### People Admin
Position Description Module

**FACULTY**

**START ACTION NEW** (workflow steps for the Modify are the same except under the Modify heading)

<table>
<thead>
<tr>
<th>USER</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
</table>
| Hiring Manager                            | • Initiates Start Action New transactions for requisition/POD position process  
• Creates advertising for position posting  
• Creates prequalifying questions (if appropriate)  
• Sends to Director for review             |
| Director                                  | • Reviews requisition/POD position details  
• Makes any necessary corrections or returns to hiring manager for corrections  
• Submit to Provost or Faculty Affairs     |
| Provost Designee                          | • Reviews requisition/POD position details  
• Makes any necessary corrections or returns to hiring manager for corrections  
• Returns to Hiring Manager to Hold for Budget depending upon requisition request; OR  
• Submits to Office of Budget Management (OBM) |
| Faculty Affairs (positions associated with the COM) | • Reviews requisition/POD position details  
• Makes any necessary corrections or returns to hiring manager for corrections  
• Returns to Hiring Manager to Hold for Budget depending upon requisition request; OR  
• Submits to Office of Budget Management (OBM) |
| PBC/AHC (Position Budget Control for Academic Health Center) | • Reviews position requests against departmental budgets  
• Resolves discrepancy with the hiring department  
• Submits to Office of Budget Management (OBM) |
| Office of Budget Management (OBM)         | • Reviews position requests against departmental budgets  
• Resolves discrepancy with the hiring department  
• Submits to Office of Budget Management (OBM) |
| Office of Equal Opportunity (OEO)         | • Reviews position for agreed upon recruitment plan  
• Submits to Human Resources ((HR)) |
| Human Resources (HR)                      | • Review position  
• Inputs Position Number for HR  
• Arranges necessary advertising  
• Posts position as directed |
GETTING STARTED – START ACTION NEW STEP-BY-STEP

Hiring Manager User

Log On

- Log into People Admin
- Select “Start Action” on the left navigation bar under POSITION DESCRIPTION
- Select “Start Action” under New Position Description – Faculty
- Select Job Classification Title from drop down menu on the Proposed Classification Tab, click Search
- View Summary or choose to “Select and Continue” the job classification title
  - You may also clear results and search an additional title by using functionality at the bottom of the screen

Proposed Classification Tab

Review Proposed Classification information (changes to this information can be made by Compensation or HRSC staff only). The classification is the stored information related to the job selected job title.
- View Summary or choose to “Select and Continue” the job classification title
  - You may also clear results and search an additional title by using functionality at the bottom of the screen

Click “Continue to Next Page”.

Position Details Tab

Complete the “Position Details” Tab to provide information about the position.

- Select the College/Division from the drop down selection
- Input the organizational unit (8 digit number starting with “8”).
- From the drop down menu, select the campus location.
- Select the appropriate department.
- A Working Title is used for advertising purposes only and is not reflected in UC Flex.
- Job Classification title will default from the job classification.
- From the drop down menu, select the appropriate job category.
- Answer the question regarding the OEO Recruitment Plan. Applicable to positions in
  - Administrative – Group 102
  - Executive – Group 100
- Enter the department mail location.
- Job Classification Code will default from the Proposed Classification tab.
- UC Flex Position Title is not available at this time. This information will be entered by Compensation or the appropriate Broadband administrator during the requisition workflow process.
- UC Flex Position Number is not available at this time. This information will be entered by the Office of Budget Management (OBM) during the requisition workflow process.
- Job Description will default from the Proposed Classification Tab.
- Job Characteristic Field will default from the Classification.
- Job Minimum Qualifications will default from the Proposed Classification Tab.
- Job Unusual Working conditions will default from the Proposal Classification Tab.
- The FLSA status will default from the Proposed Classification tab.
- From the drop down menu, select the appropriate shift.
- Enter the daily work hours.
- Job Group Code will default from the Proposed Classification.
- Enter the FTE (full time equivalent) amount as a percentage.
- Select the appropriate pay basis.
- Pay scale group defaults from the Proposed Classification tab.
- From the drop down menu, select the appropriate supervisor.
- Enter the supervisor’s telephone number.
- Enter the work/office/lab/room number field of the facility where the position is located.
- Select the faculty Track Type
- Enter the affiliation (if appropriate).
- The Justification Letter field is an optional field used to record internal divisional communication.
- The Position Description information is maintained by the department. In the Position Description (Essential Functions) field, enter the specifics related to the position expectations and duties in your particular area.
- Enter Position Ideal Qualifications. Note that information entered into this field cannot be used to exclude qualified applicants who meet the Minimum Qualifications for the job.
- Enter the Position Physical Requirements. This a required field for all Positions. See the comprehensive guide related to Americans with Disability (ADA) compliance located on the HR website or the modified version located on the left menu bar.

Select “Continue to the Next Page”.
Requisition Form Tab

Complete the “Requisition Form” Tab to provide details regarding posting the position.

- Indicate whether or not Human Resources should post the position immediately upon receipt or if the position should be posted with a future date.
- People Admin will assign the position an Action Number once it has been sent through the first approval process.
- Faculty Affairs or the Provost Office will assign a Provostal Number if appropriate.
- Indicate whether or not you are desiring that the position be sent to PBC/AHC or OBM immediately through the workflow or whether or not the position should be returned to the Hiring Manager to Hold for Budget.
- Select the appropriate hiring manager(s). Note: Selection MUST include the individual completing the requisition in addition to any individuals who will have responsibility for inputting information.
- Record the hiring manager’s telephone number.
- From the drop down menu, select the appropriate Position Type.

- The “Limited To” field is used to indicate whether or not a position is limited to a select group (i.e., members of a bargaining unit, departmental posting only, UC wide posting).
- Requisition status field is an optional field used to indicate where positions are in the process, generally outside of People Admin.
- Enter any Comments associated with where the Requisition is.
- Select the appropriate Appointment Type.
- If the position is Temporary, input the temporary position Start Date (this information is for advertising purposes only).
- If the position is Temporary, input the temporary position End Date (this information is for advertising purposes only).
- Information should be entered into the Job Posting Date field if there is a specific date when the position should be posted (i.e., creating it on 10/15 but now posting until 12/1). Otherwise, Human Resources will input the job posting date when they receive the actual requisition for posting.
- Input a Job Close Date or mark that the position should be Open Until Filled.
- The Notification Date field is an optional field that can be used as a reminder field that the position is still posted. The system will send an e-mail notification that the position will close in “x” amount of time unless it’s requested to remain open.
- Application Review Date field is used for recording purposes only. An application review date MUST be entered for select high level Administrative positions reviewed by the EOC Coordinator and OEO (Job Groups 100 &102), prior to being submitted to Human Resources for posting. The purpose of the review is to ensure that an agreed upon Recruitment Plan is attached containing appropriate diverse advertising methods.
- In the event that permission has been obtained from the OEO to utilize a previous requisition to hire a new applicant, the copy field is designed for this purpose. Enter the requisition number of the position where the applicant is located in the field requesting the originating requisition number.
- Enter the name of the specific applicant that is to be copied into the requisition, in the “Direction to HR” field.
- For the posting, enter the Documents that MUST be attached by the applicant.
- For the posting, enter the Documents that CAN be attached by the applicant.
- If a selection of “Other” was made under the Documents to be Attached section, you MUST indicate the type of document in the Special Instructions to Applicants field. This field may also be used to communicate additional information that the applicant ought to know about prior to or in order to apply to the position.
- Enter the Pay Rate or Pay Range for the position if desired and known.
- Select the Applicant Types accepted.
- Answer the question as to whether or not an advertising Waiver was being requested of the OEO office. (A waiver request must first be authorized by the VP designee of the respective area prior to submitting to OEO.)
- Input the Waiver Request into this field. This should include the e-mail copy response from OEO authorizing the waiver as well as the actual waiver request itself outlining the request.
- Using the Utilization Analysis document located on the left menu bar, indicate whether or not Females are underutilized in the job group category for the division.
- Input the number provided as a Goal for Women.
- Using the Utilization Analysis document located on the left menu bar, indicate whether or not People of Color are under utilized in the job group category for the division.
- Input the number provided as a Goal for People of Color.
- Using the Utilization Analysis document located on the left menu bar, indicate whether or not African Americans are utilized in the job group category for the division.
- Input the number provided as a Goal for African Americans.
- If requesting a GUEST USER for the requisition, input the Guest User name here. (The guest user is designed so that Search Committees can review applicant records and resumes however it does not permit the user to make any changes to the record.)
- Select the Internal Advertising Sources.

Select “Continue to the Next Page".
Funding/PBC Tab

The Funding/PBC tab is used to communicate budget information related to the position.

- Enter the Effective Date that funds should be encumbered for this position.
- Identify whether or not the position is an “N3” designation. (The VP designee for AHC and the Provost Office will approve N3 position requests.)
- Input the Planned Compensation for the position.
- Input the Cost Distribution.
- Input the Percentage of distribution to the respective account.
- Use additional fields to input additional cost distribution sources and percentages.
- Input the name of the Funding Contact Person.
- Input the Telephone Number for the funding contact person.

Select “Continue to the Next Page”.
Advertising Accounts Tab

The Advertising Accounts Tab is designed to identify payment responsibility for position advertising. Utilize the Recruitment Advertising Guidelines policy located on the left menu bar as a guide.

- Identify whether or not the Department, Human Resources, or Both are required to pay for advertising for this position.
- Indicate whether or not specific Ad Text is being attached in the Documents section.
- Select whether or not the position is being paid for by General Funds.
- Input any additional Comments that would be useful to know when advertising the position.
- Input appropriate account information for advertising payments.
If advertising payments are being shared by multiple accounts, enter additional account advertising details.

Human Resources will enter the appropriate HR Contact person.

Utilize the general HR telephone number provided for questions.

Select “Continue to the Next Page”.
Advertising Sources Tab

The Advertising Sources Tab is designed to indicate specific locations where advertising of the position is to occur.

- Select “Add New Entry” to input an advertising source.
- Review the drop down list to determine whether or not the selected advertising source is listed. (Additional sources can be added by contacting Human Resources.)
- Select the appropriate advertising source OR
- Indicate advertising source information as directed in the OTHER free text box.
- Select the method that the advertising should appear.
- Advertising will occur as indicated or input an advertising Appearance Date.
- Select “ADD ENTRY”.
- Select “Add New Entry” if additional advertising sources are required. Repeat process.
- View, Edit or Delete entry as appropriate.

Select “Continue to the Next Page”.
Documents Tab

The Documents Tab is used to identify the type of documents that are to be added to the application or requisition process.

- Select “Attach” to attach a document.
- Select Confirm.
- Upload a document by selecting “Browse”. Locate the document on your own personal browser and select “Attach”.
- Select Confirm.
- Use the Paste a New Document section to cut and paste a document from another source into the system. Once the document has been pasted select “Attach”.
- Select Confirm.
You may remove a document by selecting “Remove” on the right hand side of the documents screen once the document has been attached.

Select Confirm.

Select “Continue to the Next Page”.

**Posting Specific Questions Tab**

The Posting Specific Questions Tab is used to ask questions of applicants during the application process in an effort to learn more about their ability to meet position qualifications. Information entered into this tab may be pulled for additional positions in the future. Questions asked related to this tab must be legal in nature.

Select “Add a Question” to enter a question.
Enter a keyword and select Search to review questions in the database; or select Create a Question to develop a unique question.

Select View to review the question or Add to add the question to the requisition.

No editing can be done to already saved questions. If a question is worded incorrectly or information needs to be added or removed, a new question must be created.

If creating a new question input the information as directed.

Select as to whether the question is Closed-Ended or Open-Ended.

Identify how to display a no response reply.

Input possible responses.

If an opened ended question select the length of the answer type.

Review, edit or delete the question if appropriate or indicate whether or not the question MUST be answered by all applicants.

Select “Submit Question”.

Select “Add a Question”.
Select “Continue to the Next Page”.

Disqualifying Points Tab

Disqualifying Points Tab is used to identify how applicants answers to questions affects their eligibility to the applicant pool.

- If a question directly reflects the minimum qualifications for the position, the question can be used to rule candidates in or out of the applicant pool. Place a check mark in the Disqualifying box next to the question.
- If a question does not directly reflect the minimum qualifications for the position, the question may be asked and responses scored however MAY NOT be used to automatically rule candidates out of the applicant pool. Place a point value in the Score box on the right hand side of the screen. Select “Recalculate”.
Select “Continue to the Next Page”.

Comments Tab

Comments may be entered into the requisition HOWEVER; saved comments entered cannot be removed by Human Resources or People Admin. Therefore, do not enter subjective comments onto this screen.

- Enter Hiring Manager comments in the Hiring Manager Comments box.

Select “Continue to the Next Page”. 
# New Position Description - Faculty

<table>
<thead>
<tr>
<th>Department</th>
<th>Classification</th>
<th>Position Status</th>
<th>Hiring Manager</th>
<th>Title</th>
<th>Hiring Manager Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Hiring Manager Comments:**

**Director Comments:**

**Vice President Comments:**

**Committee Review Comments:**

**UACM Comments:**

**Office of Budget Management Comments:**

**Provost Comments:**

**Human Resources Comments:**

*Required information is denoted with an asterisk.*

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** payoff credits: **

**payoff credits: **

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**Continues on next page...**

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**Save and stay on this page...**

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**Director User**

- Log into People Admin
- Select “Pending Actions” under the POSITION DESCRIPTION heading.
- Select “View” under the classification title for the appropriate Action Type to review position.
- Page down to review the position content or select “Edit” to make any necessary changes to the position.

### Proposed Classification Tab

Review the Proposed Classification tab to identify the type of position that is being requested.

**Select “Continue to Next Page”**.
Position Details Tab

The Positions Details Tab is used to describe the position that is being created. While it contains job information, it is used to identify specific information related to the position that is being created.

- Review information entered into this tab paying close attention to position description information including position physical requirements.
- Input the UC Flex position title.

Select “Continue to the Next Page”.
Requisition Form Tab

Requisition Form Tab is used to describe information that will be included in the job posting. It also identifies whether or not the requisition should be submitted to budget right away. Finally, the Requisition Tab reports on the diversity status of the position.

- Review the Requisition Form Tab.

Select “Continue to the Next Page”.
Funding/PBC Tab

The Funding/PBC Tab is used to indicate to the Office of Budget Management the method in which the position fill will be funded.

Select “Continue to the Next Page”.
Advertising Accounts Tab

The Advertising Accounts Tab is designed to communicate the billing information for recruitment advertising expenses.

- Review the advertising accounts information.

Select “Continue to the Next Page”.
### Payment Responsibility:
- Dept
- MS
- Both

Has an email address been entered in the form? Yes/No

Is this position paid for partially or fully by general funds? Yes/No

Comments regarding accounting account distribution:

### Charges to Department:

<table>
<thead>
<tr>
<th>GL Account</th>
<th>Fund</th>
<th>Cost Center</th>
<th>Functional Area</th>
<th>Grant</th>
<th>ID</th>
<th>WBS</th>
<th>Enrolled Fund</th>
<th>Percentage for this Account</th>
<th>Total Charges</th>
</tr>
</thead>
</table>

### Charges to Department (2):

<table>
<thead>
<tr>
<th>GL Account</th>
<th>Fund</th>
<th>Cost Center</th>
<th>Functional Area</th>
</tr>
</thead>
</table>

### Utilization Analysis
- Faculty Search Handbook
- Onboarding FAQs
- Supported Browsers
- Work Study Request
- 2011 - 2012 Work Study Accounts
- 2010 - 2011 Work Study Accounts
Advertising Sources Tab

The Advertising Sources Tab is used to identify the places where advertising will occur for the position. If an OEO Recruitment Plan exits the advertising sources should reflect the decisions detailed on the plan.

- Review the advertising sources tab for appropriate locations to advertise the position.

Select “Continue to the Next Page”.

Documents Tab

The Documents Tab is used to identify the types of documents that are required for the position either by the applicant or of the department.

- Review the Documents Tab to ensure that proper document selections have been made. You may View document selections by selecting “View” on the right hand side of the screen. You may also “Delete” documents by selecting “Delete” on the left hand side of the screen.
- To Add a document select “Add”. Browse your directory to locate the document and attach. Select “Attach”.
- Select “Finished Attaching Documents”.
- Select “Continue to the Next Page”.
Posting Specific Questions Tab

The Posting Specific Questions Tab is used to ask questions of applicants during the application process in an effort to learn more about their ability to meet qualifications. Information entered into this tab may be pulled for additional positions in the future. Questions asked related to this tab must be legal in nature.

- Review the Posting Specific Questions Tab to ensure the appropriateness and effectiveness of questions asked.
- To add a question select

Select “Continue to the Next Page”.
Disqualifying Points Tab

Disqualifying Points Tab is used to identify how applicant answers to questions affects their eligibility to the applicant pool.

- If a question directly reflects the minimum qualifications for the position, the question can be used to rule candidates in or out of the applicant pool. Place a check mark in the Disqualifying box next to the question.
- If a question does not directly reflect the minimum qualifications for the position, the question may be asked and responses scored however MAY NOT be used to automatically rule candidates out of the applicant pool. Place a point value in the Score box on the right hand side of the screen.

Select “Continue to the Next Page”.
Notes Tab

Comments may be entered into the requisition HOWEVER; saved comments entered cannot be removed by Human Resources or People Admin. Therefore, do not enter subjective comments on this screen.

- Enter Director comments in the “Director” Comments box.

Select “Continue to the Next Page”.
Actions History Tab

Review the history of actions associated with the requisition on the Actions History Tab.

Select “Continue to the Next Page.”
Workflow

- If the position reports up through the Provost Office, select to Send to Provost”.
- If the position reports up through Faculty Affairs with the College of Medicine, select to “Send to Faculty Affairs”.
- Select “Save” to save the requisition without submitting.

Select “Continue to the Next Page”.
View New Position Description - Faculty Summary

To change the status of the action, choose from the statuses below:

**Edit**

**Action Status**

- **Vac:**
  - Send to Faculty Affairs
  - Send to Provost
  - Return to Hiring Manager

**Position Details**

- **College/Division:** Academic Information Technology and Libraries
- **Organizational Unit Number:** B01231
- **Campus:** Uptown Campus (2-DM98)
- **Working Title:** Director of Academic Information Technology and Libraries
- **Job Classification Title:** Professor
- **Job Category:** Faculty Position
- **Send to OEO for Recruitment Plan:** Yes
- **Not Location:** 1023
- **Job Classification Code:** 123401

**UC Rank Position Title:**

UC Rank Position Title is currently: **Professor**
**Send to Faculty Affairs**

A selection of “Send to Faculty Affairs” is the opportunity for the Faculty Affairs Designee User to review the details of the position, add the UC Flex Position Title and the Position Number for Provost.

**Log On**

- Log into People Admin
- Select “Start Action” on the left navigation bar under **POSITION DESCRIPTION**
- Select “Start Action” under New Position Description – Faculty

- Select Job Classification Title from drop down menu on the Proposed Classification Tab, Select **Search**
- View Summary or choose to “Select and Continue” the job classification title
You may also clear results and search an additional title by using functionality at the bottom of the screen.

Select to “Continue to the Next Page”.

Select Edit.

Position Details

- On the Position Details screen review position qualifications.
  - Assign the UC Flex Position Title from the established guidelines provided by Compensation.
    - If a Title does NOT exist on the Classification drop down please contact Compensation to establish the title in the UC system.
- Input the UC Flex Position Title

Select “Continue to the Next Page”.
- Input Recruitment Number for Provostal Area

Select “Continue to the Next Page”.

- Review the remainder of the requisition and select “Continue to the Next Page”.
- Select to “Send for Committee Review”.
Committee Review

- Committee Review reviews the position for approval.

Selects “Continue to the Next Page”.

- Committee Review selects to “Send to PBC/AHC” for budget approval.
- Continue
- Confirm.

- Once Committee has reviewed, the Committee User will either
  - Submit to PBC/AHC or
  - Return to the Hiring Manager Hold for Budget
POSITION BUDGET CONTROL/ACADEMIC HEALTH CENTER (PBC/AHC)

- The PBC/AHC user reviews the position for budget prior to sending it to the Office of Budget Management (OBM) for final budget review.
- The PBC/AHC user has access to edit the PBC tab if necessary.

Selects “Continue to the Next Page”.
- Selects to “Send to the Office of Budget Management”.
- Continue
- Confirm
Submit to Provost

Same steps are repeated for “Submit to Provost” as “Send to Faculty Affairs”. Submit to Provost is the opportunity for the Provost Designee User to review the details of the position, add the UC Flex Position Title and the Position Number for Provost.

Log On

- Log into People Admin
- Select “Start Action” on the left navigation bar under POSITION DESCRIPTION
- Select “Start Action” under New Position Description – Faculty

- Select Job Classification Title from drop down menu on the Proposed Classification Tab, Select Search
- View Summary or choose to “Select and Continue” the job classification title
You may also clear results and search an additional title by using functionality at the bottom of the screen.

Select to “Continue to the Next Page”.

Select Edit.

Position Details

- On the Position Details screen review position qualifications.
  - Assign the UC Flex Position Title from the established guidelines provided by Compensation.
  - If a Title does NOT exist on the Classification drop down please contact Compensation to establish the title in the UC system.
- Input the UC Flex Position Title

Select “Continue to the Next Page”.
Input Recruitment Number for Provostal Area

Select “Continue to the Next Page”.

- Review the remainder of the requisition and select “Continue to the Next Page”.
- In the Requisition Status field the Provost user will indicate that the position is being held for “Vacancy Review”.
- Once Vacancy Review has reviewed and authorized the position, the Provost User will
  - Send to OBM
  - Return to Hiring Manager Hold for Budget
Office of Budget Management (OBM)

OBM confirms that there is adequate budget to support the creation of a position. Assigns UC Flex position number.

- Log onto People Admin
- Select “Pending Actions” under Position Descriptions
- Select “View” under the classification title to review the position information
- Select “Edit” to review position attributes on the Determination Tab and add UC Flex Position Number to the “Position Details” tab.

Select “Continue to the next Page”.

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- OBM can make no changes to the Requisition Tab.

Select “Continue to the Next Page”.

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- Review and make changes to the Funding/PBC tab if appropriate.

Select “Continue to the Next Page”.
Select to “Send to OEO” for the review of the agreed upon Recruitment Plan.
Office of Equal Opportunity (OEO)

- OEO reviews the requisition for verification of the Recruitment Plan by selecting Edit and locating the Recruitment Plan in the Document section.

Selects “Continue to the Next Page”.

- OEO submits to Human Resources (HR)

Human Resources

The Office of Human Resources reviews the position for completeness, collaborates with the hiring manager on advertising and posts the requisition as directed.