Online Recruiting System – PeopleAdmin 7
Position Management Module - Creating or Modifying a Position Description

Below is a visual diagram for the Position Description workflow:

1. An Initiator may create a new position description by selecting the Create New Position Description option.
2. An Initiator may also choose to modify an existing position description by selecting the Modify Position Description option.
3. Once complete, the Initiator will submit to the HR Consultant 2 for review and approval. These submissions are called “Position Requests” (formerly called actions).
4. The HR Consultant 2 will perform a thorough review of the position request and may approve it or return it to the Initiator for changes, corrections, additional information, etc.
5. Once approved, the new or modified position is then made available to be used to create a new posting by the Initiator or their business center HR team in the Applicant Tracking module.

To Access the Position Management Module:

Navigate to the Position Management module by clicking on the Position Management module from the module drop down box located at the top right of the Home Page. When loaded, the Position Management Home Page color scheme will turn to “orange”.

As the Initiator, you may initiate a new Position Request. Choose your role from the role drop down box at the top right of Home Page. Note that if you have any other role activated, you may not be permitted to create a new Position Description.
To Create a New Position Description:

From the Main Menu, choose Position Descriptions, then Classified/Temporary Staff or Unclassified Faculty.

The following screen and list of approved Position Descriptions will display depending on the position type you select:

To create a Position Description, click on the Create New Position Description button at the top right of the screen.

Click on the New Position Description link to start the process.

You may create a Position Description from scratch or clone (copy) an already existing and approved Position.
By Step:

1. To create a new Position Description from scratch, enter the **Job Title** (This will be the same as the position title for classified/temporary staff, and academic faculty and you may leave blank if you wish to copy from the classification/position title at a later time. For administrative/professional faculty, you may enter the specific job title.)

2. Select the **Business Center** and the **Department**. (Drop down select tables are pre-populated with valid locations and filter based on the previous field’s selection.)

3. Click on the Start Position Request button to initiate the Position Description form(s).

**OR TO CLONE A CURRENT POSITION DESCRIPTION**

1. To create a new Position Description by copying/cloning a previously approved Position Description, leave the **Job Title** blank as it will populate from the position being copied.

2. Select the **Business Center** and the **Department**. (Drop down select tables are pre-populated with valid locations and filter based on the previous field’s selection.)

3. Choose the Position Description you would like to copy by selecting the **radio box** to the left of the title. (You may view the Position Description first by right clicking the Position Description Title from the Position Description list and selecting the option to "Open link in a new tab".)

4. Click on the Start Position Request button to initiate the Position Description form.
5. You may navigate through the Position Request form by selecting “Next” and moving from page to page or by selecting the links directly from the menu on the left hand side of the screen:

6. You must first enter a Justification of Need indicating why the position is being created/established. If you have a detailed justification that you would like to upload, you may note that you will upload the justification on the position documents page. Then select “Next” to move to the next page.

7. If drafting a new Position Description from scratch, you will next select the position’s Classification. This will apply a category and some basic information for the position. Choose a Classification by selecting the radio box next to the Classification Title and select “Save”. You may then copy the Position/Classification Title to add to the Job Title field on the next screen. Then select Next at the top right of the screen. For cloned Position Descriptions, Classifications fields will automatically be populated – do not select a different classification. Then select “Next” to move to the next page.

8. Position Details
   a. **Position Information** - Fields vary by position type – classified/temporary staff vs unclassified faculty
      i. General Position Information – i.e. Job Location, Appointment Basis, etc.
      ii. Position Summary - Briefly summarize why the position exists and its role in achieving program objectives.
      iii. Decision Making/Guidelines - Identify the breadth and scope of decisions, the level of autonomy/authority and review, and any specific guidelines or reference materials used to make those decisions.
      iv. Position Duties - Describe the major or most important duties performed by this position. Be clear about both the overall function and specifics of work performed. There should be an easily identifiable relationship between the duties, the position summary, decision-making, and lead work/supervisory responsibilities in the position description. Include the percentage of time for each duty listed.
      v. Qualifications - All qualifications must have a clear connection to the position duties.

   b. **Criminal History Check Required**
c. **Motor Vehicle History Check Required**

Click the Next Button to move on to the next category of information.

9. **Position Funding Source** – Enter the funding for this Position
   a. **Funding Source**
   b. **Labor Distribution (Index, Account Code, Activity Code, Labor %)**
   c. **Position Budget Type** – optional but you may select if known

Then select “Next” to move to the next page.

10. **Supervisory Position** – select the position the new position will report to. You may filter the results by selecting the “Filter these results” link. If search default is classified/temporary staff change position type to unclassified.

Then select “Next” to move to the next page.

11. **Position Documents** – Upload:
   a. **Organizational Chart** (Required for Classified Staff and Professional Faculty positions)
   b. **Budget Authorization – Position** (if required by Business Center)
   c. **Reclassification Justification** (Classified Staff if applicable)
   d. **Position Reassignment/Correction Justification** (Professional Faculty if applicable)
   e. **Draft Ad for OISFS Review** (Tenure-Track W/Teaching Duties Only)
   f. **Other Documents if applicable**
   g. **Intent to Fill - Requisition Form** (if utilized by your Business Center to initiate posting when the position description is approved)
   h. **Salary Comparator and Proposed Salary Range** (Academic Teaching/Research positions: Provide the proposed salary range and name, title and full-time annual salary for each comparator provided. Also helpful to know how many years the employee has been in the similar position. If the salary range requested differs from the comparators provided, provided, provide justification for the salary range proposed. Utilize Core Report HRS1551)

Then select “Next” to move to the Position Request Summary.

**Position Request Summary and Taking Action on Position Description**: The Position Request Summary allows you to see the summary of all information included in the created Position Description. The Position Request may not be submitted for approval until all required fields are completed. To edit the Position Description, click on the Edit link located below the Position Description Title.

There are 4 main areas to the New Position Description Summary. These are:

1. **Summary** – A summary for the newly created position description. You may edit any of the parts of the position description by clicking on the Edit link, located below the Position Title
2. **History** – provides a full audit trail for all transactions related to the position description including comments that are added at the “Take Action on Position Request” step. History provides the summary of the transaction, who performed the action, and date and time stamps each transaction.

3. **Settings** – a quick snapshot for position’s structure

4. **Take Action on Position Request** – moves the Position Request through the workflow approval process

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**Take Action on Position Request**

- Keep working on this Position Request
- Cancel Request (move to Canceled)
- Submit (move to HR Consultant 2)

The Initiator may “Keep working on this Position Request”, “Cancel Request (move to Canceled) or “Submit (move to HR Consultant 2)” for review and approval or the HR Consultant 2 may return it to the Initiator if additional information or modification is needed. When a user takes action on a position request they are given the option to add comments prior to submission. It is important for the Initiator to indicate anything important they want noted in the position request or information to pass along to the HR Consultant 2 in the workflow. **Comments** are then added to the History section of the position.

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**Keep working on this Position Request**

Comments (optional)

![Comment field](image)

- This position request is currently in your watch list. Uncheck this box to remove it.

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When the HR Consultant 2 has completed their review, the Position Request will move to the “Approved” status and the **Initiator** will receive an email notification alert that the Position Request has been approved. If there is a vacancy associated with the position, a Posting may now be initiated from the approved position description.

If the HR Consultant 2 returns a position request to you for changes, you may find the position request in your “Inbox” under “Position Requests” on the Home Page or by selecting “Classified/Temporary Staff Position Requests” or “Unclassified Staff Position Requests” as appropriate under “Position Descriptions” and then using the search functionality to locate the request.

*Revised: Strategic Staffing / Workforce Planning (SSWP) December 2016*
To Modify a Position Description:

From the Main Menu, choose Position Descriptions, then Classified/Temporary Staff or Unclassified Faculty.

The following screen and list of approved Position Descriptions will display depending on the position type you select:

Use the “Search” functionality to find the position you wish to modify. To view the position summary, click on the blue position description title or select the view option under Actions for the position. Once you have determined you wish to move forward with modifying the position, select “Modify Position Description”.

Once the modification has been started, the position request will lock the position description from other updates until the position request has completed.

You will be required to provide a Reason for Position Modification along with the Justification of Need.
The Initiator will then work through each subsequent page of the position request making the necessary updates/modifications required. (See detailed instructions and screenshots for subsequent pages in “Create a New Position Description” section above.)

The system will automatically track any changes made to the position. When viewing the position request summary – the language in the position description prior to any changes will be noted as “Currently”.

The Initiator may “Keep working on this Position Request”, “Cancel Request (move to Canceled) or “Submit (move to HR Consultant 2)” for review and approval or the HR Consultant 2 may return it to the Initiator if additional information or modification is needed.

When a user takes action on a position request they are given the option to add comments prior to submission. Comments are then added to the History section of the position.

When the HR Consultant 2 has completed their review, the Position Request will move to the “Approved” status and the Initiator will receive an email notification alert that the Position Request has been approved. If there is a vacancy associated with the position, a Posting may now be initiated from the approved position description.

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