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Welcome to the Position Management module of PeopleAdmin. In this module, you will have the ability to create and/or modify job descriptions and complete the Position Authorization Form (PAF). The position description 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. The PAF helps the University of Idaho manage our fiscal responsibilities.

During this training document, we will cover:

1. How to create a new Staff/Professional job description and secure the proper approvals for posting the new position.

2. How to fill a vacant position using an existing job description OR PCN and secure the proper approvals for posting the vacant position.

3. How to update an existing job description 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/shiboleth

2. You will login with your current network login information.
**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:

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Location</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>✉️ Inbox</td>
<td>CENTER of Home Page upon log in</td>
<td>Displays all items requesting your attention (approval/review).</td>
</tr>
<tr>
<td>🕰️ Watch List</td>
<td>BOTTOM of Home Page upon log in</td>
<td>Displays any request you are watching (postings, position actions) for easy access.</td>
</tr>
<tr>
<td></td>
<td>Columns at TOP of screen</td>
<td>Used to update your user account details and online help for using the system.</td>
</tr>
<tr>
<td>My Profile &amp; Help</td>
<td>Upper RIGHT hand corner of screen</td>
<td>Used to toggle between the Position Management and Applicant Tracking modules.</td>
</tr>
<tr>
<td></td>
<td>Upper RIGHT hand corner next to your name</td>
<td>Displays the user groups available to you and the arrow will toggle you into each user group.</td>
</tr>
</tbody>
</table>

**Module Type Definitions**

- **POSITION MANAGEMENT**
  Used to create or modify Position Descriptions, view Position Descriptions, 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 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.
Core Functions of the Position Management Module

- View position descriptions
  - Hover over ‘Position Descriptions’ and click Staff/Professional or Faculty

- Create, refill, or modify position actions (position descriptions and PAFs)
  - Hover over ‘Position Descriptions’ and click Staff/Professional or Faculty

- View actions in process and all approved actions
  - Hover over position descriptions and click Staff/Professional Actions or 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 (orange header) and authorized to create a position description. You must be logged in as a Supervisor/Manager or AAC for your department in order to initiate an action.

2. Hover over ‘Position Descriptions’ and click Staff/Professional. **NOTE:** “Actions” allows you to view actions in process and all approved actions.

3. Click the **Create New Position Description** 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 Working Title for the position.
6. If you are creating a new position, then follow step a. If you are cloning an existing position within your department, then follow step b.

   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”.

   b. If you have an existing position description within your department(s) you wish to copy or ‘clone’, click on the radio 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. Selecting 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.

8. Classification — Using the radio button, select the anticipated classification for the position.  
   Note: Final classification of positions will be approved by Human Resources. Click 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.

**Classification**

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

<table>
<thead>
<tr>
<th>Classification Group</th>
<th>Administrative Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Class Code</td>
<td>16005</td>
</tr>
<tr>
<td>Employee Category</td>
<td>Classified</td>
</tr>
<tr>
<td>Salary Grade</td>
<td>3</td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Overtime Eligible</td>
</tr>
</tbody>
</table>
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. Also, if a shared position, this will allow you to select which College/Unit it will be serving (i.e. Director of Development for College of Letters, Arts, & Social Sciences). This field will be displayed on the announcement posting. This is a required field.
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.

Staff-Professional Position Request Rationale – enter the justification for this position that the Executive Approver would need to see, and why it is critical for the mission of your department and the University. This is a required field.

Search Waiver Request and Comments – If you will be requesting a search waiver (appointing 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.

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.

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

Position Title – confirm or enter the Working Title for the position.

Position Type - select Permanent (under 9000 PCN) or Temporary (over 9000 PCN) depending on funding or if there is a contingency on this position.

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.

Suffix Number – select the appropriate suffix number depending on the position type (00 for Permanent positions or 01 for Temporary positions). 00 is used with a Permanent PCN unless there is a contingency associated with the position. 01 is always used with a temporary PCN (over 9000).
Pay Range – indicate the anticipated salary range for this position. This will be between the minimum and mid-point of the anticipated pay grade, unless otherwise approved by the Executive Approver. Please add a note to the action History to indicate request for approval.

FLSA Code – field will be blank if this is a new position. A FLSA Code will be assigned by Human Resources after classification approval by HR.

Type of Appointment – indicate the type of appointment position will be from the drop-down menu.

FTE – enter the FTE of the position (full time, 1.0 FTE positions are 2080 hours per fiscal year). If the position works less than 40 hours per week 52 weeks per year, calculate the FTE percentage by multiplying the number of hours per week (example: 32 hours/week) by the number of weeks worked per year (example: 52 weeks/year) and divide by 2080 (32*52 = 1664/2080 = 80% or .8 FTE)

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

Position Summary – enter a summary of the position responsibilities. This is the Major Function section from the position description. If you are cloning a position, this will default from the cloned position and can be edited as appropriate.

Responsibilities

The responsibilities are the job duties/tasks performed by the position. At least 3 responsibility entries are required. The total percentage of time for all responsibilities should equal 100%. You will also need to select at least one Marginal responsibility.

Select Add Responsibilities Entry to add a new 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.
Position Management Module

Job Duty Function – enter the overall description of the duty. This is also known as a “By Statement”. Example: Provide customer service to department by:

Job Duties/Responsibilities – enter the list of responsibilities that are required to fulfill the duty outlined in the “Job Duty Function”.

Percentage of Time – enter the approximate percentage of time designated to the job duty. This should round to the nearest 5% interval.

Essential/Marginal – select whether this duty is an Essential or Marginal function as defined under the Americans with Disabilities Act. A description of what an Essential and Marginal function is located on the Human Resources website under “Recruitment”. There must be at least one Marginal duty at least 5%.

NOTE: If you need to remove a Job Duties/Responsibilities entry, select the “Remove Entry?” box. The responsibility will not automatically delete once selected, but it will be removed once action is approved. If you select the “Remove Entry?” box, be sure that all fields have some text in them. If they are blank, the entire action form will claim that it is incomplete and will not allow you to move the action forward.
**Qualifications**

Minimum Qualifications – enter the minimum qualifications required for the position. Subject to review and approval by Human Resources.

Preferred Qualifications – enter the preferred qualifications for the position. These were formerly known as the Additional Desirable Qualifications on the position description.

Physical Requirements & Working Conditions – specify bona fide and job specific physical requirements and special working conditions required for this position. Subject to review and approval by Human Resources.

**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. **At least one (1) funding entry** is required. 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Type</td>
<td>Select the appropriate funding type from the drop down box. <strong>NOTE:</strong> If “Temporary Grant” is selected, then review by Office of Sponsored Programs is required.</td>
</tr>
<tr>
<td>Budget/Index</td>
<td>Enter the budget number used to fund the position.</td>
</tr>
<tr>
<td>Percentage</td>
<td>Enter the percentage of the above budget used to fund this position. The percentage from all budgets will need to total 100%.</td>
</tr>
<tr>
<td>Activity Code</td>
<td>Enter an activity code if desired.</td>
</tr>
<tr>
<td>Account Code</td>
<td>Select the correct account code (E4105 for regular salaries and E4107 for Administrative Increment salaries). E4107 is most commonly used with faculty positions.</td>
</tr>
<tr>
<td>Proposed NBAPBUD Salary</td>
<td>This is the salary amount that is budgeted for the position for the specific budget number. <strong>NOTE:</strong> There is a 10 character limit for this field.</td>
</tr>
</tbody>
</table>

**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 most commonly used with faculty positions.

**Proposed NBAPBUD Salary** – this is the salary amount that is budgeted for the position for the specific budget number. **NOTE:** There is a 10 character limit for this field.
Grand Total Proposed NBAPBUD Salary – this is the expected grand total from all budget sources.

Funding Comments – please specify if additional information will be helpful in explaining budgeting information such as if salary savings from a vacant position will be used to help fund this position, 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

Employee

This section should normally be skipped as there is no employee to place at this time.

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. If the supervisor is in a Faculty position, be sure to change the filter to include “Faculty.”

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

Action Summary

Review the summary information of the position description and PAF information. If all required fields are completed, 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.
10. Routing / Take Action on Action

When you are ready to send your completed position description and PAF, press the “Take Action On Action” button in the upper right. You will receive multiple options on what action to perform. To add the position to your “Watch List” but not move it forward in the workflow, select “Keep working on this Action.” To move your completed position description 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. Please check with your AAC regarding departmental requirements for using this field. **Note:** These notes are discoverable and found in the “History” tab of the Action.

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 position description 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 Current or Upcoming Vacant Position:

1. Verify you are in the ‘Position Management’ module (orange header) and authorized to create a position description. You must be logged in as a Supervisor/Manager or AAC for your department in order to initiate an action.

2. Hover over ‘Position Descriptions’ and click Staff/Professional. **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 located in the upper right portion of the screen. Confirm you chose the correct position description and click the Start button.

---

Inbox | PeopleAdmin | Watch List
---

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

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 radio button to select the anticipated classification for the position. Note: Final classification of positions will be approved by Human Resources.
   a. If you intend to reclassify (change the grade up or down) the position, you will need to submit the Reclassification Request form and Questionnaire in the Position Documents section. Resources available on the Human Resources website.

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

<table>
<thead>
<tr>
<th>Classification Group Title</th>
<th>Administrative Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Class Code</td>
<td>16005</td>
</tr>
<tr>
<td>Employee Category</td>
<td>Classified</td>
</tr>
<tr>
<td>Salary Grade</td>
<td>3</td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Overtime Eligible</td>
</tr>
</tbody>
</table>
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 – The Division/College will default in as originally saved. If the Division/College is different, select the Division or College where this position will be located. Also, if a shared position, this will allow you to select which College/Unit it will be serving (i.e. Director of Development for College of Letters, Arts, & Social Sciences). This field will be displayed on the announcement posting. This is a required field.
Position Management Module

Position

- Current Date of Request

  Anticipated Appointment Effective Date
  04/22/2014

  End Date of Action (if applicable)

- Staff Professional Position Request Rationale

- Search Waiver Request
  No

- Search Waiver Request Comments

- Search Waiver Approval

  Search Exception Request
  No

  Search Exception Comments

- Search Exception Approval

  Position Title
  Administrative Assistant

  Position Type
  Permanent

  Position Control Number
  004562

  Suffix Number
  00

  Action
  Please select

  Reactivate Expired PCN
  This field is required

- Pay Range
  The advertised pay range must be from the minimum to midpoint of the pay grade. Please contact your HR Business Partner if you require an exception.

  10.50 - 13.67

- FLSA Code
  Not Applicable

- Type of Appointment
  Fiscal Year

- FTE
  1

- Full Time/Part Time
  Full Time

- Position Summary
  As part of the Human Resources team the position performs a variety of tasks which support the administrative duties for several positions within Human Resources, including the Assistant Vice President for Human Resources, the Director of Benefit Services, the Director of Organizational Development and Learning and the Director of Employment
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.

Staff-Professional 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.

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.

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.

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

Position Title – confirm or enter the Working Title for the position.

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 on funding or if there is a contingency on this position.

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

Suffix Number – The Suffix Number will default in as originally saved. If the suffix number is different, select the appropriate suffix number depending on the position type (00 for Permanent positions or 01 for Temporary positions). 00 is used with a Permanent PCN unless there is a contingency associated with the position. 01 is always used with a temporary PCN (over 9000).
Position Management Module

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

<table>
<thead>
<tr>
<th>Please select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refill Position</td>
</tr>
<tr>
<td>Change Position Class</td>
</tr>
<tr>
<td>Change Position Type of Appointment</td>
</tr>
<tr>
<td>Change Position Full Time/Part Time</td>
</tr>
<tr>
<td>Minor Updates to Responsibilities</td>
</tr>
<tr>
<td>Major Updates for Review</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

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 job description and PAF will go through the full review and approval process.

If you select “Minor Updates to Responsibilities” or “Other”, the job description will go to AAC and Human Resources, 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

FLSA Code – The FLSA Code will default in as originally saved. Human Resources will determine if the FLSA Code needs to be changed.

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.

FTE – The FTE will default in as originally saved. If the FTE is different, enter the FTE of the position (full time, 1.0 FTE, positions are 2080 hours per fiscal year). If the position works less than 40 hours per week 52 weeks per year, calculate the FTE percentage by multiplying the number of hours per week (example: 32 hours/week) by the number of weeks worked per year (example: 52 weeks/year) and divide by 2080 (32*52 = 1664/2080 = 80% or .8 FTE)
Position Management Module

Full Time/Part Time – The Full Time/Part Time will default in as originally saved. If Full Time/Part Time is different, select full time or part time from the drop down box. Anything below .875 FTE with a Fiscal Year appointment should be part time.

Position Summary – The Position Summary will default in as originally saved. If Position Summary is different, enter a summary of the position responsibilities. This is the Major Function section from the position description.

Responsibilities

The responsibilities are the job duties/tasks performed by the position. **At least 3 responsibilities are required.** The total percentage of time for all responsibilities should equal 100%. You will also need to select at least one Marginal responsibility. The Responsibilities will default in as originally saved. Select **Add Responsibilities Entry** to add additional entries. **Note:** When you select “Add Responsibilities Entry” you will automatically be taken to the top of the page. You will need to scroll down to the appropriate section to continue completing the form.

* Job Duty Function

* Job Duties/Responsibilities

* Percentage Of Time

* Essential/Marginal

Add Responsibilities Entry

Job Duty Function – The Job Duty Function will default in as originally saved. If you need to change, enter the overall description of the duty. This is also known as a “By Statement”. Example: Provide customer service to department by:

Job Duties/Responsibilities – The Job Duties/Responsibilities will default in as originally saved. If you need to change, enter the list of responsibilities that are required to fulfill the duty outlined in the “Job Duty Function”. 
Percentage of Time – The Percentage of Time will default in as originally saved. If you need to change, enter the approximate percentage of time designated to the job duty. This should round to the nearest 5% increment.

Essential/Marginal – select whether this duty is an Essential or Marginal function as defined under the Americans with Disabilities Act. A description of what an Essential and Marginal function is located on the Human Resources website under “Recruitment”. There must be at least one Marginal duty at least 5%.

Qualifications

Minimum Qualifications

Preferred Qualifications

Physical Requirements & Working Conditions

Minimum Qualifications – The Minimum Qualifications will default in as originally saved. If you need to change them, enter the minimum qualifications required for the position. Subject to review and approval by Human Resources.

Preferred Qualifications – The Preferred Qualifications will default in as originally saved. If you need to change them, enter the preferred qualifications for the position. These are known as the Additional Desirable Qualifications on the position description.
Physical Requirements & Working Conditions – The Physical Requirements & Working Conditions will default in as originally saved. If you need to change them, specify physical requirements required for this position (must be determined to be essential functions) and special working conditions. Subject to review and approval by Human Resources.

**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. **At least one (1) funding entry is required.** 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 Type**
  - Please select

- **Budget/Index**

- **Percentage**

- **Activity Code**

- **Account Code**
  - Please select

- **Proposed NBAPBUD Salary**

  - Remove Entry?

  - Add Funding 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%.

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 most commonly used with faculty positions.

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

Grand Total Proposed NBAPBUD Salary (all funding sources) - this field is required.

Funding Comments - please specify if additional information will be helpful in explaining budgeting information such as if salary savings from a vacant position will be used to help fund this position, 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. Reclassification requests and supporting documentation will need to be included here. Reclassification resources available on the Human Resources website.

Click Next >> to save and move to the next screen.
Position Management Module

Employee

This section will show 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. If the supervisor is Faculty, be sure to change the “Position Type” to Faculty.

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

Action Summary

Review the summary information of the position description and PAF information. If 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

8. Routing / Take Action on Action

When you are ready to send your completed position description and PAF, press the “Take Action On Action” button in the upper right. You will receive multiple options on what action to perform. To add the position to your watch list but not move it forward in the workflow, select “Keep working on this Action.” To move your completed position description 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 found in the “History” tab of the Action.

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 position description 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.
Position Management Module

Updating an Existing Position Description
(for a current incumbent):

1. Verify you are in the ‘Position Management’ module (orange header) and authorized to create a position description. You must be logged in as a Supervisor/Manager or AAC for your department in order to initiate an action.

2. Hover over ‘Position Descriptions’ and click Staff/Professional. NOTE: “Actions” allows you to view actions in process and all approved actions.

3. Locate the Position Title and Employee First Name and the Employee Last Name and click the desired position title hyperlink. This will take you to the Classification page.

4. Click on the “Modify Position Description button” located in the upper right portion of the screen. Confirm you chose the correct position description and click the Start button.

Note: You can navigate between the sections simply by selecting one of the Editing Action options.
If you added or changed information within a section, be sure to Save before selecting a new Editing Action.

4. Classification – The classification of the position will default in. If Human Resources determines a possible change in classification after reviewing, the reclassification process will be initiated. Note: Final classification of positions will be approved by Human Resources.
   a. If you intend to reclassify (change the grade up or down) the position, you will need to submit the Reclassification Request form and Questionnaire in the Position Documents section. Resources available on the Human Resources website.

Click Next to continue.

5. 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**

<table>
<thead>
<tr>
<th>Classification Title</th>
<th>Administrative Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Class Code</td>
<td>16005</td>
</tr>
<tr>
<td>Employee Category</td>
<td>Classified</td>
</tr>
<tr>
<td>Salary Grade</td>
<td>3</td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Overtime Eligible</td>
</tr>
</tbody>
</table>
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 – The Division/College will default in as originally saved. If the Division/College is different, select the Division or College where this position will be located. Also, if a shared position, this will allow you to select which College/Unit it will be serving (i.e. Director of Development for College of Letters, Arts, & Social Sciences). This is a required field.
Position Management Module

Position

- **Current Date of Request**: This field is required.
  - **Anticipated Appointment Effective Date**: 04/22/2014
  - **End Date of Action (if applicable)**
  - **Staff Professional Position Request Rationale**
  - **Search Waiver Request**: No
  - **Search Waiver Request Comments**
  - **Search Waiver Approval**
    - **Search Exception Request**: No
      - **Search Exception Comments**
      - **Search Exception Approval**

- **Position Title**: Administrative Assistant
- **Position Type**: Permanent
- **Position Control Number**: 004562
- **Suffix Number**: 00
- **Action**: Please select
- **Reactivate Expired PCN**: This field is required
- **Pay Range**: 10.50 - 13.67
- **FLSA Code**: Not Applicable
- **Type of Appointment**: Fiscal Year
- **FTE**: 1
- **Full Time/Part Time**: Full Time
- **Position Summary**: As part of the Human Resources team the position performs a variety of tasks which support the administrative duties for several positions within Human Resources, including the Assistant Vice President for Human Resources, the Director of Benefits Services, the Director of Organizational Development and Learning and the Director of Employment.
Current Date of Request – enter today’s date. This is a required field.

Anticipated Appointment Effective Date – enter the date you expect the changes to be effective. 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.

Staff-Professional Position Request Rationale – enter a justification and a summary of the changes. 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.

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.

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

Position Title – confirm or enter the Working Title for the position.

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 on funding or if there is a contingency on this position.

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

Suffix Number – The Suffix Number will default in as originally saved. If the suffix number is different, select the appropriate suffix number depending on the position type (00 for Permanent positions or 01 for Temporary positions). 00 is used with a Permanent PCN unless there is a contingency associated with the position. 01 is always used with a temporary PCN (over 9000).
Position Management Module

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

<table>
<thead>
<tr>
<th>Please select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refill Position</td>
</tr>
<tr>
<td>Change Position Class</td>
</tr>
<tr>
<td>Change Position Type of Appointment</td>
</tr>
<tr>
<td>Change Position Full Time/Part Time</td>
</tr>
<tr>
<td>Minor Updates to Responsibilities</td>
</tr>
<tr>
<td>Major Updates for Review</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

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 job description and PAF will go through the full review and approval process. (Please go to “Refilling a Vacant Position Description” on Page 20)

If you select “Minor Updates to Responsibilities” or “Other”, the job description will go to AAC and Human Resources, who will then determine the proper process going forward.

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

FLSA Code – The FLSA Code will default in as originally saved. Human Resources will determine if the FLSA Code needs to be changed.

Type of Appointment – The Type of Appointment will default in as originally saved. If the type of appointment is changing, indicate if position will be a Fiscal Year or Academic Year appointment.

FTE – The FTE will default in as originally saved. If the FTE is changing, enter the FTE of the position (full time, 1-FTE, positions are 2080 hours per fiscal year. If the position works less than 40 hours per week 52 weeks per year, calculate the FTE percentage by multiplying the number of hours per week (example: 32 hours/week) by the number of weeks worked per year (example: 52 weeks/year) and divide by 2080 (32*52 = 1664/2080 = 80% or .8 FTE)
Full Time/Part Time – The Full Time/Part Time will default in as originally saved. If Full Time/Part Time is changing, select full time or part time from the drop down box. Anything below .875 FTE with a Fiscal Year appointment should be part time.

Position Summary – The Position Summary will default in as originally saved. If Position Summary is different, enter a summary of the position responsibilities. This is the Major Function section from the position description.

Responsibilities

The responsibilities are the job duties/tasks performed by the position. **At least 3 responsibilities are required.** The total percentage of time for all responsibilities should equal 100%. You will also need to select at least one Marginal responsibility. The Responsibilities will default in as originally saved. Select **Add Responsibilities Entry** to add additional entries. **Note:** When you select “Add Responsibilities Entry” you will automatically be taken to the top of the page. You will need to scroll down to the appropriate section to continue completing the form.

- Job Duty Function
- Job Duties/Responsibilities
- Percentage Of Time
- Essential/Marginal

Job Duty Function – The Job Duty Function will default in as originally saved. If you need to change, enter the overall description of the duty. This is also known as a “By Statement”. Example: Provide customer service to department by:

Job Duties/Responsibilities – The Job Duties/Responsibilities will default in as originally saved. If you need to change, enter the list of responsibilities that are required to fulfill the duty outlined in the “Job Duty Function”.
Percentage of Time – The Percentage of Time will default in as originally saved. If you need to change, enter the approximate percentage of time designated to the job duty. This should round to the nearest 5% increment.

Essential/Marginal – select whether this duty is an Essential or Marginal function as defined under the Americans with Disabilities Act. A description of what an Essential and Marginal function is located on the Human Resources website under “Recruitment”. There must be at least one Marginal duty at of least 5%.

Qualifications

Minimum Qualifications

Preferred Qualifications

Physical Requirements & Working Conditions

Minimum Qualifications – The Minimum Qualifications will default in as originally saved. If you need to change them, enter the minimum qualifications required for the position. Subject to review and approval by Human Resources.

Preferred Qualifications – The Preferred Qualifications will default in as originally saved. If you need to change them, enter the preferred qualifications for the position. These are known as the Additional Desirable Qualifications on the position description.
Physical Requirements & Working Conditions – The Physical Requirements & Working Conditions will default in as originally saved. If you need to change them, specify physical requirements required for this position (must be determined to be essential functions) and special working conditions. Subject to review and approval by Human Resources.

**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.

6. Since you are making an update to an existing job description, you do not need to complete the rest of the sections unless you are making a change related to funding.

7. Skip to the Action Summary

**Action Summary**

Review the summary information of the position description and PAF information. If 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.
8. Routing / Take Action on Action

When you are ready to send your completed position description, press the “Take Action On Action” button in the upper right. You will receive multiple options on what action to perform. To add the position to your “Watch List” but not move it forward in the workflow, select “Keep working on this Action.” To move your completed position description forward to your Affirmative Action Coordinator (AAC), select “Send to AAC Initial Review”.

![Take Action On Action](image)

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 found in the “History” tab of the Action.

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.

![Take Action](image)

Once you submit your completed position description, 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.
Approvals

Below is a visual representation of the workflow for the Position Management module, along with a quick explanation of each stop and the role of each user and their permissions.
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 position, change of position, or reactive position must be forwarded to position control for review. Modify position forwarded to HRS Final Review.

**Position Control:** New position, change of position or reactive 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 job description has been approved, the Affirmative Action Coordinator (AAC) can forward the approved job description and PAF to a variety of approvers. The AAC will be responsible for ensuring the job description and PAF are properly routed. These routes are outlined below:

<table>
<thead>
<tr>
<th>WORKFLOW ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep working on this Action</td>
</tr>
<tr>
<td>Send To HRAI (move to HRAI)</td>
</tr>
<tr>
<td>Send To Executive Approver (move to Executive Approver)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Return To AAC Initial Review (move to AAC Initial Review)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send to Office of Sponsored Programs (move to Office of Sponsored Programs)</td>
</tr>
<tr>
<td>Send to Approver (move to Approver)</td>
</tr>
</tbody>
</table>

Send to HRAI - The approved job description 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 job description 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 job description 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 job description 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 job description 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:

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 job description 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 Staff/Professional or Faculty (depending on type of position you need).
   a. Your position will be located in the “Staff/Professional 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 or Human Resources Business Partner.