:** "Actions" allows you to view actions in process and all approved actions



3. Click the  button at the top right corner.
4. You will receive a pop-up window to choose the action you would like to start. Click on **New Position Description**.



5. Enter the proposed Position Title. **Note:** The Position Title will be the distinctive title used for recruitment purposes. Refer to the guideline at the end of this manual that represents the faculty position classes, working titles, and faculty status options that will be used in BANNER.
6. If you are creating a new position, then follow step a. If you are cloning a position, then follow step b.



## Position Management Module

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- a. The Organization Unit section should default to your Executive Level, Mid Level, and Department. If you have responsibility for more than one area, you will have to choose from the corresponding drop-down list. Then press “**Start Action**”.

**Start Action**

- b. If you have an existing vacancy announcement within your department(s) you wish to copy or ‘clone’, click on the radial button to choose the position description from the list at the bottom of the page. This will default in pertinent information from the ‘cloned’ position description into this action and allow for edits. You may search for a position by using the “**Filter These Results**” link.

7. Click the **Start Action** button. **Start Action** Selecting **Next** **Next >>** automatically saves the information on the screen and moves you to the next action on the list.

**Note:** You can navigate between the sections simply by selecting one of the **Editing Action** options.

Editing Action
Classification
Position Details
Funding
<input checked="" type="checkbox"/> Position Documents
<input checked="" type="checkbox"/> Employee
<input checked="" type="checkbox"/> Supervisor
Action Summary

If you added or changed information within a section, be sure to **Save** **Save** before selecting a new **Editing Action**.

8. Classification – Using the radial button, select the anticipated classification for the position. See the guideline at the end of this manual. **Note:** Final classification of positions will be approved by the Provost’s Office. Click **Next** **Next >>** to continue.  
**Note:** If you have cloned a position, the classification will default from the position you have selected.
9. Complete all required information in each of the sections which are listed on the left hand side of the screen (Editing Actions). Please note that if you ‘cloned’ from an existing position description many of the fields will be prepopulated and ready for you to edit if applicable.

# Position Management Module

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## **Classification**

Information is read-only and defaulted in from the classification type you selected from the prior screen. If not correct, go to previous screen and change selection.

## **Position Details**

### **Title**

Information is read-only and defaulted in from the classification type you selected from the prior screen. If not correct, go to previous screen and change selection.

#### Title

<b>Classification Group Title</b>	Regular Faculty
<b>Position Class Code</b>	12951
<b>Employee Category</b>	Faculty
<b>Salary Grade</b>	GN
<b>FLSA Status</b>	Overtime Exempt

# Position Management Module

## Organization

### Organization

\* **Location**

Moscow  
 Boise  
 Caldwell  
 Coeur d'Alene  
 Kimberly  
 Idaho Falls  
 McCall  
 Parma  
 Twin Falls  
 Add Location (please specify)

This field is required.

\* **Division/College** College of Art & Architecture ▼ This field is required.

Location – select the work location for the position. If the location is not listed, select Add Location and specify where the position will be located. More than one location can be selected, if necessary. This is a required field.

Division/College – select the Division or College where this position will be located.  
**NOTE: In most instances, this should be the same as what was initially entered in step 6.a. and represent the home college and unit. Joint appointments for faculty are indicated in the faculty position request rationale and by so selecting later on the form.** This field will be displayed on the announcement posting. This is a required field.

# Position Management Module

## Position

Position

\* Current Date of Request  This field is required.

\* Anticipated Appointment Effective Date  This field is required.

End Date of Action (if applicable)

\* Faculty Position Request Rationale  This field is required.

\* Search Waiver Request  This field is required.

Search Waiver Request Comments

Search Waiver Approval

\* Search Exception Request  This field is required.

Search Exception Request Comments

Search Exception Approval

\* Interim/Term Appointment  This field is required.

\* Position Title

\* Position Type  This field is required.

Position Control Number

\* Suffix Number  This field is required.

\* Multi-Year Contract (Non-Tenure Track)  This field is required.

\* Joint Appointment  This field is required.

\* Tenure Tracking  This field is required.

\* Rank  This field is required.

\* Extension Type  This field is required.

\* Pay Range  This field is required.  
(advertised salary range)

\* Type of Appointment  This field is required.

\* FTE  This field is required.

\* Full Time/Part Time  This field is required.

\* Hours  This field is required.

\* Position Summary

Summarize job responsibilities into a few sentences, which adequately define the position.

## Position Management Module

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Current Date of Request – enter today’s date. This is a required field.

Anticipated Appointment Effective Date – enter the date you expect the position will be filled. This is a required field.

End Date of Action (if applicable) – Select the date the position is intended to conclude; by nature these are typically temporary positions with a foreseen end date, such as temporary faculty lecturers.

Faculty Position Request Rationale – enter the justification for this position and why it is critical for the mission of the University. If using an existing PCN but creating an additional seat, ensure the PCN number is listed. If a joint appointment, ensure both units are listed. If intending to allow two ranks as a possibility for negotiation indicate the ranks. If it is a possibility although rare, to allow negotiation for tenure, indicate it in this field. If using a 01 suffix, identify the contingency in this field. If creating a roster for hiring, ensure that detail is included in this field. This is a required field.

Search Waiver Request and Comments – If you will be requesting a search waiver (to appoint an individual to this position without conducting a search), select “Yes” and enter the justification in the Search Waiver Request comments. Additional documentation can be added as an attachment in the Position Documents section. Select “No” if there will not be a waiver request. **NOTE: If yes is selected, the position must be routed to HRAI.**

Search Waiver Approval - HRAI will select the Search Waiver Approval field, as appropriate.

Search Exception Request and Comments – If you will be requesting a search exception (shortened time line for posting the announcement or a request for an internal/UI search only), select “Yes” and enter the justification in the Search Exception Request Comments. Additional documentation can be added as an attachment in the Position Documents section. Select “No” if there will not be an exception request. **NOTE: If yes is selected, the position must be routed to HRAI.**

Search Exception Approval - HRAI will select the Search Exception Approval field, as appropriate.

Interim/Term Appointment – Confirm whether this will be an Interim/Term appointment. This is only applicable for faculty appointments with an administrative component, using an administrative PCN. If not applicable, leave the selection blank. See the guideline at the end of this manual.

Position Title – confirm or enter the distinctive title for recruitment purposes.

## Position Management Module

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Position Type - select Permanent (under 9000 PCN) or Temporary (over 9000 PCN) depending on funding or if there is a contingency on this position. See the guideline at the end of this manual.

Position Control Number – field will be blank if this is a new position. A PCN will be assigned by Human Resources after the position is approved. **Note: if creating an additional seat, ensure the PCN is identified in the faculty position request rationale.**

Suffix Number – select the appropriate suffix number. The suffix 00 is an ongoing appointment with no anticipation of an ending date. These are typically used with a Permanent PCN unless there is a contingency associated with the position, such as interim or term appointment or grant funding. The Suffix 01 is an appointment that is contingent in some nature and requires consideration for reappointment based on need or funding. It is generally used with a temporary PCN (over 9000) for temporary faculty appointments. The suffix 03 is a summer session appointment for faculty with academic year contracts. It is used to appointment them for work during summer session, outside of the academic year contract period.

Multi-Year Contract (Non-Tenure Track) – if requesting a multi-year contract for a non-tenure track clinical or research faculty appointment, select “2” or “3” in drop-down box to indicate the length. If not applicable, choose that option from the dropdown box. **NOTE: multi-year contract appointments are reported to the State Board of Education and close monitoring of reappointment is the responsibility of the unit.**

Joint Appointment – if requesting a position or to make an appointment between more than one unit, select “YES” from the dropdown box. If not applicable, select “NO” from the dropdown box. **NOTE: a description is required in the Faculty Position Request Rationale which minimally describes the “home unit” and percentage of assignment between each unit. It may be beneficial to upload full details and documentation in the position documents.**

Tenure Tracking – indicate if the position will be tenure track or non-tenure track. Selecting “Negotiable” means that the appointment made can be either tenure or non-tenure track. This is rare and a description is required in the Faculty Position Request Rationale. “Not Applicable” is used for temporary faculty. See the guideline at the end of this manual.

Rank – indicate the rank of the faculty appointment. “None” is used for temporary faculty. Not applicable may be used in certain administrative or other appointment circumstances and is rare. See the guideline at the end of this manual.

## Position Management Module

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Extension Type – if the faculty appointment is for Extension, indicate the type of Extension appointment otherwise enter “Not Applicable”. See the guideline at the end of this manual

Pay Range – indicate the anticipated salary range for this position. Generally the annual salary range is provided in the form.

Type of Appointment – indicate if position will be a Fiscal Year or Academic Year appointment. Often, less than annual is used for temporary faculty appointments, semester by semester basis. Summer Session should be selected if selecting an 03 suffix and the appointment is during summer session. FY 10 mo. and FY 11 mo. are rare for faculty and **justification for the selection must be entered into the Faculty Position Rationale field.**

FTE – enter the FTE of the position

Full Time/Part Time – select full time or part time from the drop down box. Anything below .875 FTE should be part time.

Hours – select the range for how many hours per bi-week the position is expected to work.

Position Summary – the University of Idaho definition of the Faculty type will default into this field. This is intended to initially help with the summary development for the particular responsibilities needed. **NOTE: This should be changed to fully summarize the particular faculty need.**

# Position Management Module

## Responsibilities

The responsibilities are the job duties/tasks performed by the position. University faculty positions must include at least 4 (four) responsibility areas. Temporary faculty positions must include at least 1 responsibility area. The total percentage of time for all responsibilities should equal 100%. Select **Add Responsibilities Entry**

[Add Responsibilities Entry](#) to add each entry. **Note:** When you select “Add Responsibilities Entry” you may be automatically taken to the top of the page. You will need to scroll down to the appropriate section to continue completing the form.

Responsibilities

This responsibility builder serves as a notice of vacancy for faculty hiring. University Faculty positions must include at least 4 (four) responsibility areas that outline the anticipated faculty responsibilities. Temporary Faculty positions must include at least 1 (one) responsibility area that provides the anticipated job assignment. The faculty responsibility areas are: Teaching & Advising; Scholarship & Creative Activities; Outreach & Extension; University Service & Leadership. If no assignment in one of the four areas is anticipated, please indicate this by entering 0%. University Faculty position descriptions are still required to be completed within the first few days of employment.

\* Job Duty Function

\* Job Duties/Responsibilities

\* Percentage Of Time

Remove Entry?

[Add Responsibilities Entry](#)

Job Duty Function – for University faculty there should be an entry for each of the following or a 0% assignment in that area: Teaching & Advising; Scholarship & Creative Activities; Outreach & Extension; University Service & Leadership. Temporary faculty often only have Teaching & Advising entries, but may have responsibility in any of the other areas and those should be included when applicable. These four areas are the basis for the University faculty position description that is required upon appointment.

Job Duties/Responsibilities – enter the list of responsibilities or summarize the responsibilities/disciplinary focus for the vacancy announcement.

Percentage of Time – enter the anticipated percentage of time designated to the responsibility/disciplinary focus area.



# Position Management Module

## Qualifications

### Qualifications

\* **Minimum Qualifications**

This field is required.

**Preferred Qualifications**

**Physical Requirements  
& Working Conditions**

Minimum Qualifications – enter the minimum qualifications required for the position. Subject to review and approval by the Provost and Executive Vice President.

Preferred Qualifications – enter the preferred qualifications for the position.

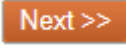
Physical Requirements & Working Conditions – specify bona fide and job specific physical requirements and special working conditions required for this position.

## Action Number

### Action Number

#### Action Number

Action Number – System generated number. Keep the number to use when creating an Electronic Personnel Action Form, (EPAF) after hire.

Click **Next**  to save and move to the next screen.

## Position Management Module

### Funding

Click the **Add Funding Entry**  button to add budget information. If multiple budgets will be used to cover the cost of the position, you can select **Add Funding Entry** to add additional budget rows. Each budget will require a separate funding section.

**Funding**

*	<b>Funding Type</b>	<input type="text" value="Please select"/>
*	<b>Budget/Index</b>	<input type="text"/>
*	<b>Percentage</b>	<input type="text"/>
	<b>Activity Code</b>	<input type="text"/>
*	<b>Account Code</b>	<input type="text" value="Please select"/>
*	<b>Proposed NBAPBUD Salary</b>	<input type="text"/>

Remove Entry?

Funding Type – select the appropriate funding type from the drop down box. **NOTE:** If “Temporary Grant” is selected, then review by Office of Sponsored Programs is required.

Budget/Index – enter the budget number used to fund the position.

Percentage – enter the percentage of the above budget used to fund this position. The percentage from all budgets will need to total 100%.

Activity Code – enter an activity code if desired.

Account Code – select the correct account code (E4105 for regular salaries and E4107 for Administrative Increment salaries). E4107 is used with faculty administrative positions or when a special administrative increment is approved by the Provost and Executive Vice President.

Enter the Proposed NBAPBUD salary – this is the salary amount that is budgeted for the position for the specific budget number.

# Position Management Module

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## Position Control Information

### Position Control Information

\* **Grand Total Proposed NBAPBUD Salary (all funding sources)**  **This field is required.**

**Funding Comments**

**Position Control Comments**

Grand Total Proposed NBAPBUD Salary – this is the expected grand total from all budget sources.

Funding Comments – please specify, provide additional information to help explain budgeting such as, if salary savings from a vacant position will be used to help fund this position, or if a position is funded at the top of the range, where the extra funding will come from if only the minimal funding was provided above, etc.

Click **Next**  to save and move to the next screen.

## Position Documents

Upload an organizational chart which identifies this position within the department or organization.

Upload additional documents as required for this position. Scan and upload documents related to Search Waivers or Search Exceptions.


Click **Next**  to save and move to the next screen.

# Position Management Module

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## Employee

This section should normally be skipped as there is no employee to place at this time. Please check with your AAC or HR Business Partner if you think you have a situation that fits.


Click **Next**  to save and move to the next screen.


## Supervisor

Select the position which will be responsible for supervising the new position. You can select **Filter these results** to search the list by PCN number, current supervisor name, title, etc.

Select the radial button of the correct supervisor then select **Next**  to save and continue to the next screen.

## Action Summary

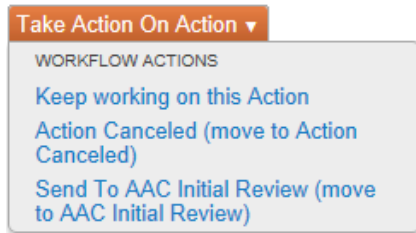
Review the summary information of the vacancy announcement and PAF information. If the section is completed correctly, it will be accompanied by a blue check mark. 

An orange exclamation point  to the left of a section indicates that required information is missing. Select the blue **Edit** link for that section to go back and make the required updates. Select **Save** or **Next** to save and continue. After saving you can move to the **Action Summary** to review the final information for additional errors.

# Position Management Module

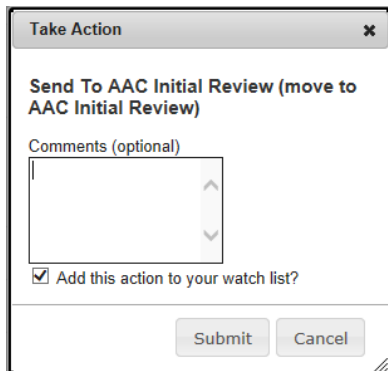
## 10. Routing / Take Action on Action

When you are ready to send your completed vacancy announcement and PAF, press the “Take Action On Action” button in the upper right. **Take Action On Action** You will receive multiple options on what action to perform. To move your completed vacancy announcement and PAF forward to your Affirmative Action Coordinator (AAC), select “Send to AAC Initial Review”.



You will receive a pop-up window to add any optional comments you wish to share with your AAC. **Note:** These notes are discoverable and will be seen by all approvers in the process.

You also have the option to add this position to your watch list. This checkbox is automatically selected. If you do not wish to keep this position in your watch list, deselect the check box. Click on **Submit**.

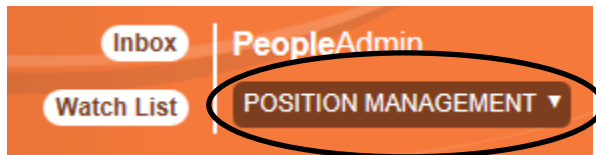


Once you submit your completed vacancy announcement and PAF, a unique Action Number will be assigned to your action. This number will be found at the bottom of the Position Details page. Record this number for future use.

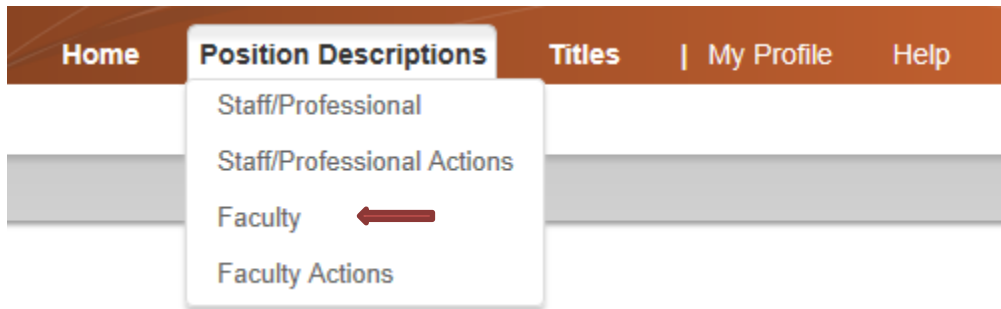
# Refilling a Vacant Position:



**\*This system does not replace the annual Faculty position description process. This process is to edit the initial vacancy announcements for postings.**

1. Verify you are in the 'Position Management' module and authorized to create/modify a faculty position description, vacancy announcement (Supervisor/Manager or AAC).



2. Hover over 'Position Descriptions' and click **Faculty**. **NOTE:** "Actions" allows you to view actions in process and all approved actions




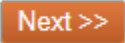
3. From the list named **Position Title** click the desired position title hyperlink. This will take you to the Classification page.
4. Click on the "Modify Position Description button"  [Modify Position Description](#) located in the upper right portion of the screen. Confirm you chose the correct position description and click the Start button  . **NOTE:** "Position Description" is equal to "Vacancy Announcement".

**Note:** You can navigate between the sections simply by selecting one of the **Editing Action** options.

# Position Management Module

Editing Action
Classification
Position Details
Funding
<input checked="" type="checkbox"/> Position Documents
<input checked="" type="checkbox"/> Employee
<input checked="" type="checkbox"/> Supervisor
Action Summary

If you added or changed information within a section, be sure to **Save**  before selecting a new **Editing Action**.

5. Classification – If you anticipate a change in classification of the position, use the radial button to select the anticipated classification for the position. Note: Final classification of positions will be approved by the Provost and Executive Vice President. Click **Next**  to continue.
6. Complete all required information in each of the sections which are listed on the left hand side of the screen (Editing Actions).

## Position Details

Information is read-only and flooded in from the classification level you selected from the prior screen. If not correct, go to previous screen and change selection.

### Title

Title	
<b>Classification Group Title</b>	Regular Faculty
<b>Position Class Code</b>	12951
<b>Employee Category</b>	Faculty
<b>Salary Grade</b>	GN
<b>FLSA Status</b>	Overtime Exempt

# Position Management Module

## Organization

### Organization

*	<b>Location</b>	<div style="border: 1px solid red; padding: 5px;"><input type="checkbox"/> Moscow <input type="checkbox"/> Boise <input type="checkbox"/> Caldwell <input type="checkbox"/> Coeur d'Alene <input type="checkbox"/> Kimberly <input type="checkbox"/> Idaho Falls <input type="checkbox"/> McCall <input type="checkbox"/> Parma <input type="checkbox"/> Twin Falls <input type="checkbox"/> Add Location (please specify) <input style="width: 150px;" type="text"/></div> <p style="color: red; font-size: small;">This field is required.</p>
*	<b>Division/College</b>	<div style="border: 1px solid red; padding: 2px;"><input style="width: 150px;" type="text" value="College of Art &amp; Architecture"/> <input type="button" value="v"/></div> <p style="color: red; font-size: small;">This field is required.</p>

Location – The location will default in as originally saved. If the location is different, select the work location for the position. If the location is not listed, select Add Location and specify where the position will be located. More than one location can be selected, if necessary. This is a required field.

Division/College – select the Division or College where this position will be located.

**NOTE: In most instances, this represent the home college and unit. Joint appointments for faculty are indicated in the faculty position request rationale and by so selecting later on the form.** This field will be displayed on the announcement posting. This is a required field.



# Position Management Module

## Position

Position

\* Current Date of Request  This field is required.

\* Anticipated Appointment Effective Date  This field is required.

End Date of Action (if applicable)

\* Faculty Position Request Rationale  This field is required.

\* Search Waiver Request  This field is required.

Search Waiver Request Comments

Search Waiver Approval

\* Search Exception Request  This field is required.

Search Exception Request Comments

Search Exception Approval

\* Interim/Term Appointment  This field is required.

\* Position Title

\* Position Type

Position Control Number 4831

\* Suffix Number

\* Multi-Year Contract (Non-Tenure Track)  This field is required.

\* Joint Appointment  This field is required.

Tenure Tracking

\* Rank  This field is required.

\* Extension Type  This field is required.

\* Action  This field is required.

\* Reactivate Expired PCN  This field is required.

\* Pay Range  This field is required.  
(advertised salary range)

\* Type of Appointment  This field is required.

\* FTE

\* Full Time/Part Time  This field is required.

\* Hours  This field is required.

\* Position Summary

## Position Management Module

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Current Date of Request – enter today’s date. This is a required field.

Anticipated Appointment Effective Date – enter the date you expect the position will be filled. This is a required field.

End Date of Action (if applicable) – Select the date the position is intended to conclude; by nature these are typically temporary positions with a foreseen end date such as, temporary faculty lecturers.

Faculty Position Request Rationale – enter the justification for this position and why it is critical for the mission of the University. This is a required field. **NOTE: Modifications/changes other than, or in addition to, just refilling the position must be very well explained in the rationale.**

Search Waiver Request and Comments – If you will be requesting a search waiver (to appoint an individual to this position without conducting a search), select “Yes” and enter the justification in the Search Waiver Request comments. Additional documentation can be added as an attachment in the Position Documents section. Select “No” if there will not be a waiver request. **NOTE: If yes is selected, the position must be routed to HRAI.**

Search Waiver Approval - HRAI will select the Search Waiver Approval field, as appropriate.

Search Exception Request and Comments – If you will be requesting a search exception (shortened time line for posting the announcement or a request for an internal/UI search only), select “Yes” and enter the justification in the Search Exception Request Comments. Additional documentation can be added as an attachment in the Position Documents section. Select “No” if there will not be an exception request. **NOTE: If yes is selected, the position must be routed to HRAI.**

Search Exception Approval - HRAI will select the Search Exception Approval field, as appropriate.

Interim/Term Appointment – Confirm whether this will be an Interim/Term appointment. This is only applicable for faculty appointments with an administrative component, using an administrative PCN. If not applicable, leave the selection blank. See the guideline at the end of this manual.

Position Title – confirm or enter the distinctive title for recruitment purposes.

Position Type - The Position Type will default in as originally saved. If the funding source is different, select Permanent (under 9000 PCN) or Temporary (over 9000 PCN) depending

## Position Management Module

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on funding or if there is a contingency on this position. See the guideline at the end of this manual.

Position Control Number – The PCN of the original position will default in.

Suffix Number – select the appropriate suffix number. The suffix 00 is an ongoing appointment with no anticipation of an ending date. These are typically used with a Permanent PCN unless there is a contingency associated with the position, such as interim or term appointment or grant funding. The Suffix 01 is an appointment that is contingent in some nature and requires consideration for reappointment based on need or funding. It is generally used with a temporary PCN (over 9000) for temporary faculty appointments. The suffix 03 is a summer session appointment for faculty with academic year contracts. It is used to appointment them for work during summer session, outside of the academic year contract period.

Multi-Year Contract (Non-Tenure Track) – if requesting a multi-year contract for a non-tenure track clinical or research faculty appointment, select “2” or “3” in drop-down box to indicate the length. If not applicable, choose that option from the dropdown box. **NOTE: multi-year contract appointments are reported to the State Board of Education and close monitoring of reappointment is the responsibility of the unit.**

Joint Appointment – if requesting a position or to make an appointment between more than one unit, select “YES” from the dropdown box. If not applicable, select “NO” from the dropdown box. **NOTE: a description is required in the Faculty Position Request Rationale which minimally describes the “home unit” and percentage of assignment between each unit. It may be beneficial to upload full details and documentation in the position documents.**

Tenure Tracking – indicate if the position will be tenure track or non-tenure track. Selecting “Negotiable” means that the appointment made can be either tenure or non-tenure track. This is rare and a description is required in the Faculty Position Request Rationale. “Not Applicable” is used for temporary faculty. See the guideline at the end of this manual.

Rank – indicate the rank of the faculty appointment. “None” is used for temporary faculty. Not applicable may be used in certain administrative or other appointment circumstances and is rare. See the guideline at the end of this manual.

Extension Type – if the faculty appointment is for Extension, indicate the type of Extension appointment otherwise enter “Not Applicable”. See the guideline at the end of this manual

## Position Management Module

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Action – You will select the type of action you are trying to make for this modification. Your selection will determine the proper process route.

Please select
Refill Position
Change Position Class
Change Position Type of Appointment
Change Position Full Time/Part Time
Minor Updates to Responsibilities
Major Updates for Review
Other

If you select “Refill Position”, “Change Position Class”, “Change Position Type of Appointment”, “Change Position Full Time/Part Time”, or “Major Updates for Review”, the vacancy announcement and PAF will go through the full review and approval process.

If you select “Minor Updates to Responsibilities” or “Other”, the vacancy announcement will go to AAC and the Executive Approver, who will then determine the proper process going forward. (Please go to “Updating an Existing Position Description” on Page 33)

Reactivate Expired PCN – If you are using a currently active PCN, select “No.” If the position has been vacant for one (1) year or more, the PCN will need to be reactivated. Please check NBIPINC in Banner to see if the PCN needs to be reactivated. If you need to reactivate a permanent PCN, select “Yes.” Permanent positions that need to be reactivated will go to Position Control. Temporary positions that need to be reactivated will not go to Position Control.

Pay Range – Defaults in from original PAF. Indicate the anticipated salary range for this position if it is changing. Generally the annual salary range is provided in the form.

Type of Appointment – The Type of Appointment will default in as originally saved. If the type of appointment is different, indicate if position will be a Fiscal Year or Academic Year appointment. Often, less than annual is used for temporary faculty appointments, semester by semester basis. Summer Session should be selected if selecting an 03 suffix and the appointment is during summer session. FY 10 mo. and FY 11 mo. are rare for faculty and **justification for the selection must be entered into the Faculty Position Rationale field.**

FTE – The FTE will default in as originally saved. If the FTE is different, enter the new FTE of the position.

# Position Management Module

Full Time/Part Time – The Full Time/Part Time will default in as originally saved. If the status is changing select full time or part time from the drop down box. Anything below .875 FTE should be part time.

Hours – select the range for how many hours per bi-week the position is expected to work.

Position Summary – The Position Summary will default in as originally saved. The University of Idaho definition of the Faculty type will default into this field if there has not been a previous change. This is intended to initially help with the summary development for the particular responsibilities needed. **NOTE: This should be changed to fully summarize the particular faculty need at the time of recruitment.** If Position Summary is different, enter a summary of the position responsibilities. This is the Major Function section from the UI Job descriptions (UIJD). If you are cloning a position, this will flood in from cloned positions and can be edited as appropriate.

## Responsibilities

The responsibilities are the job duties/tasks performed by the position. University faculty positions must include at least 4 (four) responsibility areas. Temporary faculty positions must include at least 1 responsibility area. The total percentage of time for all responsibilities should equal 100%. Select **Add Responsibilities Entry**

[Add Responsibilities Entry](#)

to add each entry. **Note:** When you select “Add Responsibilities Entry” you may be automatically taken to the top of the page. You will need to scroll down to the appropriate section to continue completing the form.

Responsibilities

This responsibility builder serves as a notice of vacancy for faculty hiring. University Faculty positions must include at least 4 (four) responsibility areas that outline the anticipated faculty responsibilities. Temporary Faculty positions must include at least 1 (one) responsibility area that provides the anticipated job assignment. The faculty responsibility areas are: Teaching & Advising; Scholarship & Creative Activities; Outreach & Extension; University Service & Leadership. If no assignment in one of the four areas is anticipated, please indicate this by entering 0%. University Faculty position descriptions are still required to be completed within the first few days of employment.

\* Job Duty Function

\* Job Duties/Responsibilities

\* Percentage Of Time

Remove Entry?

[Add Responsibilities Entry](#)

Job Duty Function – for University faculty there should be an entry for each of the following or a 0% assignment in that area: Teaching & Advising; Scholarship & Creative Activities; Outreach & Extension; University Service & Leadership. Temporary faculty often only have Teaching & Advising entries, but may have responsibility in any of the other areas

# Position Management Module

and those should be included when applicable. These four areas are the basis for the University faculty position description that is required upon appointment.

Job Duties/Responsibilities – enter the list of responsibilities or summarize the responsibilities/disciplinary focus for the vacancy announcement.

Percentage of Time – enter the anticipated percentage of time designated to the responsibility/disciplinary focus area.

## Qualifications

### Qualifications

* <b>Minimum Qualifications</b>	<div style="border: 1px solid red; height: 100px;"></div>	This field is required.
<b>Preferred Qualifications</b>	<div style="border: 1px solid gray; height: 100px;"></div>	
<b>Physical Requirements &amp; Working Conditions</b>	<div style="border: 1px solid gray; height: 100px;"></div>	

Minimum Qualifications – enter the minimum qualifications required for the position. Subject to review and approval by the Provost and Executive Vice President.

Preferred Qualifications – enter the preferred qualifications for the position.

Physical Requirements & Working Conditions – specify bona fide and job specific physical requirements and special working conditions required for this position.

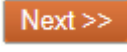
# Position Management Module

## Action Number


### Action Number

#### Action Number

Action Number – System generated number. Keep the number to use when creating an Electronic Personnel Action Form, (EPAF) after hire.

Click **Next**  to save and move to the next screen.


## Funding

Click the **Add Funding Entry**  button to add budget information. If multiple budgets will be used to cover the cost of the position you can select **Add Funding Entry** to add additional budget rows. Each budget will require a separate funding section. The Funding will flood in as originally saved.

### Funding

*	<b>Funding Type</b>	<input type="text" value="Please select"/>
*	<b>Budget/Index</b>	<input type="text"/>
*	<b>Percentage</b>	<input type="text"/>
	<b>Activity Code</b>	<input type="text"/>
*	<b>Account Code</b>	<input type="text" value="Please select"/>
*	<b>Proposed NBAPBUD Salary</b>	<input type="text"/>

Remove Entry?



Funding Type – select the appropriate funding type from the drop down box. If “Temporary Grant” is selected, then review by Office of Sponsored Programs is required.

Budget/Index – enter the budget number used to fund the position.

Percentage – enter the percentage of the above budget used to fund this position. The percentage from all budgets will need to total 100%.

# Position Management Module

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Activity Code – enter an activity code if desired.

Account Code – select the correct account code (E4105 for regular salaries and E4107 for Administrative Increment salaries). E4107 used with faculty administrative positions or when a special administrative increment is approved by the Provost and Executive Vice President.

Enter the Proposed NBAPBUD salary – this is the salary amount that is budgeted for the position for the specific budget number.

## Position Control Information

### Position Control Information


\* **Grand Total Proposed NBAPBUD Salary (all funding sources)**  **This field is required.**

**Funding Comments**

**Position Control Comments**

Grand Total Proposed NBAPBUD Salary – this is the expected grand total from all budget sources.

Funding Comments – please specify, provide additional information to help explain budgeting such as, if salary savings from a vacant position will be used to help fund this position, or if a position is funded at the top of the range, where the extra funding will come from if only the minimal funding was provided above, etc.

Click **Next**  to save and move to the next screen.



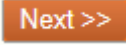
# Position Management Module

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## Position Documents


Upload an organizational chart which identifies this position within the department or organization.

Upload additional documents as required for this position. Scan and upload documents related to Search Waivers or Search Exceptions. If submitting a reclassification request, your supporting documentation will be included here.

Click **Next**  to save and move to the next screen.


## Employee

This section will show who the previous employee who was seated in the position.


Click **Next**  to save and move to the next screen.


## Supervisor

The Supervisor will default in as originally saved. If you need to change the Supervisor, select the position which will be responsible for supervising the new position. You can select **Filter these results** to search the list by PCN number, current supervisor name, title, etc.

Select the radial button of the correct supervisor then select **Next**  to save and continue to the next screen.

## Action Summary

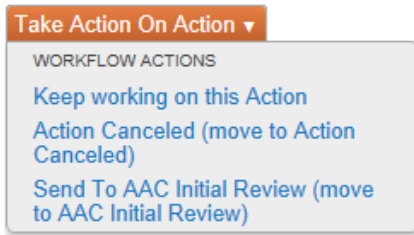
Review the summary information of the vacancy announcement and PAF information. If the section is completed correctly, it will be accompanied by a blue check mark. 

An orange exclamation point  to the left of a section indicates that required information is missing. Select the blue **Edit** link for that section to go back and make the required updates. Select **Save** or **Next** to save and continue. After saving you can move to the **Action Summary** to review the final information for additional errors.

# Position Management Module

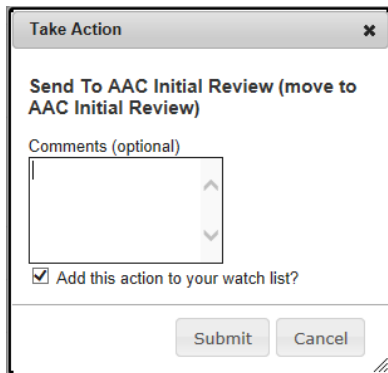
## 7. Routing / Take Action on Action

When you are ready to send your completed vacancy announcement and PAF, press the “Take Action On Action” button in the upper right. **Take Action On Action** You will receive multiple options on what action to perform. To move your completed vacancy announcement and PAF forward to your Affirmative Action Coordinator (AAC), select “Send to AAC Initial Review”.



You will receive a pop-up window to add any optional comments you wish to share with your AAC. **Note:** These notes are discoverable and will be seen by all approvers in the process.

You also have the option to add this position to your watch list. This checkbox is automatically selected. If you do not wish to keep this position in your watch list, deselect the check box. Click on **Submit**.



Once you submit your completed vacancy announcement and PAF, a unique Action Number will be assigned to your action. This number will be found at the bottom of the Position Details page. Record this number for future use.

## **Updating an Existing Position Description**

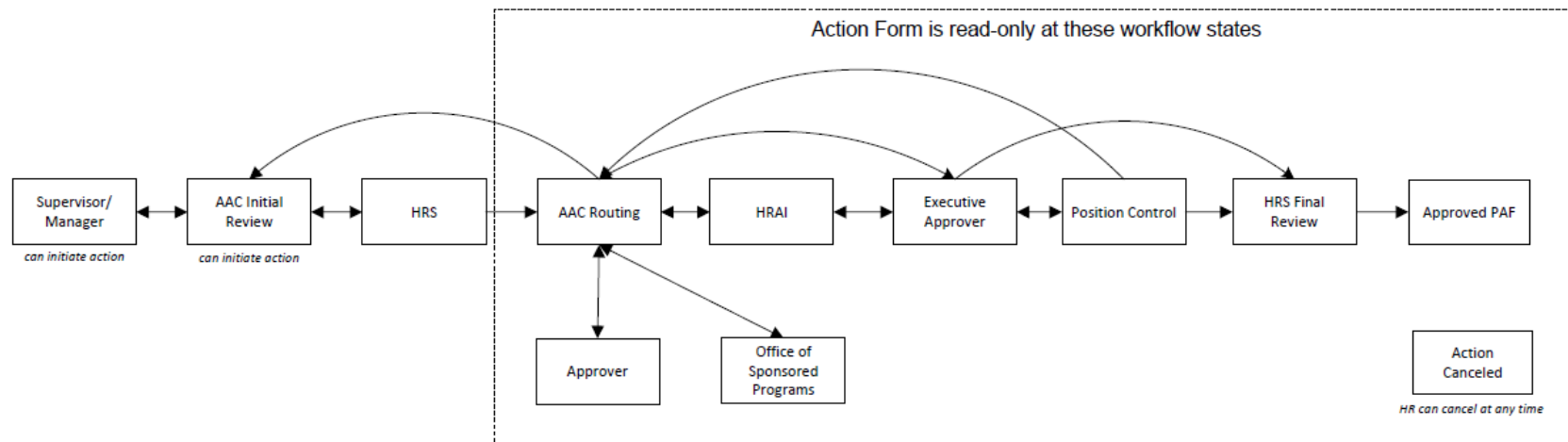
**(for a current incumbent):**

**\* This process is not applicable for Faculty. The position description module is used only for creating and editing Faculty vacancy announcements. This does not replace the annual faculty position description process.**

# Approvals

Below is a visual representation of the workflow for the Position Management module, along with a quick explanation of each step and the role of each user and their permissions.

## Faculty: New Position Action & Modify Position Action Workflow



### User Group Definitions & Functions:

**Supervisor/Manager:** Initiate a new position action or modify position action. Forwards action onto AAC for initial review.

**AAC Initial Review:** Can initiate a new position action or modify position action. Approves actions sent from the Supervisor/Manager. Forwards action onto HRS.

**HRS:** Reviews classification grade and assigns the appropriate FLSA exemption code (if applicable).

**AAC Routing:** Determines where to appropriately forward the next action for approval (i.e. Approver, Office of Sponsored Programs, HRAI, Executive Approver, Position Control or back to AAC Initial Review to make changes).

**Approver:** If additional approval is needed, AAC can forward to multiple approvers (i.e. Department Heads, Directors, Deans, Fiscal Officers, or others as necessary and appropriate for each specific position). Funding editable at this user group. Once approved, Approver forwards action back to AAC Routing.

**Office of Sponsored Programs:** All grant funded positions must be forwarded and approved by OSP. Once approved, OSP forwards action back to AAC Routing.

**HRAI:** If a search waiver or search exception request is proposed, action must be forwarded to Human Rights Access and Inclusion for approval. If approved, forwarded to Executive Approver. If declined, sent back to AAC Routing.

**Executive Approver:** Reviews and approves position action. User group comprised of President/Provost/Vice Presidents or designee(s). New permanent position, or reactive permanent position must be forwarded to position control for review. Modify permanent or temporary position and reactivate temporary position are forwarded to HRS Final Review.

**Position Control:** New permanent position and reactive permanent position must be reviewed and approved by the Executive Director of Planning/Budget or Budget Analyst.

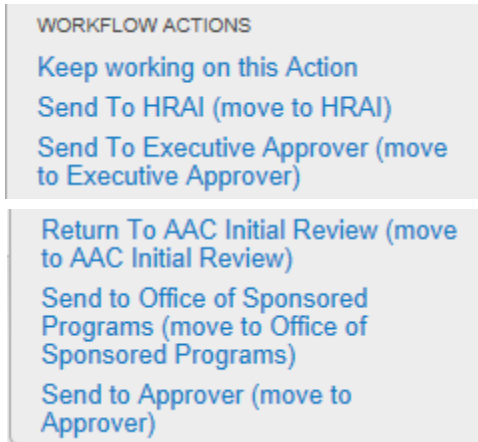
**HRS Final Review:** Reviews and approves all position actions and assigns appropriate PCN.

**Approved PAF:** A record of all approved PAF's (combined with job descriptions) are approved and stored with position descriptions.

**Action Cancelled:** HR has the ability to cancel a forwarded PAF, including the job description, at any time.

## AAC Routing Queue

After the vacancy announcement has been approved, the Affirmative Action Coordinator (AAC) can forward the approved vacancy announcement and PAF to a variety of approvers. The AAC will be responsible for ensuring the vacancy announcement and PAF are properly routed. These routes are outlined below:



Send to HRAI - The approved vacancy announcement and PAF will be routed to HRAI when a Search Waiver or Search Exception is requested or if completing a Postdoctoral Fellow position.

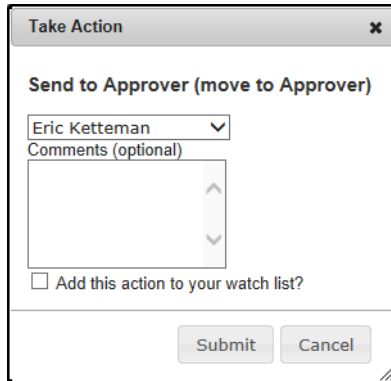
Send to Executive Approver – The approved vacancy announcement and PAF will be routed to the Executive Approver after all needed approvals have been met and the final approval from the President, Provost, or appropriate Vice President (or their designee) is needed.

Return to AAC Initial Review – While the vacancy announcement and PAF is in the AAC Routing queue, it is in a read-only state. If you wish to make any changes, you will need to route to the AAC Initial Review in order to make edits.

Send to Office of Sponsored Programs – The approved vacancy announcement and PAF will be routed to the Office of Sponsored Programs if any grant funding is being used for the position.

Send to Approver – The approved vacancy announcement and PAF will be routed to an Approver when others within a College/Unit or shared College/Unit need to either approve the position or funding. (Go to next page for instruction on how to assign an Approver)

## How to Assign an Approver:

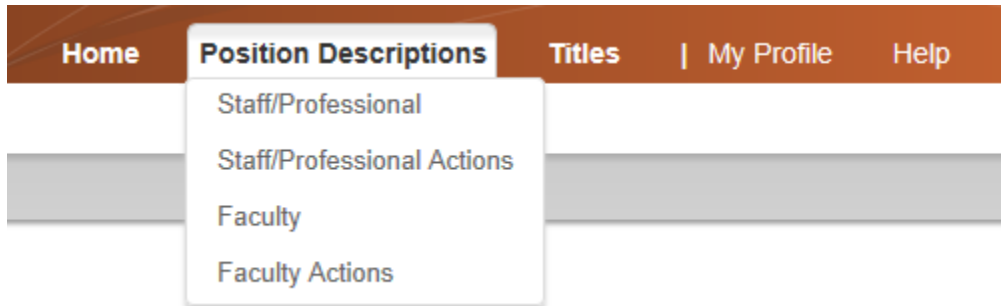


The screenshot shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Send to Approver (move to Approver)'. Below this is a dropdown menu with 'Eric Kettelman' selected. Underneath the dropdown is a text area labeled 'Comments (optional)'. At the bottom left, there is a checkbox labeled 'Add this action to your watch list?'. At the bottom right, there are two buttons: 'Submit' and 'Cancel'.

When you select “Send to Approver”, a pop-up window will appear with a drop down box. From here, you can select the employee that you would like to approve your PAF. An e-mail will be sent to the approver requesting an action. If you do not see the desired Approver, please contact Human Resources.

# Next Steps

1. Once you have an approved vacancy announcement and have obtained all approvals for your PAF, your position will stay in the Position Management module as “Approved”.
2. You can view your position by hovering over ‘Position Descriptions’ and click Faculty.



- a. Your position will be located in the “Faculty PDs” section of the page. You may search for your specific position or another position by using the “**Filter These Results**” link.
3. Once your position is “Active”, you can now post your position using the Applicant Tracking module.
  - a. Be sure to check with your corresponding Executive Approver on a maximum length of time a position can be Active before needing to re-request your PAF.
  - b. Instructions on how to use the Applicant Tracking Module are located on the Human Resources website.

If you have any further questions or need extra help, please contact your corresponding AAC, Human Resources Business Partner, or Office of The Provost and Executive Vice President.



### Faculty Staff Handbook 1565 D. University Faculty:

FSH	University Faculty	NBAJOBS Title	Permanent Position Class & Title (NBAPOSN)	Tenure Track or Ineligible for tenure tracking (PEAFACT)	Faculty Rank (PEAFACT)
D.1	Instructor & Senior Instructor	Instructor Faculty	12950: Instructor Faculty	Ineligible	Instructor Senior Instructor
D.2	Faculty	Regular Faculty	12951: Regular Faculty	Tenure track	Assistant Professor Associate Professor Professor
D.3	Research Faculty	Research Faculty Research Faculty-Ext Spec Research Faculty-IGS	12952: Research Faculty 12952: Research Faculty-Ext Spec 12952: Research Faculty-IGS	Tenure track or Ineligible Tenure track or Ineligible Ineligible	Assistant Professor Associate Professor Professor
D.4	Extension Faculty	Extension Faculty	12953: Extension Faculty	Ineligible Ineligible Tenure track Tenure track Tenure track	Instructor Senior Instructor Assistant Professor Associate Professor Professor
D.5	Librarian	Library Faculty	12954: Library Faculty	Ineligible Ineligible Tenure track Tenure track Tenure track	Instructor Senior Instructor Assistant Professor Associate Professor Professor
D.6	Psychologist	Licensed Psychologist	12955: Licensed Psychologist Faculty	Ineligible Ineligible Tenure track Tenure track Tenure track	Instructor Senior Instructor Assistant Professor Associate Professor Professor
D.7	Officer-Education	N/A	N/A	N/A	N/A
D.8	University Distinguished Professor	N/A	N/A	N/A	Distinguished Professor
D.9	Clinical Faculty	Clinical Faculty	12956: Clinical Faculty	Ineligible	Assistant Professor Associate Professor Professor

### Faculty Staff Handbook 1565 G. Temporary Faculty:

FSH	Temporary Faculty	NBAJOBS Title	Temporary Position Class & Title (NBAPOSN)	Ineligible for tenure tracking	Ineligible for faculty rank
N/A	Lecturer	Temp Faculty-Lecturer	15300: Temporary Faculty	N/A	N/A
G-2	Visiting Faculty	Temp Faculty-Visiting Faculty	15300: Temporary Faculty	N/A	N/A
G-3	Acting Faculty	Temp Faculty-Acting	15300: Temporary Faculty	N/A	N/A
G-4	Associate	Temp Faculty-Associate	15300: Temporary Faculty	N/A	N/A

## Faculty Staff Handbook 1420 E. Administrative Faculty:

\* Fluctuates based on faculty incumbents faculty type which is tracked in PEAFACT and FSH policy in combination with department and college bylaws.

FSH	University Faculty	NBAJOBS Title	Permanent Position Class & Title (NBAPOSN)	Tenure Track or Ineligible for tenure tracking (PEAFAC)	Faculty Rank (PEAFAC)
E.2	College Dean	Dean Interim Dean Term Dean	12300: Dean	*	*
E.2	College Associate Dean	Associate Dean Interim Associate Dean Term Associate Dean	10800: Associate Dean	*	*
E.2	College Assistant Dean	Assistant Dean Interim Assistant Dean Term Assistant Dean	10400: Assistant Dean	*	*
E.2	School/Unit Director	Director Assoc Director Assistant Director  <i>may use Assoc or Asst prefixes as appropriate</i>	12350: Dept Head/Chair/Director  Director Assoc Director Assistant Director	*	*
E.2	Department Chair	Department Chair Assoc Department Chair Asst Department Chair  <i>may use Assoc or Asst prefixes as appropriate</i>	12350: Dept Head/Chair/Director  Department Chair Assoc Department Chair Asst Department Chair	*	*
E.2	Department Head	Department Head Assoc Department Head Asst Department Head  <i>may use Assoc or Asst prefixes as appropriate</i>	12350: Dept Head/Chair/Director  Department Head Assoc Department Head Asst Department Head	*	*
E.2	Program Head	Program Head District Director Superintendent  <i>May use Interim or Term prefixes as appropriate</i>  <i>**CALS: may use Division Chair as a title for Program Head pcn</i>  <i>**LIBRARY: may use Head, xxx as appropriate for Program Head pcn</i>	12355: Prog Head/Dist Dir/Super  Program Head District Director Superintendent	*	*