### Incumbent

**START ACTION MODIFY/RECLASS - INCUMBENT**

<table>
<thead>
<tr>
<th>USER</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>• Initiates Start Action Modify/Reclass –Incumbent transaction for review of position.</td>
</tr>
<tr>
<td></td>
<td>• Sends to Supervisor for review.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>• Reviews Percentage of Duties (POD) and Position Details tabs.</td>
</tr>
<tr>
<td></td>
<td>• Send to Director for review.</td>
</tr>
<tr>
<td>Hiring Manager</td>
<td>• Initiates Start Action Modify/Reclass –Incumbent transaction for review of position.</td>
</tr>
<tr>
<td></td>
<td>• Sends to Employee for review.</td>
</tr>
<tr>
<td>Director</td>
<td>• Initiates Start Action Modify/Reclass –Incumbent transactions for review of position.</td>
</tr>
<tr>
<td></td>
<td>• Sends to Employee for review.</td>
</tr>
<tr>
<td></td>
<td>• If employee initiated, review POD and Position Details tab.</td>
</tr>
<tr>
<td></td>
<td>• Sends to VP Designee or Send to Provost.</td>
</tr>
<tr>
<td>VP Designee (Vice President Designee or Faculty Affairs)</td>
<td>• Reviews POD and Position Details tabs.</td>
</tr>
<tr>
<td></td>
<td>• Sends to Compensation or Broadband.</td>
</tr>
<tr>
<td></td>
<td>• Complete Final Basic Pay field on Determination Tab, based on Compensation or Broadband recommendation.</td>
</tr>
<tr>
<td></td>
<td>• Send to HR Final Determination.</td>
</tr>
<tr>
<td>Provost Designee</td>
<td>• Reviews POD and Position Details tabs.</td>
</tr>
<tr>
<td></td>
<td>• Sends to Compensation or Broadband.</td>
</tr>
<tr>
<td>Compensation or Broadband</td>
<td>• Reviews POD and Position Details tabs.</td>
</tr>
<tr>
<td></td>
<td>• Completes Determination Tab.</td>
</tr>
<tr>
<td>OBM (Office of Budget Management)</td>
<td>• Reviews Determination tabs.</td>
</tr>
<tr>
<td></td>
<td>• Updates planned compensation if requested.</td>
</tr>
</tbody>
</table>
GETTING STARTED – START ACTION MODIFY/RECLASS INCUMBENT

STEP-BY-STEP

**Employee**

**Log On**

- Log into People Admin
- Select “Start Action” on the left navigation bar under **POSITION DESCRIPTION**
- Select “Start Action” under Modify/Reclassify – Incumbent
- Select **Search** to view the current position (if no position appears contact Human Resource.)

- Select **Start Action** under the current Classification Title.
Percentage of Duties Tab

- View the Current Job Description, and then select “Continue To Next Page”.
- Complete the “Percentage of Duties” tab. **Note:** On this screen, please list in order of importance, and in detail, the job function and duties assigned to this position and estimate the percentage of time given to each function.
  - To begin entering each individual duty, click the **Add New Entry** button. Enter each percent of time and duty, and click the **Add Entry** button. Percentages must add up to 100%. You may copy and paste from another document. Do not include duties which constitute less than 5%.
  - To edit an existing entry, click the **Edit** link. To delete an entry, click the **Delete** link. Then “Continue To Next Page”.

![Percentage of Duties Tab Screen](image-url)
Position Details Tab

Complete the “Position Details” Tab. Complete all the subsequent questions.

- From the drop down menu, select the employee’s supervisor (if the supervisor is not listed, **you must notify them to set up an account before proceeding**).
- Answer the question related to what specific duties or responsibilities have been changed, added to, or deleted from this position since it was last reviewed.
- From the drop down menu, select “Who Most Frequently determines job priorities and assignments of this position?”
- Select the degree that the position typically collects and analyzes information and makes decisions.
- Enter examples in the “Please give examples” field, if appropriate.
- Answer the question related to whether or not the individual works in a personnel office dealing with information used in collective bargaining.
- Indicate the group that the position most frequently interacts with.
- Answer the question regarding whether or not the individual provides supervision? If Yes,
  - indicate the number of exempt positions the employee supervises
  - indicate the number of non-exempt positions the employee supervises
- Describe how decisions made by the position would affect UC.
- Detail the responsibilities that the position has for expense control.
- Explain how the position is responsible for implementation of services and programs.
- **Attach an organizational chart in the Documents section in People Admin.**
Business Fiscal Broadband Tab

The Business Fiscal Tab is REQUIRED for positions falling under the Business Fiscal Broadband category. If this is not a Business Fiscal Broadband position, you may skip this tab.

- Input the percentage of time spent performing each task listed. The total of the entries should equal 100%.
- Answer the question regarding commitments to grants.
- Answer the question regarding position level.
- Answer the question regarding budget responsibility.

Select “Continue to the Next Page”.

Information Technology (IT) Broadband Tab

The IT Broadband Tab is REQUIRED for positions falling under the Information Technology Broadband. If this is not an IT Broadband position, you may skip this tab.

- Input the percentage of time spent performing each task listed. Percentage totals should equal 100%.
- Indicate the appropriate task level for the item listed.

Select “Continue to the Next Page”.
Documents Tab

An Employee may attach their resume under the documents tab. (Not applicable for classified or represented employees.)

- 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 Next Page”.

Notes Tab

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

- Enter comments in the Employee Comments box.

Select “Continue to the Next Page”.

Action Status

Select to “Save without Submitting” or “Send to Supervisor”

- The supervisor will receive an email notification when “Send to Supervisor” is selected.
- If you “Save without Submitting” you will need to click on “Pending Actions” (located on the left tool bar under) to view your PDQ. Select View under the Classification title. To make changes click Edit above Action Status. When completed select “Send to Supervisor”.
**Hiring Manager User or Director User** (This action is used if a Hiring Manager or Director starts a position review of an incumbent.)

**Log On**

- Log into People Admin
- Select “Start Action” on the left navigation bar under POSITION DESCRIPTION
- Select “Start Action” under Modify/Reclassify – Incumbent
Enter the “UC Flex Position Number” or “Previous Employee Last Name”, click **Search**.

**Percentage of Duties Tab**

- View Current Job Description, and then select “Continue To Next Page”.
- Complete the “Percentage of Duties” tab. **Note:** On this screen, please list in order of importance, and in detail, the job function and duties assigned to this position and estimate the percentage of time given to each function.
  - To begin entering each individual duty, click the **Add New Entry** button. Enter each percent of time and duty, and click the **Add Entry** button. Percentages must add up to 100%. You may copy and paste from another document. Do not include duties which constitute less than 5%.
To edit an existing entry, click the **Edit** link. To delete an entry, click the **Delete** link.

Select “Continue to the Next Page”.

**Position Details Tab**

Complete the “Position Details” Tab. Complete all the subsequent questions.

- From the drop down menu, select the supervisor (if the supervisor is not listed, **you must notify them to set up an account before proceeding**).
- Answer the question related to what specific duties or responsibilities have been changed, added to, or deleted from this position since it was last reviewed.
- From the drop down menu, select “Who Most Frequently determines job priorities and assignments of this position?"
- Select the degree that the position typically collects and analyzes information and makes decisions.
- Enter into the “Please give examples” field if appropriate.
- Answer the question related to whether or not the individual works in a personnel office dealing with information used in collective bargaining.
- Indicate the group that the position most frequently interacts with.
Answer the question regarding whether or not the individual provides supervision? If Yes,
  o indicate the number of exempt positions the employee supervises
  o indicate the number of non-exempt positions the employee supervises

Describe how decisions made by the position would affect UC.

Detail the responsibilities that the position has for expense control.

Explain how the position is responsible for implementation of services and programs.

Attach an organizational chart in the Documents section in People Admin.

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**Business Fiscal Broadband Tab**

The Business Fiscal Tab is REQUIRED for positions falling under the Business Fiscal Broadband category. If this is not a Business Fiscal Broadband position, you may skip this tab.

- Input the percentage of time spent performing each task listed. The total of the entries should equal 100%.
- Answer the question regarding commitments to grants.
- Answer the question regarding position level.
- Answer the question regarding budget responsibility.
Information Technology (IT) Broadband Tab

The IT Broadband Tab is REQUIRED for positions falling under the Information Technology Broadband. If this is not an IT Broadband position, you may skip this tab.

- Input the percentage of time spent performing each task listed. Percentage totals should equal 100%.
- Indicate the appropriate task level for the item listed.
Documents Tab

Attach an organizational chart in the Documents section in People Admin.

- 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 Next Page”.

Notes Tab

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

- Enter comments in the Hiring Manager or Director comment box, as appropriate.

Select “Continue to the Next Page”.

Select to “Save without Submitting” or “Send to Employee”

- Employee will receive an email with instructions how to review their pending position review (pending action).
Supervisor User

- Log into People Admin
- Select “Pending Actions” under the POSITION DESCRIPTION heading.

Percentage of Duties Tab (POD)

Percentage of Duties tab is designed to specifically outline the amount of time spent performing job tasks.

Review entries regarding POD descriptions and amount of time spent performing each work task.

- Select “View” to review the information in detail and “Done” when review is complete.

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

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

- Review information entered into this tab paying close attention to the answers to the questions toward the bottom of the page.

Business Fiscal Broadband Tab

The Business Fiscal Broadband Tab is used to describe the functions and responsibilities of a position that fall under the Business Fiscal Broadband.

- Review the Business Fiscal Tab for accuracy of identified business fiscal tasks.

Select “Continue to the Next Page”.

IT Broadband Tab

The IT Broadband Tab is used to describe the functions and responsibilities of an Information Technology position.

- Review for accuracy, the information entered into the IT Broadband Tab.

Select “Continue to the Next Page”.

Documents Tab

Attach the organization chart on the “Documents” tab.

- 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 Next Page”.
Notes Tab

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

- Enter comments in the Supervisor 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”.

Action Status

Select to “Save” or “Send to Director”
**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.

**Percentage of Duties Tab (POD)**

Percentage of Duties tab is designed to specifically outline the amount of time spent performing job tasks.

Review entries regarding POD descriptions and amount of time spent performing each work task.

- Select “View” to review the information in detail and “Done” when review is complete.

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

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

- Review information entered into this tab paying close attention to the answers to the questions toward the bottom of the page.

Business Fiscal Broadband Tab

The Business Fiscal Broadband Tab is used to describe the functions and responsibilities of a position that fall under the Business Fiscal Broadband.

- Review the Business Fiscal Tab for accuracy of identified business fiscal tasks.

Select “Continue to the Next Page”.

IT Broadband Tab

The IT Broadband Tab is used to describe the functions and responsibilities of an Information Technology position.

- Review for accuracy, the information entered into the IT Broadband Tab.

Select “Continue to the Next Page”.

Select “Continue to the Next Page”.

Documents Tab

Attach the organization chart on the “Documents” tab.

- 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 Next Page”.

Notes Tab

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

Enter 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”.

Select to:
  ○ “Save”
  ○ “Send to VP”
  ○ “Send to Provost”
Send to VP or Send to Provost (Faculty Affairs approves as VP)

- 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.

Percentage of Duties Tab (POD)

Percentage of Duties tab is designed to specifically outline the amount of time spent performing job tasks.
Review entries regarding POD descriptions and amount of time spent performing each work task.

- Select “View” to review the information in detail and “Done” when review is complete.
- Select “Continue to the Next Page”.

Select “Continue to the Next Page”.

Position Details Tab

The Positions Details Tab is used to describe the position that is being modified/reclassified. While it contains job information, it is used to identify specific information related to the position that has been requested to be reviewed.

- Review information entered into this tab paying close attention to the answers to the questions toward the bottom of the page.

Business Fiscal Broadband Tab

The Business Fiscal Broadband Tab is used to describe the functions and responsibilities of a position that fall under the Business Fiscal Broadband.

- Review the Business Fiscal Tab for accuracy of identified business fiscal tasks.

Select “Continue to the Next Page”.

IT Broadband Tab

The IT Broadband Tab is used to describe the functions and responsibilities of an Information Technology position.

- Review for accuracy, the information entered into the IT Broadband Tab.

Select “Continue to the Next Page”.

Documents Tab

Attach the organization chart on the “Documents” tab.

- 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 Next Page”.

Notes Tab

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

- Enter 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”.

Once review is completed select the appropriate action status:
- “Save”
- “Send to Broadband” (for IT, Research Assistant, Architect, Research/Academic and Business/Fiscal Broadband programs).
- “Send to Compensation” (for non-academic, non-broadband positions)
- “Send to Director”

Broadband User or Compensation 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.
Percentage of Duties Tab (POD)

Percentage of Duties tab is designed to specifically outline the amount of time spent performing job tasks.

Review entries regarding POD descriptions and amount of time spent performing each work task.

- Select “View” to review the information in detail and “Done” when review is complete.
- Select “Continue to the Next Page”.

Continue to Next Page
Position Details Tab

The Positions Details Tab is used to describe the position that is being modified/reclassified. While it contains job information, it is used to identify specific information related to the position that has been requested to be reviewed.

- Review information entered into this tab paying close attention to the answers to the questions toward the bottom of the page.

Business Fiscal Broadband Tab

The Business Fiscal Broadband Tab is used to describe the functions and responsibilities of a position that fall under the Business Fiscal Broadband.

- Review the information entered into the Business Fiscal Tab.

Select “Continue to the Next Page”.

IT Broadband Tab

The IT Broadband Tab is used to describe the functions and responsibilities of an Information Technology position.

- Review the information entered into the IT Broadband Tab.

Select “Continue to the Next Page”.
Proposed Classification Tab

Broadband/Comp may change the job classification title from drop down menu on the Proposed Classification Tab.

- Click **CHANGE CLASSIFICATION** at the bottom of the page.
- From the Job Classification title drop down menu select the appropriate title, Select Search
- Click **Select and Continue** under the Job Classification Title, this will update the current job classification data with the new.

Select “Continue to the Next Page”.

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Modify/Reclass – Incumbent  January 2012
Determination Tab

Complete all applicable fields on the “Determination Tab”.

- Employee Last Name, Employee First Name and M#
- Effective Date of Action
- Action Type
- Reason For Action
- UC Flex Position Title
- UC Flex Position Number
- Object Abbr
- Object Name
- Job Number
- Pay Scale Group
- Pay Frequency
- Target Market, Minimum, APR, Midpoint & Maximum (pay ranges)
- New Hourly Rate
- Longevity Rate
- Salary Determination (Reclass Only)
- Personnel Area
- Pers subarea
- Employee group
- EE subgroup
Documents Tab

Review the organization chart and employee’s resume on the “Documents” tab.

- You may View document selections by selecting “View” on the right hand side of the screen.

Select “Continue To Next Page”.

Notes Tab

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

- Broadband can enter comments in the Broadband Comments box.
- Compensation can enter comments in the Compensation 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”.

Modify/Reclass – Incumbent

January 2012
If review is completed select the appropriate action status:
  o “Save”
  o “Send to VP– Reclass” (If reclassifying incumbent)
  o “Send to VP– No Reclass w/Salary Adj” (If incumbent is not to be reclassified but is to receive a salary adjustment)
  o “Send to Historical – No Reclass” (If incumbent is not to be reclassified and is not receiving a salary adjustment)

**Office of Budget Management (OBM) User**

OBM will receive an e-mail notification to log in to People Admin and the review the Determination tab and confirms that there is adequate budget to support the Final Basic Pay, update position title and attributes in UC Flex and review the “Update Planned Comp” field.

- Log into 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.
- Review the “Update Planned Compensation” field. (If “Yes” is selected, update the planned Comp; if “No” is selected, do not update the planned comp until a PMR is submitted by the department).

Select “Continue to the Next Page”.

Modify/Reclass – Incumbent

January 2012
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 comments in the OBM 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”.

Action Status

- “Send to HR Final Determination” for processing

Human Resources

Human resource(s) will receive an email with the determination form information and enter all changes into the UCFlex system. This ends the Modify/Reclass – Incumbent action, any incumbent reclassifications will be updated on the employee’s Position Description in People Admin.

Note: For Employee, Supervisor or Director to view the determination tab once a reclassification is approved follow the steps below.

1. Log in to People Admin
2. Select “Search Actions”
3. Type in Employee Name
4. Put a green check mark in the “Approved (Staff Position Modified) box and select Search.
5. Select view and scroll down to view Determination tab.